

**The Roles Played by Unions in the Provision of
Continuing Education
in the
Hong Kong Special Administrative Region**

By

Wong Chi Mei, M.Ed.

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Statement of Original Authorship

I certify that the work in this thesis has not previously been submitted for a degree nor has it been submitted as part of requirements for a degree except as fully acknowledged within the text.

I also certify that the thesis has been written by me. Any help that I have received in my research work and the preparation of the thesis itself has been acknowledged. In addition, I certify that all information sources and literature used are indicated in the thesis.

Signed: Production Note:
 Signature removed prior to publication.

Wong Chi Mei

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Preface

With the advent of knowledge-based economic structures, globalization and the rapid growth in computer-based technologies, the traditional Chinese philosophy of one skill lasting for one's whole working life is no longer effective. A high quality workforce is a strong basis for economic growth, so upgrading the quality of the workforce is a policy priority for all policy makers. In his 2007 policy address, Hong Kong's Chief Executive, Donald Tsang, stated,

Employment is an issue that has to be tackled by setting long-term strategies. Hong Kong's economic growth model has changed. The need for training and self-improvement is not just confined to low-skilled, low educated and middle-aged workers. We need to turn our training policy into a long-term social investment. (Tsang, 2007, p. 32)

However, although the Hong Kong Government highlighted this problem, it did not put forward the policies and measures to deal with it.

For most people, Continuing Education is the traditional pathway to knowledge and skills recognition after leaving the formal education system. In this era of the knowledge-based economy, where every employee has to keep up with the demand for ever-changing skills and knowledge, continuing study is one of the ways to sustain a place in the labour market and enhance employability.

In facing the poor level of investment in Continuing Education provided by the Hong Kong Government, the unions, as the protector of the interests of Hong Kong workers, has a proven track-record of making a major contribution. The research presented in this thesis examines the background, the reasons and the framework within which Hong Kong's unions have played their role in meeting employees' training needs, assisting working adults to achieve their development through Continuing Education.

List of Abbreviations

CE:	Continuing Education
CEF:	Continuing Education Fund
ERB:	Employees Retraining Board
FLU:	The Federation of Hong Kong and Kowloon Labour Unions
FTU:	Hong Kong Federation of Trade Unions
HKSAR:	Hong Kong Special Administrative Region
HKTUC:	Hong Kong and Kowloon Trade Union Council
ITAC:	Industrial Training Advisory Committee of Qualification Framework
TUC:	Trade Union Congress of United Kingdom
VET:	Vocational Education and Training
VTC:	Hong Kong Vocational Training Council
YPET:	Youth Pre-employment Programme
YWETS:	Youth Work Experience and Training Scheme

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Abstract

This thesis develops the argument that unions in Hong Kong have an important role to play in narrowing the gap between employees' educational needs and the provision of courses. The thesis demonstrates that the special history and the unique features of Hong Kong unions produced opportunities for them to offer education services to employees. The study confirms that the unions' education services meet employees' needs for Continuing Education.

Hong Kong unions' provision of educational services is the result of their need to differentiate themselves from other unions in a competitive environment as well as of union members demanding those services in the absence of the Hong Kong Government providing them. The unions' lack of a legal right to engage in collective bargaining led to the fragmentation of the union movement, with different unions guided by different ideals, and in turn to unions having to provide a range of services, including education services, to attract members and to consolidate their power. In addition, union members demanded that the unions provide educational services since the Hong Kong Government (both before and after 1997, when China assumed sovereignty over Hong Kong) failed to develop proper Continuing Education policies, which in turn led to employees getting the opportunity to study in union training centres.

A survey of the demand for Continuing Education by HKU SPACE (Hong Kong University, School of Professional and Continuing Education, 2001) shows that 8% of participants in Continuing Education in Hong Kong studied with the biggest union group, the FTU. This demonstrates that the unions play an important role in the provision of Continuing Education.

The research demonstrates that the unique background of Hong Kong unions, their flexible education arrangements and low course fees, and the close relationship between union members and unions, motivate employees to study and help them overcome barriers to study. Unions are not only concerned with employees' day-to-day

work-related knowledge but also with “holistic” life and health issues. The ideal of regarding Continuing Education as a labour right supports the unions’ policy to invest their resources in helping employees to study.

The thesis argues that Hong Kong unions have an important role to play in narrowing the gap between employees’ educational needs and the actual provision of courses. The thesis demonstrates that the special history and the unique features of Hong Kong unions produced opportunities for unions to offer education services to employees. The study confirms that the unions’ education services meet employees’ needs for Continuing Education.

Seven recommendations are made which are intended to assist unions in narrowing the gap between the educational needs of employees and the provision of education services in the Hong Kong Special Administrative Region.

Chapter 1

The Problem and Its Background

1.1 Statement of problem and the significance of this research

Unions in Hong Kong have an important role to play in fulfilling the needs for Continuing Education (CE)¹ of workers in Hong Kong and providing courses under Qualification Framework. The purpose of this research is to assess and analyse the general workforce's training needs and the provision of CE and Vocational Education and Training (VET). The research will provide explanations for the unions' strategic role in the provision of CE, describe in detail their efforts to fulfil workers' training needs through the provision of appropriate training opportunities, and examine the roles that unions can play and the courses they can provide in meeting employees' CE needs in the Hong Kong context.

1.2 Introduction: research background

This chapter examines the current general situation relating to the training needs of the Hong Kong workforce and the current investment of Hong Kong SAR in Continuing Education. Specifically, this will provide a background for further consideration of those Hong Kong unions involved in CE.

In the course of economic restructuring towards a knowledge-based economy, a skills mismatch and the low educational attainment of the workforce are major hurdles impeding the technological advancement of the whole society. Hong Kong is now facing a major problem in manpower demand and supply in terms of its need for a highly qualified workforce to sustain its competitiveness.

¹ Continuing Education may be part-time and post-initial education and training. This includes, among other forms of provision, in-house training and extra-mural courses (Leung, 2004, p. 58).

1.2.1 Knowledge-based society and education

To face the challenges of globalization and the need for a competent and quality labour force attractive to investment, the Hong Kong Government has to reframe the education structure and vocational training to meet the challenges of globalisation. Preparing for Hong Kong's future CE needs has become a necessary policy priority.

The *Review of Education System Reform Proposals* (Education Commission, 2000) pointed out that in a knowledge-based society our demand for CE is much higher than before. The Review argued that CE performs several functions: (1) It gives full play to one's potential and enhances the quality of the individual; (2) it enables learners to acquire up-to-date skills to stay competitive in a rapidly changing and increasingly globalised economy; and (3) it allows learners to acquire qualifications in academic, professional or vocational training that meet their personal aspirations and occupational needs.

Although education is regarded as important, the government's expenditure does not correspond to its public rhetoric. Expenditure on education as a proportion of GDP was 4.1 per cent in 2001-2002 and fell to 3.8 per cent in 2005-2006, compared with the UK's expenditure of 4.6 per cent in 2001-02 and 5.4 per cent in 2005-06 (HM Treasury, Public Expenditure Statistical Analyses, 2007).

1.2.2 Skills mismatch and Vocational Education and Training (VET)

The *Report on Manpower Projection to 2007* (Government of the Hong Kong Special Administrative Region, 2003) confirmed that there is a problem of skills mismatch in Hong Kong. The Report pointed out that there is

an upward shift in manpower requirements more towards workers with better education and higher skills. In addition to on-going orientation towards a knowledge-based economy, expanding business opportunities in the mainland of China upon China's accession to the WTO and ever closer economic links between Hong Kong and the Mainland will also lift the demand for workers at the upper segment of the occupation hierarchy.

(Government of the Hong Kong Administrative Region, 2003, p. 2)

The Report projected that in 2007 there would be a large surplus of manpower with lower secondary (Government of the Hong Kong Administrative Region, 2003, p. 6) and upper secondary education qualifications, while there would a shortfall in the labour force of more than one hundred thousand persons with post-secondary qualifications or first degree and higher levels (Education and Manpower Bureau, 2003, Annex 11). The Report also pointed out that those with lesser educational qualifications and skills were usually found to be less able to cope with changes in manpower demand (p. 3). Yet, at all levels, most employees envisage having to do more in the same time, work under greater pressure and have a greater range of skills. The government's *Thematic Household Survey Report No. 13: Employment Concerns and Training Needs of the Labour Force*, Census and Statistics Department (HKSAR Census and Statistics Department, 2003) shows that the challenges identified by employed persons in 2001-2003 included heavier workload (43.8%), salary/wage cut (32%), longer working hours (27.5%) and higher job requirements (18.2%) (see Table 1.1). Moreover, the report also shows the changes in job requirement experienced in the years 2001 to 2003 identified by employed persons. These changes included higher intensity of work (33.7%), job straddling/multi-skilling (33%) and skill upgrading (18%) (see Figure 1.1). The employed persons clearly expressed that they saw

problems/challenges for themselves in the developing knowledge-based economy. Data from the perspective of the business community were also provided in these reports. Businesses surveyed (Ng, S. H., 1987; The Chamber of Hong Kong Computer Industry, 2011) acknowledge the need to equip their staff well in order to compete for business. The findings of these reports pose a significant challenge to government and education and training institutions in regard to manpower planning and provision, if they are to effectively strive for an optimal and efficient use of the available human resources and to underpin economic growth.

Table 1.1 Challenges / problems faced by employees, by occupation (N=1,000)

Occupation	Challenges / Problems				Employees Total N
	Heavier Workload N (%)	Salary / wage Cuts N (%)	Longer Working Hours N (%)	Higher Job Requirements N (%)	
Managers and administrators, professionals and associate professionals	479.5 (48.8)	274.1 (27.9)	327.9 (33.3)	254.8 (25.9)	983.3
Clerks	276.4 (49.7)	160.0 (28.7)	148.3 (26.7)	139.6 (25.1)	556.5
Service and shop sales workers	186.9 (43.1)	163.2 (37.6)	110.8 (25.5)	68.1 (15.7)	433.9
Craft and related workers	98.9 (36.2)	117.7 (43.1)	55.6 (20.4)	36.8 (13.5)	273.0
Plant and machine operators and assemblers	76.3 (36.3)	84.5 (40.2)	75.3 (35.8)	11.4 (5.4)	210.2
Elementary occupations	229.3 (36.9)	186.5 (30.0)	129.3 (20.8)	49.3 (7.9)	620.9
Others	1.1 (49.5)	# (*)	1.1 (49.5)	0.5 (25.1)	2.1
Overall	1,348.4 (43.8)	985.9 (32.0)	848.2 (27.5)	560.6 (18.2)	3,079.8

Notes: (#) Number being less than 50.

(*) Share being less than 0.05%.

Figures in brackets represent percentage shares of employed persons in respective occupations.

Numbers (and thus also percentages) in columns total more than total N since employees commonly nominated more than one challenge / problem.

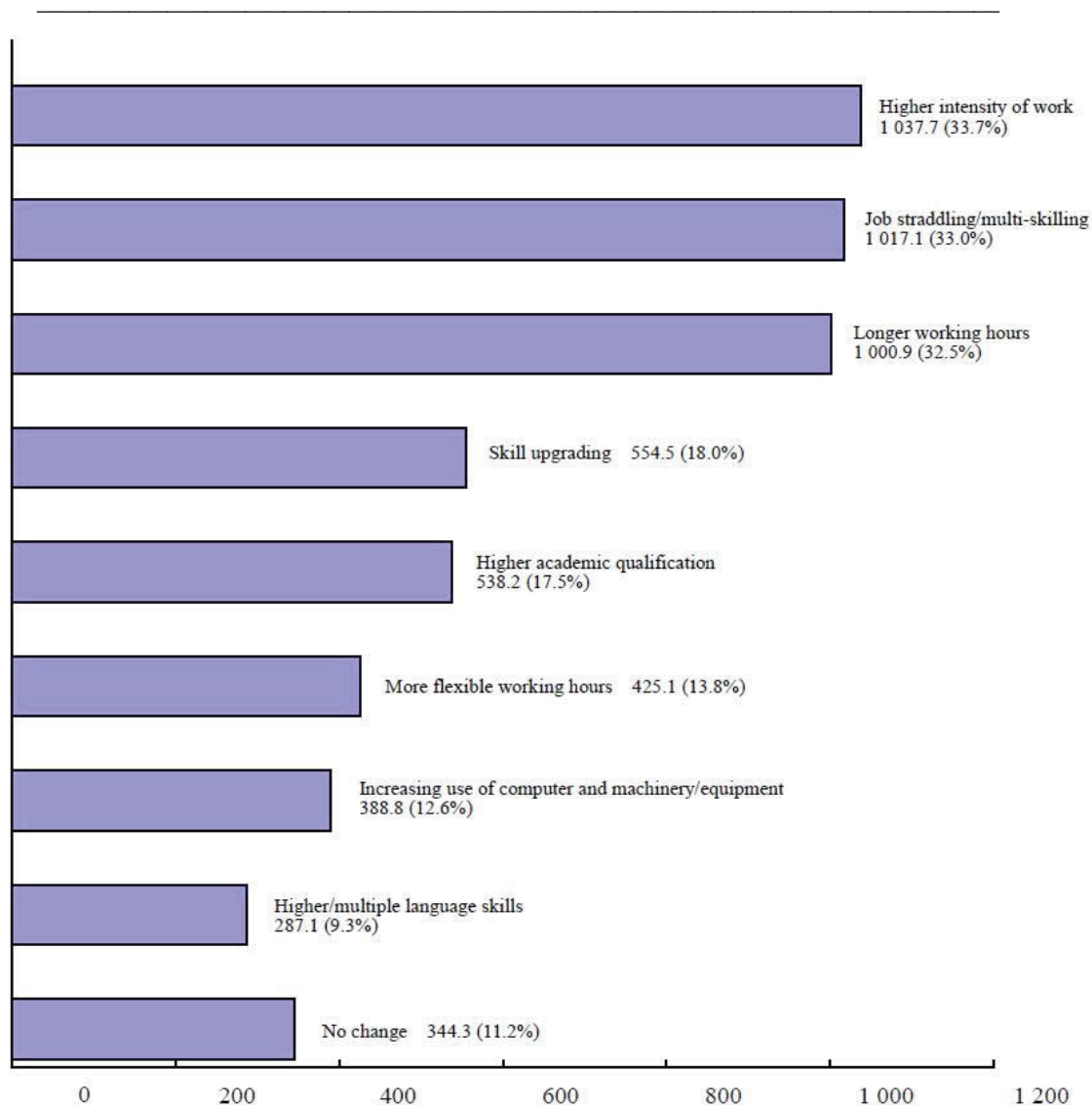


Figure 1.1 Employed persons by change in job requirement experienced in the past three years

Note: Figures in brackets represent percentage shares of all employed persons.

If the phenomenon of labour with no proper occupational training is not addressed or if it is not tackled properly, it will undermine key strengths of Hong Kong's economy. The skills mismatch can be resolved through systemic VET being provided to the existing workforce. However, many commentators point out that the Hong Kong Government has not developed appropriate policies and measures to cope with workers' training needs (Cheung, 2006, p. 1003; Kennedy, 2002; Leung, 2004).

Cheung (2006) commented that among the recent policies on CE, the policy solutions were mostly short-term inducements, such as providing financial subsidies and loans (p. 1000). His views are based on Elmore's (1987) concepts of policy tools or instruments and he uses this framework to observe that the Hong Kong Government's attention has been directed to the issue of allocation-limited resources to achieve short-term goals. As will be demonstrated in this thesis, the performance of the Hong Kong Government in relation to CE is obviously different from its announced policies. However, in 2001, the Education and Manpower Bureau appointed PriceWaterhouseCoopers to conduct research and put forward optimal structures to satisfy the needs of the occupational training, training and retraining market for the future (PriceWaterhouseCoopers, 2001, p. 1). The *Vocational Training and Retraining Organisation Structure Review Report* concluded that the arrangements of the structure for training and retraining were not capable of providing for Hong Kong's current needs (2001, p. 3). The research report *Hong Kong Occupational Training and the Development of Unions* (Hong Kong Federation of Trade Unions, 2002) commented that the existing training structure lacks comprehensive planning, causes many problems and renders training and retraining unresponsive to the needs of society (2002, p. 18).

1.2.3 Needs of Continuing Education in Hong Kong

According to the series of territory-wide surveys into public demand for CE in 1999, 2001, 2003 and 2006, conducted by the School of Professional and Continuing Education of University of Hong Kong (HKU SPACE), the trend to undertake CE has been gradually increasing from 20.7 per cent of Hong Kong residents doing so in 1999 to 28.1 per cent in 2005-2006. Of the people interviewed in the 2005 survey, 33.6 per cent expressed an intention of commencing study in the near future. A significant

finding relating to the academic level most pursued by the respondents in the 1999 (Shen, Lee & Chan, 2002), 2001 (HKU SPACE, 2001) and 2003 (HKU SPACE 2003) surveys is that most wanted a qualification at the sub-degree level (45.3 per cent, 53.9 per cent and 48.3 per cent respectively). However, the 2005/06 survey (HKU SPACE 2006) showed that more than half of the respondents (54.6 per cent) pursued non-award subjects while 30% of the respondents pursued sub-degree level programmes. And the 2007/08 (HKU SPACE, 2008) survey reported that 52.7% respondents expressed the intention to enrol in non-award bearing programmes, with 32.8% pursuing a “certificate, diploma and higher diploma” level programme. A comparison of the figures of the series of surveys shows there was increasing demand for CE in Hong Kong. According to the analysis by HKU SPACE, this is because adult learners put more emphasis on “personal interests”. And this “suggests a broader interest in continuing education than merely for economic benefits, and positions Hong Kong closer to a learning society” (HKU SPACE, 2008, p. 34). However, the training fees are also a major concern of the participants when selecting courses. The 2005 survey showed that nearly 40 per cent of respondents planned to spend less than HK\$3,000 on CE, with the survey also indicating that the average annual expenditure by those studying short courses (non-award bearing) was HK\$3100.

The surveys by HKU SPACE give a clear picture of the CE providers in the big Hong Kong market, a market that is growing. In addition to the School of Professional and Continuing Education of the University of Hong Kong, there are other universities, “taking the form of University extra-mural departments” (Cheung, 2006), which offer CE: the School of Continuing Studies of the Chinese University of Hong Kong (established in 1965), the Caritas Adult and Higher Education Services (established in 1966), the School of Continuing Education of the Hong Kong Baptist College

(established in 1975) and the Open University of Hong Kong (established in 1989). From their prospectuses we can get the basic idea that “these institutions provided basic education and interest courses (sic) for the general public as well as high-level and intellectually oriented courses for well educated adults” (Cheung, 2006). The extra-mural studies departments of the universities can take advantage of the positive image derived from being part of a “university” offering quality study. However, tuition fees are very high compared with similar courses offered by the union training centres.

Following from the above, the question arises as to which organisations can play a major and effective role in this market to meet the needs of the learners, especially the large number of learners who cannot pay high fees for their studies and who are interested in non-award programmes?

The *2001 survey on the Demand of Continuing Education in Hong Kong* (HKU SPACE, 2001) revealed that the Hong Kong Federation of Trade Unions (FTU) was a major course provider with eight per cent respondents joining their study programmes. These and other figures show that unions have long played a significant role in CE. The unions’ work in this area needs further examination if a complete picture of the range and quality of CE programmes is to be provided. The next section will present background information on the major unions providing CE to employees in Hong Kong.

1.2.4 Hong Kong unions

The *Annual Statistical Report 2006* by the Registry of Trade Unions, Labour Department (2007) stated that there are 731 registered trade unions with around 680,000 members. The trade union participation rate is 20.88 per cent as a whole in

Hong Kong. There are three trade union federations, with the FTU having 230 affiliated unions in 2006 and 250 in 2009, with a membership of around 310,000 and 330,000 respectively, accounting for half the union membership. Other significant union federations are the Hong Kong Confederation of Trade Unions (CTU), the Federation of Hong Kong and Kowloon Labour Unions (FLU) and the Hong Kong and Kowloon Trade Union Council (HKTUC); they have 73, 74 and 30 affiliated unions with a total membership of one hundred and sixty thousand, forty thousand and around twenty thousand respectively. In addition, there are five significant civil servants' general unions or federations: the Hong Kong Federation of Civil Service Unions, the Hong Kong Civil Servants General Union, the Hong Kong Chinese Civil Servants Association, the Hong Kong Discipline Employees General Union and the Hong Kong Civil Servants Association. The last-named union is one of the unions affiliated with the FTU. The report shows that 150 unions are active in the public service. Therefore, there are about 200 unions with no affiliation in Hong Kong. Most of these unions are small and not active in current labour issues. This is evident from the registration of electors for the Labour Advisory Board (LAB) election, as most of the electors are from the FTU, CTU and FLU (Labour Department, 2008). As determined by the election rules of the LAB, a registered union can elect its representatives to the LAB provided that it has registered as elector. However, only slightly more than half of the registered unions have registered as electors.

The LAB is a consultative body appointed by the Chief Executive to advise the Commissioner for Labour on matters affecting labour, including legislation and Conventions and Recommendations of the International Labour Organisation (ILO). The LAB comprises representatives of both employers and employees. "Of the six

employee representatives, five are elected by employee unions registered under the Trade Union Ordinance and one appointed ad persona....” (Labour Department, 2008).

The rules and functions of the LAB demonstrate the importance of the organization as it can affect policy making related to labour ordinances and government policies. Policies related to labour are discussed before being taken to the Legislative Council, meaning that, in effect, a green light must be sought from the LAB before any company may apply to import labour. As this is a matter of great importance, the unions should try their best to fight for seats on the LAB. However, the small number of registered electors to this Board more or less reflect the unions’ level of activity.

As mentioned above, the list of electors shows that the active unions are primarily from three union camps. The following section and Chapter 3 will present a closer examination of these three camps and introduce some of the contextual factors that explain why they have now a major role in offering courses.

The situation of the unions in Hong Kong

The FTU is the largest federation with the longest history in Hong Kong. It was established in 1948, with strong political links with Mainland China. The Federation’s slogan “Love Motherland, love Hong Kong” clearly reflects its patriotism towards the People’s Republic of China. The Hong Kong Federation of Trade Unions (2006) emphasizes an obligation to Hong Kong and fighting for the rights of and benefits for Hong Kong employees, while improving working conditions and study opportunities.

The CTU describes itself as a pro-democracy labour and political group. It was established in 1990 and claimed to have a total membership of 170,000 in 2008 (The Hong Kong Confederation of Trade Unions, 2008). The principles put forward by the CTU are “Solidarity, Rice Bowl, Justice, and Democracy.” The CTU is affiliated to the

International Confederation of Free Trade Unions (Registry of Trade Unions, Labour Department, 2007).

The FLU was established in 1984 and is affiliated to CTU, but claims to be an independent federation. The FLU is a workers' conglomerate registered as an association in Hong Kong. Its mission is "Banding together the working class, striving for reasonable rights, participating in democratic reform, promoting prosperity of society." It claims to employ an independent, fair and pragmatic strategy all along (The Federation of Hong Kong and Kowloon Labour Unions, 2008). On its website, the home page of FLU emphasizes that education centres and vocational skills training schools offered to the workers are a significant service to the workers (The Federation of Hong Kong and Kowloon Labour Unions, 2008).

In the 1970s, the HKTUC was the second largest union centre, just behind the FTU. It is a pro-Taiwan union. With the sharp change in the Taiwan political situation, the union centre became a small union centre with only 33 affiliated unions and a total membership of no more than 20,000 (Registry of Trade Unions, Labour Department, 2007).

The strongest union centres are very active in political issues. This is illustrated in the number of representatives with union affiliations in the Legislative Council and the supreme advisory authority, the Executive Council of the Hong Kong SAR. In the term of 2008 to 2012, Of the 60 Legislative Councillors, four are directly affiliated to the FTU; of these two obtained their positions through direct election in their district and two through labour functional constituency election. In addition to it, one Legislative Councillor is from the CTU and one from the FLU. The president of the FTU is a current Executive Council Member.

At the same time, the office bearers of the three union groups sit on many government advisory committees, some union representatives in Legislative Council and one in the Executive Council, those are the core authorities in the Government of the HKSAR.

As can be seen, there is union strong representation at the level of Government policy-making. However, the traditional tool for fighting for workers' rights, that of collective bargaining, is still absent from Hong Kong's industrial landscape.

Collective bargaining is not common in Hong Kong as there is no ordinance to support the practice. The documents of the unions in Hong Kong indicate that the unions are making use of their services and the provision of welfare to attract members. Many of their activities are concerned with study and the attainment of qualifications. In the newsletters and periodicals of the different groups of unions, many of the articles advertise services relating to training; out-reach activities and even co-op style services. *The 34th general meeting: committees and services unions working reports* (The Hong Kong Federation of Trade Unions, 2009) indicated that it had attracted more than ten thousand members in 2006 to 2009 through welfare services. England & Rear (1981) offer a clear description of the phenomenon: "Yet of the three main Functions of the trade unions—political involvement, the provision of benefits, and job regulation—it is the latter which receives the least attention from unions in Hong Kong" (p. 161). This contention is supported by the unions' own promotional literature (The Hong Kong Federation of Trade Unions, 2009).

According to the Hong Kong Trade Union Ordinance, a minimum of seven persons, engaged in the same industry, can form a union. Official records by the Labour Department of the registration of trade unions show that there can be many unions within the one industry (Labour Department, 2009). For example, there are 10

FTU-affiliated unions in the clothing industry. The absence of industry-based unions makes it difficult for the labour unions to vie for collective bargaining in Hong Kong. This situation will be discussed further in Chapter 3.

As there is no collective bargaining ordinance in Hong Kong, the unions do not have a role to play. Chiu (2002) points out that unions in Hong Kong do not have a legal collective bargaining role: “whether unions have a role in negotiating terms of employment and in representing workers in case of disputes depend much on the consent and goodwill of the employers” (p. 21). In a situation with no collective bargaining rights, the unions have to make use of services and welfare to attract members.

1.2.5 Existing training service provided by Hong Kong unions

The unions in Hong Kong offer a large range of courses under the heading of “Continuing Education”. If not every trade union centre, at least the three union major groups have their own training centres providing government subsidized training programmes, as well as their own, in-house developed courses. The CTU, FTU and FLU are also in the list of top ten course providers in the Employees Retraining Scheme (ERS) which is administered by the Employees Retraining Board (ERB) under the Employees Retraining Ordinance. Under the direction of the Executive Council, the ERS “seeks to help local employees adjust to changes in the employment market, arising from Hong Kong’s economic restructuring, by acquiring new or enhanced vocational skills” (Audit Commission, 2000, p. 1). The scheme is subsidized by the levies collected from the employers of imported labour, and now also from imported domestic helpers. As the scheme is very significant to employees on lowest rung of the hierarchy of employees, it will be analysed in depth in a later part of this chapter. Under the scheme, over the years since its inception in 1993, it has offered more than a

million retraining places. The chairman, Mr Michael Tien Puk-sun, stated that, “We have contributed remarkably, not only to the alleviation of our unemployment problem, but also the upgrading of the quality of our workforce” (Employees Retraining Board, 2007). The FTU provides around three thousand training places every year, and the CTU ten thousand, while the FLU offers around five thousand places according to their officers.

Moreover, the Skills Upgrading Scheme is also a very significant programme subsidized by government; its secretariat is in the Vocational Training Council (VTC). The three unions’ groups are also significant service providers and their union representatives are members of the *Industrial Consultative Committee* for the scheme. There are 26 industrial sub-committees and each has its developed courses. The training providers have to bid for the tender to run the courses. The FTU provided courses under 16 industrial sub-schemes, CTU under 12 and FLU under 16 in 2010.

In addition to this, the three union centres also provide courses as part of the Youth Pre-employment Training Scheme (YPTP) and Youth Work Experience and Training Scheme (YWET), which are subsidized by the Labour Department. These two programmes are designed to help unemployed youth with low education attainments, usually below Form Five, to have free of charge pre-vocational training and job seeking assistance. One of the unique features of the schemes is the appointment of social workers as mentors during the job seeking process and a six-month follow up is provided.

The three union groups are also the significant course providers. In addition to running the government subsidized programmes, the union groups also run their adult education study programmes and activities, known as “Spare Time Study Centre (FTU

STSC)”. The FTU currently runs more than 50 training centres, the CTU has at least six and the FLU has around eight (Employees Retraining Board, 2007). According to the FTU prospectus, most of the courses are “interest” courses, such as flower arrangement and yoga, and practical skills courses, such as London Commercial Chamber Institute (LCCI) accounting courses, language learning, property management and business studies. However, it is not difficult to discover, through information provided in the prospectuses, that around five per cent of courses are award-bearing subjects granted by different award bodies, such as City and Guild or Australian Technical and Further Education (TAFE) (The Hong Kong Federation of Trade Unions Spare Time Study Centre, 2010).

Moreover, facing the twin challenges of globalization and the emphasis of the Government on occupational retraining, the FTU keenly felt the necessity to provide vocational training or qualification-awarded training in order to address the identified needs of workers. These pressures in part explain the establishment of the FTU Occupational Retraining Centre in 1993 and the FTU Occupational Development Service Board in 2007.

The unions do not receive direct subsidies from the government to run their training service; the government only subsidises by way of programme or course. The Continuing Education Fund (CEF) is a typical example to illustrate this government’s ideology. Under the regulation of the fund, the students can apply for reimbursement from the CEF office after successful completion of the CEF-recognized course; only courses on the reimbursable course list are eligible for reimbursement. Institutes have to apply to the Hong Kong Council for Academic Accreditation and Vocational Qualification (HKCAAVQ) and the Office of CEF for the title in the reimbursement list (Continuing Education Fund Office, 2010). The unions, like other institutions, can

apply for the accreditation of their courses. The successful accredited courses of the unions can also be put on the reimbursable course list. As it is the government's education policy to subsidize registered formal education schools and institutions directly, according to the *Annual Report 2006-07* of the VTC, the government provided a direct subsidy of HKD 2,327.6 million to the Council in 2006/07 (Vocational Training Council, 2007). In respect of CE, the government only subsidizes courses through schemes such as the Employees Retraining Scheme and the Skills-upgrading Scheme. The HK Government stated that "mature-aged students were expected to bear the learning costs from their own earnings and that continuing education courses should be self-financed" (Cheung, 2006).

However, the unions' Groups do not put many resources into running traditional union education programmes, such as negotiation techniques for union representatives, knowledge of labour law, etc., but they do provide training in occupational safety and health. According to the *Annual Rreport 209/2010* of the Occupational Safety and Health Council (Occupational Safety & Health Council, 2010), unions frequently apply for funding from the Council to conduct Occupational Safety and Health seminars. As required by the Occupational Safety and Health Ordinance, Chapter 39, all construction workers must attend the mandatory safety training course, which must also be accredited by the Labour Department every three years. From the providers list (Labour Department, 2010), some unions affiliated to the FTU and the CTU are accredited course providers. In addition, the FTU runs a union development education centre to provide education for the office bearers of its affiliated unions, including education about the Chinese workers' struggle or the theory underpinning the union movement. Popular union education programmes as found in the UK or Australia, such as those around collective bargaining techniques, have rarely been provided in Hong

Kong. Where something similar does exist, it is not part of a regular programme, but takes the form of a seminar to introduce, for example, a new ordinance or compensation claim procedure (The Hong Kong Federation of Trade Unions, 2006).

1.2.6 Government policy on Continuing Education (CE)

As mentioned above, the Hong Kong Government is not enthusiastic in its dealings with CE needs in Hong Kong (Cheung, 2006; Leung, 2004). The 1997 policy address was the first time that the government allowed open discussion of CE at the macro-policy level. The government's policy included a paragraph discussing the need to push Hong Kong to become a learning society. The 2007 policy address was only the second time the government talked about this issue, and it has not discussed the issue since.

The Current Chief Executive, Mr Donald Tsang Yum Kuen, made it very clear in his *Policy Address 2007 to 2008* that he will put much effort into tackling the employment issue by improving occupational training through funding provided by the ERB and the Labour Department. In his statement he said, he will,

examine how to rationalize, integrate, and enhance the employment and training services currently ... we will also launch a pilot scheme to trial the one-stop employment support mode and on-the-job training. We hope that the revamped service mode will more effectively help the unemployed.

(Tsang, 2007, p. 33)

The address acknowledged a definite need for the training of local workers. Their study opportunities and needs should be considered. Should there be any space for the unions to take advantage of the situation and to be more active course providers? In the following year, the Hong Kong Federation of Trade Unions (HKFTU) and the FLU

announced that the Hong Kong Government had allocated one school building to each federation, at an honorarium rate of one dollar per month, characterising this move as a significant indicator of the government's support of the unions' mission to offer CE to workers in Hong Kong. This issue will be further discussed in Chapter 3.

However, apart from this good news for two of the union federations, the great task of helping the employees to participate in CE remains largely uncompleted and the current performance of the ERB and the related scheme to help employees cope with the rapid growth of the knowledge-based economy provides few grounds for an optimistic outlook. The function and the content of ERB are discussed below. Since the new "Manpower Development Scheme" was adopted in October 2007, "the ERB has extended the eligibility criteria for its courses and services to include people aged 15 or above with an education attainment of sub-degree or below" (Employees Retraining Board, 2010). Moreover, the ERB has gradually consolidated the Skills Upgrading Scheme and the Youth Training Scheme into the ERB to achieve a one-stop employment support mode and on-the-job training".

In addition to the inducement-based policy, the ERB scheme seems to be one of the significant schemes that support working adults to pursue CE.

Following are the details of schemes subsidized by the HK Government, from which we may obtain a clearer insight into the government's actions of supporting adult learners.

(A) The Employees Retraining Board (ERB)

The ERB is an independent statutory body set up under the Employees Retraining Ordinance (1992). The main function of the ERB is to provide training to eligible workers to assist them to take on new or enhanced skills so that they can adjust to

changes in the economic environment and have their employability enhanced. According to the *ERB Annual Report 2007-08* (ERB, 2008), since its establishment until the end of March 2008, over 1.1 million retraining places were offered. The ERB consists of a government body comprising employers' and employees' representatives, human resources professionals and government officials. There are four employees' representatives from unions on the board, with three being principal office bearers from the FTU, CTU and FLU, and the fourth usually from an independent union with no affiliation to general unions or union federations. In 2007 to 2008 the fourth representative came from the Cathay Pacific Local Employees General Union.

The Retraining Board is funded by the Employees Retraining Fund. Apart from a capital injection from General Revenue, the Employees Retraining Fund is financed by a levy charged on employers hiring imported workers (including foreign domestic workers) at a rate of HK\$400 per imported worker per month.

The ERB is a funding board; it provides training through its collaboration with 53 training bodies in 2006 (ERB, 2007), including the FTU, CTU and FLU. The ERB has for many years committed to assist unemployed workers, in particular those with lower education level (secondary level 3 and below) and aged 30 and above. However, in 2007, when the unemployment rate dropped, the Chief Executive announced

Employment is an issue that has to be tackled by setting long-term strategies. Hong Kong's economic growth model has changed. The need for training and self-improvement is not just confined to low-skilled, low-educated, and middle-aged workers. We need to turn our training policy into a long-term social investment. (Tsang, 2007)

Pursuant to the policy direction, and on the advice of the Executive Council, the ERB started to “relax the eligibility criteria for the ERS to cover people aged to 15 to 29 and with education level at sub-degree or below” (Tsang, 2007, para. 1.16).

However, the coverage of the ERS – which provides exactly the same service as that offered by the ERB – depends on how much funding it can obtain from the levy. Before 2003, the ERS could only obtain the training levy imposed on those employers importing employees under the Labour Importation Scheme (Employees Retraining Board, 2010), as the imported domestic helper scheme was not included in its coverage. As a result, before 2003 the levy was insufficient to cover the expenditure of the ERS; the government had to inject start-up capital and recurrent funding to the tune of HK\$700 million.

In 2003 the Executive Council decided that the employers of imported domestic helpers should pay the same levy of \$400 per worker per month. However, the subsequent judicial review instructed the ERB not to make use of the levy at that time. In 2007, following the judicial review, the ERB had collected \$40 million from the levy, and could therefore expand the coverage of the training service (Employees Retraining Board, 2008, para. 1.5).

In 2009, the ERB started to expand its service to cover a larger clientele in Hong Kong. It extended the service age group from 30 years of age and above to as low as 15 years of age, and the education level was also extended from educational level Form Three or below to associate degree or below. In addition, the course coverage was extended from skills level (such as domestic helper training) to diploma level, such as financial planning.

Nevertheless, according to the application guidelines for enrolment, the conditions applied to the scheme were very tight and the education attainment was limited to associate degree and below. The scheme was not available to those with degree qualifications.

The importance of this scheme relates to its purpose of helping unemployed workers to return to the labour market after retraining. According to figures released by the *ERB Annual Report 2008-09* (Employees Retraining Board, 2009), the placement-tied courses (full-time courses) accounted for 61 per cent, and more than 50 per cent of courses were concerned with property management and security (30%) and domestic services (23.3%). Before being integrated with the Skills Upgrading Scheme (SUS), its part-time courses were mainly IT applications and workplace language programmes. The qualification level of the re-trainees (students) in ERS is mainly Secondary 5 and below, which accounts for 90% or more. The ERB claimed to be offering more than 500 courses through approximately 70 training bodies, helping the unemployed applicants by providing skills-based training (Employees Retraining Board, 2009). This was a far cry from helping employees to upgrade their skills in order to cope with the growth of the knowledge-based economy.

Apart from this, the ERB positioned itself as a manpower development scheme; the concrete measures it adopted were intended to help the re-trainees to earn recognized qualifications. Based on this ideology, the ERB announced that it would submit all the courses to be accredited to the Hong Kong Council of Accreditation of Academic and Vocational Qualification (HKCAA), meaning that all the courses would be tightly controlled from the point of entry to the end of the course and the outcome assessment, the assessment and the entry requirements being the primary indicators in the Qualification Framework (QF) (Education Bureau, 2009). The current entry

requirements have been raised to meet the requirements of the QF and the applicants have to attend a series of entry tests and interviews. This scheme is the main programme subsidized by the government designed to help employees get the recognized qualifications and upgrade their skills. However, considering the measures adopted by the ERB, whether the scheme helps or hinders employees' CE is in doubt (The Hong Kong Federation of Trade Unions, 2009).

(B) Skills Upgrading Scheme

The SUS, which was introduced in 2001, covered a total of 26 industries in 2008. It aims to provide focused training to workers with lower skill levels. The Hong Kong VTC has set up an independent secretariat to assist in implementing the scheme, which includes consulting the relevant trades, developing training packages, commissioning training providers, conducting inspections for quality assurance, devising common assessment tests for the purpose of certification and managing finances (Vocational Training Council, 2007, para. 4.ii).

The SUS is governed by a Steering Committee, which was appointed by the Education and Manpower Bureau in 2000. The committee comprises representatives from employees, employers, the VTC and the ERB (Audit Commission, 2008, para. 1.2-1.5). The FTU and CTU have their representatives on the Steering Committee.

Under the scheme, a working committee is formed for each industry, and up to 2008, 26 industry working committees had been formed (Audit Commission, 2008). Each industry committee comprises representatives from employees, employers, training bodies and government. The working committee is responsible for developing training courses, appointing training bodies, monitoring the provision of training courses and

suggesting skills assessment standards for the courses, as well as granting the certificate.

The government subsidizes the SUS. Potential student applicants must be in-service employees and must pay 30 per cent of the training fee, while the government subsidizes the rest. Up to September 2007, the scheme had provided training to 193,000 persons since its establishment. According to a government announcement, the SUS scheme will be managed by the ERB from April 2011.

(C) Youth Pre-employment Training Programme

The Youth Pre-employment Training Programme (YPTP) is managed and subsidized by the Labour Department and is targeted at school leavers aged 15-19 years. Its primary objective is to provide young people with a wide range of employment-related training and workplace attachment opportunities, thereby improving their employability and competitiveness.

(D) Youth Work Experience and Training Scheme

The Youth Work Experience and Training Scheme (YWETS) is managed and subsidized by the Labour Department and provides on-the-job training for young people aged 15-24 years with below-degree educational attainments. It enhances their work skills, experience and credentials to improve their employment prospects. The Labour Department assigns NGOs to be the training bodies. The NGOs then assign social workers to be case managers to counsel the trainees registered in the scheme.

1.2.7 Conclusion

With the advent of knowledge-based economic structures, globalization and the rapid growth in computer-based technologies, the Hong Kong labour force has to upgrade its

knowledge and skills. The government's analysis in the *Report on Manpower Projection to 2007* (Government of the Hong Kong Special Administration Region, 2003) shows that there are significant internal and external pressures on Hong Kong industry to ensure that employees have proper CE to equip them to meet the challenges of the new millennium. However, the government's own CE policy indicates weakness at the level of policy and implementation. It is critical that the training gaps be addressed and enhanced services be provided.

According to the reports by Hong Kong University's SPACE on public demand for CE from 1999 to 2008, the trend to participate in CE gradually increased from 20.7% in 1999 to 28.1% in 2005, and down to 25% in 2007 (Hong Kong University, School of Professional and Continuing Education, 2008). Between 1999 and 2003 the most popular qualification was the sub-degree level. However, from 2005 onwards non-award subjects became more popular. As the demand for CE expanded, tertiary institutions extended their services in CE by developing extra mural departments. These institutions provided basic education and interest courses for the general public as well as high-level and intellectually-oriented courses for the better educated. However, their tuition fees for such courses are very high, presenting a clear obstacle for employees wishing to participate in CE. As revealed by the reports mentioned above, the course fees are a major concern of participants when selecting courses. However, a 2001 survey (Hong Kong University, School of Professional and Continuing Education, 2001) revealed that the HKFTU was a significant course provider with eight per cent of respondents joining their study programmes. This shows that many Hong Kong people attended courses provided by the HKFTU. This begs the questions of why these courses are so popular and how the unions can attract people to participate in their courses. Traditionally, unions provide the workers'

education, which is mainly related to labour rights and the raising of class-consciousness for union representatives. However, Hong Kong unions also provide vocational and CE. The above paragraph drew attention to the Hong Kong unions' lack of collective bargaining power, which is the typical negotiating tool of the unions in western countries. In Hong Kong, however, they have representatives sitting on policy boards at different levels of policy development, such as the Executive Council and the Legislative Council, the supreme policy making and legislative authorities. Are these constituted to provide the conditions for the unions to provide CE?

The above paragraph briefly introduced the CE services provided by the unions; the survey findings of the HKU SPACE echoed the assertion that unions are actively involved in offering services in CD. In this introductory chapter the research has seen so far that the workers need CE to upgrade their skills and knowledge in order to cope with the ever-changing needs of our industrial society, and that the Hong Kong government has a weak CE policy.

Therefore, by being active in CE, the unions are playing a significant role in filling the gap between the workers' training needs and the courses on offer. The situation and the phenomena revealed in this chapter informed this research, investigating the reasons, styles, measures and political implications of the unions providing CE in Hong Kong.

The next section of this chapter will set out the questions that guided this research and the conceptual framework that guided its development.

1.3 Objectives of the study

1.3.1 What is the research about?

The purpose of this research is to assess and analyse the gap between the general workforce's training needs and the provision of CE and VET. The research will provide explanations for the unions' strategic role in the provision of CE, describe in detail their efforts to narrow the gap between workers' training needs and the provision of appropriate training opportunities, and examine the roles that unions can play and the courses they can provide in meeting employees' CE needs in the Hong Kong context.

1.3.1.1 Gap between training needs of general workforce and the training opportunities provided

A series of surveys of the needs for CE in Hong Kong (Hong Kong University, School of Professional and Continuing Education, 2006, 2008, 2010) revealed an ongoing need for CE, even though there are many training opportunities provided by different institutions at different levels. However, there is still a tremendous need for vocational training and CE across all walks of life in Hong Kong. Hong Kong's Chief Executive announced a one-stop employment support mode by enhancing the Retraining Scheme and the training subsidized by the Labour Department and the Social Welfare Department (Tsang, 2007, p. 33). There is a gap between needs and provision. This research will examine whether the unions in Hong Kong can play a role in filling the gap by providing education and learning opportunities for workers.

1.3.1.2 Strategic role played by unions in narrowing the gap between workers' needs and the provision of VET

The constitutions of Hong Kong unions show that the unions' main objective is to protect workers' rights and benefits, while the FTU (2009) clearly points out that

occupational training opportunities are regarded as labour rights and that the unions should fight for them. How can this be achieved? For the purpose of identifying the originals of this ideal, the history of Hong Kong's unions in the field of workers' education will be studied first, as the history constitutes the background to make the Hong Kong unions put their focus on the provision of CE. Moreover, it has to analyze how the unions have the resources to play the roles in helping workers fight for the study opportunities and how the unions motivate the employees to study and remove the study barriers.

Based on the existing training offered by unions and the needs for CE revealed by research by Hong Kong University's School of Professional and Continuing Education (hereafter HKU SPACE), the continuing ability of the unions to provide training services to meet the needs of the employees will be studied also.

1.3.1.3 Worker unions' role as direct course provider

In this section, I will study the unions' strategic role in the provision of VET as a direct VET course provider. Since the establishment of the VTC in 1982, set up under the Vocational Council Ordinance, the VTC has officially played the role of providing qualified vocational training to the Hong Kong public, while the ERB (established in 1992), provides retraining courses to lower level workers. However, as there is a shortage of resources while the demand for CE is high, the government has had to open up the education market to other organizations, including to unions. There is evidence to show that worker unions have been involved in training and retraining activities for workers in the past, including government subsidized training schemes such as the Skills Upgrading Scheme and the Employees Retraining Scheme. I will study whether unions, through participating in a structured vocational training system, can provide

employees with opportunities for VET that are able to effectively meet the demands of both the employees and the market.

1.3.1.4 Worker unions' role in policy formulation

As mentioned in Section 1.2.1.3, the unions' representatives have sat on many consultative committees and policy making boards of government, it is worth studying how worker unions take part in policy formulation to build up an effective training and retraining system for workers. There are more opportunities for union leaders to be involved in the tripartite committees (employer, employee and government representatives) to discuss policy drafting.

1.3.1.5 Conclusion

It is expected that this research will contribute to the unions' better understanding of the provisions needed to meet employees' training needs. The research seeks to provide unions and the HKSAR government with insights into the needs of the workforce in the context of the provision of CE. The research will also enable the purpose and the objectives of learners to be identified. With this identification, unions can shed light on the future participation patterns in CE. For Hong Kong society as whole, the research will be significant in offering a future direction in continuing education when providing courses and infrastructure training. This should enhance the quality of CE and therefore help the local workforce to keep abreast of rapidly changing trends.

A framework for the articulation pathways for Hong Kong employees to upgrade their vocational skills through life-long learning will also be discussed. It is hoped that the research can enhance the awareness of Hong Kong workers in their CE and training opportunities, which will enable them to survive in this ever-changing society.

1.3.2 Research questions

The following research questions guide the research:

- 1) What training is provided by the employers of Hong Kong workers in the context of globalization?
- 2) What conclusions can be drawn about education and training needs of the workers in relation to their employment responsibilities?
- 3) What inadequacies/mismatches have arisen between the training/education provisions of unions and government and the needs of Hong Kong workers?
- 4) What assistance could the Hong Kong workers' unions provide to address the CE needs of workers?
- 5) What have the unions achieved thus far in addressing the educational and training needs of Hong Kong workers?
- 6) What development plan could be proposed to address the needs of workers, taking into consideration the assistance provided by labour unions?

Subsidiary questions

As revealed by *the Report on Manpower Projection to 2007* (Education and Manpower Bureau, 2003), there is a significantly large percentage (42 per cent) of the Hong Kong workforce with an educational attainment of Secondary Level 3 or below. This fact leads to the following subsidiary research questions:

- 1) What challenges will these workers with low education attainment face?
- 2) What is needed for these workers to meet the requirements of the labour market?

- 3) What are the present and future educational and training needs for upgrading the quality of the workforce to meet the needs of a knowledge-based economy?
- 4) As the organisations representing workers, what are the strategic roles of workers' unions in the context of helping workers upgrade their skills to meet the requirements of the ever-changing labour market?
- 5) What are the expectations of the workers of the unions in the context of educational and training support?

1.3.3 Importance of study

This study offers an analysis of strategy to policy makers so as to provide them with concrete evidence when planning their strategies in relation to CE and methods of improving the quality and skills of the labour force.

The study will also provide the leaders of the unions with a clear picture on which to base their strategic plan for providing CE service to employees.

Third, the study also provides a stronger evidence base for academic discussion of a framework for the provision of CE by Hong Kong unions in order to increase awareness among academic institutions of ways of co-operating with unions in Hong Kong, to the ultimate benefit of Hong Kong as a whole.

1.3.4 Scope and delimitation of study

This research is limited in studying the role played by Hong Kong unions in the provision of CE. It assesses the ability of the three Hong Kong Union groups to provide training to fill the gaps between employees' needs and the provision of courses. The perspectives of government, academic institutions and union leaders will

be assessed to arrive at a considered view of the courses and services concerned with CE that the workers' unions should provide. The policy of the Government of the Hong Kong Special Administrative Region in relation to CE will be touched upon but limited to the relations with unions.

Chapter 2

Review of Related Literature

Last chapter demonstrates the research background and the aim of the research. This chapter provides a review of the literature related to workers' education and the employees' needs in CE. The first part will examine the theoretical basis for the provision of CE by unions and the relationship between these courses and employability. The second part will discuss the issues that underlie the reasons employees attend the CE courses. The chapter will also examine the policy adopted in the context of the Hong Kong situation. Finally, a framework model will be proposed as a means of better matching employees' learning needs with the provision of opportunities by the unions in Hong Kong.

2.1 Workers' education: technical-professional and raising of class-consciousness

The definition and purpose of "workers' education" and "union education" has a long history, as is the question what kinds of education the unions should run or provide. There are two schools of thought, a technical-professional approach and an approach that can be described as raising of class-consciousness. Many courses focus on training workshop representatives and union leaders. According to some academics, "workers' education" is working raising of class-consciousness so it should focus on the training of workshop representatives and union leaders. Hellyer and Schulman (1989), for example, support the consciousness-raising/activist model of workers' education. They proposed that the outcome of workers' education be measured by "the extent to which workers and their allies could unite through education to bring about changes in the workplace and in the wider social context" (p. 572). They rejected the point of human

resources development that “the educational activities of workers, when defined by their interests, go beyond the acquiring of job skills or managing a union. Educational activities must be an integral part of social action” (p. 574). As the ideology captured in the definition is to provide representatives to fight for the rights and benefits of the working class, this is also the aim of workers’ education.

There is another, broader definition of workers’ education, which includes all work skills training, CE and training of workshop representatives. The ideology of workers’ education as implied by the definition mentioned by Hellyer and Schulman (1989) is to raise the ability of workers to fight for better working conditions and opportunities. That is, an essential element of the format of workers’ education is collective learning in which the learners need to identify themselves as members of the labour-selling class, not simply as individuals. This requires workers to learn to improve their situation relative to the owners of capital, which does not mean that all collective learning is of a consciousness-raising type.

Hopkins (1985), for example, adopted a broader concept that also covers a technical/professional approach, namely, “that [the] sector of adult education which caters for adults in their capacity as workers and especially as members of workers’ organization” (p. 2) be identified as comprising five major components which provide (i) basic general skills; (ii) role skills for union and workers’ organization activity; (iii) economic, social and political background studies; (iv) technical and vocational training; and (v) cultural, scientific and general education. Hopkins’s explanation is in line with the concept of lifelong education.

Historically, workers’ education is a means of raising the workers’ class-consciousness under capitalism, as discussed by Salt (2000), who stated, “Historically, education has

often been seen by workers and their organizations as a means by which they can advance their interests in the class struggle with their employers” (p. 115). In the context of economic globalization, unions have to educate the workers across nations to protect their rights and benefits. Salt (2000) pointed out that education is the only way to let workers understand the dynamics of the global economy of which they are part and develop solutions to the problems that they face as we enter the twenty-first century (p. 115). Nesbit (1991) also argued that workers’ education needs to emphasize consciousness-raising over technical professionalism.

Trade unions have historically not regarded VET as an important part of their local and national bargaining agenda (Forrester et al., 1995b; Rainbird, 1990). It is commonly believed that union education should be an integral part of social action, which should be concerned with fighting for social justice. Only when workers and their representatives are aware of their rights and able to identify the cause of economic changes, can they find a way to equip themselves with the techniques to bargain for policies that will bring about a more just society (Hellyer & Schulman, 1989; Nesbit, 1991; Salt, 2000). Since the 1980s, however, the situation has been changed to emphasize VET (Forrester, 1995), as the raising of class-consciousness alone is not enough to help workers face up to a changing world and meet their needs. Salt (2000) pointed out that,

many unions have relied upon the collective learning model but have used it to engage in technically based education. Whilst this may represent a successful strategy for some unions and workers worried about how a lack of skills may make their workplaces less competitive than those elsewhere and may therefore lead to job losses, for others such union-initiated technical education raises concerns because its content often differs little

from that of company-initiated training designed to improve workers' stock of human capital. (p. 120)

Many of the differences in approach to workers' education taken by the unions are a reflection of their philosophical orientation (Hammah & Fischer, 1998), which also reflects the approaches and policies of unions in facing changes in political power and the economy, and hence their wish for the survival of unions. With globalization and the changed economic situation and the adoption of neo-liberal practices within an increasingly competitive global environment by government and employers (Harrod & O'Brien, 2002), collective bargaining power has weakened which has contributed to the decline in membership (Charlwood, 2002, p. 488). Therefore, unions have had to seek another avenue to consolidate their bargaining power and to attract members. Forrester (1995, 2005) argues that workers' education has been extended in scope to include improving the employability of workers.

From the perspectives of today's unions, workers' education cannot be bound solely to the raising of class-consciousness; employability is the main concern of the unions. The UK Trades Union Congress (TUC) played an active role in partnership with employers to promote vocational training, as it considers that employee development leads to improvement in employees' confidence and self-esteem and greater motivation and flexibility in employment (TUC, 1994). As Forrester (2005) commented, in the context of the wider global socio-economic forces, globalization and the knowledge-based economy, the unions had to reposition their political strategy to regain their lost bargaining power. According to Forrester's analysis, the TUC has placed "a high priority on continuously developing the skills of working people" and "to achieve that economic growth, individuals must be allowed and encouraged to develop their competence throughout their working lives, through both education and

training” (p. 261). It seems that adopting the avenue of providing services related to employability is one of the strategies used in workers’ education. Forrester (2005) pointed out that, “learning ‘service’ was seen as a major source of ‘added value’ for unionism” (p. 259). The TUC’s new strategy for workers’ education reflected the notion that union education has to respond to the needs of its members and of society. Livingstone & Roth(2004) claimed Canada’s unions’ involvement in occupational training in response to the workers’ demands. The common avenue adopted by the TUC and by Canadian unions mostly involves workplace education policy and programme formulation (Forrester, 2005; Livingstone & Sawchuk, 2004) rather than course delivery. In the UK, the TUC mainly acts as promoter, negotiator and deliverer of learning to TUC members (TUC, 1998). In this regard, workplace learning is the focus of education provided by unions related to employability. According to Forrester (2005), the TUC promotes the creation of a learning workplace and society through Union Workplace Learning Representatives (ULRs) and negotiates with employers to achieve this.

The statutory support for ULR activity covers analysing learning, or training needs, providing information and guidance, arranging learning or training, promoting the value of learning, and finally, consulting with employers on such activities. Consequently, the TUC reports that 60,000 employees have been encouraged to learn in 2004 and 250,000 workers were estimated to be involved in learning in 2010. In the meantime, the union records 59% of ULRs report positive impact on membership levels. (Forrester, 2005, p. 260)

In a similar situation, Livingstone & Raykov (2004) reflected the positive effect of union involvement in the workplace learning negotiations and arrangements.

Livingstone & Roth (2004) reported a survey of workers' learning practices in southern Ontario conducted over the 1995 to 2000 period. They wrote that,

in general, we have found that there are both relatively closer links between workers' informal knowledge and their participation in further educational programmes, and also lower levels of underemployment, in more economically powerful locals. These are large locals (unions) that have relatively extensive worker-run union education programmes, as well as co-operative programmes with local educational institutions developed in response to worker demand, all of which are provided with sustainable resource support through negotiations with employers, national and district union offices, and government programmes. (p. 121)

In light of Livingstone's description, it is not difficult to locate the positive impact on workers to have better job opportunities as a result of the workers' education offered by unions.

As Stroud & Fairbrother (2008) pointed out, the training for the enhancement of employability was not always available, especially for "those beyond the confines of the industry/sector in which an individual is working" (p. 231). As they noted: the nature of employment is more flexible than previously, and it is very common for a person to have a number of careers; therefore, as there is a lack of training opportunities, "the very real consequence for workers needing or wishing to find employment elsewhere is that the opportunity to do so is much more circumscribed than it might otherwise be" (p. 231). Based on this analysis, commentators commonly agreed to extend the workers' education to the scope of enhancement of employability, or at least technical-orientated training (Forrester et al., 1995b; Forrester, 2001, 2004;

Stroud & Fairbrother, 2008; Verma & Kochan, 2004). However, the real argument is over what measures should be applied in this context: whether to bargain for the justice of learning opportunities at the political level (Forrester, 2005); to negotiate with employers or seek direct intervention in workplace learning (Forrester, 2005; Stroud & Fairbrother, 2008); or for the unions to deliver the courses themselves (Forrester, 2005).

Even in the terms of workplace learning, most commentators represent one of two ideologies: one is to arouse the workers' awareness of injustice and inequality, the other is to be involved in the development of members' employability profiles in (narrow) skill-related activity (Stroud & Fairbrother, 2008). The former is more or less concerned with raising class-consciousness, while the latter is concerned with employability and skills-led workplace learning. In this connection, the commentators pursue to serve members in this context, rather than developing an active engagement with workplace learning practices in an active and involved way (Forrester, 2005; Stroud & Fairbrother, 2008). They argue that the unions lack the resources for direct involvement in workplace learning (Levesque & Murray, 2006; Stroud & Fairbrother, 2008) but they consider that union involvement in workplace learning would increase training opportunities (Forrester, 2005; Stroud & Fairbrother, 2008). They further argue that the positive impact on the employability profile would in turn reinforce the bargaining power of the workers and increase their ability to obtain and maintain satisfactory work (Tamkin & Hillage, 1999). More importantly, the UK cases proved that "learning in the workplace", a key part of union renewal strategies, has laid down the foundation for a potential revival of trade unionism (Herry, 2005; Stroud & Fairbrother, 2008; Thompson et al., 2007). From this analysis, we can clearly see the purpose of workers' education; it is an avenue to raise class-consciousness, to promote

unionism and to increase the workers' skills and bargaining power. However, as mentioned above, the strategies and avenues adopted by the unions are as varied as the political and economic background. In comparison with other developed areas, Hong Kong has a very special political background, so workers' education in Hong Kong is quite different from that in other developed areas.

Many unions in Hong Kong, as described by Salt, are adopting the broad definition of workers' education; they make use of collective learning to apply to class-consciousness raising education as well as technically based or vocational education. In Hong Kong the unions are not exceptionally active in representing the workers in their fight for good working conditions, rights and benefits; they focus on such areas as occupational safety and health, and knowledge of labour regulations. Meanwhile, although there is no formal collective bargaining in Hong Kong, the unions have to make use of different channels to represent the workers to negotiate with the employers. One such avenue is the LAB. When there is a labour dispute, the union representative negotiates on behalf of the workers. According to the labour ordinance, workers with a grievance can appoint a union. Thus, the unions have the very important duty of training union representatives. This is more important in Hong Kong, as there is no formal education, such as in the UK in the public education system, to train shop stewards and union representatives. In Hong Kong, the unions have to train those union office bearers and the representatives themselves. According to the annual reports of the three big union groups, FTU, CTU and FLU, significant resources are allocated to this type of workers' education. There are therefore frequent seminars and talks provided by Hong Kong unions to educate workers and representatives about their rights and benefits. These facts support the contention that workers' education falls into the category of raising workers' class-consciousness (i.e.,

basic general skills, “role skills” for union and workers’ organization activity, and economic, social and political background studies) and that this remains a key part of the role of Hong Kong unions. However, it can also be seen that the Hong Kong union groups extend the concept of workers’ education to include Technical and Vocational Training and even cultural, scientific and general education (FTU Spare Time Study Centre, 2010). Moreover, their pathways are quite different from the UK and Canada; they deliver the vocational and cultural education directly to their members and to non-members. According to *The 34th general meeting: committees and services units working reports* (The Hong Kong Federation of Trade Unions, 2009), this activity can play a key role in enhancing their growth. From 2007 to 2009, for example, approximately 10% of the total membership was recruited during course registration procedures when they enrolled in courses delivered by unions.

As Salt (2002) noted, some join unions in order to protect their economic status, judging the unions’ worth by what it can do for them (p. 137). In Hong Kong, according to Chiu (2002), the pseudo-democratic political representation, the limited number of labour representatives in the legislature, the limitation on introduction of Bills initiated by legislators together with the restrictive voting rules of the Legislative Council all put workers at a disadvantage as far as their legal rights and protections are concerned. As employers can choose to negotiate or not negotiate with any trade unions, the way that the unions can play to protect the workers’ interest may be the provision of training for the purpose of protecting their economic status. It is also a means of attracting workers to join the unions. This is reflected in their routine practice of running continuing education centres.

We need to examine the background of the priorities adopted by unions in Hong Kong in order to gain a full understanding of the relationship between training provision and

the training needs of workers over the next ten years and beyond. More particularly, we need to understand these union activities in the context of changes set out in the new policy concerning the implementation of the QF in May, 2008, in Hong Kong (The Hong Kong Federation of Trade Unions, 2009).

2.2 Post-Fordism – challenges faced by workers in the 21st century

2.2.1 Economic changes

In the 21st century, with the rapid development of the knowledge-based economy, every employee faces new challenges brought in by the new economy. Merriam and Caffarella (1999) stated that the “demographics, the global economy, and technology are three forces affecting all of society’s endeavours, including adult learning” (p. 22).

Scanlon (2008) reminds us that the world of work has changed as a result of global economic restructuring. The result has been a decline in manufacturing, an increase in the service sector, the use of casual labour, lower pay, short-term contracts, job insecurity, a culture of working longer hours and a polarization of pay levels between the boardroom and ordinary workers. Even worse is that the “Traditional identity of people with their work because, as traditional skills become irrelevant, the owners of these skills are made redundant and become as obsolete and irrelevant as their skills” (Scanlon, 2008, p. 17). So in this new era, the workers have to learn to cope with the new change of the globalisation and knowledge-based economy.

The situation described by Scanlon has been discussed by academics, who have categorised this phenomena as a shifting of Fordist techniques to Post-Fordist production (Forrester, 1995; Jessop, 1995; Lipietz, 1994; Paul & Jonathana, 1991). They observe that, as the structure of the economy changes, the rapid development of

technology and the process of internationalization, the long-lived, Fordist production style characterized by mass production and semi-skilled work on an assembly line has been replaced by the Post-Fordist production style with multi-skilled workers producing a more diversified range of products, with very short times indeed to change from one to another. Wood (1989) and Forrester (1995) pointed out that multi-skilling implies the breakdown of traditional craft control over work. Much routine assembly work has been automated, leading to large-scale redundancies but requiring higher levels of skills and attitudinal change on the part of the remaining workforce.

In facing the challenges of a re-structured economy, workers in traditional jobs have had to deal with the fact that their skills are quickly becoming outdated, and their jobs are disappearing. They have to learn new skills to reposition themselves in the labour market. The shifting to a Post-Fordist style means that both the older generation workers with skills and the new generation with higher educational qualifications have to deal with the ever-changing economy as well as the changes in required skills and knowledge. Whether we are in 1990 or the new 21st century, the following description by Murray (1991) seems to be applicable:

A core of multi-skilled workers whose tasks include not only manufacture and maintenance, but the improvement of the products and processes under their control... In Post-Fordism, the worker is designed to be a computer as well as a machine. (p. 63)

Hall and Jacques (1989) made a similar comment, writing that

the new times argument is that the world has changed, not just incrementally but qualitatively, that Britain and other advanced capitalist societies are increasingly characterized by diversity, differentiation, and

fragmentation, rather than homogeneity, standardization and the economies and organizations of scale that characterized modern mass society. (p. 21)

In the 21st century, guaranteed life-long employment in one job no longer exists. With rapid changes at all levels of society, the new economy and the adoption of new technologies, every employee has to prepare for job rotation and job change. “Flexibility” and “multi-skills” are ever-present job requirements for all current employees (Employees Retraining Board, p. 31-40). Cormican and O’Sullivan (2000) also commented that, “some changes associated with the emerging new capitalism have resulted in an expectation that those in the workforce should upgrade and diversify their skills”.

From the above analysis of the move from Fordist techniques to the Post-Fordist style, it can be said that with globalization and the introduction of new technologies, ways of working, working requirements and working conditions have to be changed to fit the new economy. The Post-Fordist style workforce needs talent, flexibility and constant skills upgrading. This trend is not unique to industrialized countries, such as the United States, Canada or Great Britain; Hong Kong also faces a similar situation.

Hong Kong is no exception among modern industrialized centres in terms of the challenges it has faced over the last 30 years. Economic structural change moving Hong Kong from labour intensive manufacturing industries to high technology and service industries has had major effects on individual workers. Government statistics show that approximately 40% of the working population was engaged in the manufacturing industry in the 1980s; at the time of writing, no more than 5% of workers are engaged in this industry but around 80% of employees are currently involved in the service sector (including the finance industry). This feature of the

modern Hong Kong economy, combined with factors such as globalization and corporate competition, have put significant pressure on employers to increase their capacity to compete. Unfortunately, labour costs are the first place these companies look to when assessing their own competitiveness. Ways of achieving cuts include increasing productivity by enhancing workloads or by developing the skills repertoire of the workforce (Cheung, 2006; Leung, 2004).

To meet such challenges and to develop flexibility and multi-skilling, the government and the academic community have suggested, amongst other things, that CE is the way to meet the continuing changes in the 21st century. Harris (1999) pointed out that

Post-Fordist forms of economic organization have established a new relationship between the economy and education whereby the latter is based, increasingly, on the requirements of wider contexts of application and competitive international and local markets.... The knowledge society and lifelong learning are central concepts. (p. 124)

Hall and Jacques (1989), Forrester et al. (1995b), Harris (1999), Pillay, Boulton-Lewis, Wilss, & Lankshear (2003) shared the similar idea that the central point of “education” is to make “continuing learning” of the workforce possible. Glastra, Hake & Schedler (2004) also stated that as the speed and scope of changes of the economic structure change, so do social structure and cultural orientations, and so everyone has to be involved in constant learning of “the personal life world” (p. 292).

In the Hong Kong context, Lee (1997) pointed out that “continuous change requires continuous learning, the most obvious in which rapid change occurs involves the world of work” (p. 205). She also pointed out that Hong Kong’s past experience of success

relates to its adaptability and willingness to embrace change. However, adaptability and willingness are insufficient; suitable skills are also required.

Preparing the labour force for fierce competition in the globalized economy is a crucial problem that all governments of developed and developing countries face. Bringing about an increase in the talent of the workforce is on the agenda of the Hong Kong Government's CE policy. As Cheung (2006, p.998) argued, "correlated with the knowledge deficit of the workforce, a shortage of highly educated manpower represents another barrier for Hong Kong to move towards a knowledge-based economy".

In Hong Kong the rapid growth of the knowledge-based economy leaves no doubt that the enactment of the QF by the Hong Kong Government will force the workers to learn. According to the announcement by the Hong Kong Government's Education Bureau, three industries were using the accredited standard of competence to assess the quality of the workforce and individuals in 2008. The QF system is designed to deal with the ever-changing requirements of the knowledge-based economy. The Education Bureau (2008) explains the reason behind the launch of the QF is that,

with the advent of globalization, rapid advances and popularization in technologies and Hong Kong's further transformation into a knowledge-based economy, the local workforce needs to be better equipped if its capabilities and competitiveness are to be enhanced. To ensure sustainable manpower development in the context of a rapidly changing world, we need to facilitate articulation along academic, vocational and Continuing Education pathways through the establishment

of a comprehensive and voluntary learning network based on the Qualification Framework. (p. 1)

As there is a set of standards, employers have a benchmark against which to judge any potential employee.

Being part of an ever-changing world, the government has had to adopt new policies to respond to a new situation. The core objective is to provide a talented, flexible and multi-skilled workforce. In order to sustain their place in the workforce workers need to continually upgrade, both vertically and horizontally. They have to equip themselves to be multi-skilled in facing changes in the working model in their work and the work places. In short, the common view is that education is the key to making the labour force fit the era of the knowledge-based economy.

2.2.2 Needs for training

Helping workers equip themselves with the skills to face the challenges of the knowledge-based economy has been emphasized at the international level. The Organisation for Economic Co-operation and Development interprets knowledge-based economies as those economies that are directly based on the production, distribution and use of knowledge and information (Organisation for Economic Co-operation and Development, 1996, p. 7). In a knowledge-based society, knowledge, technology and geography interact (Leydesdorff, 2006); knowledge pushes successive innovations of technology and vice versa. An increasing labour market demand for more highly skilled workers marks the knowledge-based economy (Organisation for Economic Co-operation and Development, 1996). Of the features of the worker in the new economy, flexibility is the key and it is reflected in the Bahrami (1992) model of the difference between the traditional firm and the emerging flexible

firm, the emphasis shifting from efficiency to flexibility. One of the conditions of flexibility is the ability and willingness to accumulate knowledge and continue to learn (Organisation for Economic Co-operation and Development, 1996). In addition, the need is not only for specific skills or a functional skill for a specific purpose, but broad and unspecific skills. That is, as Streeck (1989) mentioned, firms do not only need what is functional in their present environment, but in a period of change also what may become functional in uncertain and contingent future environment. Furthermore, the untapped talent of the workforce is just as important for the economy's future needs.

It is commonly understood that the members of the labour force in the knowledge-based economy must be smart, flexible, multi-skilled and ever upgrading their skills to fit the ever-changing requirements of their jobs. Tuijnman (2003) points out that the advent of the knowledge-based economy alters the requirements of employees to now be "knowledge workers" and to be prepared to upgrade their skills and knowledge as skill requirements continue to rise. However, identifying the ways in which employees' capacities to fit the new trend can be enhanced is currently being debated by both commentators and policy makers.

Many commentators believe that CE, irrespective of its form or its milieu, is the key to maintaining workers' competency and the way to narrow the gap between current skills and the requirements of work. Continuing education is also seen as the key to raising the productivity of learners and therefore enhancing their earning capacity (Forrester et al., 1995a; Forrester, 2001, 2005; Lee, 1997; Livingston, 1999, 2005; Merriam & Caffarella, 1999; Organisation for Economic and Development, 1996; Tuijnman, 2003).

Jobs in the knowledge-based economy require a good deal of formal education, and demand continuous learning, flexibility, excellent literacy, numeracy and problem solving skills and the ability to acquire and apply new ideas and use knowledge creatively. As Forrester et al. (1995a) pointed out that education is a fundamental way in which people face up to change. In order to face the globalized, knowledge-based economy, the need to upgrade the quality of the labour force and the requirements of a learning society, many countries are concerned about promoting lifelong learning and CE as a way of enhancing the competitive edge of their economic development. Pillay et al. (2003) stated that,

there may be a need to provide opportunities for workers to engage in training and learning associated with work. The focus of many training opportunities is on developing workers' capacities to acquire knowledge continuously, something which increasingly is becoming an essential part of work practices. (p. 95)

A consensus has been reached that the basic requirement for workers to keep up with the ever-changing technologies and the knowledge-based economy is continuous learning. It is important to maintain a learning society and provide continuing study opportunities in a globalized and competitive world. However, the argument continues over who and how to help the workers to keep up with market requirements and raise their employability by means of education and training.

2.2.3 Government's and employers' responsibility to provide quality training for the labour force

It is generally agreed that a workforce that is continually learning is one that will also continue to maintain and improve its productive capability. The opinion is broadly

voiced that employers and government have the responsibility to increase the skills and ability of the workforce; employers can earn greater profits from employees provided that they have the proper skills and ability, while the government can guarantee the supply of quality labour (Forrester, 2005; Stroud & Fairbrother, 2008). However, it is also true that employers do not willingly invest in the training of labour, and that governments lack effective policies to deal with the needs of the new economy (Cheung, 2006).

Most firms will have a tendency to invest less in training than they should considering their own self-interest. As workers are free to move from one firm to another, firms can never be guaranteed a return on their investment in training. Moreover, employers believe that skills are readily applicable across firms as “collective goods”. Within this discourse, training is not the responsibility of one individual firm; it is a matter for industry as a whole, or for society in general (Forrester, 2005; Streeck, 1989; Stroud & Fairbrother, 2008). Even when employers are willing to invest in internal training, most of this training is specific, rather than general. Streeck (1989) reported that in a crisis firms come under pressure from their core workforce to protect their jobs but will instead tend to cut their training programme as a first step in cutting labour costs. Commentators also point out that “workforce development is not always a priority for employers, and might even be viewed as a threat to managerial control” (Heyes, 1999). And even worse, when there are opportunities to the employees, but those opportunities, “access to them may be restricted” (Stroud & Fairbrother, 2008).

It is clear from the literature that employers push the responsibility for workers’ training onto society as a whole, and that society in this instance can be taken to refer to the government. In this case, it is very important that the government should have a proper CE policy to deal with the continuing training needs in the new economy.

However, there are often criticisms of such policies, and this is also true for the Hong Kong Government (Cheung, 2006).

2.3 Hong Kong's situation

As discussed above, with the advent of the knowledge-based economy, the production style has changed from Fordist techniques to a Post-Fordist style. As stated above, the features of the new economic style include worker flexibility, multiple skills, intelligence and a continuous supply of untapped talent. Involving labour in continuous learning is one of the ways to guarantee the provision of a continuous and capable labour force. The situation in Hong Kong is similar to that of other developed countries, such as the USA and countries in Europe where, “much routine assembly work has been automated, leading to large-scale redundancies but requiring a higher level of skills and attitudinal change on the part of the remaining workforce” (Forrester et al., 1995a). The situation has become more significant since the mid-1980s when Mainland China adopted its open economy policy, resulting in the mass migration of manufacturing industries northwards from Hong Kong. In the 1980s the percentage of manufacturing workers was nearly 40% of the whole working population, compared with 6.6% in 2001 and 5.1% in 2006 (Census and Statistics Department, 2008). Therefore, a large number of workers in the manufacturing sector have lost their jobs. Meanwhile, there is growth in service sector employment in which the economic activities are more diversified. In other words, the job requirements are very different from the past. To adapt and survive in such a rapidly changing environment, workers have to acquire a variety of skills and increased knowledge.

Therefore, Hong Kong is no exception to the tide of lifelong learning and CE. The Hong Kong Government has outlined the requirements for workers:

We need workers who have a strong sense of purpose; who are knowledgeable and competent in the work they do; capable of independent and critical thinking; sensitive and responsive to change; positive and resilient in the face of temporary setback; and creative in problem solving. (Tung, 2000)

In the *Report on Hong Kong Manpower Projection to 2007* (Government of the Hong Kong Special Administrative Region, 2003) the Hong Kong Government raised the problem of Hong Kong's need for capable workers and in *The 2007-08 Policy Address, "A New Direction for Hong Kong"* (Tsang, 2007), Mr Donald Tsang stated that "the need for training and self-improvement is not confined to low skills, low educated and middle-aged workers. We need to turn our training policy into a long-term social investment" (para. 73). As can be seen from these statement by the leaders of Hong Kong, CE is very important and investment in CE is high on the government policy agenda. In Hong Kong, with no proper policy to back up the needs of workers facing challenges from the changes of demographics, technology and economy, the situation is similar to that described by Merriam & Caffarella (1998, p. 22). Hong Kong commentators have made similar criticisms of the government's reluctance to formulate an effective policy to deal with the needs of CE (Chung, Ho, &Liu, 1994; Lee, 1997). In reality, it is not easy for workers alone to meet the requirements of the new knowledge-based economy. The following section will examine the CE policy and provisions adopted by the Government of the Special Administrative Region.

2.3.1 Hong Kong's Continuing Education: policy and provision

Chung et al. (1994) observed that the need for flexibility and speedy adaptation implies a high rate of skill and knowledge obsolescence as well as significant labour turnover in the local workforce. Chung's observation means that traditional skills and

knowledge cannot meet the requirements for flexibility in the modern society. CE programmes are mechanisms for reacting to the shifting demand for skills generated by rapid economic restructuring (Lee, 1997). Cheung (2006) states that CE conventionally means the education provided for people after they have left the formal education system, while Lee (1997) considers that CE should be flexibly organized, implemented and then discontinued in a relatively short period of time. In addition, Cheung (2006) argues that CE is generally perceived as a means to strengthen the workforce through knowledge and skills.

Lee (1997), Cribbin (2004) and Cheung (2006)) had an in-depth analysis of the development of CE and the policy adopted by the Hong Kong Government, it has come to a similar conclusion: the Hong Kong Government CE policy is short-term, inconsistent and duplicates some of the existing policies.

These authors divide the development of CE and policy into four stages: the 1950s to 1977, 1978 to 1988, 1989 to 1997 and 1998 to present. The following is an analysis of the four policy stages, bringing together the work of these authors.

(1) 1950s to 1978

“In the 1950s the concept of Continuing Education in the sense of providing education beyond the typical school leaving age had only just emerged” (Lee, 1997). In the 1950s and 1960s, the basic concept of CE was remedial education for those who had missed educational opportunities since the Second World War and the economic recession in Hong Kong. The Colonial Government established Adult Education to offer evening classes up to secondary level using premises and facilities of government schools. It has to be noted also that in this period some CE was provided by Extra-mural Studies departments of universities that had been formed to respond to the needs of society.

(2) 1978 to 1988

This period saw the Government adopting a CE policy that recognized education, in the White Paper in 1978, as a continuing process. The White Paper stated that the “development of educational opportunities for mature students was welcomed” (Government Secretariat, 1981). However, the government did not introduce any concrete measure except for the introduction of the Adult Education Fund, which was available to voluntary organizations to apply to for subvention to organize remedial education. The Government introduced this fund “to provide subvention to non-government organizations to run basic informal adult education courses” (Office of Continuing Education, 2006, p. 1). Direct involvement in the delivery of Adult Education was provided through the Adult Education evening courses (Cheung, 2006). However, as the commentator (Lee, 1997; Cheung 2006) pointed out, the government had adopted a laissez-faire approach, with no solid action in the development of CE for mature-aged students, on the basis that they had earnings so they had to self-finance the cost of learning (Cheung, 2006, p. 994).

It has to be noted that Hong Kong was facing the beginning of a period of economic restructuring, as the manufacturing sector was declining. Many workers lost their jobs and needed to be retrained (Leung, 2006). The unions, such as the Textile, Dyeing and Weaving Union, asked the government to consider supporting the workers’ training and retraining to equip the workers with new skills (The Hong Kong Federation of Trade Unions, 1982) to work in other sectors. To respond to the new economic situation in the textile quotas system, the government formed the Advisory Committee on Diversification in 1979 to identify strategies to handle these issues. As quoted by Lee (1997), after the study, the committee suggested that,

adult education could be a retraining tool, creating cost-effective, accessible upgrading opportunities for out-of-work textile workers who were unable to enrol in full-time formal education. More broadly, it was noted that the adult education could also play a pivotal role in the general upgrading of labour force. (Lee, 1997, p.205)

As quoted by Lee (1997), this report also recommended that Hong Kong develop an open education Institute with flexible entry requirements. However, the government did not act, except for admitting in 1981 that the “the adult and continuing education field was very fragmented and it was difficult to obtain hard facts on which a coordinated policy could be based” (Government Secretariat, 1981, p. 39). On the other hand, in response to the workers’ training needs, the HKFTU started offering its CE programmes to low-level workers in 1981. This was a clear sign from the union showing its dissatisfaction with the Government’s CE policy (The Hong Kong Federation of Trade Unions, 1997). Meanwhile, in the same period, a large institution – the School of Professional Education and Executive Development of the Hong Kong Polytechnic (now the Hong Kong Polytechnic University) – was established (Hong Kong Polytechnic University, School of Professional Education and Executive Development of, 2009).

(3) 1989 to 1997

“In the late 1980s, continuing education became better known to the public. It was perceived as a means for individuals to acquire knowledge for academic and skill development” (Cheung, 2006). In 1989, the Open Learning Institute of Hong Kong (now the Open University of Hong Kong) was established in Hong Kong; it was considered a breakthrough in government involvement in CE (Lee, 1997), although it was self-financed until 1993. During this period, there was significant expansion in CE

institutions (Cheung, 2006) as CE schools were established at universities. However, the institutions, including the Open University, as described by Cheung (2006), mainly provide higher education and professional training, and most charge very high school fees. Their provision of CE clearly does not meet the needs of general workers who need to update work skills and knowledge. The unions in Hong Kong made it clear that they needed the government to help workers to acquire the proper training to face the challenges from the knowledge-based economy (The Hong Kong Federation of Trade Unions, 1997).

In the context of direct government engagement in CE the Employees Retraining Board was established in 1992. The nature of the Board was introduced in Chapter 1. The Board mainly helps middle-aged workers with below Form Three education attainment, offering short-term courses through various training bodies, which are announced in the Hong Kong Government Gazette, to unemployed workers, under a raft of entry requirements. However, researchers broadly agreed that the effectiveness of the scheme was very low (Chan & Suen, 2003; Wong, 1998), because of the short duration and the limitation of the scope of the courses. Wong (1998) commented that,

the training bodies have the difficulty in designing courses to achieve the training objectives set by ERB as a low result of the low education level of the unemployed manual workers. Furthermore, owing to resource constraints, most courses are lower than what is required by the employers.

(p.407)

Although there was much vocal criticism, even from the Audit Commission (2000) of the Hong Kong Government, setting up the ERB should be regarded as a very

significant measure by Government to invest in CE to help the workers enhance their employability (Wong, 1998).

(4) 1998 to present

In 1998, Hong Kong experienced an economic downturn; the Hong Kong Government then became more proactive in dealing with issues relating to the quality of the labour force. The first Chief Executive following Hong Kong's return to Chinese sovereignty, Mr Tung Chee-hwa, stressed in his first policy address that CE was critical to Hong Kong's development into a knowledge and learning-based community (Tung, 1998). Following this declaration, many related policies were implemented. Significant initiatives included the launch of the Workplace English Campaign in 2000 and the Continuing Education Fund in 2001 (Office of the Workplace English Campaign, 2006; Office of the Continuing Education Fund, 2006). The former provided subsidies to employees who needed to use English in their workplaces to take English courses. However, to date it has been used to subsidize employers to organize English courses for their staff. The latter was to provide subsidies to applicants aged 18 years and above to take CE courses. The policy that really drew employees' attention was the setting up of the QF as this involved the participation of employer and employee representatives.

The implementation of the QF was announced by policy brief to the Manpower Development Committee in 2002. It was hoped that the framework would be up and running in three industries in May 2008. The framework increased the pressure on workers to acquire further qualifications and new expertise. A paper to the Legislative Panel on Manpower from the Education Manpower Bureau (EMB) (2002) pointed out:

A Qualification Framework (QF) is made up of a hierarchy of qualifications that sets out the general outcome standards of qualification at each level. A well-structured QF will bring wide recognition of the qualification that it encompasses. Through their participation in developing the QF, employers can ensure that the skills and standards required of their workforce will be included in various education and training programmes.

(p. 1)

Clearly, pursuing the QF is a high priority of the Hong Kong EMB; it tries to set up all the benchmarks of skills for employers and employees. The establishment of the QF means that most employees have to attend training or study sessions to remain employable. Moreover, the mechanism of Recognition of Prior Learning (RPL) is predicted to encourage existing workers to undertake further training (Education Bureau, 2008).

In addition to the policy mentioned above, the Skills Upgrading Scheme is also one of the schemes that broadly attracts the attention of employees as it claims to have involved around 200,000 persons since it began in 2000 (Audit Commission, 2008).

Cheung's closer analysis of the policy settings of the Government reveals that the underlying philosophy is one of laissez-fair or user-pays. As Cheung (2006) remarked, the Hong Kong Government mainly offered short-term inducement-based solutions, such as monetary assistance, to encourage people to pursue continued education (p. 1000). It is worth noting that the main CE providers are the CE departments of the universities in Hong Kong. According to Cheung's analysis, the courses provided are well-structured (Cheung, 2006) but the course fees are very high, which is the main barrier to course enrolment (Shen, Lee, & Chan, 2002).

As mentioned above, the FTU has offered CE to employees since 1981 (The Hong Kong Federation of Trade Unions, 2010), and *the 2001 Survey on the Demand of Continuing Education in Hong Kong* (HKU SPACE 2001) survey showed it to be a successful course provider, as it attracted nearly 8% of the continuing education course participants in the research period. It also aroused public attention as the union played a significant role in the provision of CE to employees in Hong Kong. Many observers see the FTU, the largest union group in Hong Kong, as a significant course provider in the territory (Cheung, 2006).

2.4 Significance of unions' participation in provision of VET

2.4.1 Background of unions' participation in provision of VET

As mentioned above, the demands for education, training and lifelong learning in Hong Kong are both significant and immediate. There is also the question of who should take responsibility for the labour force's capability to deal with the challenges of the knowledge-based economy. Should it be the government, employers or the employees themselves to shoulder this responsibility?

What about employers' contributions in providing training? In the context of the United Kingdom, Forrester et al. (1995b) observed that although the 1988 Government (United Kingdom) White Paper on Employment for the 1990s boldly asserted that employers were both providers and consumers of training, they had the primary responsibility for ensuring that the labour force in Britain had the skills to support an expanding economy. Employers accepted that it was their duty to commit expenditure to the training of their employees in collaboration with other partners such as TECs, schools and colleges, however, employers are not really willing to invest in training for employees (Forrester et al., 1995b). Forrester et al. (1995b) state that the employers in

Britain were reluctant to invest in and develop workplace and competence-based training schemes, while employees also “displayed an absence of recent training experience” (p. 20). Hong Kong’s situation is quite similar to the description by Forester et al. (1995b). Hong Kong’s employers are also unwilling to invest in human resources development. Only a small percentage of employers allocate resources to organize training for their employees. Ng (1987) gives a very clear description of the attitudes towards investment in employee training, writing that the Hong Kong employers receptively adopted an open mind attitude to open market competition and adaptability to technological innovations, “but less so to the notion of systematic, organized training as a form of human capital” (p. 108). He also cites findings from an electronic industry survey showing that nearly 50% of workers claimed that “they had never received any training since entry into this industry”. This is also echoed by Tam’s (2001) research, showing that only 8% of companies in Hong Kong have provided training for their employees (Tam, 2001). The figure is much more unfavourable than in other developed economies, such as the United States (93%), the United Kingdom (83%) and Australia (68%) (Tung, 2000). It is commonly agreed that the reluctance of employers to invest in human capital is fear-based, as they worry that the “trained up” human resources will be poached on the open labour market. There is also the problem often articulated by the small- or medium sized manufacturing plants that they only possess meagre capital and human resources to spend on training (Ng, 1987). Ng’s comment raises another concern for the Hong Kong economy, which is characterized by small and medium-sized enterprises (SMES) and where 99% of employers have fewer than 100 employees and they account for 70% of the workforce. Their lack of resources for employee training constitutes a major stumbling block to improving the quality of the labour force in Hong Kong. This analysis is still valid today. According to the *Report on Manpower Projection to 2007* (Government of the

Hong Kong Special Administrative Region, 2003), 15% of all economically active persons have attended job-related training/retraining courses arranged by their employers; 10% in the 12 months preceding the survey. It has to be noted that the word “arrange” is used; this does not necessarily imply employer support or subsidy. *The 2nd Audit Report of Skill Upgrading Scheme* (Hong Kong University, Policy 21st, 2006) stated that 32% of participants had been recommended by their employers but only 36% of them were subsidized by employers. By simple calculation, this means that only 11% of the participants were subsidized by their employers. However, the report also showed that 29% of the participants were recommended by their workers’ unions to attend the courses under this scheme. A recent report from Provisional Minimum Wage Commission (2010) to the Legislative Council about the minimum wage discussion reported that the employers strongly suggested cutting the training fee as one of their main avenues to cut the labour cost. These reports and surveys reflect the common understanding that employers are unwilling to support their employees’ efforts to undertake studies. In contrast, worker unions recognize that skills levels are closely related to employability, so they realized they had to make use of their resources to help the workers (The Hong Kong Federation of Trade Unions, 2000).

As it is well-known that education has a great impact on career development, Baker (2004), the director of the ILO Bureau for workers’ activities, pointed out that “evidence strongly suggests that it is possible to reduce poverty and improve living standards generally by shaping the labour market with minimum-wage laws, and supplementing this with active training and skill formation policies”. Hong Kong’s unions clearly show that they understand this philosophy and that they have to support employees to equip them with proper skills. Owing to the situation of a high demand for training coupled with a limited supply, unions have been prepared to fill the

training gap. They have begun to organize up-to-date occupational skills and knowledge training for workers, especially those with lower skills. This is the background for unions to become involved in the provision of VET (The Hong Kong Federation of Trade Unions, 2000).

Cheung (2006) and Shen, Lee, and Chan (2002) confirm that there are significant roles for the unions to play in lifelong education and, as Rainbird (2000) noted, the unions' role in training policy is of great importance.

2.4.2 Significance of unions as direct course provider

There is no doubt that workers have to learn, but they still have autonomy in their choice of where to train. Ball's (2002) findings show that workers in America are more accustomed to training provided by unions instead of educational institutions. Although the training described by Ball was related to the workers' education in respect to class-consciousness and justice, it also reflected the close relation between unions and the workers. Courtney (1992) explained that,

these individual decisions by individuals are linked to their perception of themselves in relation to others. People conduct themselves in tune with the membership or perceived membership of groups. This suggests that although there may be opportunities for workers to enrol on courses at their local further education colleges, they will not choose them because it does not appear to be "normal" to them in their context. Yet, in apparent contradiction, they may enrol on a similar course at the same college when it is organized by a worker union. (p. 97)

As mentioned in section 1.1, the Hong Kong workers' unions are playing an active role in providing CE, covering the range of workshop representative skills, technical skills,

skills related to employability and daily living skills. Chapter 3, “Placing the Activities of Hong Kong Unions in an International Context”, will provide an in-depth analysis of the political background for this and the reason why the Hong Kong unions play active roles as CE providers.

In Chapter 6, 7 and 8, the research will examine whether it is true that Hong Kong workers prefer to enrol in training courses organized by unions and the reasons for such a preference.

2.4.3 Profile of Hong Kong workers’ unions in Continuing Education

As Ng (1987) and Lee (1997) point out, Hong Kong workers are flexible and adaptive. Ng also observed that workers’ acquisition of knowledge offers some guarantee of being fit for specific job requirements in an era of economic change. The union also recognized that continuous learning is one of the key principles of a sustainable labour market (The Hong Kong Federation of Trade Unions, 2000, 2003). The reports reveal that some Hong Kong people have the self-awareness to enrol in CE to keep up with the pace of the development of the economy, which is one reason why Hong Kong is still able to keep up with international standards of development. To shed light on the participation patterns of Hong Kong adults in CE, HKU SPACE has been conducting a series of territory-wide surveys on the public demand for CE in 1999, 2001, 2003, 2005,/06, 2007/08 and 2009/10. According to one of these surveys (Hong Kong University, School of Professional and Continuing Education, 2008), the overall rate of participation in CE by Hong Kong citizens aged 18 to 64, and not being full-time students, was 25% in 2007, or nearly one million persons. During the same period, the FTU provided training to around 300,000 persons every year from 2006 to 2009 (The Hong Kong Federation of Trade Unions, 2009). This figure provides a very clear picture of the union training centre making it possible for many Hong Kong employees

to take advantage of further study opportunities. Early in 2001 and again in 2002, reports in the same series of surveys by HKU SPACE (Hong Kong University, School of Professional and Continuing Education, 2001; Shen et al., 2002) confirmed that the market share of the union training centre in the CE field was 6.4% in 1999 and 8.1% in 2001. Before analysing the reason for the size of the market share, I will profile the union centre, focusing on the training arm of the FTU because it has an outstanding profile in the CE field among the other union centres (Cheung, 2006; Hong Kong University, School of Continuing Education, 2002; Leung, 2004).

The analysis of the training service offered by the FTU is based on its prospectus and its working reports, and takes advantage of the system of open accountability of the FTU. *The 34th general meeting: committees and services units working reports* (The Hong Kong Federation of Trade Unions, 2009) show that the FTU delivers its courses directly to its members and non-members. The teaching modes include seminars, workshops, classroom teaching and practice in simulated contexts and workplaces. The FTU organizes the courses for seven semesters every two years and each semester covers approximately 15 weeks. The FTU confirmed in its Working Reports that it serves seventy to eighty thousand persons every semester. The FTU training centre comprises around 50 training venues/training centres. The courses it offers are categorized in Table 2.1, based on the Prospectus for Autumn Programmes (The Hong Kong Federation of Trade Unions Spare-time Study Centre, 2010).

Table 2.1: Courses offered by FTU by clusters of subjects in 2010

Category	Courses (No.)	Classes (No.)	Courses
Technical	222	350	Electricity, vehicle maintenance, construction, environmental protection
Commerce & Management	254	407	Accounting, finance, investment, banking, laws, management
Arts, Sociology, Philosophy	359	592	Interpersonal skills, psychology, behavioural learning
Interest	302	854	Planting, drawing, flower arrangement, doll making, accessories making, photography
Recreation, Medical	449	1722	Nutrition, health, Chinese medicine, natural healing
Music, Dancing, Drama	206		Singing, dancing, fitness coaching , training, etc.
Language	147	855	Nearly 20 languages, main languages are English, Japanese and Putonghua
Catering	260	466	Different kinds of Chinese, western and South-East Asian cooking
Computer	353	848	Computer Software Application learning, computer assembly
Courses only for Teenagers and Seniors	266	654	Courses for teenagers and seniors
Government subsidized			Mainly under two schemes: Employee Retraining Scheme and Skills Upgrading Scheme

The courses are related to work skills, interests and daily life needs. As elaborated in the FTU's working report, the FTU tries to make use of its training service to enhance workers' employability and enrich its members' and all the ordinary employees' daily lives, then push society to be a learning society. Approximately 80% of the courses offered by the FTU are short-term courses, mostly with 12 lessons in a course and one to three hours per lesson per week. The FTU interprets this arrangement as giving working adults greater choice and greater flexibility. The FTU does not set any entry

test or requirements but its prospectus explains very clearly what the courses cover, what their level is and what conditions the students should meet, but this is not compulsory.

From the prospectus it is also found that the workers' education in the FTU covers all streams; it is fully comprehensive workers' education, as it covers shop stewards' skills, labour rights and the labour ordinance, occupational safety and health, and of course, mainstream vocational training.

Other than the coverage of the learning areas, the locations of the training venues and the training arrangements are worth mentioning. The prospectus shows that the FTU has more than 50 training venues offering different courses in each venue. Moreover, the training mode is very flexible with the teaching duration from one hour to nearly 10 hours per session/lesson. The profile of the CE offering has been elaborated by the FTU's working report, which states that as the FTU knows the workers' needs and their difficulties, it has tried its best and maximized its facilities and resources to offer opportunities to the workers who need the different kinds of training (The Hong Kong Federation of Trade Unions, 2006). From the study of *2001 Survey on the Demand of Continuing Education in Hong Kong* by HKU SPACE (Hong Kong University, School of Professional and Continuing Education, 2001) and the figures and profiles published by the FTU itself, it is certain that the union training centre in Hong Kong offers study opportunities that meet the needs of workers. However, the reasons why the unions can play such a role in CE in Hong Kong need to be examined as well as whether they can further develop their service to cover the increasing need for CE.

2.5 Conclusion

In this chapter the theory behind union education has been examined. There are some arguments about the coverage of union education; one view argues that union education should cover class-consciousness training and even social justice (Forrester, 2005); another argues that union education should cover different categories other than ideology, i.e., practical ones, such as vocational training. With the advent of the knowledge-based economy, British unions have adapted the latter field and expanded the scope of education to cover vocational training. As the production style has changed from Fordist production to a Post-Fordist style, workers are required to be multi-skilled and flexible. With new technology and an ever-changing economy, traditional skills are being made redundant, and workers are forced to learn continuously to meet the needs of the new economy and avoid being made redundant themselves.

Assisting workers to keep up with the forward movement of society is the responsibility of government and employers' as they are the direct beneficiaries. If the labour force is given sufficient training, both government and employers can profit. However, as shown above, it is clear that the employers are reluctant to offer training to their employees, and so unions in many OECD countries have to fill the gaps and provide study opportunities for the workers and Hong Kong is no exception.

The analysis above shows that the Hong Kong Government does not have a comprehensive CE policy. It has to be noted that the CE participation rate is 25% in Hong Kong, compared with 31% in OECD countries (Hong Kong University, School of Professional and Continuing Education, 2008). Although the participation rate has risen in recent years, it is far from meeting the needs of the new economy and the new, technological era. As the conclusion of the *Survey on the Demand of Continuing*

Education in Hong Kong 2007/08 (Hong Kong University, School of Professional and Continuing Education, 2008) stated, “the Hong Kong continuing education participation rate is relatively low compared to those of the developed countries”. As stated above, the participation in CE was 25%, but the average participation rate among OECD countries was 31% (Hong Kong University, School of Professional and Continuing Education, 2008). However, the survey reports showed that the FTU had an 8% market share of CE in Hong Kong. The FTU clearly plays an important role in providing study opportunities to Hong Kong employees which help to fill the gap between the courses provided and the needs of employees.

This thesis aims to explore how the FTU mobilizes employees to engage in further education, how it meets the employees’ needs and how the FTU helps them overcome barriers to study. This thesis will mainly use interviews to have an in-depth discussion with the stakeholders and give a clear picture of the issues concerned.

Chapter 3 will discuss the political factors that led the Hong Kong unions to begin workers’ education programmes encompassing CE. Subsequent chapters will discuss the model of the thesis and the conceptual framework.

Chapter 3

Placing Activities of Hong Kong Unions in an International Context

In Chapter 2 the roles of unions and government in the provision of CE for workers in the context of Hong Kong were analysed. It concluded that unions have played an important role in providing CE to employees in a situation where there was a lack of appropriate CE policy by the Hong Kong Government and the reluctance of employers to invest in training of their employees. In the OECD countries, unions have adopted an approach in their provision of training that focused on raising their members' class-consciousness and on bringing about justice, with some unions, such as the TUC in Britain, extending their education to cover a broader area, including vocational skills training. In Hong Kong the unions have provided vocational training for a long time, for example in the case of the FTU, for over 30 years. This chapter aims to analyse what it is about Hong Kong's special political background that makes it different from western countries and that has enabled Hong Kong unions to have the opportunities to be direct course providers in relation to enhancing the employability of the Hong Kong workers.

There are many differences between Hong Kong unions and those of other countries. The most significant is the lack of collective bargaining power by unions in Hong Kong. Unlike unions in Europe and the United States, Hong Kong unions find it difficult to organise labour movement advocacy due to the lack of a legal right to represent workers in a collective bargaining process. Hong Kong unions work through the welfare services, including CE, to get Hong Kong workers to join unions.

3.1 Lack of any role in collective bargaining

As described by Coates & Topham (1988), the evolution of collective bargaining over the past 200 years has moved through various stages, each representing a higher level of sophistication than the preceding one. Thus the history of collective bargaining moved from primitive workplace bargaining, reinforced by methods of mutual insurance, through stages involving national industry-wide agreements to a current situation where unions in many developed countries have been involved in negotiations with the state over the content of government incomes policies. Coates & Topham (1988) emphasise the importance of union education developing a skilled team of negotiators.

Collective bargaining is an important role for unions in many countries as they represent workers at an official level in negotiations with government and employers. It is a representative umbrella that protects the workers as well as advancing their rights and benefits. In addition, it is a critical aspect of union work that also leads to workers joining the unions. It also provides for regeneration as active members grow into union roles such as union representatives or shop stewards. This has been common practice in the western labour movement. However, for reasons that are historical and cultural the long struggle for collective bargaining powers by the labour movement in Hong Kong has yet to succeed.

As mentioned in Chapter 2, there are many alignments among unions with different political ideologies. These include pro-Taiwan and pro-Beijing unions, independent unions and civil servants unions. Hong Kong unions lack a strong internal organization, in the form of a Labour Congress, such as UK TUC or a centre to co-ordinate the policies and activities of individual unions, which are separate from and independent of each other. As a result, the ties between unions, right from the

beginnings of the union movement and up to this moment, have been and are weak (Chow, Y., 2009; England & Rear, 1981; Leung, 1992; Ng, 1982a; Ng, 1997; Ng, Ip, & Chan, 2007; Steele, 2005). This fragmentation is one of the reasons why Hong Kong's unions have been unsuccessful in attaining collective bargaining powers.

The former Chief Labour Officer, S. Chan (1983), precisely described the split between labour unions with different political ideologies in negotiations with employers as causing losses to the workers during disputes. Chan, as Chief Labour Officer – the Labour Department is the conciliation organisation in any labour dispute, and the Labour Officer always plays the role of mediator in conciliation meetings – had many opportunities to attend the negotiation meetings when there were disputes or grievances. His analyses provide an indispensable record of the history of the Hong Kong labour movement from the 1950s to the 1980s.

The cases cited by Chan (1983) in his paper “Trade Union Participation In Industrial Conflict” clearly reflected the split between right-wing and left-wing unions in the 1960s. Chan wrote “when another transport company succeeded in reaching a temporary settlement of the dispute over retirement benefits with the right-wing union, there were strong objections from the left-wing union which, for historical reasons was not recognized by the company” (pp. 207-219). A similar case happened in the 21st century, in the same bus company. The wage increase agreement between the company and the left-wing union (affiliated with the FTU) was the subject of protest from the independent union, via a press conference.

In the context of such cases it is not difficult to conclude that formal collective bargaining is difficult to develop in Hong Kong (Chow, 2009; England & Rear, 1981; Ng, 1982a, 1997; Ng et al., 2007; Steele, 2005; Turner, Fosh, Gardner, Hart, Morris,

Ng, Quinlan, & Yerbury, 1980; Williams, 1990). Turner et al. (1980) stated in their book *The Last Colony: But Whose? A Study of The Labour Movement, Labour Market And Labour Relations In Hong Kong?* that

it is clear that compared to other countries at a similar level of industrialization or development, and where the formation of trade unions is not greatly inhibited by law or by political conditions, the membership of unions among Hong Kong employees is low, the formal collective bargaining, or analogous processes involving organized employee participation, is little developed. (pp 17-18)

3.2 Lack of legal foundation for collective bargaining in Hong Kong

Irrespective of the union's capacity to make collective demands, the lack of any legal foundation is the critical reason for the lack of success in developing collective bargaining (Williams, 1990). Even if there were any collective agreement between individual employers and employees, the agreement would not necessarily be regarded as legal and binding to the both sides. In Hong Kong, according to the Trade Unions Ordinance, "no court may entertain any legal proceedings 'instituted with the object of directly enforcing or recovering damages for the breach of' any agreement between, inter alias, one trade union and another" (Williams, 1990, p. 54). However, the function of collective bargaining is enshrined in the statute as well as the political system in the UK and other industrialized countries. As noted by Ng (1982a) in his paper *Are Trade Unions obsolete in Hong Kong?*, the Whitley Reports (1916-1917) had set up the foundation for collective bargaining and the negotiation formats, and the British unions followed this format to organize negotiations, with a Federation to

co-ordinate negotiations even when different demands were being put forward. At every level, there is only one negotiation team on the workers' side so that collective bargaining can work.

By contrast, trade unions in Hong Kong lack legal foundation. Even though Hong Kong follows the British legal system in both Criminal and Common Law, there are substantial differences when it comes to labour law and the reasons for the differences in the handling of collective bargaining can be traced back to 150 years of British Colonial rule in Hong Kong.

The contest for political power and the resultant fragmentation

Having been under British rule for 150 years, the Hong Kong labour movement has also been affected by Hong Kong's complicated political background. During the Ching dynasty, the Chinese government conceded Hong Kong to Britain in 1842. From that date until 1997, Hong Kong was a part of the British Empire. The local Chinese, who comprised more than 95% of the population, especially ordinary labour, were anti-British (Chow, Y., 2009; Chow, M., 2011; The Hong Kong Federation of Trade Unions, 2008). There was much resentment of British rule. The British, in order to strengthen their rule in Hong Kong, marginalized those who did not pledge allegiance to the British. The Colonial Hong Kong Government achieved this by imposing numerous unfair and possibly discriminatory measures against the local Chinese (Chow, Y., 2009; Chow, M., 2011).

After the establishment of the People's Republic of China (then often called the New China) in 1949, three political forces, Mainland China, Taiwan and Britain, were vying for involvement in the Hong Kong political system. The three different political forces all had their representatives in Hong Kong and unions were used by each of these

players as a means of advancing their cause. Each of these powers made use of unions to organize the ordinary labour to back up their political demands and justify their involvement in Hong Kong issues (Chow, Y., 2009; Turner et al., 1980). Since then the trade union movement in Hong Kong has traditionally been split along political-ideological lines, with each union aligned with one of these three power blocks (Leung, 1992).

Thus, the FTU, which “has been explicitly pro-China” (Steele, 2005, p. 14) did not cooperate with the Hong Kong Colonial Government, and this can be seen in the way in which the unions federated in the FTU handled labour disputes. Chan (1983) stated that in the 1950s and 1960s,

the right-wing unions were seen to be more ready to avail themselves of the conciliation service of the Labour Department. By contrast, the left-wing unions tended to ignore this service whenever they got the upper hand in a situation. But, if forced by circumstances to come to the service, e.g. when the employer was strong enough to withstand their pressure, they took a hostile and uncompromising attitude towards the officers of the conciliation service. (p. 212)

The right-wing unions continued to seek accommodation with the Hong Kong Government (Chan, 1983, p. 212). In this context, the right-wing unions mentioned by Chan (1983) were affiliated with the Hong Kong Trade Union Congress (Labour Department, 2009), which “was supported by and was explicitly Pro-Taiwan” (Steele, 2005, p. 14). Ng & Levin (1983) have a description of what in Hong Kong are called left-wing and right-wing unions:

the left-wing unions are those either affiliated to or friendly towards the Hong Kong Federation of Trade Unions (FTU) while the right-wing unions are those affiliated to or friendly towards the Hong Kong and Kowloon Trade Unions Council (HKTUC). (p. 44)

However, 1972 marked a turning point in the labour relations scene. Chan (1983) stated that as Beijing changed its foreign policy from being anti-western to opening the door to the west, so the pro-China unions changed their strategy from confrontation to co-existence with the Hong Kong Government on labour issues (pp. 213-214). According to Chow (2009), different union camps in Hong Kong were affected by their different political backgrounds, the Nationalist Party (based in Taiwan) representing the right wing and the Communist Party (based in Mainland China) representing the left-wing. To complicate matters further, starting from 1970s there were the independent camps, which were backed by other international union camps, and religious groups, such as the Christian Industry Committee, which became a major player in the CTU in the 1990s. The different political ideologies fragmented the Hong Kong labour movement. As a result, formal collective bargaining has not developed up to the present in Hong Kong. In the UK, as described by Coates & Topham (1988), multi-unionism was seen as the norm in British industry. At national, company and even at plant level, it was usually necessary for unions to recognize each other's claims to represent a part of the workforce. In Hong Kong there was nothing like this. In any disputes, there were different unions from different camps representing their members. So it is very clear that collective negotiation could not work in Hong Kong: the fragmentation, which was a result of historical events and different ideologies, combined with the lack of any legal industrial framework was fatal to the union movement in Hong Kong.

Hong Kong Unions were too weak to organize any large scale activities to fight for the rights of workers; they could only organise some seminars or petitions to the Labour Department to ask for amendments to the Labour Relations Ordinance and regulations. For the purpose of attracting members, handling labour disputes was of the utmost priority and the critical point of competition among different union groups. As mentioned by Chan (1983), the “open door policy” adopted by Mainland China in 1972 marked a watershed in the attitude and approach of left-wing unions towards handling labour disputes. However, Chan (1983) was writing about the attitude of the left-wing unions towards the Labour Department, not their attitude towards involvement in labour disputes. As reflected by England & Rear (1991), left-wing unions, from the 1920s and the famous Kwangtung and Hong Kong workers’ general strike onwards, were actively involved in different labour disputes and grievances, as it was a way for them to demonstrate their resolve to fight for workers’ rights and benefits. Moreover, this was also an avenue for union leaders to contact workers and the press.

In western countries, whenever there is labour dispute, irrespective of the level, the union representatives can, in accordance with custom and law, represent the workers in negotiations with the employers. With their lack of any collective bargaining power, Hong Kong unions cannot take anything for granted; they have to fight for their representative status enabling them to negotiate reasonable remuneration and working conditions (Chow, 2009; Chow, 2011; The Hong Kong Federation of Trade Unions, 2008). However, as there are many unions active within a company or an industry, there is often uncertainty about which actually is the workers’ official representative. It is very common that workers with grievances will vote to choose their representatives from among different union camps. All the unions in Hong Kong claim that they are

representatives of the workers; the individual unions jockey for the power of negotiation for the purpose of building up their political position and to attract members (Chow, 2009).

In a situation where the unions have not had the legal power conferred on them to carry out collective bargaining, the union functions as carried out by Hong Kong unions are totally different from those of the unions of western industrialized countries, such as the United Kingdom and Australia. In the industrialized countries, unions' officers and shop stewards are the formal representatives; they have the right to represent the workers to negotiate for working conditions and minimum wages, and the right to call a strike. Even though the Conservative Party came to power in the UK in 1979, introducing many policies aimed at reducing the power of unions, such as the withdrawal of unemployment insurance administration authority from unions, causing union membership to fall, tripartism still had a good deal of success in incorporating unions at the national level (Carter & Cooper, 2002). Unions maintained strong representation at the national level. In England and Australia, the Labour Party (UK) and the Labor Party (Australia) are both said to be in partnership with the unions, enabling the unions to have a greater say in policy making and union rights.

3.3 Labour Department's active role in handling labour disputes

Although in Hong Kong the British Government did not want the unions becoming too much involved in labour issues, at the same time, the British administration had to show that it supported the same democratic principles in Hong Kong that were already well established in the UK. Especially after the outbreak of the 1967 civil disturbances, triggered by a labour dispute in a rubber factory, the Colonial Government became more aware of grievances in the wider society, as well as among the workers.

Consequently, new policies designed to improve working conditions, but described by the left-wing as a “Sweet Bomb Policy” (meaning good on the surface, but harmful inside), were implemented to allow greater involvement of local Chinese in Hong Kong Government policy making. In the context of labour policy, the Colonial Government still adopted a policy to exacerbate the fragmentation of the trade union movement (Leung, 1992). The much maligned “Trade Unions Ordinance” allows seven people to register a trade union but confines a federation of unions or a general union to be active in the same trade, occupation or industry. A federation of unions can only be registered under the Societies Ordinance. Under the Trade Unions Ordinance, the union, once registered, is a cooperate body, and enjoys limited immunity from the civil and criminal law consequences of inducing or procuring industrial action in breach of contract (Williams, 1990). A federation was not entitled to the rights of trade unions and this policy has continued to operate since the return to Chinese sovereignty in 1997. On the surface it would seem that union fragmentation is the common goal of all Hong Kong’s administrations, both colonial and the post-colonial Hong Kong Government of the Special Administrative Region.

As mentioned above, although there was no legal collective bargaining, the unions could make use of the workers’ willingness to allow the unions to represent them in negotiating with individual employers. As most workers were at a low level of educational attainment and the level of protection of the workers by the Labour Relations Ordinance was also very low, many workers, whenever they developed a grievance, would require a union leader to represent them in negotiations with their employer. The unions made a lot of effort to become involved in these individual conflicts, as these were the ways to increase the opportunities for the unions to contact the workers and hence to increase union membership. However, following a policy

change by the Hong Kong Colonial Government, the Labour Relations Ordinance was amended. As Ng & Levin (1983) has identified the attention of the government to the development of labour administration since the late 1960s (p. 27). Steele (2005) pointed out that the Hong Kong Employment Ordinance, created in 1968, is the foundation of employment policy. The quantity of labour legislation has doubled in the years 1969 to 1977 compared to the years before 1968 (Steele, 2005, p. 9). The increase of labour protection is a response to workers' demands, intended to ease the pressure "from the local aspirations for a better quality of life, as signalled by the 1966-67 upheavals" (Ng, 1982b, p. 751), as well as for the purpose of ensuring stability in the "colony and to force employers to provide workers with adequate compensation to quell discontent" (Steele, 2005, p. 9). It is widely agreed that the development of Chapter 49 of Hong Kong Law (i.e., the Employment Ordinance) had helped to reduce labour disputes, and also, as labour officers were actively involved in the handling of labour disputes, the unions' role in grievances (Turner et al., 1991). According to the analysis by Turner et al. (1991), from 1987 to 1991 labour disputes mainly related to conditions of employment, accounting for 66% of disputes, while wage disputes accounted for 21%, and less than 2% of disputes were over dismissals. According to the records (Yiu, 1983), none of those disputes was handled by direct trade union negotiation, while informal negotiation with employers counted for 25%. "This may be a facet of modern Hong Kong Chinese culture, in that when somebody regards a salary as unsatisfactory, the worker will often just leave and find another job. Wages negotiations tend to happen mainly in the big companies" (Yiu, 1983, p. 169). Ng et al. (2007) have further explained the formation of tripartitism by the Hong Kong Government to replace the influence of unions in solving workers' grievances (p. 117).

This situation was partly caused by the narrow concern with labour issues by the largest labour organization, the FTU; Mainland China's influence behind the unions cannot be neglected. The FTU, the largest union group in Hong Kong, proclaims itself to be a patriotic union loyal to the People's Republic of China and the Communist party, as stated in the constitution of the FTU (The Hong Kong Federation of Trade Unions, 1986). It always claimed to support "Hong Kong' Stability and Prosperity", and it emphasized a harmonious labour relationship in its general meeting working reports (The Hong Kong Federation of Trade Unions, 1997, 1998, 2000, 2002); the FTU's stance of insisting on negotiation rather than calling strikes is very clear. As England & Rear (1981) pointed out, "China's economic and political interests required that there should be as little disruption as possible to Hong Kong's trade or civil order, and that the FTU understood and accepted the importance of this" (p. 167). As from 1981, with the beginning of the Sino-British negotiations over Hong Kong's sovereignty and the adoption of the "one-country, two systems" administration, the system applied in Hong Kong, stability and prosperity became the utmost priority of the Chinese Central Government in the administration of the Hong Kong Special Administration Region. The FTU clearly understood this, which is why it consistently promoted the importance of a harmonious labour relationship (Ng, 1997, p. 672).

Having to support the policy of maintaining Hong Kong's stability and prosperity, and the "one country, two systems" from the end of the 1970s to the end of 1980s, the FTU maintained a low profile in labour disputes and the "FTU's default made the administration itself the major agent of labour protection and improvement meanwhile" (Turner et al., 1991, p. 98).

In consideration of other union groups, we find that the influence of the right-wing unions in the Hong Kong labour market has diminished (Ng, 1997). This is evidenced

in policy changes in Taiwan, the loss of seats in the Legislative Council and the Labour Advisory Board (LAB) by the Hong Kong Trade Union Congress.

The other union groups, especially the independent labour unions, have gradually become more established. However, due to their often aggressive stance, they have found it difficult to gain the cooperation of the other unions (Ng, 1997).

Up to the 21st century, a similar situation was reported in the FTU 32nd general meeting: committees and service units working reports (FTU, 2003). The report presented that labour disputes involving the FTU were reduced. The reasons given were similar to the description in *The Last Colony, but Whose?* by Turner et al. (1980) 20 years ago. The main reason is that Labour Department is actively involved in handling labour disputes (The Hong Kong Federation of Trade Unions, 2006). In this situation, the Hong Kong unions were obliged to look for other avenues to attract members, which presented a significant challenge to the union leaders.

However, as mentioned above, the Government sometimes had to mobilize the unions to demonstrate their proclaimed commitment to balancing the voices in society; there had to be some way for the workers' representatives, i.e., the unions, to participate in policy making to a certain extent. The LAB and the Labour Constituency seats in the Legislative Council gave the unions a voice in society.

3.4 Labour Advisory Board and Legislative Labour Constituency

As mentioned in Chapter 1, the LAB is a non-statutory, tripartite body appointed by the government with the function to advise the government on labour issues. Its terms of reference are to advise the Commissioner for Labour (who is also ex-officio Chairman) on such matters affecting labour, including legislation and conventions and

recommendations of the ILO as the Commissioner for Labour may refer to it (Ng, 1982b). On the labour side, the seats are evenly distributed within the five union centres, or five political camps. The sixth is assigned by the Labour Department. History tells us that it is not difficult to find the LAB being used as a stepping-stone to the Legislative Council for union leaders and employer representatives. Ng et al. (2007) commented that the LAB played a significant role in building a “statutory infrastructure of employment standards at the workplace” (p. 116).

The LAB is an advisory body; its members can make any comments and suggestions on labour issues but have no legal power to request any amendment of the Ordinance or comment on labour disputes. However, as it is simply the channel for unions to participate in the policy advisory process, the unions usually put a lot of effort into bargaining with the employers, and try to use the LAB to affect government decisions in the context of labour policy formulation or amendments (Chow, 2009). However, the “Board’s restricted mandate prevents it from initiating any proposals of its own” (Williams, 1990), so the LAB’s influence on labour issues is limited.

Since the introduction of labour constituency seats in the Legislative Council in 1985 (two seats then and three seats at present), there have been two official tiers to discuss labour issues; the LAB is regarded as the forum for pre-Legislative Council discussion, with the final law making body being the Legislative Council. So another significant way for the unions to participate in policy making is through the Legislative Council.

The total number of seats in the Legislative Council is 60, combining directly and indirectly elected members. The three seats from the labour constituency indirectly elected to the Legislative Council are from the FTU and the FLU as these seats are voted by the unions. According to the figures presented by the Registry of Trade

Unions, Labour Department (2008), of the total of around 700 unions in Hong Kong, the FTU has more than 230 affiliated unions and unknown number friendly unions, while the FLU has nearly 100 affiliated unions, so it is not difficult for them to win seats. However, as there are 60 seats in the Legislative Council, the labour voice in the Legislature is small and can be easily overlooked. Nevertheless, no matter how weak the labour presence in this council, a labour councillor can at least make use of the available legal rights to request the authority concerned to listen to labour's voice and sometimes force concessions on labour issues in exchange for approval of government expenses or bills.

The unions place a high value on seats in the Legislative Council as the high social status that accrues from winning these seats earns the respect of both workers and employers.

In recent labour disputes, a labour constituency councillor or directly elected councillor supported by the unions represented the workers or the unions in negotiations with the employers and the government. It is the strategy of the unions to fight for the rights of employees through available legal powers and use these to institutionalise the unions' right to represent the workers.

3.5 Making use of other ways to attract members

On the surface, compared with the UK and Australia, the unions in Hong Kong are weaker in political influence and bargaining power. However, attention must be drawn to the membership profiles of these countries. In the UK, the aggregate trade union membership has gradually fallen from 53.4% in 1979 to 29.4% of 2000, while in Australia, union membership has fallen by 24.5% from 1995 to 2000 (Carter & Cooper, 2002; Jensen, 2004). In 2003, union membership in Australia was 22.9%, while in

Hong Kong it was around 22% between 2000 to 2007 (Labour Department, 2009). Globally, union membership is dropping sharply but in Hong Kong it is quite stable. It is a common characteristic of the Chinese to be more interested in economics than politics. Jensen (2004) noted that, “The importance of Confucianism is used to explain the low level of conflict between employers and employees”. As Chinese society has been influenced by Confucian philosophy for more than 2000 years, usually Chinese “will accept authoritarian management and avoid confrontation with the employer, such cultural arguments imply that the demand for collective representation is absent” (Chan & Snape, 2000, p. 124). This cultural factor can be applied to explain the lack of enthusiasm for political participation. In the Legislative Council elections from 1986 to 1995, unions from the FTU camp used the slogan “we want a meal ticket rather than a ballot paper” (Hong Kong Legislative Council, 1990, p. 454) which is described by Ng (1982a) as “bread and butter” union philosophy (p. 64) to get members and other workers to vote for them. The commonly voiced opinion of Hong Kong workers is that they are quite realistic; they want the benefit rather than the political power. It is very common that in a labour dispute the workers will vote for their representatives to sit at the negotiation table, based on which union is most likely to be able to get benefits and compensation for them. Hong Kong unions actively provide benefits to workers, and this emphasis is designed to get them to join a union.

As to union’s political background and cultural philosophy, unlike unions in western countries which have adopted the organizing model to replace the traditional service model to stem the tide of membership loss (Carter & Cooper, 2002), Hong Kong unions are still using the service model to attract members. It is very common that the promotion of services and benefits, such as travelling, studying and insurance at a low premium, offered by unions occupies a large column in the unions’ newsletters.

The membership figures indicate that benefits and services play an important role in recruiting and keeping members in unions in Hong Kong. In *The FTU 34th general meeting: committees and services units working reports* (The Hong Kong Federation of Trade Unions, 2009), it is openly said that the workers' club, which mainly provides welfare service and CE services to members and the public, recruited more than thirty thousand new members every year from 2006 to 2008, which accounts for nearly 10% of the existing membership.

In Hong Kong the unions find it very difficult to keep existing members, as they cannot directly deduct membership fees from their members' salaries, a practice very common in Australia and the UK. How to prevent from losing members is a daily problem faced by the union leaders. To solve this problem, it is general practice in Hong Kong to make use of services to attract members and thus to have an income from membership fees; members in turn enjoy the benefits offered by the unions to paid-up members.

According to the *The FTU 34th general meeting: committees and services units working reports* (The Hong Kong Federation of Trade Unions, 2009), a CE service offered by unions is an attractive benefit provided to the ordinary employees that can help maintain the membership.

Another point that needs to be mentioned relates to financial resources; insufficient resources to run activities is also a significant problem among the Hong Kong unions. Generally, the yearly membership fee in Hong Kong is no more than one hundred dollars (around fifteen Australian dollars) (Chow, 2009). Taking the FTU as an example, it has around 250 affiliated unions, and a total membership of 330,000. Based on its information regarding fees, each member has to pay around 100 Hong Kong

dollars each year, so the FTU can collect around \$3.3 million. One can see that this is not sufficient to employ staff to serve the unions. Based on available financial reports (The Hong Kong Federation of Trade Unions, 2009), if there were no other donations, the union would suffer severe deficits. Services, therefore, especially CE services, can help to solve the unions' financial problems.

3.6 Conclusion

In this chapter, I have discussed the political situation in which the Hong Kong unions operate. This political perspective also shed light on the reasons behind Hong Kong unions offering CE.

Based on the experience of western unions, collective bargaining is the main tool for the unions to fight for labour rights and benefits, as it is considered a basic right for the union to negotiate with the employers and the government. However, over the 150 years of colonial rule in Hong Kong before 1997, the British Administration did not want the unions to have the power to negotiate with the government and therefore formulated policies to prevent the unions uniting. The Mainland China Government has supported the Hong Kong workers and unions and strongly influenced political and daily living issues. In a complex political landscape there were many alignments among unions with different political ideologies. These include pro-Taiwan, pro-Beijing, independent and civil unions. For these reasons, Hong Kong lacks a central organization or council of unions to act as a lynchpin in the fight for workers' collective rights.

To conclude this chapter, it is clear that with the different political, cultural and social background of the west, the unions in western industrialized countries are able to make use of collective bargaining to organise workers and fight for their rights, while in

Hong Kong the lack of collective bargaining has made it necessary for the unions to make use of welfare services to get workers to join the unions and maintain their membership. Consequently, the more members they have, the more power they wield. Offering CE services is a significant tool for the unions to attract members.

Chapter 4

Profile of People Engaged in Continuing Education

As shown in Chapter 2, the unions' function in the CE of Hong Kong's workers is an important aspect of their work. Chapter 2 concluded that the unions play an indispensable role in helping workers access vocational training, including bargaining with the government and employers for study places and the direct provision of training services to workers. The unions also shoulder the responsibility for helping workers enhance their chances of employment through vocational training to meet the requirements of a knowledge-based economy. Chapter 3 revealed that Hong Kong unions, given no legal rights of collective bargaining to represent workers, have to rely on other ways of attracting members. They have long been attempting to achieve this aim through establishing for themselves a significant social role by providing training opportunities to workers. The statistics affirmed the significant function of Hong Kong unions in the provision of CE in Hong Kong. The thesis aims to illuminate the relationship between the educational functions of the unions and the training needs of employees, thereby enhancing understandings of the inadequacies or mismatches that have arisen between the two. The thesis also addresses the means by which unions cater for the training needs of workers, and more importantly, through analysing the underlying rationales, it anticipates the future roles of the unions in the context of CE in Hong Kong. This chapter will discuss the profile of people participating in CE, their concepts of participation in CE, their motivation for participating in CE and any barrier/s to their participation in CE.

4.1 Profile of participants in Continuing Education in Hong Kong

Leung (2004) and Chan and Holford (1991) studied the profile of participants in CE through a telephone survey and found that blue-collar workers have a low participation rate in CE compared to white-collar workers (Leung, 2004). Leung (2004) compared the figures from Chan and Holford's survey in 1991, and found a higher participation rate for CE in 2004 (28.4%) than in 1991 (22.46%).

Leung (2004) also found that it was the 20-29 age group that tended to take up courses and with a higher participation rate, compared with other age groups, and that the participation rate in CE declined with age. He concluded that the higher participation rate by post-secondary school leavers might suggest a lack of vocational training in mainstream education. Moreover, the companies or the school leavers themselves may recognize a knowledge gap between the standard curriculum and work requirements (Leung, 2004). In addition to the companies providing training to new workers, the workers themselves have to undertake an upgrade of their skills and knowledge to meet their workplace requirements.

In addition, the reports of the Surveys on the Demand of Continuing Education in Hong Kong (Hong Kong University, School of Professional and Continuing Education, 2001, 2006, 2008) and similar reports by Shen et al. (2002) and Leung (2004) show that quite a high percentage of learners "were motivated by personal interests". Table 4.1 compares the figures collected in the three reports related to the reasons for participation in CE.

Table 4.1: Reasons for participation in CE, by prompted vs. non-prompted response (%)

Reasons for participation in CE	Shen et al. (1999) % prompted response (% non-prompted)	Leung (2004) % prompted response (% non-prompted)	HKU SPACE (2005/6) % prompted response (% non-prompted response)	HKU SPACE (2007/8) % prompted response (% non-prompted response)
1. Personal interest	70.7 (13.8)	80 (22.5)	29	43.7
2. Improvement in work capabilities	79.9 (38.9)	70 (27)	22.9	36.5
3. Learning new skills	N/A	N/A	14.4	29.9
4. Enriching social life	N/A	N/A	7	10.3
5. Promotion	43.4	41 (5)	7	14.3
6. Change of job	22.8 (2.1)	21	6	8.5
7. No special reasons	N/A	N/A	5.2	4.8
8. Requested by employer	N/A	N/A	3.5	5.8
9. Social trend	N/A	N/A	2.4	7.7
10. Higher salary	N/A	N/A	2	3.2
11. Self-development	82.2 (28.9)	80 (32)	N/A	N/A
12. Obtain qualification	40.7 (7.9)	39 (2)	N/A	N/A
13. Peer group encouragement	12	18	N/A	N/A

N/A: Not available

Note: “prompted” means a list of reasons being given to the respondents, while “non-prompted” means no reasons being given to the respondents.

Although different terms were used in the survey reports to describe the reasons for participation by adults in CE, five main reasons can be inferred: (1) personal improvement, (2) improvement in work capabilities, (3) acquisition of new skills, (4) enrichment in social life, and (5) fulfilment of personal interest. These reasons seem to be the main motivators for Hong Kong people to participate in Continuing Education.

4.2 Motivation to participate in Continuing Education

An examination of the figures by Shen et al. (2002), Leung (2004) and Hong Kong University, School of Professional and Continuing Education (2006, 2008) reveals the main reasons for participation in CE. Lieb's summary (1991) suggested six main motivating factors for adult learning: (1) social relationships, (2) external expectations, (3) social welfare, (4) personal advancement, (5) escape / stimulation and (6) cognitive interest. Houle (1979) concluded that the adults he interviewed held three learning orientations: goal-oriented, activity-oriented and learning-oriented. Tough (1976) argued that each adult learner engages in a learning activity for several reasons, including the use of knowledge or skills to work, while Maslow (1970) argued that people have different needs at different stages of life and achievement. The main reasons for participation in CE are consistent with the needs of taking part in CE in Hong Kong (see Table 4.1), which confirms the motivations cited by Tough (1968) and Maslow (1970). The current thesis is concerned with enhancing the understanding of the ways in which Hong Kong unions address the needs and motivations of employees. As shown in Table 4.1, most people give "personal interest" as their reason for participating in CE. The first five main reasons given in Table 4.1 for participation in CE can be related to personal interest, enriching social life, enhancing daily work knowledge, etc. These reasons or motivations for undertaking CE are not necessarily linked to qualifications. In a 1999 survey 40.7% of respondents cited the need to obtain a qualification for their undertaking CE (Item 12, Table 4.1), and in a 2004 survey this was largely unchanged at 39%.

Although the 2006 and 2008 HK SPACE reports (Hong Kong University, School of Professional and Continuing Education, 2006, 2008) did not provide any detailed figures, the 2008 HK SPACE report stated that "personal interests as main motivator of

continuing education can be attributed to the fact that over half of the adult learners were studying non-award bearing courses in 2007” (Hong Kong University, School of Professional and Continuing Education, 2008, p. 11). Table 4.2 shows that “non-award bearing” courses accounted for more than 50% of all CE courses, thus more or less demonstrating that obtaining a qualification is not the most important reason for participation in CE in Hong Kong. Table 4.2 also illustrates the changes in academic qualifications sought by the CE participants between 2001 and 2007/8.

Table 4.2: Academic level pursued by participants in CE

Academic Level	2001 (%)	2005/6 (%)	2007/8 (%)
Non-award bearing	24.2	54.6	55.3
Certificate of attendance	11.2	N/A	N/A
Advanced certificate/diploma	1.5	30.5	34.3*
Associate degree	9.4	N/A	N/A
Bachelor’s degree	5.3	7.6	4.8
Master’s degree/postgraduate	0.9	7.3	5.6

*Combining Certificate, Diploma and Higher Diploma (*Survey on the Demand of Continuing Education in Hong Kong* (Hong Kong University, School of Professional and Continuing Education, 2001, 2006, 2008).

N/A: Not available

According to the HK SPACE surveys, the most common reason for a shift in the most sought after academic programmes to non-award bearing courses was found to be “personal interest” rather than just for “economic benefits” (Hong Kong University, School of Professional and Continuing Education, 2008). In addition, more young persons had already taken the opportunity to obtain a bachelor’s degree in their formal education (Hong Kong University, School of Professional and Continuing Education, 2006).

The HK SPACE survey reports further suggested that “full time workers were the most active in pursuing continuing education”. In the report covering 2007/08 (Hong Kong University, School of Professional and Continuing Education, 2008), 74% of the respondents who participated in CE in 2007/08 were full-time workers, compared to 71.6% in 2005/06. However, the report stated that of the full-time workers’ surveyed, 28.7% had participated in CE in 2007/08, compared to 33.2% in 2005/06. These figure provide a picture of which social sector is the main target of the course providers. The course providers need to take into consideration another factor, i.e., the nature of the courses attended, with most participants attending short courses lasting not more than three months: 42.7% in 2004 according to Leung (2004), compared with over 60% in 1991 according to Chan and Holford (1991). Most participants in CE were charged less than \$500. The HKU SPACE report also revealed that of adult learners, 24.3% in 2005/06 spent less than HK\$1,000 in pursuing further studies, compared to 20.9% in 2007/08. The median wage in Hong Kong in 2008 was about HK\$9,000, and as shown in Table 4.3, the course fee was the prime concern in choosing CE.

Table 4.3: Reasons for choosing a particular CE institution

Reason	Award-bearing programme 2005/06 (%)	Non-award bearing programme 2005/06 (%)	Programme in 2007/08 (%)
1. Level of course fee	42.2	44.2	39.5
2. Reputation of CE institution	34.9	29.9	33.7
3. Practicability of programmes	30.7	27.3	33.7
4. Location of teaching and learning venue	22.9	36.4	33.4
5. Class commencement time	20.8	29.4	24
6. Quality of lecturers and tutors	25.5	23.4	17.7

Source: Hong Kong University, School of Professional and Continuing Education (2006, 2008)

Note: Figures do not distinguish between “award-bearing” and “non-award bearing”.

By comparing the prospectus from the extra-mural studies departments of the universities, which accounted for a large proportion of people participating in CE – 28% of people undertaking CE took the courses offered by the major institutions in 2001 – the average course fee was found to be much higher than those offered by the FTU, the labour organisation. For example, the average course fee of the English Pronunciation Course offered by the FTU was about HK\$25 per hour, whereas HKU SPACE, the extra-mural studies department of Hong Kong University, charged nearly HK\$76 per hour. Despite this comparison being a “rough” one, the difference in tuition fees constitutes a significant reference figure for an analysis of the contribution of the FTU to CE, especially when considering that the course fee is the prime concern of the participants in CE, as mentioned above. Having analysed the profile of the people undertaking CE in Hong Kong, it is equally important to investigate the barriers to undertaking CE courses, which is done in the next section.

4.3 Barriers to participation in Continuing Education

As regards the reasons for non-participation in CE in western countries in the 1980s, Cross (1981) and McGivney (1993) gave a very clear description of the barriers the adult learners faced in CE: (1) institutional barrier, (2) psychological barrier and (3) dispositional barrier. Cross (1981) and McGivney (1993) pointed out that those situational barriers were those arising from one's situation in life at a given time, such as lack of time, home responsibilities and lack of money. According to McGivney (1993), the "institutional barriers" consist of all those practices and procedures that exclude or discourage working adults from participating in educational activities, such as inconvenient schedules or locations. The "dispositional barriers" are those related to attitudes and self-perceptions about oneself as learners. The explanation for non-participation in CE in Hong Kong in the 21st century is not dissimilar. Table 4.4 summarizes the major barriers to CE in Hong Kong.

Table 4.4: Major barriers to participation in CE in Hong Kong

Barrier	Respondents (%) (Shen et al., 1999)*	Respondents (%) (Leung, 2004)	Respondents (%) (HKU SPACE, 2008)
No free time	72.2	70	69.2
Lack of course information	48.5	40	NA
Need to take care of family	45.8	40	16
Course fee too high	43	19	7.1
Inconvenient meeting place	41.1	15	N/A
Inconvenient meeting time	48.5	40	N/A
No money	39.0	15	7.1
No suitable course/programme	38.2	16	10.3
Prefer self-learning	34.5	15	N/A
Course not useful	26.8	15	N/A
Too busy at work	N/A	N/A	19.7
Not confident in studying	N/A	25	N/A
No encouragement from others	N/A	23	N/A
Educational background inadequate	N/A	15	N/A

Note: Data collected in 1999.

According to the reports cited in Table 4.4, the respondents in the 1999 and 2004 surveys were prompted with a list of possible barriers and asked to select those applicable to them, while the figures reported for 2007/08 were gathered without respondents being prompted.

As to the barriers to CE, time is the most significant, together with “inconvenient meeting time”, “need to care of family members”, “lack of course information” and “inconvenient meeting place” ranked high on the list. Leung (2004) observed that three groups, housewives, mature adults over the age of 40 and blue-collar workers, tended to have lower participation rates. Leung’s study concluded that the low participation rate of blue-collar workers was a result of their economic conditions or possibly a lack

of suitable courses, or in Leung's words, "it might be related to technical issues, for example, lack of course information and inconvenient meeting place or might be related to the culture of that part of social group in which continuing education is not in their social agenda" (Leung, 2004, p. 74). He also criticized the situation where institutions and profit making providers of training might offer commercial studies courses, such as management or accountance courses, of large class sizes, whereas technical courses usually require special equipment and a small ratio of teacher to students, conditions which some institutions find difficult to provide. If the unions believe that education can help the workers, Leung (2004) and Chow (2009) argue, and then it is the duty of the unions to negotiate with government to secure sufficient resources to offer courses catering to blue-collar workers.

4.4 Conclusion

In this chapter, a general picture was provided of the patterns of participation in CE in Hong Kong and the courses participants are most likely to pursue. In addition consideration was given to what are the main motivators and barriers to participation in CE. By drawing on different reports on the demand for CE in Hong Kong, it was concluded that the CE participants are mostly motivated by a desire for self-development, improvement of work capabilities, promotion, learning new skills and out of self-interest. As acknowledged in the latest report by HKU SPACE (HKU SPACE 2010), an enrichment of social life also plays a part in the decision to take a CE course, accounting for 10% of participation in CE. Based on the profile of participation, it is not difficult to explain why participants in CE prefer to choose non-award bearing courses, accounting for more than 50% of survey respondents. The level of qualifications awarded the participants need also gives the indicators to course providers and as the pursuing of non-awarded bearing courses is very high, so it gives

the base to the analysis of the reasons why the the unions, as non-formal institutions in Hong Kong can attract the CE participants. Moreover, the main “factors for choosing continuing education institutions revealed in the reports” (Hong Kong University, School of Professional and Continuing Education, 2008; Leung, 2004; Shen et al., 2002) include (1) level of course fee, (2) reputation of the CE institution, (3) practicability of programmes, (4) location of teaching and learning venue, (5) class commencement time, and (6) quality of lecturers and tutors. From these reports mentioned above, it can deduce why people participate in CE, how they choose their learning programmes and what they want to get from the programmes.

The reports (Hong Kong University, School of Professional and Continuing Education, 2008; Leung, 2004; Shen et al., 2002) suggested what are the motivations of the employees in Hong Kong, underscoring the need for the thesis to show how the unions address the learning needs of workers and create opportunities for them to continue their education. In addition, the barriers to participation have been discussed. The Hong Kong situation is similar to that in the model proposed by Cross (1981). It was found that “lack of time” is the most critical barrier to participation in CE in Hong Kong.

The importance of the FTU in encouraging participation in CE has been discussed in Leung (2004). The profile of people engaged in CE has been analysed in this chapter. It gives a picture of how Hong Kong people have been motivated and what are the barriers they have encountered when considering participation in CE. This analysis will be applied in the next chapters to see how Hong Kong unions motivate employees to study and how they help them overcome the barriers in the context of CE.

Chapter 5

Methodology

Chapter 4 presented a detailed discussion of the theoretical framework of the current thesis. It analyzed the profile of Hong Kong CE participants and affirmed the aim of the current thesis to identify how the unions in Hong Kong meet the employees' study needs and how they help participants, especially employees, to overcome any barriers to study. This chapter will introduce the research methodology adopted in the thesis, including the data collection methods and the approach to the analysis of the data.

Qualitative methods will be adopted in this thesis, comprising the following:

- (i) interviews with eight persons from different social spheres,
- (ii) focus group meeting with managers of union training centres; and
- (iii) focus group meeting with course participants studying in union training centres.

5.1 Interpretative model with a phenomenological approach

The current thesis is a qualitative study, drawing on an interpretive model with a phenomenological approach to collect, interpret and analyse data. Eight individual interviews and two focus groups with two meetings were conducted with trade union leaders, academics, government officials, tutors, students and managers of union training centres, with the aim of discovering their perceptions, opinions and experience of the roles played by the Hong Kong unions in CE. The interviewees' answers were transcribed after each interview for thematic analysis. The researcher would identify

themes in the data collected and draw conclusions from such themes, and ultimately produce an aggregate summary of these.

Nunan (1992) summarised the features of qualitative research methods as follows: They are (a) concerned with understanding human behaviour from the actor's own frame of reference; (b) naturalistic and uncontrolled; (c) close to the data, providing an "insider" perspective; (d) grounded, discovery-oriented, exploratory, descriptive and inductive; (e) process-oriented, and they (f) assume a dynamic reality. As the current thesis aims to explore the perceptions of the interviewees and the participants of the focus groups, an understanding of their cultural background and the participants' own frames of reference are important. Interviews seek to identify the in-depth perspectives of participants. Schultz (2006) argued that qualitative research methods are most often used in educational research to understand the cultural or everyday practices of individuals and social groups, and the ways in which these practices affect access to and distribution of resources across time and space, and the consequences of this distribution of resources (p. 359). Likewise, the current research, through the data collected in interviews and focus groups, aims to understand the perceptions and the practice of the individuals and social groups of access to the CE offered by the unions in Hong Kong.

According to Candy (1989), researchers following an interpretative paradigm aim to produce interpretative accounts of phenomena. Some of the assumptions adopted behind such accounts are:

...(2) an acceptance of the extreme difficulty in attaining complete objectivity, especially in observing human subjects who construe, or make sense of, events based on their individual systems of meaning; (3) the view

that the aim of inquiry is to develop an understanding of individual cases, rather than universal laws or generalisations; (4) the assumption that the world is made up of tangible and intangible multifaceted realities, and that they are best studied as a unified whole, rather than being fragmented into dependent and independent variables (in other words, context makes a difference). (Candy, 1989, p. 4)

The interpretive approach is the traditional research methodology, as noted by McIntyre (1998), who stated that “the traditions provide typical methodologies grounded in developed rationales and theorizations of human inquiry” (p. 161). “Good” interpretive research is contingent upon the ways in which a researcher works with the material at hand, with a deep understanding of their own activity. As a member of the employee CE world, the researcher has access to materials and possesses an understanding of the field, which enables her to structure the assumptions and problems before embarking on the enquiry. Although the interview / focus groups questions are semi-structured with some questions same in interviews and focus groups and my knowledge in this research field is made out of “common knowledge” (McIntyre, 1998), the researcher’s background knowledge provides her with the tools to properly handle the interviews conducted for the study. Throughout the interview / focus groups, the researcher performed a facilitating role to minimize bias or leading questions and enhance participations.

According to McIntyre (1998), five reference points in the application of this methodology have to be addressed, including “(1) problem and method constructions; (2) inquiry as process; (3) participants’ perspectives; (4) participants’ constructs and (5) reflexivity of the researcher” (p. 169). McIntyre made use of his “project on factors affecting the participation by indigenous Australians in vocational education and

training” to argue that appropriate application of interpretive methodology in this research was crucial. He concluded that the “most appropriate form of research with indigenous people is one which is participatory” (McIntyre, 1998, p. 175).

Leung (2004) also used qualitative methodology for his research into unions active in CE, conducting interviews with union members, analysing and interpreting the data gathered, and arriving at conclusions. Leung considered that his interviews with union leaders “enable us to explore the thinking of those with responsibility to promote lifelong learning. ...Their perceptions of their task are crucial to our understanding of how lifelong learning will develop in Hong Kong” (p. 19). Leung’s research also applied quantitative methodology in the form of telephone data gathering to analyse the profiles of participants in CE. His purpose in applying quantitative methods was to supplement the data he had gathered from different social groups.

Apart from some statistical analysis of participation rates, quantitative methods are not applied in the current research. When Leung (2004) carried out his study of Hong Kong unions’ educational activities, little systematic research had been done of the profile of Hong Kong adult learners or of CE participants, but since then HKU SPACE has been conducting a series of quantitative studies on this issue every two years (Hong Kong University, School of Professional and Continuing Education, 2001, 2006, 2008, 2010). The HKU SPACE survey data are available to the current researcher, as well as the data from Leung’s research, to provide a firm background and framework for further analysis. The current research thus adopted a qualitative research design, using in-depth discussions to explore the perceptions of the research participants. The participants being interviewed in this study came from different social groups. Their perceptions of how the unions carry out their educational roles

help the researcher to explore the general situation regarding the provision of CE in Hong Kong.

For the current study most data were collected through interviews. During the interviews, in-depth perspectives were discussed and problems were explored, which enabled the collection of opinion and the clarification of questions. As McIntyre (1998) stated, one implication of this kind of enquiry is that it is a negotiated process. The researcher needs to confront and critique his or her own practice and uncover hidden constitutive assumptions. In this study, the researcher analysed the perceptions of the interviews of the unions' involvement in CE voiced by the interviewees and drew conclusions from these to test her own assumptions about the roles played by the unions in CE. According to Fontana & Frey (1994), interviews are one of the most powerful ways to understand our fellow human beings.

As mentioned above, in this research the data were collected through semi-structured individual interviews and focus group discussions. The researcher interviewed eight persons from different social groups, and conducted two focus group discussions, the groups comprising people of different cultural backgrounds and experience gained in CE offered by unions. This allowed the researcher to triangulate the data gathered in interviews and focus group discussions, as well as the data from different sources, by checking them against the data gathered in interviews and focus group discussions. The emphasis was on the richness of the information regarding various factors of importance in the unions' role in the delivery of CE in Hong Kong. In addition, triangulation, as argued by Scott and Morrison (2006), "provides key pathways for comparing the data collected by different methods, allowing findings to be corroborated" (p. 252). Cohen, Manion, & Morrison (2000) state that "triangulation may be defined as the use of two or more methods of data collection in the study of

some aspect of human behaviour” (p. 112). They also stated that this technique is used in the social sciences to “map out, or explain more fully, the richness and complexity of human behaviour by studying it from more than one standpoint” (p. 112). They quoted Campbell and Fiske (1959) to confirm triangulation to be a powerful way of demonstrating concurrent validity, particularly in qualitative research.

In addition to eight individual interviews, two focus group discussions were conducted with the aim of enriching the information gathered in the interviews and explore the perceptions of interviewees from other standpoints. Cohen et al. (2000) cited Bogdan and Biklen’s (1992) study to state that “group interviews might be useful for gaining an insight into what might be pursued in subsequent individual interviews” (p. 287). According to the summary by Cohen et al. (2000), the advantages of focus group interviews include (1) timesaving, (2) minimal disruption and (3) bringing together people with varied opinions, or as representatives of different collectives. Focus groups, being conducted in the current research, are, according to Cohen et al. (2003, p. 288), a form of group interview and the researcher relies on the interaction within the group to achieve discussion of a topic supplied by the researcher. One of the features of a focus group is to bring “specially chosen” participants together to “discuss a particular given theme or topic”, with the interaction of the group leading to data and outcomes (Morgan, 1988, p. 9)

The researcher attempts to describe the roles played by the unions in the context of CE. From the participants’ perceptions and suggestions regarding the possibilities existing for the unions in Hong Kong to deliver educational services to fill the gap between employees’ needs and service provision of the unions. The current study is a typical example of qualitative research taking an interpretive approach, displaying the five elements listed above as features of participatory research, following McIntyre (1998).

5.2 SWOT analysis

A SWOT analysis will be carried out by the interviews and focus group participants of the ability of Hong Kong unions to provide training opportunities to workers. This type of analysis is seldom applied in the education area, but it has been applied in Leung's (2004) research of education duties of the FTU. Leung used the SWOT analysis to examine the position of the unions in CE in Hong Kong. As the research area and aims in this thesis are similar to those in Leung (2004), the SWOT analysis is also applied here to enable a similar analysis of the unions' functions in the CE context in Hong Kong. The SWOT analysis was developed for business strategic planning, as Humphrey (2004) pointed out,

by sorting out the SWOT issues into the 6 planning categories, one can obtain a system which presents a practical way of assimilating the internal and external information about the business unit, delineating short and long term priorities, and allowing an easy way to build the management team which can achieve the objectives of profit growth, ... this approach captures the collective agreement and commitment of those who will ultimately have to do the work of meeting or exceeding the objectives finally set. (p. 11)

The SWOT analysis is also an effective method of identifying an organization's internal resources, operational and organisational strengths and weaknesses, together with external opportunities and threats (Dibb & Simkin, 2001). It can help identify the greatest potential for growth by reinforcing an organization's strengths while addressing its weaknesses and threats to it (Leung, 2004). This research is not a business study but a strategic analysis of the roles of the unions as education providers. The services they have been providing to workers are based on business decisions,

covering the six categories of “product, process, customer, distribution, finance, and administration” (Leung, 2004) but using different terminologies and definitions. Finch (1994) described a business perspective of the techniques in quality measurement. The SWOT model was found to be effective in quality and performance analysis, since it supports a comprehensive analysis of an organization in terms of its internal strengths and weaknesses, as well as external opportunities and threats, impacts from changes in its macro-environment, potential and major causes of problems and obstacles.

The researcher therefore applies the SWOT analysis by the interviews and the focus groups participants to the FTU’s provision of CE, seeking to identify the implications of its existing position and its future opportunities in Hong Kong. As the study aims to find out how the unions in Hong Kong could address workers’ needs of CE, the SWOT analysis is adopted to identify the strengths and weaknesses of the existing situation of the unions in the context of the provision of CE. Moreover, the researcher uses the SWOT analysis by the interviews and the focus groups participants to identify opportunities the unions can explore to enhance their assistance to workers in need as well as the threats the unions will encounter. Conclusions may be able to be drawn, reflecting the existing situation and predicting future trends.

5.3 Research method

Two types of research methods were adopted: individual interviews and focus group discussions (also referred to as group interviews). Semi-structured interviews and focus group discussions were conducted and recorded in Cantonese, supplemented with transcription in Chinese. The interview questions are provided in Appendix 3. Given the different backgrounds of the participants, the researcher expected that the development of each interview would vary. If a participant has special interests in exploring a certain area, more efforts will be spent on that particular aspect. Further,

when the interview recordings were transcribed, themes on the interview data were developed.

The transcribed interview notes amounted to 50 pages. For reliability and dependability, suggested by Cohen et al. (2003) to involve members' validation (p. 120), transcriptions were given to participants to check for accuracy.

5.4 Participants in study

The study participants are experts from different social backgrounds, with experience in continuing education or an in-depth knowledge of unions. They are (i) academics; (ii) government officials; (iii) tutors and (iv) union leaders with experience in CE.

Two focus groups were organized to draw on their ideas. The first group consisted of seven employees currently taking courses offered by the FTU. Being the adult learners of the FTU, they were able to talk about their educational needs and the reasons for taking the courses at one of the union's training centres. The aims of the research study were thoroughly explained to the participants before the conduct of the focus group.

The second focus group consisted of eight CMs employed by the FTU. They were selected on the basis of their character and experience, and those having direct work relationship with the researcher were excluded. As frontline staff they were able to draw on their daily work experience, their contacts with and observations of course participants, tutors and union leaders, and make comments and suggestions about the unions running training centres and the needs of the workers.

5.5 Sampling design

5.5.1 Individual interviews

Eight persons in four different social groups were interviewed for the purpose of obtaining different perspectives on the unions' provision of CE. The analysis of the unions' direction in CE was taken from multiple perspectives, and supplemented with other opinions.

As this research draws on the perceptions of the interviewees, interviewees with in-depth knowledge about the research topic contribute significantly to the result of the study. The method for selecting interviewees was what Maxwell (2005) calls "purposeful selection", which is "a strategy in which particular settings, persons, or activities are selected deliberately in order to provide information that can't be gotten as well from other choices" (p. 88). The researcher selected the interviewees from different social groups with the purpose of obtaining opinions from different perspectives, including union insiders and outsiders. The researcher intended to discuss the theme of the thesis on different working levels, such as policy level, academic level and executive level. Interviewees were government senior officers, academics, teachers at union education centres and union leaders with experience in CE.

Interview questions touched on three levels of CE, policy-making, companies and course provision. Seven interviewees agreed to disclose their full names and their positions in their organisations, and one agreed to disclose his position but not his full name.

The interviews were concerned with the articulation of the individual perspectives of the participants, thus contributing to the researcher developing an important basis for analysis and interpretation. McIntyre (1998) stated that,

perspective can (in Schultz's terms) be theorised as a fluid organisation of social knowledge which is brought into play in a given situation, generating schemes of interpretation which, for example, enable meaningful actions in that setting. Such schemes often operate as background understandings. (p. 167)

The critical point suggested by McIntyre relating to correctly recognizing, eliciting, exhibiting, examining and analysing participants' perspectives requires the researcher to foreground his or her account of the methods used to constitute an inquiry and produce a research account. Exchanging perspectives between researcher and participants will help the researcher to reach a greater understanding of the issues. As mentioned above, the researcher is a practitioner in the field of union education, so a close relationship with the interviewees had been built before conducting the study. The selection of participants thus contributed to a "reciprocity of perspectives" in the interviews.

5.5.2 Group interviews

As stated by Cohen et al. (2003), it is potentially useful to triangulate focus groups discussions or group interviews with more traditional forms of interviewing (p. 288). For focus groups to be successful, some issues need to be addressed, including the number of focus groups, the size of each group, the participants and the chairing (Morgan, 1988, p. 41-8). According to Morgan, an ideal arrangement is two focus groups with each group consisting of seven members. Each group should be homogeneous in the topic area since "otherwise the discussion will lose focus or become unrepresentative", and the researcher needs to "ensure that participants have something to say and feel comfortable to say it" (Cohen et al., 2000, p. 288).

Two focus groups were formed to collect participants' direct personal experience and comments on the needs for CE and the gap between those needs and the courses provided, and finally to find out why the union training centres are able to fill the gap. All of the participants in the focus group agreed to disclose their full names. The interviews were semi-structured and the questions listed in Appendix A.

The participants in the student focus group were selected from different course subjects and different centres. The selection criteria were: (i) current students with at least one year's study experience at a union centre; (ii) willingness to discuss issues with other students; (iii) good interpersonal skills and outspoken character. The tutors in the union training centres were asked to identify suitable participants. Finally, seven participants were contacted, with the researcher informing the participants of the aims of the focus group. The focus group meeting was conducted without any problems or difficulties.

The interviews were conducted in Chinese (primarily in Cantonese) to facilitate understanding and communication. All the interviews were transcribed in Chinese. The transcriptions were submitted to the interviewees for verification of accuracy and validity. The interviews were all taped and the interviewees were given a guarantee that the recordings would be destroyed two years after the publication of the thesis. All the persons being interviewed agreed to disclose their positions but not their full names.

A focus group was carried out with the aim of obtaining the opinions of CMs from different training venues of the FTU. This approach saved time and allowed the managers to share their experiences. Moreover, they motivated each other to express their opinions when articulating the joys and travails of the workplace. As they are the front-line staff of the unions, they possess first-hand information and were able to

make concrete suggestions for improvement of the CE services provided. When selecting the members of this focus group, the researcher adopted certain selection criteria including: (i) having service experience of five years or more in the union training centres; (ii) holding the position of centre manager; (iii) having good interpersonal skills, and (iv) being well-informed in the service sector. These criteria echo suggestions by Morgan (1988). As the researcher has a long-time working relationship with the centre managers, the study is likely to benefit from their knowledge. It was very important that their participation was agreed to by the head of the union training centre, so that they feel they are permitted to talk about their daily work and voice their opinions.

One month later another group interview was conducted to obtain the opinions of students currently enrolled in courses offered by the FTU. As current students, they were able to provide information about their courses, voice their needs for CE and five the reasons they enrolled in the courses offered by the FTU.

5.6 Conclusion

The research followed the framework developed in Chapter 4 and the methodology discussed in this chapter, including conducting eight individual face-to-face interviews and two focus groups of stakeholders in CE. As discussed above, this research is a qualitative study, adopting an interpretive model with a phenomenological approach. The interviews and focus groups were conducted following the criteria set out above. The participants in the individual interviews and two focus groups had similar backgrounds of a relationship with unions in the context of CE.

In addition, a SWOT analysis is introduced to guide the participants of the interviews and focus groups in their analysis of the FTU's internal resources, operational and

organisational strengths and weaknesses, together with the external opportunities and threats.

Finally, all the data collected in the interviews will be compiled, analysed and triangulated. Themes, which included all the major ideas and responses of the participants, were developed from the data. The resulting themes are the basis of the model of the FTU in the context of continuing education.

Chapter 6

Centre Manager Focus Group Analysis

In Chapter 5, the methodology applied in this thesis was discussed. As explained there, two focus group meetings (also referred to as “group interviews”) and eight individual interviews were to be carried out to collect the data, followed by analysis and presentations of findings and conclusions. One of the focus groups was comprised of eight CMs from the same union training centre. This chapter presents an analysis of the discussions of this focus group. The participants of this focus group were directly involved in the delivery of CE, in line with McIntyre’s views of what constitutes participatory research (1998), so they could provide insiders’ opinions and thus make it possible for the analysis to be based on first-hand data. A SWOT analysis was used by the participants of the focus group to analyse the current situation faced by the union training centres, drawing on the opinions voiced prior to the SWOT analysis being conducted.

As described in Chapter 5, the purpose of the focus group meeting was to investigate CMs’ experiences as front-line providers of CE and to provide a space for them to articulate their critique of the unions’ current roles in CE in Hong Kong. This feeds into the main aim of the research, i.e., to find out how the union training centre can motivate employees to participate in CE and overcome any barriers to such participation.

The interviews were analysed using thematic analysis and axial coding (Strauss & Corbin, 1990). The following themes emerged from this process:

- (1) Training subsidized by employers;
- (2) Employees’ needs for training opportunities:

- (i) leisure and living needs;
 - (ii) social communication needs;
 - (iii) needs for immediate and updated knowledge and practical skills; and
 - (iv) needs for earning recognized qualifications.
- (3) Unions' role and actions role in meeting employees' needs:
- (i) background and special relations among tutors, students and the centre itself;
 - (ii) flexible arrangement and competitive course fee;
 - (iii) fewer psychological and institutional barriers;
 - (iv) effective promotion channels or information dissemination; and
 - (v) immediate reflection of the market needs.
- (4) Future trends in training to be offered by unions:
- (i) rise in number of adult learners seeking award-bearing courses and qualifications;
 - (ii) new opportunities rendered by the QF; and
 - (iii) maintaining the success of the unions' adult learning programmes.

6.1 Profile of centre managers

As mentioned in Chapter 5, eight centre managers were invited from the FTU Spare Time Study Centre (STSC), which is a training organisation operated by the largest union group, Hong Kong Federation of Trade Unions.

The centre managers who manage the sub-centres of FTU Spare Time Study Centre explained that their routine duties are to (i) liaise between sub-centres² and head office; (ii) manage the sub-centre, including staffing, installation of facilities and daily

² "Sub-centre" refers to a branch of the FTU Spare Time Study Centre to differentiate between the organisation and the centres operated by it.

administration of courses; (iii) collect evaluation and opinions from students on course content, course delivery and tutors' performance; (iv) collect information from tutors on new ideas and trends of their specific industries; (v) disseminate information and requirements from head office to tutors and students; (vi) enrol students; and (vii) implement requirements by head office and report back to head office.

From the above description, we can conclude that the CMs are a significant data source for this research as they are the front-line staffs who contact course deliverers and participants on a daily basis. They are the ones who have access to the information critical to the CE needs of workers in Hong Kong. They had experience working for the union training centre ranging from 5 to 30 years. All agreed to have their full names used in the thesis as they wanted their participation in this change process to be recorded, and therefore their names are not anonymised in the thesis. Following are the profiles of the CMs who participated in the focus group.

Ms Tai, Manager of KK Centre in Kowloon³

Ms Tai has been working for the union training centre for more than 20 years. She has been the Centre Manager (CM) for 15 years. The KK Centre she manages is the biggest centre run by the FTU STSC, offering more than 600 classes each semester,⁴ covering nearly the whole spectrum of courses offered, such as engineering, commerce, psychology, sociology, planting, dancing, management, sports, computer, and cultural and recreational courses. As a part of her work as CM, Ms Tai has to contact more than ten thousand students and two hundred tutors every semester. Apart

³ Geographically Hong Kong is divided into three areas: Kowloon, Hong Kong Island and New Territories; Hong Kong is further divided into 18 administrative zones.

⁴ The union organizes training courses throughout the year. Each semester is three to four months in duration. Most courses comprise 12 lessons, with each lesson lasting for one and a half to three hours.

from being a CM, Ms Tai is also an Assistant Director of the FTU STSC. She is therefore also involved in policy making at the said union training centre.

Ms Lau, Manager of KZ Centre in Kowloon

Ms Lau joined the trade union training centre 30 years ago when there were only two centres. She has been in the management position of a sub-centre for nearly 20 years. The KZ Centre she manages is a complex service centre which offers more than 160 classes each semester. Course coverage includes bakery, computer studies, manicure, languages, commerce studies, and some special interest courses, such as knitting and clay doll making. Ms Lau has to contact more than five thousand students and one hundred tutors each semester. Ms Lau is also an Assistant Director of the FTU STSC and participates in policy making for the FTU Spare Time Study Centre.

Mr Chan, Manager of NN Centre in New Territories

Mr Chan has been working for the STSC for more than 20 years and has been a CM for almost 20 years. The NN Centre he manages offers more than 200 classes every semester. The NN Centre provides a broad spectrum of courses with the exception of engineering courses, which are not offered. Every semester, Mr Chan has to contact more than five thousand students and around 200 tutors. Mr Chan is also an executive member of the Weaving and Dyeing Employees Union. The NN Centre is located on the premises and at the office of the Weaving and Dyeing Employees Union.

Ms Ho, Manager of KL Centre in Kowloon

Ms Kin Ho has been working for the STSC for nearly five years, and the manager of the KL Centre for three years. This centre mainly offers commerce and logistics studies courses. The KL Centre is located on the premises of the Logistic Industry Employees Union.

Ms Lam, Manager of KW Centre in Kowloon

Ms Lam has been working for the STSC for more than 20 years, and became the CM 10 years ago. The centre offers about 120 classes catering for 2,400 students each semester. The KW Centre offers commerce and computer studies courses, along with government subsidized courses such as Employees Retraining courses and Skills Upgrading Scheme courses. In addition to her role at the KW Centre, Ms Lam is also an Executive Member of Hong Kong Metal and Electronic Industries General Union. The KW centre is located at the union's offices.

Ms Chan, Manager of HD Centre on Hong Kong Island

Ms Chan has been working for the STSC for more than 10 years, and was promoted to CM three years ago. The HD Centre is a big centre, running about 250 classes each semester in commerce, computer studies, dancing, fitness training and special interest courses.

Ms Chan's background provides us with a different perspective on the topic of CE. She was a student in the Youth Pre-employment Training Programme⁵ conducted by an FTU training centre. Due to her high achievement in the programme, she was invited to join the FTU staff in a training centre after she finished the programme.

Ms Leung, Manager of KY Centre in Kowloon

Ms Leung has been working for the STSC for more than 20 years. She manages around 160 classes per semester, offering courses ranging from computer studies, commerce, fashion and merchandizing to special interest courses. The KY Centre is located on the premises of the Hong Kong Apparel Industry Employees General Union.

⁵ The Youth Pre-employment Training Programme (YPTP) is organized and subsidized by the Labour Department, helping youth aged 15 to 19 of age. Training programmes are offered by NGOs.

Ms Chu, Manager of HC Centre on Hong Kong Island

Ms Chu is an Executive Committee member of the Hong Kong Department Stores & Commercial Staff General Union. She has been working for the union and the centre for more than 10 years. As the premises of the centre also house the general office of the union, the centre also functions as a service centre for union members. More than 100 classes are offered in this centre every semester.

6.2 Analysis of discussion of centre manager focus group

The analysis of the discussion by the centre manager focus group will be grouped under different topics: (i) training subsidized by employers; (ii) employees' needs for training opportunities; (iii) the unions' roles and actions in meeting employees' needs; and (iv) future trends in training to be offered by unions.

6.2.1 Training subsidized by employers

It is difficult for the union training centres to ascertain which of the students taking part in training courses are subsidized by their employers. Nevertheless, based on their daily contact with students, CMs estimated that no more than one per cent of the students were subsidized by their employers. They pointed out that fewer and fewer employers are subsidizing employees to study, basing this observation on the number of students asking for receipts in order to claim reimbursement from employers. It is possible that some employers do not want their staff to study in union centres because of the different ideologies they and the trade unions hold. However, the timing of this phenomenon is more likely to reflect the fact that employers are less willing to support employees to study in recent years, years that have been characterised by economic uncertainty.

On the other hand, companies occasionally invite a union centre to provide tailor-made training/classes to their staff. As Ms Tai commented, most of the time this training, such as “Low Voltage Switch Board” and “Construction Mandatory Safety Training”, is of specific technical skills rarely offered by other organizations. This is either because other organizations do not have tutors who possess the knowledge needed to deliver the course or the organizations are not willing to offer courses in a piecemeal fashion.

CMs observed that employers approach union centres to provide tailor-made training because the centres can organise courses flexibly and at a low price. Ms Tai explained that, “We do not need to seek any approval or any accreditation for our courses. Once we think a course is useful to workers and we have the capacity, i.e., the resources and the tutor, to deliver the course, we can go ahead to offer it according to employers’ or users’ demands and expectations” (Tai (CM) 23.04.2010). Ms Lau added, “We can offer courses, including tailor-made courses, at a low price. Moreover, with training centres spread all over Hong Kong, courses can be arranged flexibly at great convenience and advantage to employers and employees” (Lau (CM) 23.04.2010).

According to the CMs’ observations, employers, especially small and medium-size enterprises, do not have the intention to provide training to employees, except in new technologies their staff need to know. CMs admitted that they did not have an overview of the extent to which employers were willing to offer training to their staff. This is because their direct contact with employers was limited and their analysis was only based on the information they got from students participating in courses.

6.2.2 Employees' needs for training opportunities

One conclusion can be drawn from the discussion with CMs, which is that the market for CE is large precisely because the needs of employees' are not being met. With reference to what they know about course participants, CMs concluded that the different training needs of employees could be categorised as follows: (i) leisure and living needs; (ii) social communication needs; (iii) needs for immediate and updated knowledge and practical skills; and (iv) needs for earning recognized qualifications.

6.2.2.1 Leisure and daily living

By talking with students and tutors, CMs know that many students study flower arrangement, sports, dancing, music, drawing, health knowledge, fortune telling, etc. as leisure pursuits. Their participation in these courses is aimed at enriching their quality of life and to give them a break from the pressure of their daily work.

Other examples of leisure and daily living courses given by CMs more often included hair cutting and styling courses and cosmetics courses. Students join these for reasons that include personal interest, family cohesion and self-improvement. Adult students can make use of hair cutting skills to help their family members. They can also serve the community as volunteers. With the increased knowledge gained in courses, students' topics in discussion with their friends and bosses are broadened, which may have positive benefits as they try to climb the career ladder.

Another example of a leisure and daily living course is the wine tasting course. It is a popular and useful course for adult learners. CMs quoted students' opinions that the course suits them very much as what they need is the basic knowledge of how to read names of different kinds of wine, origins of the wine, how to taste them and which food matches with which wine. All of these are for leisure purposes. Of course, the

knowledge is useful in business talk when building up business network or chatting with business partners. In addition, the knowledge also helps build up the social network as they can share their new-found expertise knowledge in areas such wine tasting with the friends from different walks of life. The CMs pointed out that the social network would also be useful to the adult students' daily work.

CMs emphasized that participants join these courses mainly to obtain knowledge that is useful in their daily life, and not so much for work or business purposes. That said, the value that courses make to participants' lives may originally be just to satisfy an interest but the knowledge gained may make a contribution to their professional development at a later stage. This point will be further discussed below.

Health is another popular course category among adult students. Although most learners do not have the chance to study health sciences at medical schools, everybody needs to know how to improve their health and care about themselves physically. In the union centre, they can learn about Chinese medicine and basic health care. In the centre Ms Chu manages, many courses in Chinese medicine are offered. A majority of the students study the courses for their own care while occasionally a few advance further in the study of Chinese Medicine at other institutions and become licensed practitioners.

Environmental protection is another topic represented in a number of courses. Adult participants take part in courses such as LED light applications. In the course, they learn how to apply energy-saving principles in their daily lives and how to install such equipment to reduce energy consumption. Robot making, installation of electricity equipment, painting and plumbing are of a similar nature. Other students learn practical skills for DIY purposes.

One phenomenon that CMs commented on is that a number of students join basic music theory courses, take elementary musical instrument classes or singing courses at union centres. It is uncommon to find adult students, i.e., students in their late 20s or even older, learning to play a musical instrument in other centres in Hong Kong. However, this is not the case in union centres. CMs observed that adult students taking musical courses at the union centres, aged from their 20s into their 70s, feel comfortable as they do not need to face challenges and strange looks from teenage learners. Ms Chan pointed to a musical conductor course to further explain the phenomenon. Conducting is a professional skill that needs years of training. However, in the union centre, the contact hours for an elementary conductor course are just 18. Learners study purely out of interest, to enjoy the process of professional playing. To enrich students' learning experience, the union centre also organizes internal concerts to let learners perform the songs they practice.

The courses mentioned above are mostly short courses. CMs reflected that the students like to spend one to two sessions (each session usually lasts for 90 to 180 minutes) every week to learn something out of interest or to increase their general knowledge. According to the CMs, these courses are offered so as to provide learners with a richer, more colourful and meaningful life after work. As Ms Tai said, adults can realize their childhood dreams, for example, playing the piano, at union centres.

The CMs' opinions voiced that the aim of union centres is to provide continuing learning opportunities so as to enrich people's lives, which leads to the development of a civil society (Cox, 1995). The happier and healthier people's lives are, the more harmonious society is.

CMs were proud to mention that the union centre is not only a place for people to fulfil their dreams, but also a venue that nurtures practical professional development. CMs reported that many students initially took courses out of interest, but gradually developed their career by making use of the skills they learned. Mr Chan gave an example of a female student who was a clerk when she joined a cosmetics and make-up course for the purpose of taking care of her skin. After studying in the centre for five years, she became a professional beauty therapist, and she told the centre staff that she loves her new career very much and appreciated the union centre in giving her the opportunity to learn cosmetics. Other CMs echoed that this is not a single case. Hundreds of similar cases are happening at different centres. A point to be noted here is that these cases usually relate to practical subjects, such as yoga training, sports training and hairdressing.

Meanwhile they emphasized that participants in the same course may be attending for different reasons. For example, in special interest courses, some students study to gain professional qualifications while others do so because of social needs or to gain work-related skills. The original reason for signing up and the reasons for continuing with the course may change over time. There can be some divergence from the original purpose of the courses envisaged by the union. A typical example is that students who enrol in special interest courses often find that they enjoy the social aspect of the course and stay on as much for that as for the actual course itself. Thus the courses meet both educational and social needs.

6.2.2.2 Social communication

As mentioned above, the analysis of the data provided by the CMs revealed that many students join the courses to fulfill social needs. In class, they can make friends and share experiences with the other students taking the same classes. Students in such

courses may not have partners or friends who follow the same interest in other communities, and look to these classes to meet like-minded people. They are glad that they can build up another social network here in the classroom.

Professional networking is an important student activity in the classes. An example of this was described by Ms Leung, CM of the KY Centre (which is also the centre for the Hong Kong Wearing Apparel Industry Employees General Union). According to her observations, merchandisers studying the same merchandising courses enjoy becoming acquainted with people in the same trade. They can build up another social community to share information about their trade and get help from classmates in times of need. CMs also noted that it is quite common that students enrol in several courses in one semester. Those students tend to study at different centres in different time slots for different subjects, mainly for practical purposes but also partly for social communication purposes.

Ms Lau emphasized that courses provided by the trade unions cover all four essential areas needed by people, i.e., food, clothing, housing and transportation. Issues such as birth, age, illness and death are also covered. Sick people, perhaps suffering from cancer, can join courses designed particularly for them, for example, a therapeutic natural healing course. They have the opportunity to make friends, and build up a base of mutual support within the class. This social networking is a typical function of courses offered by union centres. CMs pointed out that this need for “caring” is in large demand in modern society. Mixing the acquisition of life knowledge with meeting social needs is made possible in the union training centre. Trade union training centres provide a diverse range of training and CE covering many areas other than job-related skills. However, as a group, the CMs expressed the belief that training related to upgrading working skills and knowledge is more important.

6.2.2.3 Updating knowledge and practical skills

CMs pointed out that upgrading work skills and equipping employees with skills that make it possible for them to strive for excellence in the labour market is one of their aims, clearly stated in the working reports of the training centres. A significant number of participants join courses for the purpose of obtaining immediate, work-related knowledge and practical skills. Ms Tai emphasized that participants generally sign up for courses in order to acquire new skills and information or to upgrade their existing skills, an observation supported by other CMs.

As courses run by the union centres usually last for one to twelve lessons, knowledge delivered in the course can be seen as fragmented or including only a section of the required practical knowledge. Nevertheless, such activities may be entirely suitable for the purpose of filling participants' current knowledge gaps. An example Sarah, the KY CM, gave was a course named "Garment Trimming (Velcro, Release Buckle, String, interlining) Course". The course is always fully subscribed and most of the participants are currently working as merchandisers. The course covers new knowledge of different "texture of buckles"⁶ in six hours. The purpose of the course is to upgrade students' knowledge in the application of different buckles in the garment industry. Obviously, this is just a small piece of knowledge in the field of clothing manufacture, but it is very useful to merchandisers as the course enhances their knowledge in preparing specifications for production, orders or tenders, or it upgrades their techniques in the quality control process in which some important points are easily ignored. The course is a very typical example of what participants look for at the union training centre. It shows that employees need similar skills-based courses very much.

⁶ "Texture of buckles" refers to the knowledge of textile and fashions.

The utilization rate for the 3,000 courses with nearly 7,000 classes offered every semester in the union centres is over 95% (or 95% of places are taken). The average course completion rate is 80%. The CMs deduce that the modes of course operation and the course contents meet the expectations of employees who enrol in the courses.

CMs pointed out that it is obvious that employees like to enrol in short courses, which are around 18 hours in duration, that provide hands-on practical skills rather than theoretical knowledge. The example CMs cited was teaching the use of MYOB, popular accounting software. Most of the students taking these courses are working in the accountancy field. They may be chartered public accountants or accounts clerks. They already know accounting theory but are willing to spend 18 hours to learn the use of this software. The adults taking these courses are not there for the purpose of receiving any recognized educational qualification; instead, they wish to learn practical skills to fill a gap in their knowledge at work.

The prospectuses of the FTU Spare Time Study Centre bear out the view of the CMs, since most of the courses are practical ones. Courses under the category of “Engineering Course” are mostly short courses or workshops with specific content, such as how to choose a specific model of motor, how to make a special Chinese button, how to apply for a painter’s license, etc. “Commerce” courses may teach about investing in the share market or legal knowledge useful in daily life. CMs quoted from the prospectuses of the various union training centres and the utilization rate of courses as proof of employees’ training needs and training modes. They concluded that the availability of short courses and practical knowledge courses are significant factors in participants taking part in courses offered at union training centres. They emphasized that learning practical skills is the main reason for people taking courses while fewer students attend courses to earn recognized qualifications.

6.2.2.4 Recognized qualifications

In the focus group discussion, the CMs emphasized that in a knowledge-based society recognized qualifications appear to be necessary for success in some careers, such as financial planning. They pointed out that recently the trend has been towards a “certificate era”, and thus, union centres have begun to offer courses which resulted in the students gaining a qualification. The CMs explained that this trend of requiring recognized certificates has grown in the last 10 years, as learning requirements have had to keep pace with economic trends in Hong Kong. When talking about this point, the CMs insisted that offering courses and seminars that teach everyday working knowledge still have priority in their teaching schedule.

The CMs pointed out that union centres offered some courses that require accreditation from the authorities concerned, such as the Hong Kong Council of Accreditation of Academic and Vocational Qualification (HKCAAVQ), while other courses prepare students for open examinations. However, they explained that certificate courses were at different levels and covered a wide spectrum.

According to the focus group participants, one very popular course is management studies or the study of business administration, while other popular courses include licensing requirements or mandatory requirements for specific jobs. The centres offer many management courses that are accredited by different organizations, such as the SBP.⁷ These courses can directly offer recognized qualifications to students while some provide only the stepping-stone to the achievement of some qualification. The CMs used the example of the business administration certificate course to explain this arrangement; the course is designed to let students continue the top-up degree course offered by other institutions after completion of a diploma course with accreditation by

⁷ The Society for Business Practitioners is an accreditation organization in the UK with a branch in Hong Kong.

the institution concerned, but do so at one of the union centres. Students like to make use of this learning ladder as they pay less in school fees if they study only for part of the course at a union centre rather than for the whole degree course at a degree issuing institution. And of course there are participants who just want to complete the diploma course and are not interested in the top-up degree course.

In addition to the degree courses, the students also like to take the courses leading to the conferral of recognized international qualifications such as the C&G,⁸ LCCI,⁹ or TAFE.¹⁰ The subjects concerned are varied; they include commercial courses, engineering courses, computing courses and skills-based courses such as hairdressing and beauty therapy.

As mentioned above, some students take courses out of interest firstly, but later on develop that interest into a professional skill and these recognized international qualifications provide great assistance to such students. Mr Chan, manager of the NN Centre, found that many students study beauty therapy to learn about their own skincare, but later, they are attracted by the C&G diploma and after further, related study; they become professional beauty therapists, make-up artists and make-up for theatre and TV. He cited this case to demonstrate how students' goals can change during and as a result of the courses they take in the union centres.

In addition to international qualifications, Hong Kong's newly established QF also plays an active role in inducing employees to study. The CMs reflected that the students like to attend courses with accreditation from HKCAAVQ under the QF. The Education and Manpower Bureau (EMB) of the HKSAR is the secretariat organising

⁸ C&G: City and Guilds, UK

⁹ LCCI: London Chamber of Commercial Industry; in Hong Kong, the accounting certificate issued by this institute is well regarded by employers as evidence of the competency required to be an accounting clerk.

¹⁰ TAFE: Technical and Further Education, Australia

the discussion within industries and laying down the Units of Competency (UOC) written by the expert writers and endorsed by industry delegates. Referring to the UOC, the training centres work out their course contents and submit these to the HKCAAVQ for accreditation; if approved, the courses will be articulated in the HKCAAVQ Qualification Register (QR). This is accessible to the general public. According to the CMs' focus group, the training centres have registered some courses, including hairdressing and property management, and it is clear to them that the accredited courses are more attractive than the courses in which the contents are similar but with no accreditation/recognition. However, when asked, not all the students in the same class had the same aims; some were there for the recognized certificate but others were there purely out of interest. In accordance with general practice in Hong Kong, the accredited courses require the students to pass the continuing assessments and final examination, whereas students who are there just for interest do not want to study under examination pressure. The CMs explain that they place the students with different aims in the same class but take different approaches to handling the students' course work; the ones who pass the examination are awarded the recognized certificate, while the others only receive an attainment certificate. They emphasize this as their distinguishing feature from the other CE institutions.

The CMs concluded that the training needs of employees imposes a huge burden: they study with different aims, partly out of interest and in order to enhance their daily life, partly to gain some knowledge that may be useful in their work or out of personal interest, partly for the immediate use of work, and of course, some study solely to gain the recognized qualifications. They emphasized that some courses are unique but some are also offered in other institutions or training centres. They proudly argued that the

features of what their union offers are unique and could not be replaced by any other institutions.

6.2.3 Unions' role and actions in meeting employees' needs

Discussing how the unions are playing their role to meet the employees' training needs, the researcher asked (i) what can the unions do, (ii) how they do it and (iii) why the unions should do it. The CMs answered in a very straightforward manner: the union should serve the employees as this is its duty. They then explained that their training centres try many methods to get employees to study as they believe that encouraging employees to study is one of the best ways of protecting employees' rights and benefits. In the discussion around the reasons the students have for participating in the courses offered by unions, the CMs admitted that some courses are unique in the union centres, but some are also provided in non-union institutions. The thematic analysis of these sections of the interviews showed that in these cases, students are attracted to the courses offered by unions for a variety of reasons, including (i) the background and the special relations among tutors, students and the centre itself, (ii) the flexible arrangement and the competitive course fee, (iii) less psychological and institutional barriers, (iv) effective promotion channels or information dissemination, and (v) immediate reflection of market needs. In the following sections a detailed explication of each theme is presented as it emerged from the CMs' interviews.

6.2.3.1 Background and special relationship between tutors, students and centre

According to the CMs' analysis in this focus group, emphasis was placed on the special status of the centres as union centres. The tutors of the courses in the main have strong connections with industry and the unions. Most of the tutors are currently

working in the industry concerned. They may or may not be in senior positions in their companies, but they will possess specialist knowledge which they believe to be useful and in demand by other workers. Ms Leung (CM of the AEGU) quoted the example of the Quality Control (QC) Process Course, most of whose students are currently merchandisers in different industries; they join this course in order to enhance their ability to negotiate with buyers and to monitor the manufacturing process. These kinds of courses may be too highly specialised for formal institutions to organize. However, the primary objective of any union is the welfare of its members, so the office bearers and the executive members, to meet the needs of the workers, have to organize appropriately targeted courses. Moreover, they have the tutors who have such knowledge and the sense to organize such practical knowledge courses for their counterparts in industry. The CMs claimed that this is because the unionists have class instincts and the sensibility and commitment to serve and help their brother and sister workers.

The CMs commented that the working relationship between employees in the same company is different from 20 or 30 years ago. They understand that the relationship of work mates in a company in the past was very close, with the master assuming a patriarchal authority as both boss and teacher, something they learned from the union and fellow union members. As the 21st century progressed, this relationship changed and now fewer senior colleagues are willing to spend time teaching and mentoring their juniors. This situation is exacerbated by serious competition for advancement within a company. If one wants to learn, one has to attend courses outside the company. “As we are communicating with low-level workers, we know the trend and we can grasp the situation and act to address the workers’ needs”, Mr Chan (CM) (23.04.2010) said: “Our union members will come to our union and tell us what they

need and what they believe is a new trend in the industry, so we can get the information easily. Our tutors can design courses according to the information they get from their workplace.”

They emphasized that mastering employees’ needs is one of their strengths because of the union background and providing proper training is another strength of their union training centres. Members with a strong belief in their unions can easily understand that this is their unique strength. Recalling that fewer students studying in the union centres were being subsidized by employers, the CMs mentioned that the students at times did not reveal to their employers that they’re studying in union centres, and irrespective of who knew what or why, the students themselves were happy with their decision to study in the union centres. In addition, the CMs said that the warm, family atmosphere is also attractive to the students, and that is one that other, more formal institutions cannot offer. As the unions regard the course participants as their family members, “we try our best and create the opportunities to let the adult workers study in our centres” Ms Tai said.

6.2.3.2 Flexible arrangement and competitive fee

“Flexible”, “convenient” and “low cost” are the key words emphasized by the CMs when discussing the attractive points of their courses. They included the location maps of the centres to show the convenience of their location. They are proud of the fact that they have 50 centres located throughout Hong Kong, allowing easy access to the majority of employees living or working in different areas of the territory. They reflected that this is their strength as there are more than 250 affiliated unions under the umbrella FTU. The FTU makes use of the premises of the affiliated unions as training centres to encompass the whole area of Hong Kong. In other words, the unions running a collective training organization can take care of the employees in all of Hong

Kong. The CMs also reflected on the fact that the training centres are accommodated in the same building as the union offices, so the unions can also take care of union affairs.

Another advantage of the union training centres the CMs pointed out is their flexible course schedules and course duration. They emphasized the fact that most of their courses are short-term courses of 12 lessons, normally ranging from one and a half to three hours a session, and usually one session one week. They explained that this arrangement allows employees to easily organize their study schedule. Moreover, there are many course combinations for participants to select from, including both times and venues of courses. Ms Lau used the “English Usage Course”, a very popular course in the union training centre, as an example to demonstrate that there are more than 100 classes of this course each semester, and that the head office of the union centres is a unique provider, arranging these classes at different times and locations. That means there are 100 combination of this course in each semester. “In the ordinary course of events, the participants can find a class which suits his/her availability for study and the participants can find a class which is conveniently located.” Ms Lau said (Ms Lau (CM) 23.04.2010). All the CMs claimed as one (CMs 23.04.2010) that, “This kind of flexibility cannot be matched by other institutions because of our big pool of participants, with a union membership of at least three hundred and thirty thousand, 50 venues/training centres and more than one thousand part-time tutors”.

The competitive course fee is also a significant attraction for employees. The CMs explained that, as the tutors are semi-volunteers, and the unions own the premises, they need not worry about rising salaries and rents. Further, union members can get a 10 per cent discount on the scheduled course fee. “Of course, this is a strategic measure to get the course participants to become members of their industry/job-related unions,” they

said. From the perspective of course participants, they need not consider too much about whether the course contents are the ones they want, as because of the low course fee, if they attend the course and feel that it is not suitable, they can leave and not feel that they have wasted a lot of money. As an example, Ms Lau stated that adults pay only 300 Hong Kong dollars to join the elementary (musical) conductor course: “At first the individual adult participant thinks that the course may be interesting, so he/she will come to the centre to have a trial of ability and interest. After the trial, he/she will continue to study if he/she thinks they have the talent and interest for it.” The CMs thought that it was a distinguishing feature of their centres to let adults try to learn something that is not available in other institutions. “Lots of students reflected that they never dreamed they would have such chance to study their favourite subjects until they joined the courses in unions.” The CMs explained that while the students were in their childhood, few families could afford extra mural studies, let alone the piano lessons, as music schools usually charged expensive tuition fees. Many have reached maturity, they would not pay the high fees required to take pursue such an interest. The CMs put forward the idea that their provision of affordable tuition fees helped to remove one of the barriers to further study.

6.2.3.3 Psychological and institutional barrier to further study

The focus group of CMs also discussed the psychological and institutional barriers to further study in Hong Kong and how the union training centres help employees overcome barriers to further study. Related to the combination of a flexible study schedule and low course fees, their discussion also puts the view that the union centres’ study environment and supportive atmosphere are significant in reducing the psychological barriers to further study. All these were seen as important factors in attracting adult learners. Ms Lam added that the community centres, which are widely

disbursed geographically, are even more conveniently located than the union centres, but despite offering similar courses, they could not attract adult students. This is thought to be because they cannot provide the same sort of learning atmosphere and course schedule as union centres. Mr Lau and Ms Lam used the musical conductor course mentioned above as an example to explain that employees feel comfortable studying in union centres with classmates of a similar background, based on their shared union background. The CMs repeated the idea of “letting their dream become reality”. In the union training centres, their special union background helps them enjoy a proper study atmosphere and study process. They feel that there they can achieve, or put in terms of Maslow’s needs hierarchy (1970), they can reach the upper stage of the needs hierarchy, i.e., self-actualization. They also said that their long history in providing training that is “fit for practical use”, and the union itself, help them build up a good reputation and a friendly and practical image among working class people. These elements enhance employees’ confidence in studying to meet their needs and fulfill their dreams.

“Care” is the key term always emphasized by the CMs when discussing why employees choose to study in the union centres. They claim that it is the nature of the union to take care of employees from all directions, so their colleagues in the union training centres would follow the union’s ideology and guidelines when carrying out their work. The CMs emphasized that they are also a part of the union, with their main task being to organize training rather than directly fighting for the rights and benefits of workers. Both staff and tutors of training centres provide extra care in addition to teaching in the classrooms. The CMs highlighted this point with the example of providing a cup of tea, which staff will serve the tutor before going into the classroom. It is a simple gesture of caring from the organisation, but the tutors feel it and they will

also transmit this warm feeling in their teaching and in their attitude towards the students. Again, this is the nature of the unions in Hong Kong, maybe not of all unions, but at least in the FTU, the umbrella group of many Hong Kong unions.

According to the CMs, institutional barriers commonly prevent or hinder learners from pursuing their desired goals. However, in the union centres, some of these barriers can be removed by setting minimal entry requirements for courses. Only applicants aged 16 years and above are accepted, as this is the minimum legal age for undertaking full-time employment in Hong Kong. This is usually the only entry requirements. Applicants can choose any course they like. The union centre's prospectus is the learners' handbook, with all courses, course content, teaching mode, locations and course schedule set out in it. As the prospectus is a very thick book, it has been nick-named "Yellow Pages". Applicants can search through the prospectus to find courses they're interested in, which can be matched to their situation and conditions. Applicants can enrol in any course without having to pass any entry test or examination. Union leaders strongly believe that adults are capable of deciding for themselves which are the most suitable courses to attend, and so they believe that there is no need to set entry requirements to guide applicants.

In addition, the courses provided in the FTU centres do not require students to take final tests and exams unless they have applied for a "certificate with pass results". As long as the students complete their course with a 70% attendance rate, they will be given an attainment certificate. This helps reduce the anxiety of adult students and may also encourage course participants to continue studying, the CMs explained. While discussing this point, they simultaneously expressed their concern for the well-being of their students: "When we found that the students come here immediately after work, we let them eat bread in classrooms and encourage them not to worry about being late,

saying try to come and get even a bit knowledge as it is better than nothing.” They explained that students could enrol in an upper grade course even if they have not achieved a pass in the final examinations of the lower grade course. Union centres believe in adults’ cognitive abilities and thus let them make their own choices. The CMs roughly estimated that over 50 per cent of students would continue to enrol in upper grade courses if available. The CMs emphasized that failing in the final exams does not necessarily mean the student has not taken in the knowledge delivered in the course. They thought that as the students are working adults, they may not have sufficient time to study for the exam, but they can apply the knowledge in their actual work when they encounter the right situation.

Indeed, while the CMs may not have studied educational theory before, they have worked in the field for a long time, meeting learners every day. Their long experience has helped them to understand the needs of the learners. Moreover, the CMs expressed the view that the union ideology of “caring” provided them with the right direction to serve the employees in the context of continuing education. They wanted more and more workers to understand the importance of learning and know about their service, and they used the union centre network to let union members and the public know of their service.

6.2.3.4 Effective promotion channels and information dissemination

The focus group of CMs expressed the view that effective promotion channels cannot be neglected in any discussion of the reasons for people enrolling in any course in CE. The strong network of union centres guarantees the dissemination of information to potential service receivers: the newsletters of the more than 200 affiliated unions and their umbrella organisation, the FTU; 350,000 copies of the prospectuses of the centres each semester; communication among the 18 district offices of the FTU; and

communication among the pool of current students and tutors. Moreover, the connection with employers and their associations also offers a significant channel to disseminate information about the courses. Ms Leung quoted as an example the “Men’s Suit Pattern Marking Course”, which the Clothing Industry Training Authority (CITA)¹¹ has run in the past but has now stopped due to insufficient students. However, according to Ms Leung, “when the information is promoted to the members by means of the union newsletter, we enrol a ‘full house’ of students within one week”. Course information that is easy to reach their union members is one of the successful elements in running the training programmes. Ms Leung (manager of KY Centre) and Ms Ho (manager of KL Centre) added that their prospectuses play a different role than the core of their promotional network. They found that due to their long history and reputation in the adult CE field, many people regularly visit their centres to pick up the prospectus, “which they regard as informative and reliable. They will search here for what they like, and once they find an interesting course which they have never heard or thought of before, they will immediately enrol in our service.”

This strong promotional network is an invaluable asset and the important point is that the CMs know how to use this resource to promote their services to the people who need them. At the same time, the CMs are also proud of their network as a strong course information tool. This network helps them to respond promptly to market needs.

6.2.3.5 Immediate reflection of market needs

Flexibility, as mentioned above, is also an invaluable feature to attract employees for further study. In addition, the CMs emphasized that one of the training centres’ features is their quick response to market needs. They pointed out that as they are

¹¹ The Clothing Industry Training Authority is an industry-oriented training organization subsidized by a levy from the export revenue of the clothing industry.

directly involved in the daily operation of industry because of their members and the tutors working in the market, they can easily obtain timely market information. Being part of their system, tutors are familiar with the mechanism for proposing courses to the centres if they consider them suitable for the market. Then, after discussion and preparation, the course will be available to the public in a very short time. The mechanism, they emphasized, is the “simple measure to obtain approval of the course from headquarters. We do not need to hand over our course to any authorities for accreditation; we can run any courses we choose, apart from gambling, so we can immediately respond to market needs,” they claimed (CMs 23.04.2010). The course titles appearing in the prospectus very often play the role of a guide informing students of new knowledge in their industry that they may need to know.

While the CMs discussed aspects of the historical development of the provision of training services to the employees, they also reflected on what it means to be in the new knowledge-based economy. They are afraid that they will also have to adapt some core ideologies to face the challenge from the new needs of professional workers.

6.2.4 Future trends in training to be offered by unions

According to the CMs, the union training centres are proud of their achievements and their long history of offering training services to union members but at the same time they are also concerned about the new trend of providing training to meet the new challenges of the knowledge-based economy. This section will discuss (i) the rise in the number of adults seeking award-bearing courses and qualifications; (ii) the new opportunities provided by the QF and (iii) maintaining the success of the unions’ adult learning programmes.

6.2.4.1 Rise in adult learners seeking award-bearing courses and qualifications

The CMs expressed the opinion that in the new economic situation some students are quite concerned whether they will be awarded a recognized qualification at the end of a course they have taken. However, the CMs pointed out that the term “recognized” cannot be clarified in the current situation, as there is no common benchmark for such a recognition. They found that students like courses which state that they are a Certificate or Diploma Course, so the centres are responding by changing courses into Certificate or Diploma Courses with a revised delivery mode. The main change relates to the arrangement of final examination requirements. If the students want to get a certificate, they have to successfully complete the course with a more than 80% attendance rate and pass continuous assessments and final examinations. If the students only want to get the knowledge and are not concerned about a certificate, they can enrol but do not take part in any exam. The CMs estimated that about 30% students do not take the exam. They feel that this arrangement can partly meet the requirements of the students for a certificate. However, they are also aware that today’s students want (and increasingly need) properly recognized qualifications, such as a bachelor’s degree or a properly accredited qualification, from an organization such as the HKCAAVQ. They also point out that the qualifications awarded by overseas educational institutions are also well “recognized” by adult learners. The CMs therefore expressed the belief that their organization has to cooperate with other institutions to offer courses with a “recognized” qualification. There was some acceptance of the notion that the union centres are not as competitive as the formal tertiary institutions. On the other hand, the CMs insisted that some students preferred the study atmosphere of the union centres and the low entry threshold, even over a course with the same content offered at a tertiary institution and leading to a bachelor’s degree. They emphasized that they did not need to offer courses which led to bachelor’s degrees from top universities. Ms Tai

and Ms Chan (CMs 23.04.2010) said: “We can introduce studies for a bachelor’s degree, for example, from universities in the Philippine; this is also a qualification and this qualification is recognized worldwide, and this is the study opportunity that we can give to employees with comparatively lower learning ability.” Ms Tai (23.04.2010) said that, “Notwithstanding the level of the qualification being classified as low, it is also a recognized qualification and the employees have also put in an effort to achieve it.”

The CMs agreed unanimously that to organize courses leading to a recognized qualification would be one of their goals in future. The managers also pointed out that it is not their priority, but they wanted to give employees in Hong Kong more chances and services.

In addition, the CMs voiced their responses to the Continuing Professional Development Programme (CPD). They thought that for the purpose of upgrading or maintaining professional standards to meet market needs and guarantee consumer rights, the government and the authorities concerned, such as the Insurance Authority, Travel Industry Council or the Estate Agents Authority, required practitioners to study recognized courses with a specified number of required hours as one of the annual re-licensing requirements. They foresaw, in the light of their experience and the information gained from the government departments concerned, that this trend will continue and will also extend its scope to cover more industries. So they were firm in their belief that this is the right way to organize these kinds of courses and serve the union members. As these are butter and bread issues for employees, the CMs emphasized that this kind of work-related training will be their priority.

6.2.4.2 New opportunity provided by Qualification Framework

According to all the CMs, the newly established QF is regarded as an opportunity for the union centres to renew their mission to serve union members and the public. (They added that the members of their unions may be entitled to a 10% discount of the school fee, which is one way to attract members of the public to become union members.) They gave the example of their hairdressing courses to illustrate this idea. The hairdressing courses have been traditionally available in union centres for more than 30 years; most of the students take the courses out of interest and for the purpose of self-help. However, since the new arrangement with the new vocational qualification accredited by the HKCAA was introduced, for the purpose of meeting the accreditation requirement, the union centre has had to change the traditional structure of the courses, as a result of which students' motivation for enrolling in courses in the centres has also changed. The CMs have found that some students are now studying to gain a professional recognition, not just out of interest as before. For the industries now with the setting up of QF, the QF is seen as offering opportunities for providers to upgrade their image as they can get recognition of the courses from the government. The CMs therefore believe that adhering to the QF and the Units of Competence¹² when preparing courses will be the way forward.

6.2.4.3 Maintaining the success of Adult Learning Programmes

Despite the importance placed on offering courses with recognised qualifications, the CMs still insist that the provision of courses for employees and members aimed at enriching their daily life and enhancing their capabilities in their day-to-day work remains the bedrock responsibility of the union training centres. They emphasized that

¹² Units of competence refers to competency standards and these standards represent the industry benchmarks for skills, knowledge and attributes required to perform a job at a certain level (Education Bureau, 2011).

the ideal of devising programmes to meet all the union members' study needs has not changed; however, as resources are limited, they have to target the needs of the majority of union members, they base their judgement of what is required on the observation that most of their course participants attend the courses for reasons other than to attain recognized qualifications.

The CMs, therefore, drawing on their experience and the information collected daily from tutors and students, see the future direction of their union centres as servicing workers' training needs. They make the enhancement of day-to-day work-related learning a planning priority, ahead of improving workers' capabilities via award bearing courses. They expressed the conviction that the large pool of union members, the strong communication network and the role of the unions will remain the foundational strengths of their service to employees. However, there was also general acknowledgement that there is a shortage of resources, such as training facilities and professional support, as well as looming financial problems. In combination these constraints have the potential to seriously hinder the implementation of their blueprint for offering courses to employees all-round courses.

6.3 Analysis of role played by unions in Continuing Education

It was mentioned in Chapter 5 that a SWOT analysis would be used to guide the focus group participants in their discussion of several themes, i.e., the strengths, weaknesses and opportunities the Hong Kong union training centres have and the threats they are facing in the context of CE. In the final part of the focus group discussion with the CMs, they were asked to use the SWOT analysis tool to comment on the situation of the union providing training services. The CMs were asked to comment, based on their work experience and their daily contact with tutors and students, on the role played by the union in delivering CE. The researcher introduced the SWOT analysis is and how it

is used. Then the CMs were asked to compare the current situation of a union training centre with other training centres and educational institutions in Hong Kong. They were asked to give their analysis concerning four areas: strengths, weaknesses, opportunities and threats. In this part of the discussion, their earlier analysis was revisited, and based on their comments; a full picture of the direction the training offered was to take was arrived at within the analytical framework of SWOT (see Table 6.1). Using SWOT analysis, the CMs provided their comments on how the union training centres reinforce their strengths to motivate employees to undertake further study and overcome any barriers to study. They also considered how to overcome the weaknesses of the union training centres and explored the opportunities available to them to offer more courses in future.

Table 6.1: Hong Kong union training centre situation analysed by CMs using SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> • Fewer institutional barriers, due to the low threshold • Fewer psychological barriers due to sharing a voice with other unions • Fewer demographical barriers as centres are located throughout Hong Kong • Strong cohesion among union members • Union members work as tutors and give their time and knowledge to the unions and the other members (as semi-volunteers) • Members are loyal to the unions and believe in their unions and their leaders • Strong network within the unions and the communities • Strong connection with other parties and institutions • Close relationship with China Central Government • Strong solidarity among unions thus capable of fighting together for the same goal • Strong volunteer and tutor force with heart to serve union members and employees 	<ul style="list-style-type: none"> • Insufficient professional tutors a weakness of the new clerical and professional unions • Shortage of resources compared with government-subsidized institutions and NGOs • The image is not good enough to attract students other than the ordinary workers and union members • No proper promotion; no idea how to upgrade their social stature; too low a profile • Lack of confidence in senior management and office bearers of the unions to reach the relatively higher level of training offered • Management weakness in handling course accreditation

Table 6.1: Hong Kong union training centre situation analysed by CMs using SWOT (contd.)

Opportunities	Threats
<ul style="list-style-type: none"> • Newly established QF provides opportunities for unions to offer new, accredited courses • Knowledge-based economy is still the main trend pushing working adults to continue to pursue more in-depth studies covering more ground. The new residents from Mainland China with low education attainment need vocational training. • FTU, with the approval from Mainland Central Government to organize the National Trade Test in Hong Kong, is creating training needs for those having to work in Mainland China or overseas • Hong Kong SAR Government willing to allocate more resources to vocational training, illustrated by the donation of school buildings to the three umbrella unions to run HKCAAVQ and related award-bearing courses. 	<ul style="list-style-type: none"> • More competitors than before, including formal tertiary institutions offering similar low level courses • More official requirements and regulations • Lack of resources causing insufficient staff training; not enough staff to face the challenges of the knowledge-based economy • Insufficient resources to properly train tutors to meet the needs of the new trend

The SWOT analysis was used to provide a summary of the union training centres in the context of providing CE in Hong Kong, as shown in Table 6.1. Based on this analysis, the CMs outlined a future direction for the union training centres.

Strengths

One of the strengths of the union training centres is that the unions can attract workers on the lowest rung of the workers’ hierarchy to study at the centres. As the courses run at the centres are designed and managed by the centres themselves, they can set entry

and exit requirements based on the needs and the strengths of potential students. The general understanding of the nature of the unions, and the current practice of the staff and the office bearers, help not only to attract but also to retain students. As the centres have a large pool of tutors, professional support and channels to collect information, they can design courses to meet both industry needs and personal needs, resulting in a positive upwards spiral effect, i.e., more and more tutors and students will be attracted to serve and study at the centres. The unions can increase the number of service locations by making use of union premises and thus reduce the students' transport problems, which in turn helps make the courses more attractive. According to the concept "economy of scale", by fully utilizing the courses the centres have developed, the unions can employ staff at minimum cost.

Weaknesses

One of the weaknesses of the union training centres is the shortage of resources since this is a stumbling block to the extension of services to higher-level training or award-bearing courses. Although FTU Spare Time Study Centre has 50 training sub-centres located within easy reach of employees after working, they are small and have inadequate facilities, especially lacking in high tech facilities or heavy machinery, and are therefore used for providing courses that require simple facilities or for commercial or language courses. Otherwise the union training centres have to cooperate with institutions or companies that have the proper facilities to provide the desired training. Since the union training centres have the big pool of students and other organizations have the hardware, cooperation will be the way for the union centres to extend their training service.

Opportunities

One of the opportunities available to the union training centres is to offer courses with qualifications awarded by the QF. This is an important consideration when planning to extend their training services in the future as QF qualifications will be widely recognized by authorities and industry. Not only will working adults with no previous qualifications be able to get their vocational qualifications in this way, facilitating QF qualifications will also create another training market. The unions, with their close connection to industry and being members of ITAC,¹³ have had the foresight to organize courses and training that meet workers' needs. However, as mentioned by CMs, the union training centres lack the knowledge to prepare courses for accreditation, and so this is a problem they have to overcome in the near future. This problem can be solved by experience getting in the preparation of the courses for accreditation by their management staff under the help of HKCAAVQ. As the report: Partners in the quality Journey, 2010/11 annual report (Hong Kong Council for Accreditation of Academic & Vocational Qualifications, 2011) mentioned that "The HKCAAVQ makes use of various capacity building activities to prepare its key quality assurance partners, i.e. programme providers, specialist and staff, for accreditation exercises" (p. 39). It is most important that CMs let senior management know that there is a need for proper staff training.

The attitude of the SAR government is also an important consideration for the union when deciding on future plans. It is clear that the government supports the unions to organize the training under the QF banner, as evidenced by the government's allocation of school premises to them to run the courses concerned. According to the CMs, the government wants them to organize the QF-accredited courses to support the

¹³ ITAC: Industrial Training Advisory Committee which was formed under the Education Bureau to discuss the formation of the Unit of Competence and the structure of the Qualification Framework for the industries concerned

HKSAR Government in implementing the required standards in the industries concerned. It seems that there is hope that the unions will make good partners with the Government in this area, which is not sufficiently covered by the universities or other educational institutions. Support from the HKSAR Government may help to resolve the problem of insufficient union resources.

In connection with this, the China National Qualification is also an opportunity for the unions, especially the FTU. Hong Kong is part of The People's Republic of China (PRC) and there is a big labour and professional market in Mainland China. As licensing systems have been applied in some industries and for some jobs, such as plumbers, chefs and nursing staff, Hong Kong workers must obtain a licence to work in these areas in Mainland China. The vocational qualifications issued by the PRC are globally recognized as part of a reciprocal relationship, so the qualifications are also useful for those who want to emigrate to other countries. The CMs in the focus group has mentioned that there are two organizations that can carry out the trade tests for the Mainland authority, one of them being the FTU. The FTU can therefore make use of this opportunity to organize the trade tests and the pre-test preparatory courses for the workers concerned. The other workers who may not need this qualification immediately may also want to take this opportunity to obtain a globally recognized qualification and prove their competence.

The CMs pointed out that the close proximity of Hong Kong to Mainland China means that every day 75 newcomers (immigrants)¹⁴ will cross the Shenzhen border to live and work in Hong Kong. According to the Government, most of the newcomers are classified as having low education attainment, and no proper skills training. There are

¹⁴ According to the Report of Government of the HKSAR on "New Arrivals from the Mainland", 8679 one-way permit holders entered Hong Kong, with a daily average of 96 in the first quarter of 2011 (Home Affairs Department and Immigration Department, 2011, p. 2).

growing concerns that these newcomers will constitute a burden rather than a boon to Hong Kong and its economy, if the situation is not handled properly. The unions believe that it is their responsibility to provide skills training and proper civil education to the newcomers, who will, in time, become part of the Hong Kong workforce and are therefore a suitable target for the unions' educational services.

Threats

One of the threats to the union training centres is that there are more competitors than before including formal tertiary institutes offering similar low level courses. The other threats include the union centres have to face more official requirements and regulations in offering the government recognized courses or the government subsidized courses, such as ERB courses. In addition to it, the lack of resources leads that the union centres cannot employ sufficient staff or cannot offer sufficient training to their staff, then the staff meetd the problems to face the new challenges in the accreditation procedure required by HKCAAVQ and the government concerned departments, such as Education Bureau. Similarly, as the union centres do not have sufficient resource, so they cannot provide sufficient training to their tutors as well.

The most heated debate within the FTU relates to whether or not it should put a lot of effort into providing more advanced training with higher qualifications, such as bachelor's degrees. The FTU can see that there is increasing need in this area but the CMs are not accustomed to organizing these programmes. In addition, the lack of resources and proper staffing are issues that need to be dealt with before such programmes can be successfully implemented. However, the CMs do agree that they have to provide some award-bearing courses but this is not their highest priority.

6.4 Conclusion

This chapter has presented the thematic analysis produced by the CMs who participated in the focus group discussion. The CMs, all working for the same union training organisation, i.e., the FTU, with work experience ranging from five to 30 years, commented on the role played by unions in the context of CE. According to their analysis, the union has the duty to serve the employees in Hong Kong, to enhance their day-to-day work-related knowledge and skills. To enrich their quality of life is also important as it can help to extend their social network, which will ultimately benefit civil society and the employees themselves. Due to the strengths identified above, such as reducing institutional and psychological barriers to further study in union training centres, strong professional support to course design and delivery, flexible combination of courses and convenient location, and low school fee, union training centres can motivate employees to study and overcome any barriers to study. In addition, the opportunities laying ahead, such as the implementation of QF, many employees needing the courses provided to achieve the competence standard set in the industry QF, suggest that the union training centres should make use of these opportunities to play an active role in serving employees' study needs.

However, the CMs also claimed that with the advent of the knowledge-based economy and the “certificate era” in Hong Kong, many employees need qualifications, so courses resulting in a recognized qualification are one of their goals. But the weaknesses of and threats to the union training centres, such as the shortage of resources compared with government-subsidized institutions and NGOs, have prevented the union training centres from providing courses resulting in a recognized qualification.

By analysing the union training centres' strengths, weaknesses and opportunities, and the threats to them, the CMs set the priorities for the provision of courses. In order of importance, they are to provide (1) day-to-day work-related knowledge and skills, (2) social and communication techniques, (3) interesting courses, and (4) courses resulting in a recognized qualification.

Lastly, the CMs emphasized that their priorities will be changed to meet the requirements of union members in an ever-changing environment. It is their duty to help employees meet the changes in the economy and survive in the labour market.

Chapter 7

Student Focus Group Analysis

In Chapter 6, the focus group interviews of union training centre CMs were discussed and evaluated. In this chapter we will discuss the focus group of seven students who attended courses in the union training centres. This focus group was held one month after the focus group of CMs. The purpose of the student focus group was to ascertain the opinions of the role played by union training centres, as seen from the perspectives of students. Though CMs and students are directly related in the union training centre, the students as stakeholders can give their opinions and analysis from the perspective of course recipients as distinct to course providers. The students can directly provide their intrinsic feeling of how and why they chose to study in the union centre. The information provided can help the researcher analyse the themes of this research, articulate the information from the other interviews and reach conclusions about the role played by union centres in the context of CE. The student focus group interview lasted for nearly two hours on a Saturday night. This arrangement was for the convenience of the students to attend after work, the time and venue being suggested by them. The focus group was conducted in a large and quiet conference room. The environment was comfortable and the researcher arranged the seats to make sure that participants could easily hear each other's speech. The students gave their opinions and suggestions according to the pre-designed questions. The areas touched on in the focus group included the training opportunities provided by employers, the students' reasons for participating in the training courses offered by the union and their suggestions for the future development of the union courses.

As described in the methodology chapter, the purpose of the focus group was to investigate adult students' experiences as direct recipients of CE in a union training

centre and to provide an opportunity for them to articulate their critique of the unions' current roles in CE in Hong Kong. Responding to the research themes, they were asked to discuss whether they received any supports from the employers to study, why they came to the union training centre and how they chose the courses. At the end of the interview, they were asked to use the SWOT tool to analyse the strengths and weaknesses of the union, and what opportunities and threats the unions were perceived to be facing. Finally, they were asked to provide suggestions about the future role of union training centres in the context of CE.

Following thematic interpretation of the interviews, the following major themes were identified, coded and analysed:

(A) Training offered by employers

(B) Courses offered by the union centres they have joined, the reasons for studying and their observations

- (1) Why do you study?
 - (a) To learn for leisure purposes:
 - (i) Learning more for their daily life and for relaxation;
 - (ii) Health improvement;
 - (iii) Joining sports programmes for health betterment;
 - (iv) Expanding their social network; and
 - (v) To serve the community.
 - (b) To learn work related skills.
- (2) Why do you choose the union training centres?
 - (a) Low entry threshold;
 - (b) The flexible arrangements;
 - (c) The professional tutors help the students to learn;

- (d) The variety of courses attracting working adults to study;
- (e) Concentrated content paved the way for the students to learn more subjects at one time;
- (f) Systematic course arrangement to satisfy learning needs; and
- (g) Good reputation of the union inspiring confidence in the students.

(C) Their expectations of the union training courses

The participants in the focus group received invitation through the CMs and the tutors in different FTU training sub-centres. Twenty invitations were issued from different areas (different courses and different locations), but only seven students appeared in the focus group. The basic requirements of the participants were that they should study in the union centres for at least one year and be from different centres and courses.

The participants in this focus group agreed to disclose their names and they hoped their opinion could contribute to union activities in the field of CE. However, for the privacy of the students, the researcher invited them to choose the name they wished to have attached to their opinions in the research report.

7.1 Profile of students

The seven participants in the student focus group were all studying in the same union training centre, but were from different training locations (or sub-centres) and different course disciplines. Their study experience in the union centre ranged from one to thirty years, and their ages ranged from the 20's to 50's. The following are the profiles of the seven participants in this group.

(a) Student 1 (Mr A)

Mr A is a senior manager in an NGO with more than 40 years working experience and had already attained a postgraduate education level in a formal education institution. He has been studying in the union centre for nearly thirty years. He joined the gymnastics course thirty years ago when he was young, then the leadership course when he was promoted to a management position. Now he is taking subjects relevant to Chinese fortune telling (Feng Shui and Face Reading). He joined the courses for interest and with the intention of learning more about Chinese traditional culture. He considers that the knowledge he has acquired from his chosen courses has become an important tool in his management of staff. As he explained, he can make use of the knowledge from interesting courses to provide a wider range of topics in his communication with colleagues, and uses the techniques of Chinese tradition of Face Reading to discern what his staffs are thinking. He explained that quite a lot of students in the management level now apply this technique in the selection of staff. As such he believed that what is “interesting” can at last be applied in a “professional” sense.

(b) Student 2 (Hoi)

Hoi is a civil servant with more than 20 years working experience and postgraduate education attainment. She has been studying in the union centre for more than five years. The courses she has taken include Chinese fortune telling, Thai catering, hairdressing, beauty and make up techniques. She explained that she has taken these courses for reasons of personal interest, after-work relaxation, and as she put it, to learn new skills to “serve the community”.

(c) Student 3 (Lavina)

Lavina is currently a bar manager and has been studying for a masters degree in Business Administration at the union centre for nearly one year. The course is

delivered at the union centre but the qualification is conferred by a Philippine university. She is taking this course to upgrade her educational attainments, and she sees this as very important in the context of a knowledge-based economy. She also added that the course fee at the union centre is affordable. Before the master course, she studied catering techniques in this union centre for nearly two years.

(d) Student 4 (Veer)

Veer is currently a shipping clerk in an import and export (I/E) company. She has been studying in the union centre for more than three years. The courses she has taken include shipping, I/E, beauty and make up techniques, and sign language. She takes the courses partly to enhance her work ability and partly for interest and relaxation.

(e) Student 5 (Mei)

Mei was unemployed at the time of the focus group. She had been an accounting clerk for more than 10 years. The courses she has taken include accounting, computer studies, and commerce studies. She takes the courses for-work related needs. She has been studying in the union centre for nearly 10 years.

(f) Student 6 (Sam)

Sam is currently working as a clerk for the Visa Department of a China State Bank in Hong Kong. He has been studying Putonghua (Mandarin) courses for nearly one year. He can apply this knowledge directly to his daily work. He is considering whether he will continue to study the award-bearing courses in the union training centre. He considered whether the qualification awarded in this union centre is recognized by his company. After the focus group, he would take the information collected in the discussion to his boss for reference.

(g) Student 7 (Shirley)

Shirley is currently a freelance trainer for different organizations in the subjects of beauty therapy and communication skills. She has been studying in the union centre for more than twenty years. She has taken more than ten courses, including beauty therapy, communication skills, singing, dancing, yoga, and workplace training and assessment (with qualifications awarded by TAFE).

The focus group was conducted for the purpose of analysing the union's role in CE from the perspective of the course participants. The interviews touched on topics and issues that can be grouped under the following headings:

- (A) the training offered by employers;
- (B) the courses offered by the union centres they have joined, the reasons for studying and their observations;
- (C) their expectations of the union training courses.

7.2 Analysis of discussion in student focus group

The analysis of this focus group will be related to the three thematic analyses outlined above.

7.2.1 Training offered by employers

From the opinions of the focus group participants, the employers can be categorized into two groups, one being large corporate or NGOs, and the being small/medium sized companies. The participants, working in the former group, observed that their companies offered them generous internal or external training opportunities. Hoi, a mid-level civil servant, pointed out that the government has a training department to arrange the training for different departments and individuals and Mr A also stated that

the NGO he is currently working for also provides staff training opportunities. Lavina and Sam also supported the notion that the larger companies usually provide on-the-job training. However they emphasized that the training is only related to their jobs or within the scope of their work. Hoi and Mr A agreed with them. Lavina said that the company where she was previously employed only selected job-related courses and did not allow the staff to choose for themselves. Sam also noted that in his bank, his department only organizes courses related to visa selling, while courses related to other skills and knowledge within the scope of bank business are not offered. Putonghua is a must in his work as the bank he is working for is the China state Bank. His department regards this as a skill the staff should have acquired before entering the company. Shirley added that she has worked for different sized companies. She agreed that a larger company will provide staff training. She was sent to America for one month to receive product knowledge training in a multinational company.

However, the small companies discussed in this focus group do not provide training. The participants emphasized that the small/medium sized companies only employ people with the required skills, because they will not provide any training to the staff. The participants pointed that small companies do not generally have the resources to provide staff training, although the employers agree that training is very important to enhance the company's competitiveness and to retain capable staff. On occasion as Veer explained, a smaller company may offer some training. She gave an example in which following a change in customs law, new customs forms were introduced and staff-members were sent to training workshops to learn the new guidelines about how to make a proper customs declaration.

The participants also pointed out that quite a lot of companies do not have their own training department and do not organize courses for the staff, although they will

subsidize the staff to learn, paying for job related courses. The focus group participants observed that they were sometimes given refunds from their companies after the completion of the courses in the union centres. However, they unanimously agreed that they would not present the receipt to the companies for reimbursement, for two reasons. The first is that the course fee is so low that they won't waste time filling in the refund form. The second is that they do not want the companies to know they are studying in the union training centres. Mr A said that he never lets his company know that he studies at a union centre as he is not sure whether the company has had any bad experiences with the union. They expressed the view that most employers are afraid of the Hong Kong union because of its political background and that, therefore, employers may prefer their staff not to be connected with the union.

With the information offered by the participants, the conclusion can be drawn that the majority of employers in Hong Kong are not interested in offering staff training over and above that which is essential to the performance of their job. The government, some big NGOs, and the large companies are exceptions, providing more training opportunities to their staff. But the content of the training is only within the scope of their business. The kinds of training provided include internal on-the-job training and external out-source training. Some companies subsidize their staff to study suitable courses in other training organizations.

However, according to government figures, approximately 80% of companies in Hong Kong are classified as small or medium companies and they do not consider offering training to their employees. This is partly because they do not have the resources to do so. However, in Hong Kong's growing, knowledge-based economic environment, continuous learning and competitiveness in the labour market are now directly linked. Whether training is provided by the employers or sourced by the employees

themselves, it is clear that the employees are driven to learn more things and in greater depth and breadth for the purpose of advancing their career path and upgrading their current skills for daily work.

According to the participants in this focus group, employers in Hong Kong basically do not support their staff, by means of study leave or subsidising course fees, but they require the staff to have the required techniques or knowledge to carry out their work. In this situation, the employees have to learn by their own means, as they need to demonstrate in their workplace that they have the required techniques, regardless whether they have a formal qualification. For this reason the participants in this focus group undertake part time study.

7.2.2 Reasons for taking part-time study and reasons for choosing union centre as part-time course provider

As mentioned above, the participating employees want to remain competitive, so they take the courses. The following section investigates why they undertake part time study and choose the courses offered by the union training centres, and discusses the background to their study choices. In this part of the thematic analysis, two categories emerged: (I) Reasons for studying? (II) Reasons for choosing the union training centres as part time course providers?

7.2.2.1 Reasons for studying

“Why do you study?” This is a straightforward question asked by the researcher. The researcher did not ask whether they needed to learn. When asked for their reasons for studying in the union centres, the participants provided a simple response: that they want to enrich their leisure time and upgrade their work capabilities. Two participants of the seven, working for an NGO and a government department, reflected they study

mostly for interest, leisure and networking. The other five participants studied for the purposes of relaxation and for work related skills. These two purposes will be analysed under the two broad categories as: (a) study for leisure, relaxation and networking; and (b) study for work related skills.

7.2.2.1.1 Reasons for study: leisure, relaxation and networking

The courses provided by the union centre come in the leisure type category, include the courses related to sports and health, music and dancing, beauty and fashion, calligraphy and painting, house decoration and maintenance and elements of Chinese traditional culture, such as Feng Shui and Face Reading. As analysed in the focus group of centre managers, these interest and leisure type courses are not only for leisure and relaxation, but may eventually become work related for some students. The two participants working in the NGO and government department joined the courses mostly for leisure purposes. They claimed that they initially studied not for work related reasons, but acknowledged that they could apply the techniques learnt to their work.

The other five participants claimed that they learnt for both leisure purposes and to develop working skills and capabilities in the union training centre. They agreed that they joined the leisure or interest courses for the following reasons: (i) to increase their knowledge of matters related to daily life such as natural healing, Chinese medicine, hair styling, cooking, Chinese classical poetry, culture, western and Chinese fortune telling; (ii) health improvement; (iii) health improvement through increased sporting activity; and (iv) to expand their social network. Analysis of the leisure purposes follows.

(i) Learning more for their daily life and for relaxation

The participants emphasized that most of the employers do not offer leisure or sports activity courses to their employees. Most of the courses offered by employers, if offered at all, are directly related to their work. Some companies provide war games (such as paintball) to the staff, but this is for building team-work in the company, rather than for relaxation. The participants confessed that they felt pressured into joining these activities organized by the companies. They admitted to wanting to relax after work, and to learn something that can help them relax. They pointed out that as most of Hong Kong's employees feel stressed in their work, they want to take some leisure courses or activities to release their stress. There are hundreds of interest courses offered by the union training centres, such as necklace making, fashion accessory making, sewing, singing, fortune telling, geomancy, palm-reading, astrology, acupuncture, Chinese medical knowledge, and interior design.

Two of the participants explained that their reason for studying is very simple; to find a way to relax outside of their working lives. The other participants Veer and Mei also pointed out that they also studied for leisure and relaxation. They pointed out that as they are clerical workers, they are accustomed to sitting in front of a computer screen and doing the same routine work every day. They want to use activities outside work to change the way they feel. They want to remove their work pressure outside work hours. They believe that the joyful learning experience they have is different from any feeling gained from their work. They pointed out that they want to learn how to relax. Singing in front of an audience can be joyful for some people (but of course means pressure to others, at the same time). It is subjective. The interviewees agreed that learning to sing is a must if one wants to enjoy singing in front of an audience. They believed that relaxation is important to build up their working attitude and good for

their health. Veer said that there are more than 100 kinds of sport and leisure courses they can join in the union training centres, many of which cannot be found in other community centres. She added that the leisure courses are very important to upgrading their working spirit. She said she has joined a lot of skills upgrading courses in the union centres, with some courses giving her a sense of relaxation. She accepts that her idea of relaxation may not be the same as that of her classmates. She cited her learning sign language as an example to explain why she joins the courses. She joined this course simply for interest. She does not care whether the skills learnt in the classroom are useful or not, but just enjoys the learning process. She studies different courses in the union centres from Monday to Saturday. Among those courses, she classified some as personal interest courses and some as work related skills courses. From her comments, it can be deduced that she tries to make use of different kinds of courses to balance her emotions and to relax. In a similar vein, Hoi also mentioned that she studies Thai catering in the union centres for relaxation. She seldom applies the Thai cooking knowledge gained in the classroom to her daily work. However, while she was saying it was useless to her work, she mentioned that she talked about her cooking knowledge with her colleague, and it could help her build up a relationship with her colleagues. Mr A also admitted that the results of studying Feng Shui and Face Reading have spun off into work related skills. As mentioned in the first part of this chapter, he made use of the Face Reading technique to estimate subordinate staff thinking and to use it in extending their conversation topics which is believed useful in building up a close relationship with colleagues.

Relaxation is very important to the health of residents of large and hectic cities. In addition, knowing how to take care of one's health is also important to society and can

help reduce the medical expenses as a whole. Apart from the relaxation, health improvement is also an important motivation for joining the courses.

(ii) Health Improvement

According to the analysis of participants, they liked to join the courses in union centres to learn about health and to learn health promoting exercise techniques, such as Tai Chi.¹⁵ The courses offered by the union centres include Chinese medicine, basic health knowledge, herbal usage etc. Participants emphasized that care of self is important in modern societies. Gaining basic health knowledge and natural healing knowledge means they can achieve the purpose of “helping others and to help ourselves”. The participant, Shirley, told the researcher that she studied some Chinese medicine and nutrition courses for the purpose of keeping herself in good health and beauty. As she was not qualified to study Chinese medicine courses in the formal education institutions, she emphasized that the union centre gave her the chance to join the course and gain knowledge and expertise. She converted this knowledge into a working skill when she became a beauty therapist and tutor. Health care is part of our daily life; many believe that everybody should have basic health knowledge. However the participants of the focus group pointed out that it is not easy to obtain systematic training other than in the formal educational institutions. The participants recognized the union centres provide opportunities for knowledge gain that are not being offered elsewhere.

In addition, routine physical exercise is also important in improving the health conditions of society. The participants pointed out that they also join the exercise courses in the union centres for the purpose of achieving a state of wellness.

¹⁵ Tai Chi is a type of martial art and is currently classified as a sport by the National Sports Institute.

(iii) Joining sports programmes for health betterment

The participants joined many physical exercises and traditional Chinese Kung Fu courses in the union centres. The courses provided by the union centres are varied, and include different sports, such as swimming and aerobic dance. The students can join the courses as a part of their routine exercise programme, such as playing in clubs or sports centres. Some of the students regarded the courses as pre-training courses to learn how to play a new sport properly and safely. They know that there are many activities they can join in the community centres and private clubs. However they do not know how to play, so they have to learn first. It is known that sports are important in building up a healthy society. The participants believed that in this regard, the union centres make a significant contribution. The students also pointed out that joining the leisure courses brings with it the added benefit of expanding their social network.

(iv) Expanding the social network

The participants of the focus group agreed that they can expand their social network when they join leisure courses. They can make some friends with common interests in the courses they have joined. The courses put the participants in contact with classmates from different industries and different walks of life. By expanding their social network, this may help them have a more joyful and fruitful life.

It is common practice for working adults to want to build up a social network outside of their work-place. Moreover, as Shirley said, she once joined the “business-starting course” to make friends and to meet the potential business partners. This social connection was seen as very important networking for their future careers.

(v) To serve the community

To be a volunteer is generally considered to be the fulfilment of a social responsibility that has the added benefit of promoting self-actualization. The participants in the focus group all expressed a belief in the importance of helping the under-privileged. All of them have taken part in voluntary work of one kind or another. The participant Hoi stated that she likes to help the elderly by cutting their hair while Veer likes to help the deaf. They expressed interest in different aspects of voluntary work. However, to be a volunteer also needs special skills. Volunteers need training. As Hoi said she wanted to serve the elderly; she learnt haircutting techniques so as to serve them in the senior citizens' centre.

Veer related similar experiences from her sign language learning. She learnt sign language out of her own curiosity at first. She now applies this technique to serve deaf people. Mr A learnt Chinese traditional fortune telling for the purpose of helping other people to enhance their confidence. As Mr A said, this fortune telling technique can be seen as his interest, but on the other hand it can also be seen as a tool for enhancing his management techniques. As earlier mentioned, he can use this technique to enrich his talking topics with work colleagues while sometimes using the philosophy learned from the fortune telling to estimate the thinking of his staff. However, this was not his original motivation in learning fortune telling.

(vi) Summary

The focus group has shown us that the students join the courses for different purposes. A minority of the participants initially study for leisure as their primary purpose but some are involved in study for both leisure and work related skills. For those who primarily studied for interest and relaxation, the study result eventually spun off into their work related skills. Shirley's case is not uncommon. Initially she studied for

interest, including such subjects Chinese medicine, but eventually the knowledge gained enabled her to apply her skills professionally in beauty therapy and teaching. In addition, the participants learnt for the purposes of obtaining techniques to serve the community. The analysis of the centre managers' responses indicated that one of their aims for the provision of study opportunities was to encourage Hong Kong to be a civil society. However, from the analysis of the focus group of employee participants, the majority of them studied for career needs as their primary purpose, rather than interest.

7.2.2.1.2 Reasons for study: enhancement of work related skill and knowledge

To a certain degree, the focus group highlighted that the participants joining the courses are working to upgrade vertically and extend horizontally through the enhancement of their working skills by obtaining recognized qualifications.

They pointed out that they have to deal with different kinds of work every day. However their employers do not provide training and just demand that they finish their work. Failure to comply will result in them losing their jobs. Facing such a fierce working environment, everybody in the company has to learn how to deal with the continually changing work requirements. However, as most of the employers will not provide training, they have to find their own way to learn the skills needed for their jobs.

Veer pointed out that she studied shipping techniques and document handling in the union centre when she was working as a shipping clerk. She said that when she graduated from Form 5, she entered into the labour market and was luckily employed as a shipping clerk. However she did not have document handling techniques. She had to ask her seniors for instruction. Her colleagues reluctantly taught her, although they were also very busy and felt threatened that their new colleague would take their jobs.

So Veer took practical courses to learn how to deal with her daily work. She added that if one can show a certificate, one can convince others to believe you have the ability to handle the work. Veer is not the only student to take classes at the centres for this reason. Mei shared a similar experience. After years of working in the company as an accounting clerk, she had to learn MYOB (accounting computer software) to deal with the computerized account system. Her company just asked her to do so without offering any training. Mei pointed out that job security is very dependent on continual upgrading of the necessary skills to do the job. She also shared her experience of how to operate “Windows”. She did not know all the functions provided by the software, so she undertook a course provided by a union training centre to learn how to use the software. She finally found out that she could handle the work faster than before as she could manipulate this software on a larger scale. Whenever there is any upgrade to the software in her work, she will attend the related courses to learn. Learning in order to keep up with job requirements was the purpose expressed by many students in the focus group. As mentioned in the first paragraph, the employers, especially those in the small and medium sizes companies, are often unwilling or unable to provide training for their staff. The employers are the beneficiaries of the employees’ technique, skills, and the knowledge. The employers do not see staff training as their responsibility. Under this circumstance, the employees have to pay to learn by themselves.

The techniques, skills or knowledge mentioned above were quite basic, not in the category of advanced study, and of a more practical nature, rather than academic. In the union centres, the students can find courses that are almost tailor-made to fit their motivation to grasp the knowledge needed immediately.

Work related knowledge, for the purpose of this study, can be categorized as either “vertical” or “horizontal”. Knowledge related to the vertical category is

characteristically seen as enhancing progression or promotion. Horizontal knowledge relates to knowledge confined to the fulfilment of current roles and tasks. The Hong Kong employees have to deal with various work requirements, as mentioned before, so to immediately learn the vertical knowledge related to their current work is one of their reasons for studying. Another reason is to extend the scope of their knowledge while also broadening their working scope as preparation for future needs. It is to stretch one's working life, as exemplified in Shirley's story: Shirley studied eloquence training, interpersonal skills, Chinese medicine usage, and a train-the-trainer course leading to awards by C&G (see Chapter 6) and TAFE in the union centres when she was a beauty therapist. Her study objective is similar to other participants, namely, to accrue other knowledge related to work but not directly applicable at the time that she studied. Shirley added that her courses paid off when the company needed the techniques she had learned and she became a trainer in the company. This is a common story of the participants in the focus group. Veer studied accounting when she was a shipping clerk. Mei took a lot of courses related to shipping and merchandizing and Hoi studied Thai language. They admitted that the training provided by the union centres extended their career life.

In addition to obtaining the practical skills, gaining qualifications is also one of the positives that they identified. Much has been said in the above paragraphs about the C&G. It reflects the idea that course participants are in need of qualifications as well as the knowledge. In addition to formal education qualifications, such as HKCEE, university bachelor's degree, etc., vocational qualifications are also important in the workplace. The interviewees agreed that some employers only consider whether a potential has the skills they require, rather than the potential to grow into a job. Veer said that the companies will write down the specifications of the positions needed, and

then the applicants have to submit their application with the qualifications transcript when applying for the jobs. Mei said she was an accounting clerk in a company after graduating from Form 5. She had plenty of experience in dealing with difficult accounting problems. However, when she applied for the same position in another company, they required her to have the LCCI intermediate level qualifications. She believed that her skills were far above the required level but had no such formal qualifications. She had to study in the union centres in order to obtain the qualifications. Meanwhile, the other participants in the focus group related similar experiences. They expressed the belief that the qualifications awarded by international institutions, such as C&G, LCCI and also TAFE, are commonly recognized by Hong Kong employers. The other reason they gave for preferring courses leading to formal qualification related to the fact that some of the courses offered in the union centres have been accredited by the awarding bodies. This means that students can obtain the award directly while completing the course and pass the internal exam and there is no need to attend the open examination offered by those awarding bodies.

In addition, the students were also eager to get the certificates and diplomas issued by the union centres, as quite a lot of the employers recognized the qualifications issued by the union centres. Sam said he wanted to join the courses leading to a university bachelor's degree. The courses, which are accredited by foreign universities, are conducted in the union centres and eventually awarded with a bachelor's degree, are for working adults to obtain the higher professional qualifications.

7.2.2.1.3 Summary

In the preceding section it was seen how the participants freely expressed their viewpoints on the importance of studying in Hong Kong and indicated their preferences for studying in the union training centres. The common theme is that many of the courses cannot be found, other than in the union centres. The majority of the students gave a high priority to the acquisition of work related skills and knowledge. This knowledge can be categorized as “vertical”, whereas “horizontal” knowledge is study for reasons of leisure, relaxation and networking, in which a significant proportion of students participated. The participants of the focus group believed that study for leisure and relaxation can enrich the quality of their life and improve their health, but eventually even leisure study was able to be related to work related skills and the extension of personal networks. The participants clearly explained their reasons for choosing to study in the union centres, and the analysis of these will be presented in the next section.

7.2.2.2 Reasons to choose union training centre as part-time study course providers?

Focus group participants were directly asked: “Why do you choose to study in trade union training centres?”. This question was aimed at finding out why participants choose union centres in preference to other NGOs or private providers. In the thematic analysis, account was taken of the frequency of occurrence of particular reasons, together with an evaluation of the language used by participants. This enabled a ranking of the thematic categories, with the reasons for choosing a union centre presented in the following order of importance.

7.2.2.2.1 Flexible entry requirement

The students thought that they could enter any course they wished, excepting those requiring a Form Five graduate or diploma as an entry requirement. One of the interviewees, Mei, said she did not have a high educational attainment. However she demonstrated that she had considerable knowledge and experience in the workplace. Formal education institutions required formal qualifications for entry. She did not have those qualifications, so she could not enter those schools. Lavina shared a similar experience. She tried to enrol in a formal tertiary institution, but was unsuccessful as she failed to meet the entry requirements. She entered a similar course in the union centre as she could fulfil the study requirements, even though she did not have the formal certificate to show that she was able to meet the entry requirements. Her experience and knowledge from her work and other studies helped her to understand the course content. The participants thought that union training centres should provide opportunities for study in any course provided that the applicants have the interest and ability to learn. The focus group also observed that the low or even non-existent threshold entry requirements encouraged them to study and to explore their potential. The union centres provided the opportunities to them to choose what they wanted and what they needed. They felt that they know how to select the right courses for themselves. In addition, factors such as the large training centres, flexible learning hours and low school fees were seen as important elements attracting the student to study.

7.2.2.2.2 Low cost, convenience of study location and study time

The students stated that the Federation of Trade Unions (FTU) could offer nearly 50 learning centres covering all districts in Hong Kong. They pointed out that the convenience offered by the union training centres provides them with the opportunity

to study after work. There must be a centre near one's working place, they said. Veer added that even in a remote area such as Yuen Long¹⁶, there is a centre. Moreover, the different starting times of most courses let the adult learners choose the most suitable one for their needs and convenience. One example quoted by Shirley was the train the trainer course; she needed to pay HK\$3,000 to the union centre, compared with HK\$10,000 in other institutions. She emphasized that the courses covered the same content, leading to the same C&G award. She believed that this is because the union offered the course to the employees, not for commercial gain, but as a service to employees in Hong Kong. The union training centres charged a reasonable price only to cover the basic costs. As Shirley is also teaching in some commercial training centres, she was able to provide information on this point to assist the analysis.

According to Shirley's analysis, the low charge does not necessarily mean a low quality service offered by the union training centres. She said, and this was supported by other participants, that most of the tutors are well qualified (but does not mean the tutors have got lots of certificates) and they are very enthusiastic about teaching adult learners. "They are very good tutors and try to teach you everything they know" (S7. 22.05.2010). The participants were impressed by the attitude of the tutors in the union centres.

But they commonly criticized the facilities in the union training centres. They expressed their understanding that the union lacks resources and does not charge high training fees. However, the shortage of facilities also hinders interest in attending some courses, such as beauty therapy. Shirley pointed that one way to circumvent this problem was to study the theory in the union centre but to have the practice in other

¹⁶ Yuen Long is in the Northern part of the New Territories, which is near the border of Hong Kong and Mainland China.

professional institutions. This is because they believe that tutors in the union centres are professional, enthusiastic and able to transfer their knowledge, skills and care to the students.

7.2.2.2.3 Role of tutors in union centres

Most of the tutors in the union centres are active in industry. The participants expressed their admiration of the tutors who were generally regarded as having good qualifications, the latest industrial knowledge, and enthusiastic attitudes. They expressed the belief that the tutors supported the principles and values of the union and that these beliefs are reflected in the tutors' willingness to contribute to the unions' courses. Shirley, as a part time tutor in the union centre, added that the tutors in the union centres are paid less than the market rate for tutors. However, as they share the common ideals and vision of the union, so they are committed to serving the comparatively less able and the underprivileged in society. Compared with the tutors in other tertiary institutions, Shirley saw the tutors who work in the other institutions having good in qualifications but bad teaching behaviours. The case she quoted was a nutrition course in a top tertiary institution. She said the institution arranged different tutors for every lesson, leading to a lack of continuity in teaching throughout the course. This made the students quickly lose their enthusiasm to study. So Shirley's respect for the tertiary school was considerably diminished. The union centres have very good tutors and that can be an attractive benefit for students to enrol for study in union courses.

The tutors in the union centres do not just deliver knowledge and skills; they also take care of the students and even help them solve their work related problems after lessons. The tutors, although they only teach one session per week in the centre, can develop a close rapport with the students. Mei and Veer pointed out that their tutors even gave

their telephone numbers out in case they had any problems and they needed to call the tutor for advice. They expressed the view that the caring attitude of the tutors motivated them to learn and increased their confidence to learn. One important point they gave is that they felt less stressed in studying in the union centres because the tutors were their friends. In addition, the flexible arrangement mentioned before also helped to reduce the level of stress involved in studying after work. The students added that the various time and location choices were very useful. They ascertained that the offering of a wide range of courses in union centres is another point of attraction.

7.2.2.2.4 Variety of courses attracting working adults to study

While talking about the variety of the courses, the participants were excited to count the courses in which they had enrolled and were studying. They drew an analogy between the prospectus of the FTU union training centre and the “Yellow Pages”, a telephone directory, as they are approximately the same thickness. They said that there was bound to be something they would like as there were so many courses available, of which quite a lot cannot be found in other institutions and training centres, even if the other institution does well on convenience. Veer said she likes to learn Chinese calligraphy, sign language, clay doll making, and import and export knowledge. She can find all the courses matching her interest in the prospectus, which means she can attend all of them in the same union centre. However, other institutions and learning centres cannot meet all her needs in this sense. The interviewees said that when they read the prospectus, they could find other courses they would never normally think about and that the prospectus helped them explore other potential areas of interests. When Hoi was talking about a Thai cooking course, Veer said that she also wanted to learn it. They regard the prospectus as a source book that they liked to share with their colleagues. Sam said that one day he took the prospectus to consult his boss to apply

for a sponsorship fee from his company. When he presented this prospectus to his boss, his boss and other colleagues spotted many courses they liked and asked him to enrol for them. Sam shared the viewpoint that the variety of the courses attracts the adult learners to think about which course contains the content in which they were interested and may have neglected before. “And once they start to learn, the learning turbo cannot stop,” they said (STs 22.05.2010).

In the following section, the analysis will present the most important theme to emerge from this part of the interview. This refers to the role of low cost, intensive delivery courses in attracting students to take up study with the union centres.

7.2.2.2.5 Intensive courses covering short time frame

As there is such a variety of courses offered by the union centres, participants said that there are many courses they liked and indeed they talked of attending many different subjects for courses in a week. They agreed that the arrangement of the intensive teaching allowed them to have more time to attend more courses. As adult learners they have a basic level of knowledge. They can make use of their existing knowledge to learn more. They can easily relate the new knowledge to the acquired knowledge, thus increasing their learning speed. This viewpoint reflected Knowles’ Andragogy theory, that: “Adults have more to contribute to the learning of others; for most kinds of learning, they are themselves a rich resource for learning; Adults have a richer foundation of experience to which to relate new experiences (and new learnings tend to take on meaning as we are able to relate them to our past experience)” (Knowles 1970). The participants have not studied education theory but fully expressed Knowles’ idea regarding the speed of knowledge acquisition, as they can relate their new knowledge to their existing knowledge gained at work or in daily life. Shirley compared her union centre beauty therapist-training course with the one she took in

another institution. She had to pay HK\$1,000 at the union centre but HK\$10,000 at another institution. She attended only one lesson per week for three months at the union centre but for half a year at the other institution. The important point she raised was that she was already involved in the industry; the things she needed from the course were the concentrated theory and the C&G certificate, whilst she felt that for her, the hands on knowledge was a waste of time. She concurred with the other students' views that the arrangements in the union centre are well matched to the needs of adult learners. They considered that as the union centres are not primarily profit oriented, unlike other private institutions, they can arrange courses more appropriately to cater for the needs of adult learners. They unanimously expressed the view that the nature of the union centres is to focus on the essentials of training; to "get to the point", because they are not looking for profits but providing a service to the employees. As the tutors are actively working in the labour market, they know what the important teaching points are that the learner should know and how they can make use of their own time and workplace to practice or reflect on these points. This can save the students time in the classroom and enable more efficient knowledge acquisition. Meanwhile, some participants argued that this arrangement is good for those with the related knowledge but not always suitable to those without such related knowledge. Sam gave the example that when he learnt Putonghua (Mandarin), the tutor wanted to teach everything within a short time. However, he found some could not keep up with the pace of learning, as this subject was totally new to them. However, Sam added that the students did not mind as the school fees were very low; they were willing to pay to join the same course again.

Indeed, the good quality tutors, many convenient locations, and the variety of courses are the main attractions listed by the students. Moreover, the systematic sequencing

and course arrangements are also attractive for the adult learners to study in the union centres. In the next section, the thematic analysis outlines the importance of the logical sequencing of courses attracting the students to study in union training centres,

7.2.2.2.6 Logical sequencing of courses to ensure easier progression to higher levels

According to the analysis of the participants in this focus group, the courses should be arranged systematically, especially those being classified as academic courses. However, the participants reflected that many courses classified as being for interest or short courses, are not arranged systematically in a lot of community centres and the NGOs. As mentioned before, the students like to take up part time study in practical programmes and health related seminars, however those containing little amounts of fragmented knowledge do not meet their needs. They appreciate the fact that that the logical sequencing courses offered in the union centres let them study step by step, to progress their learning from the beginners to advanced level. In particular, with sports courses, as this is the common course the participants in this interview liked to join, the interviewees pointed out that the community centre only allows the participants to play. Even when there is a coach, the coach is not necessarily professional. His or her primary role is to supervise the proceedings and to prevent, and if necessary, report the accidents. Lavina, Hoi, and Mei said the community centres are very loose in organizing courses. They said the participants at the community centre do not appear to be concerned with discipline and they seem to regard the course as a social gathering. However the interviewees expressed the view that the adult learners liked to learn under less pressure but not zero pressure, as they believe that there must be some structure and discipline for continuous study to work. They pointed out that they can learn the sports, such as fitness training, step by step, and the tutor in the training

centre would teach the theory and guide the students to practise. Obviously it is quite different from the practice of the community centre. The logical sequencing arrangement of the courses in the union centres can attract the students to attend the lessons they think to be worth attending. They agreed that if the course is too loose and without substantive content, it cannot motivate them to attend. Moreover, they expressed the view that they do have the same feeling of some of the private institutions. In this respect they raised another concern, namely the reputation of the school, noting that as the private fitness training centre could easily close its doors to business with the customers suffering the loss of their prepaid membership fee and the coaching fee. The next section will discuss the thematic analysis of the reputation of the union training centre.

7.2.2.2.7 Union centres' reputation as course provider

The reputation of the union is one of the guarantees to the employees to study in its centres. The participants indicated that they believe the union will not close down as they are registered under the Union Registration Ordinance. They agreed unanimously that their money, their study opportunities and their confidence are guaranteed. At the time the focus group was held, there were reports that two private yoga schools had closed down and the members of the schools lost thousands of dollars. Mei is one of the yoga students in the union centre; she told the group that she felt lucky to be studying in the union centre. Veer said that the private fitness training schools always attract people to be their members by issuing bundles of coupons and discounts. People have to pre-pay for the training and the courses in those centres. Sometimes the pre-payment is up to one year in advance. As this is a commercial environment, there is less protection for the consumers. Even when an establishment closes down, the consumer cannot get anything back; all they can do is to lodge details of the case with

the police. In the union centres, the strong backing of the union protects the consumers' interests, both financially and in terms of their study opportunities.

However, the participants also raised their concern about the qualifications. Shirley pointed out when she wants to attend some more advanced courses she will choose to learn in the other institutions, recognised as providers of "higher education" such as the CE departments of the universities. In the discussion, Sam also asked the other participants whether he should take the degree course that will be awarded by an overseas university in the union centre. This suggests that the students do not have the confidence to study higher academic level courses in the union training centres. Lavina, another member in the focus group, encouraged Sam to study, as she is a current student in a similar programme and is confident in what she has undertaken.

According to the analysis, the union centres' status in the high level course provision, such as level four (of the Hong Kong QF) or above level awarded courses, is not well accepted by two of the participants in the focus group interview. However, the participants accepted that the tutors with plenty of knowledge gained in their current industries and disciplines can help the students a lot in getting work related knowledge and relevant knowledge related to daily life. In addition, they referenced the tutors' good teaching attitude and behaviour, contributing to the development of a good reputation for the union centre and the union image of "caring employees" helps build up the reputation for the union training centre which is attracting employees to study with the union centres.

7.2.2.2.8 Summary

The members of the focus group were asked how the union centres met their learning demands and why they chose to study in the union centres. Their opinions and analyses

can be summarized as follows: As the legally registered unions back up the union centres,¹⁷ they can line up their affiliated unions' premises to become the training centres. This will provide a big pool of training centres covering all the districts of Hong Kong. The employees can study in the venues convenient to them and they can choose flexible study times that equip them with more study opportunities.

The union, by its very nature, can attract tutors who are union members and employed professionals. The tutors regard the teaching as a service to other members. These tutors are invaluable to the union and to the students. They deliver the knowledge and information with enthusiasm for the benefit of their students and the union as a whole. Moreover, as they have a rapport with the courses participants, they do not give them too much pressure; and instead they give them, the students, greater confidence to study. Other institutions may not have such good tutors. Meanwhile the stable, flexible and systematic study programmes offered by the union centres also give the adult learners confidence to attempt and to maintain their study progress. The tremendous study programmes encourage adult learners to explore their potential and enhance their ability to find a new working life.

However, the focus group also noted that the shortage of resources of the union training centres produce some problems that may hinder the provision of suitable training. The strength of the union centres does not lie in the provision of higher-level education. The students complained that quite often, when they study to a certain level, they can go no further. There is, in effect, an educational glass ceiling. They are of the opinion that the union centres should improve their service in this area. The following is the analysis of the participants' opinions regarding the future need.

¹⁷ According to Hong Kong Trade Unions Ordinance, trade union has to register to the Union Registrar.

7.2.3 Interviewees' expectations of union in connection with training

At the end of the focus group interview, the researcher invited the interviewees to offer their expectations of union centres in the context of the CE provision. The participants were led to make use of the SWOT tool to analyse the situation of the union centres and include their suggestions to improve the services to meet the needs of adult learners and employees. This analysis tool applied in the focus group was for the purpose of guiding the participants to conclude their analysis using a systematic framework to articulate their thinking and give expression to their expectations about how the union training centre could play their role in the context of CE in Hong Kong.

The following is the summary of their opinions with respect to the situation of the union centres.

Table 7.1: Hong Kong union training centre situation analysed by a focus group of course participants using SWOT

<p>Strengths</p> <ul style="list-style-type: none"> • More than 50 training centres covering Hong Kong • A big pool of professional and loyal tutors with enthusiasm in knowledge delivering • A variety of courses attracting the adult learners to explore their potential • Low threshold providing learning opportunities to the adult learners • Comparatively low school fees • Union image giving confidence to the adult learners to study 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Limited higher education qualifications offered • A shortage of training facilities • Low reputation in awarding of recognized qualifications • Poor promotion channel • Too strong workers' image
<p>Opportunities</p> <ul style="list-style-type: none"> • The newly established qualification framework creating studying opportunities to offer recognized courses and qualifications • The ever-changing and knowledge-based economy pushing the adult learners to study • The large labour market in Mainland China also creating the way for the union to offer training to the Hong Kong workers, as the Hong Kong union has a close relationship with the mainland central government • The expansion of government subsidies for working adults to study, encourages them to study 	<p>Threats</p> <ul style="list-style-type: none"> • The professional institutions, such as CE departments of universities offering similar interest courses • The commercial schools with good reputations in specific professions also receiving government subsidies to offer similar courses • The employers' increasing need of demand for professional recognition • More competition from the vocational training institutions, such as Vocational Training Council

In the discussion, the participants clearly expressed their concerns about the qualifications that the union centres cannot offer. They pointed out that the tutors are

professionals and they can learn a lot from the courses. However, their employers are looking for recognised qualifications that demonstrate that their employees gained the knowledge but they may not recognize certificates issued by union centres. Sam said he was encouraged to study a programme with publicly recognized qualifications. He had to consult his boss about whether the company recognized the qualifications jointly issued by the union training centre and the formal educational institution, because it was the company standard to recognize the qualifications and this will be a benchmark to decide whether he can retain his position and even be promoted. In this way, the participants believe that the union centres should undertake more joint programmes with the universities to better protect the students' interests. The adult learners can enjoy the study atmosphere in the union centre and at the same time obtain recognized qualifications. They guessed that the universities, especially those experiencing difficulty in enrolling new students, would be interested in offering higher education qualification programmes in the union centres. The universities also need to extend their market share; they will target the large student source available from the unions. This, they surmised, partly based on the existing joint programmes being conducted in the union centres with awards from those local and overseas universities with lower reputations. They suggested that many Hong Kong adult learners would like to study in those programmes as they believe that they would have confidence to study higher education qualifications in the union centres rather than in the universities.

Moreover, they showed awareness that the Hong Kong QF was newly established. They believed that it is appropriate for the unions to obtain accreditation from the Framework but they did not have a clear picture of what the QF signified. However they did express the belief that the QF would become the benchmark for employers to

decide job specifications, position requirements and even the promotion of employees. As the employees are part of the current labour market, the participants agreed that they would prefer to attend the courses recognized by the government QF system.

When the researcher informed the participants that there are some courses being accredited under the QF system, they commented that the union is not familiar with the contemporary promotion methods and channels. The participants knew that the union issued lots of prospectuses of the training centre to their members but did not make good use of technology, such as the Internet, to promote their service. The participants pointed out that quite a lot of their friends do not have any information about the union training centres. Their impression of the union is that it is like a 'one-dollar shop' (STs 22.05.2010), where the union members and public can take a lot courses with a flexible entry requirement, low cost, intensive content and in a sequencing arrangement which can provide the knowledge related to work skills and quality life. However, from the viewpoints of the participants, they did not describe the quality of courses provided by the union as being of low quality, but rather meaning there was a lot of choice in union centres. Furthermore, as the course fee is not expensive, courses may be chosen without significant effort to make a decision whether to participate in the courses or not. As the focus group participants said, even though the course may not be suitable for them eventually, they could drop it without large loss. But they did express the view that the union training centre provides mostly lower end courses, and Students need to go to other formal institutions to obtain higher level qualification courses. In addition to promotion, they also concluded that the union centres, with their close relationship with the local government and the mainland central government, should attract more subsidies to extend and upgrade their services.

The focus group participants observed that the government rents school buildings to the FTU and FLU at a nominal rate of one dollar per month, for use as training centres. This was considered to be a government gesture to support the union to provide vocational training to the working adults. The unions have the opportunity to extend their services. Meanwhile the participants also observed that the mainland central government allowed the FTU to run trade tests in Hong Kong for those needing the qualifications to work in Mainland China. They thought of this as an opportunity to extend the scope of trade tests and pre-test training. The participants, except those two participants working in the government department and the NGO, believe they will one day have to work in Mainland China. They expressed the opinion that the union training centres should make use of the relationship to extend the relevant training. In addition, working towards recognition from the employers should be one of the ways for the union to develop, in order to properly meet the needs of the employees.

At the end of the discussion, the participants emphasized that the union training centres should continue their current activities and extend their services to cover more award bearing programmes in the future.

7.3 Conclusion

This chapter concludes with a comparison of the patterns of the CE participants (being analysed in Chapter 4, the profiles of people engaged in CE) in Hong Kong and the responses of the participants in the focus group. First, the following are the reasons presented by the focus group participants. The majority of the participants of the focus group indicated that they study for both day to day work related skills and knowledge, and for leisure purposes. A minority of the focus group participants indicated that they studied mainly for leisure and personal interest. Some indicated that in addition to the reasons mentioned above, they wanted to learn new skills when they became aware of

a new idea or technology, which can be work related or for leisure, such as how to use new computer software. But at the end of the discussion, the minority of the participants of the focus group also admitted that the knowledge obtained in the courses eventually influenced their work related skills. The points made by the participants of the focus group are very clear; that their study in the union centre is not enforced by their employers but a response to the skills required by their employer. They even suggested that they did not want their employers knowing that they had any connection with the unions. The majority of the participants of the focus group admitted that they wanted to obtain a work related qualification, such as C&G beauty therapy diploma and TAFE Training and Assessment Cert IV, and two of the seven participants indicated that they wanted to obtain a higher qualification such as a bachelor's degree. The reasons can be categorized in the order of priority as follows: (1) leisure, relaxation, and health improvement (personal interest); (2) work related skills (improvement in work capabilities); (3) learning new skills; (4) enriching social life (to extend social networking); and (5) to obtain qualifications.

The priorities assigned to the reasons why participants of the focus group attended their courses are analogous to patterns presented in the reports, *Survey on the demand of continuing education in Hong Kong* by HKU SPACE (Hong Kong University School of Professional and Continuing Education, 2001, 2006, and 2008); see Table 4.1. In these reports, the rank order of the reasons are: (1) personal interest; (2) improvement in work capabilities; (3) learning new skills; (4) enriching social life; (5) self-development; and (6) qualifications. In Chapter 4, the analysis shows that the reasons for participation of CE students are the key motivators encouraging adults to study. The union training centre of FTU can provide the training service to fulfil their requirement of participation of CE. Second, from the perspective of key stakeholders

engaged in CE, the thesis analyses how the union training centres lowers the barriers to employees to participate in CE. In Chapter 4, it outlined the barriers to participation of CE in Hong Kong. The main disincentives are: (1) lack of time; (2) lack of course information; (3) course fee too high; (4) need to take care of family; (5) inconvenient meeting place; (6) inconvenient meeting time; (7) no suitable course; and (8) no encouragement from others. When the students in the focus group were acquainted with these barriers, they gave their reasons why they choose to study in union centres. These reasons and their analysis can be articulated to how the unions playing their roles in motivating and removing the barriers to CE. The reasons the students chose to study in union centres can be categorized in order of importance: (1) low cost fee; (2) the course arrangements in union centres very flexible, many choices for the combination of the study time, the courses and the location of the venues; (3) flexible entry requirement; (4) the good attitude of the tutors, as the tutors not just delivered knowledge, but also developed a friendly relationship and helped the students in other areas, such as discussing problems in their jobs; (5) easily obtaining relevant information from the “yellow book” prospectus. While recapping the barriers presented in Chapter 4 and comparing the reasons presented above as to why the students chose to study in union training centres, the motivations and removal of barriers to study, become evident. The participants in this focus group strongly admired the flexibility of the arrangements of the study time, study duration and the training venues, as the convenient locations close to their working places saved travel time, and helped to negate the disincentives of “lack of time”, “inconvenient meeting place” and “inconvenient meeting time”. In addition, the students claimed that the tutors and classmates are friendly, and the tutors could help them solve problems other than in their study, such as in their working lives. This can be a partial solution to the disincentive of “no encouragement from others”. Moreover, the students also stated

that the prospectus gave them the information they needed and allowed them to explore their interests and their potential. They also mentioned that they could get this prospectus easily, helping to overcome the barrier of “no information”. From the time spent in discussion and the language used by the participants, the researcher concludes that the “low course fee” was the most important reason for choosing the union as the course provider. The students admired the union training centres playing the role of motivating students and making study more accessible by overcoming potential barriers.

While the SWOT tool was used by the participants of the focus group to analyse the union in the context of CE provision, the focus group participants argued that the unions have strong resources and a good relationship with the course participants of union training centre, the FTU, due to their union background, although the union image is also a hindrance to attracting students pursuing higher education awards in union training centres. Moreover, the students understand that with the advent of the knowledge-based economy, the pursuit of new skills and knowledge is important for every employee, so the union has the opportunity to meet the CE needs of Hong Kong, but they also raised the issue of whether the union can continue to offer such training while maintaining a good reputation. From the participant’s perspective, the union training centres as private course providers with a rare subsidy from government, lacked financial resources, and constitutes an impediment to the union serving employees. They pointed out that it is obvious that part of the facilities in some courses, especially those categorized as high tech facilities, are obsolete and quite a lot of the necessary equipment is not provided in the courses, such as beauty therapy equipment. In addition, the poor use of technology to promote the course was also commented on by the focus group participants, their perception of this point reflecting

the weakness of the administrative ability of the training centre. They raised their expectations with the researcher that the union training centre of FTU should apply to the government to invest more in, the union as they were aware that the HKSAR government rents a school building to the FTU at an honorarium rate of a notional HK\$1 per month.

When the focus group participants were asked to summarize their analysis, they used the idea of the “one dollar shop” to conclude their impression of union centres. The “one dollar shop” here is not a negative comment on the quality of the courses provided, but an indication of the quality of the facilities and course resources involved. The “one dollar shop” is suitable for every body in Hong Kong to buy their commodities at a low cost with multi choices, and the locations are very convenient to all districts in Hong Kong. But if you want to buy the good bands or higher end products, then you have to choose other stores with a good reputation and better facilities. In union training centres you can easily find the courses you like to join and most of them are fit for the employees’ needs for work and living related skills and knowledge, but if the focus group participants want to study courses where a higher qualification is awarded, then the students have to choose another institution.

In this thesis, the main question is how the unions play their role in narrowing the gap of the employees’ needs and the course provision. This chapter reflects the analysis of key stakeholders engaged in CE provided by union training centre of the FTU, and their expectations. In this chapter, the discussion is reviewed of the focus group participants who reflect on their impressions of the union training centre of the FTU in the provision of the CE they need, why they need to learn and why they chose the unions as the course providers. From the perspective of the focus group participants, union training centres in Hong Kong can partially meet the employees’ needs for CE

and help employees overcome barriers to further study. The focus group participants agreed that with the advent of the knowledge-based economy, employees need to study to be better equipped with work related knowledge, and at the same time, maintaining good health and knowing how to relax from the stress arising from a busy work environment in Hong Kong. The participants in this focus group affirmed the role played by the union centre of the FTU in motivating employees to study and overcoming barriers. However, the weakness of, and threats to, the union training centres were also identified by focus group participants. The lack of financial resources, the poor reputation on higher end courses provision, and the lack of facilities in the courses also constituted impediments to the union training centres developing their further role in providing courses with higher qualifications to the employees. At the end of this discussion, the students' focus group indicated that the union training centre should consider whether to upgrade their provision of courses and how they can do it, given that many employees needed to further their studies for recognized qualifications. The following chapter discusses the role of the union in CE from different perspectives on the social spectrum.

Chapter 8

Analysis of Eight Interviews

The main theme of the thesis is to determine the role played by the union in the context of CE and ascertain how unions play their roles in filling the gap between the employees' needs for CE and the courses provided in Hong Kong. The last two chapters presented the thematic analysis from the perspectives of two groups of stakeholders in CE, namely CMs and students of union training centres. These themes were analysed from the perspectives of frontline staff and direct course receivers from the union training centre of the FTU, but it is not comprehensive. In order to achieve a more comprehensive study of these themes, eight people of different social and academic backgrounds were interviewed, having backgrounds and experiences in policy making, in organising unions and union training centres, in working with unions and in academic level of course provision. These respondents were interviewed individually, face to face so as to avoid cross-pollination of ideas and concepts that might arise from group discussion. These individual interviews were held within a period of two years at an interval of around several days to one year for each. Each interview lasted for one to one and a half hours. All the interviews were conducted in Cantonese. The transcripts are also in Chinese.

Of these eight people, two were from government departments and related organizations, two from the academic field, two were union office bearers, and two were tutors in the union centres. They all have some degree of knowledge of CE offered in union centres.

The questions asked in the interviews were similar, but with some variation to take account of the varied background of the interviewees. The questions can be seen in

Appendix 1. Participants were asked what they knew about the unions and their service in CE (sometimes the term “workers’ education” was used in the interview). They expressed their opinions on the unions providing such services and their expectations for the training services provided by unions in the future. All the interviewees were asked to use the SWOT framework to analyse the training service of unions in Hong Kong. This tool enabled the interviewees to use a common methodology to analyse the strengths, weaknesses, opportunities and threats in the context of CE provided by union training centres. The interviewees could make use of their experience and their observations to compare the union training centres with the other institutions and the NGOs in Hong Kong. Based on their analysis, they could also provide comprehensive opinions and recommendations to assist in answering the research question: what is the role played by unions in CE in Hong Kong?

8.1 Profile of interviewees

The following are the profiles of the interviewees. They all agreed to disclose their surnames and their profiles as they believed their suggestions and opinions would be useful in helping to draft new education policy for unions in Hong Kong. Nevertheless, the identities of the respondents have been masked to avoid any possible repercussions. The names used here are pseudonyms.

Interviewee 1 (I1)

Interviewee 1 has been a senior officer in charge of the Hong Kong Qualifications Framework Secretariat under the Education Bureau of the government since 2003. Before that post, he had worked in the Labour Department for about twenty years. During that period, he dealt with different aspects of work, including placement selection, youth employment, prosecution, and labour relations promotion. After that,

he worked as Deputy Executive Director of the Employees Retraining Board (ERB). In the ERB, he gained extensive vocational training and school administrative experience that has enhanced his work in his existing position. He has a strong academic background and has a master's degree in labour relations from a well-known UK university.

Interviewee 2 (I2): Dr Leung

Dr Leung holds a senior position in the Vocational Training Council (VTC). He was an apprentice for nearly forty years in the Government Electrical and Mechanical Services Department. He then continued to study in the Technical Institute (the forerunner of the VTC). After completing a diploma course in the VTC, he went to England to study. He obtained his bachelor's degree there. After that, he entered the VTC to be a tutor and later he obtained his academic qualifications step by step. He was promoted to a senior position in the VTC. At the time of writing, he is in charge of many vocational and re-employment schemes such as the Skills Upgrading Scheme (SUS), which is funded and monitored by the Labour and Welfare Bureau. Moreover, due to his academic position and strong vocational background, he is now heavily involved in discussions of the QF and is responsible for drafting the competency standards for the QF.

Interviewee 3 (I3) Dr Chan

Dr Chan is an academic and professional interviewee in this research. He is a professional in the field of psychology. He has extensive experience in vocational training and continuing education. He is a clinical psychologist with six years' experience as a clinical psychology practitioner in a correctional services facility, and has been teaching in Hong Kong universities as a visiting lecturer for more than 20 years. Moreover, he has been teaching in union training centres for nearly ten years.

He has extensive experience in training staff to deal with adolescent problems and family dysfunction in union training centres.

Interviewee 4 (I4) Dr Ho

Dr Ho is an academic interviewee with a private institution that provides education up to bachelor's degree level, although most courses are at diploma level. Moreover, he is a chartered engineer and owns a construction consultancy firm. He has been involved in union training service for nearly ten years.

Interviewee 5 (I5) Mr Lin

Mr Lin is a tutor in a union centre and an owner of an employment agency. He is also a company consultant. His private institution mainly offers tailor-made management programmes to some garment manufacturing and trading firms in Mainland China and Hong Kong. Moreover, he also helps union training centres organize similar courses. He has a twenty year relationship with the union training centres and teaches there as well.

Interviewee 6 (I6) Mr Wong

Mr Wong has been teaching in union training centres for more than 20 years. His teaching there began after a talk he gave about the garment trade in the Garment Union. He taught there in the evening and worked in a trading firm during the day at that time. He continues as a tutor in a union training centre. Meanwhile, he is an insurance underwriter and a partner of an import/export consultancy company. His business network covers Mainland China and Hong Kong. As he has to deal with mainland business, he has obtained his second bachelor's degree in Law Studies from the Mainland China Law Studies Institute.

Interviewee 7 (I7) Mr Lau

Mr Lau is an office bearer of the second largest union group, the Federation of Workers Union. He has worked in this organization for nearly 10 years. The work in which he is mainly involved is labour welfare and training. He is also a qualified graduate teacher and a principal of a registered school under the supervision of the Federation.

Interviewee 8 (I8) Mr Chau

Mr Chau is a general secretary of the Spinning, Weaving, and Dyeing Trade Workers General Union, which is an affiliated union of the FTU and has more than ten thousand members. Mr Chau has been working in this union since 1968. In addition to his senior position in the union, he also holds many positions in the FTU. Mr Chau represents the union in managing services such as welfare, co-op, travel agency, and training provided by his union. Moreover, he was one of the founders of the joint training service provided by the FTU, ie. FTU STSC in 1981. He also has experience in running nursery schools, illiteracy elimination courses, workers' education, and employees' continuing education in unions.

The eight interviewees are of different social, academic, and professional backgrounds, but with quite similar ideas on the issue of unions offering CE. They all held a common viewpoint that unions are playing a significant role in offering CE and encouraging working adults to study in Hong Kong. These eight persons are around or over 50 years of age, except Mr Lau, who is in his mid-30's. As their knowledge and working experience suggests, plus their long history of social interaction, these interviewees can analyse the issue from many aspects, such as history, government policy, the social milieu, their personal working experience and their daily contact with the unions.

8.2 Analysis of discussion

The following section presents the results of a thematic analysis of the interviews that was undertaken. The data presented is arranged according to the themes that emerged in the analysis. These themes are presented in the following order: (i) history and government policy affecting unions in providing CE; (ii) reasons why unions attract working adults to use CE service; (iii) opportunities and threats unions are facing; and (iv) their expectations for the future.

8.2.1 History and government policy affecting unions in providing Continuing Education

As stated previously, Hong Kong has a very special history of colonial governance for 150 years. The British Colonial Government adopted a *laissez faire* policy with little interest in adult education. However, as Dr Ho explained, Hong Kong has experienced a miraculous change from a labour intensive industry centre, to a high-tech and knowledge-based economy within 50 years from the 1950s. The changes were particularly prominent in the 1980s. In 1980s, Hong Kong experienced a big change , the economic structure moving from manufacturing industry to the third and fourth industries (ie. Financial and service industries) as a main pillar of the economy. Employees with high education attainment and more skills were needed. For this reason the Hong Kong government changed its education policy to meet the changing needs of Hong Kong. The interviewees all concluded that the Hong Kong government's training policy is significantly affected by the changes in the economy.

From the 1950s to the present, the economic structure has changed considerably, which has led to policy changes in formal education and CE. Under such circumstances, Hong Kong needs well-educated and trained employees. Interviewee 1 said that the

introduction of nine-year compulsory education scheme in the 1970's was a clear policy to push up the education attainment level of the whole population. However, adult education was still not on the government policy agenda at that time.

Interviewee 1 pointed out that in the 1970s, the Hong Kong Labour Department only focused on dealing with labour problems such as severance payment and back pay. In this situation, unions had a lot of opportunities to help employees. They made a great effort to deal with labour disputes involving low-level employees. In the meantime when unions fought for employees' remuneration, they also created opportunities for employees to have social activities. They organized many activities for employees, such as singing, dancing or providing classes. This role played by unions was very successful as a union recruitment tool.

Interviewee 1 also pointed out that the 1980s was a turning point for the government in policy making. During that period, the economic structure was gradually changed from manufacturing to the service industry as the main pillar of the economy. The government policy also changed from focusing on labour disputes to the issue of survival of labour in the labour market, such as how to help the manufacturing workers change to service sector and how to balance the fringe benefits and rights between labour and management. Amendments to the labour ordinance offered workers fringe benefits and proper labour welfare. However, as explained by Interviewee 1, the Hong Kong government only placed the focus on the issue of employment, labour relations, and labour welfare; training for labour was not on its regular agenda.

Interviewee 1 pointed out that since the nine-year free education was introduced in the 1970s, many workers attained "Secondary Three" education level (after nine years of schooling) in the subsequent decade. Due to the restructuring of the economy, further

education and vocational training was in great demand. Employees were aware of such change and they knew that they needed to further their studies in order to survive in the labour market. Unions, especially the FTU, took the risk in taking up the challenge of playing a significant role in the provision of continuing and vocational education to low-level employees.

Mr Chau, an FTU union leader, supported this analysis in his discussion of that role played by unions in the provision of education and social activities for employees. Based on the union's documents and his observations, he pointed out that during the period of the 1940s's to 1950s, immediately after the Second World War and the Chinese Civil War in Mainland China, Hong Kong was facing a very poor economic situation. The living standard at that time was very poor, especially for low-level workers and their families. Medical and education services provided by the government were in the early stages of development. Many children and adults did not have the opportunity to go to school. The patriotic (also referred to as the Left Wing) unions in Hong Kong tried to get together to discuss how to help low-level workers. The first thing they were in agreement with was the priority that should be given to children's and employees' education, as they believed education could help enhance an individual's ability to survive and thrive in society. More than 20 unions organized the "Workers Education Advancement Society". They started children's and workers' education throughout this society. Ten primary schools and some workers' night schools were established to provide basic general education. These schools were formally registered with the Education Department. In the meantime, individual unions also offered nursery, primary and adult education. Mr Chau stated that primary education run by unions was registered with the Education Department while workers' education was not. The society regarded training and the elimination of illiteracy as

vital services that unions should provide to workers and their members. To meet the needs of employees was the aim of unions. Mr Chau explained that the training provided during that period included car repair, arithmetic, English, tailoring, and machine sewing. The training provided during that period was not in line with the nature of Mr Chau's union, as the majority of its members were working in the textile industry. Mr Chau reflected that the ideology of the ten union leaders was to explore workers' potential ability and equip them with multiple skills to survive in the labour market. He admired the union leaders' foresight in this sense. He thought that they opened up a useful path to meet employees' needs. Today, the achievement in CE proves that the unions' direction in helping employees was the correct one. Mr Chau and Mr Lau, both from unions' background, held the same ideology that training is a worker's right. On the one hand, the unions fight for the government's provision of training for employees; on the other hand, the unions provide suitable courses for employees with their own resources.

Interviewee 1, Dr Leung, Dr Ho, and Mr Chau all made the same observation about Hong Kong's special historical background as a British colony, whose government policy was economic-oriented. The British neglect in providing employees with vocational training opened up an opportunity for unions to fill that void and offer vocational training and courses to employees.

All the interviewees agreed that the strong historical background of unions in the provision of CE has implanted a deep-rooted image in society that unions can provide fit-for purpose training to low-level employees. Consequently, this constitutes a unique strength of unions in providing CE.

8.2.2 Reasons why unions were able to attract working adults to their Continuing Education service

All the interviewees were well informed about the current training service provided by unions. Their analysis of this theme was categorized into the following items: (i) history and the government policy; (ii) strong network and the proper promotion channels; (iii) employees with full confidence in worker unions; (iv) value-added training services meeting the demands of employees; and (v) helping workers overcome their study barriers.

8.2.2.1 History and government policy

The participants recognised that government recognition of unions as partners in CE gives a message to society that unions are important providers of CE. Interviewee 1 pointed out that in 1992, when the government set up the Employees Retraining Board (ERB), it clearly affirmed its partnership with the unions (referring to the FTU, as the FTU was running extensive training courses in Hong Kong). The FTU was the first organization invited to be the ERB's training partner to provide retraining courses for displaced employees in Hong Kong.

The government had decided to set up the ERB in 1992 to help employees who were facing challenges because of the swift restructuring of the economy. Policy makers had to develop policies to deal with the problems faced by Hong Kong employees with low education attainment. The so-called three-low (meaning low education attainment, low salary, and low skills level) employees were seen as a source of social unrest if their job opportunities could not be maintained. The setting up of the ERB was regarded as one of the key policy initiatives designed to address the problem. It was funded by a levy on imported labour (ERB 2008). Its function was to provide vocational training to

those employees with low education attainment to equip them with new skills, especially those skills fitting the service sector. With the training, it was hoped that they could return to the labour market. Apart from being designed to help employees to adapt to the structural changes in the economy, this policy also provided training opportunities to better equip employees to fill labour market vacancies because at that time the labour shortage was acute. Interviewee 1 expressed the opinion that the ERB should now earmark training resources for unions for providing training to employees, especially as he considered that the government regards unions as a good partner given their close relationship with low-level employees. This network can help disseminate information and the concept of continuing study in the 21st century.

According to Dr Leung's analysis (I2 08/2008) (Dr Leung is head of the secretariat of the SUS scheme), the SUS scheme acknowledges unions as partners because the secretariat believes that unions have their supporters and their network is strong. The SUS scheme was started in 2000. This scheme is also targeted to those employees with three lows. The secretariat invites training bodies, but with the agreement of the working committee, to offer training to employees as on-the-job training. The government subsidizes the training programmes.

In the above analysis, the interviewees from different government training departments, identified the reasons why the government likes to have unions as partners in providing courses to employees in Hong Kong. They reiterated that the strong networking capabilities of unions and the confidence of employees in unions are the reasons why the government sees unions as viable partners in the provision of CE.

8.2.2.2 Strong network and good promotion channel

In the eyes of Interviewee 1 and Dr Leung, the biggest union in Hong Kong is the FTU, with more than three hundred thousand members (see also Chapter 3). In their discussion, this big union member pool, plus their families, constitutes a strong network with a notional membership of more than one million Hong Kong residents. This figure was estimated by Dr Leung, based on his estimation of one family with four members (I2 06/2008). This analysis was also supported by other interviewees. Unions in Hong Kong have nearly twenty per cent of the workforce as their members. They can make use of their membership record, their gatherings, their newsletters, and even the occasions of labour dispute mediation to disseminate information to their members and families. Interviewee 1 and Dr Leung thought that the government had made use of this network to distribute messages to the public, including the message that employees have to attend CE and vocational training to upgrade their skills and equip themselves for the ever-changing economic situation. This is a strong message from the government to deal with economic restructuring and to reduce the unemployment rate. Both Mr Lin and Dr Ho concurred that their institutions would like to jointly organize courses with the FTU, and in that context, the strong network of the FTU was one of the essential factors. Thus, it appears that the membership network plays as a strong medium for promotion of CE. Information can only be counted as useful information when it can properly reach the recipients; otherwise, it is regarded as rubbish. The messages disseminated through the channels to reach the targeted population, were an essential point in this discussion. Unions can make use of their networks to disseminate the messages to the target audience, and from the perspective of union members, this is a useful service provided by the unions. The information promoted through channels such as newsletters, pamphlets and other media, stimulates employees to think about their situation and to recognize their needs in skills

upgrading and knowledge pursuit. However, as Mr Chau commented, if this message was delivered by other organizations or institutions, the government would not achieve the same objective. This is because members have confidence in unions because of their historical background and (as previously discussed) Interviewee 1 shared the viewpoint that this service also increases members' loyalty to unions.

8.2.2.3 Employees' confidence in their own unions

All the interviewees unanimously expressed their conviction that employees have confidence in their unions, so they like to attend courses run by unions. The confidence being built up is partly attributed to the historical background of unions and partly because of the nature of the unions to protect the rights and benefits of employees. As Mr Chau elaborated, his union's image built up from its history engenders confidence in the union. He said union members, their family members, and their colleagues will participate in union activities when they receive such invitations from union officials.

Moreover, the interviewees said the union members identified unions as their own organization and even treated them as their families. Interviewee 1 added that during labour disputes, employees in grievance prefer to ask the union representatives to attend the mediation meetings and negotiate for them. He said employees have confidence that the union will fight for their rights and benefits. Employees believe that unions will provide other benefits, including study opportunities. Mr Lin also expressed his belief that unions act as guardians for employees, both in labour disputes and skills upgrading. He concluded that employees also share the same sentiments as he has seen in union training centres.

Dr Leung presented an analysis based on his own experience in managing the Skills Upgrading Scheme that quite a number of adult learners strongly aspire to study

courses subsidized by this scheme and operated in union training centres. He explained that in this scheme, institutions, universities, commercial centres and union training centres are invited to bid for course places via tendering to run courses subsidized by the scheme (i.e., the Labour and Welfare Bureau). According to Dr. Leung's information, it often happens that the same course is run by training centres from different sectors; for example, a vocational English course run by HKU SPACE and unions as well. Given the information from official documents and the statistics from his department and his daily contact, Dr. Leung learnt that a lot of employees like to study in union centres. He considered that this is because employees, especially those low-level employees feel comfortable and respected in the centres. He quoted the Chinese saying that workers regard universities as "having high doors and big dogs" (meaning that it is difficult to get inside and well guarded, although it can be interpreted as meaning that universities do not respect the workers); in contrast, employees feel like they are going home in union training centres.

Dr Ho used Maslow's hierarchy of needs theory to elaborate on this observation. He considered that employees like to study in union centres because it allows them to achieve the third level of building up a social belonging with people of similar background. Members of unions may feel comfortable in this social group. This means unions can build up a comfortable environment for employees and give them confidence to study. Dr Ho thought that quite a large percentage of employees in Hong Kong do not have proper formal education and training. They have to overcome the psychological barriers and dispositional barriers such as confidence, money and time. They dare not go to formal education institutions and universities to have further training even though the courses are similar. This viewpoint was echoed by the viewpoints of other interviewees.

The perspectives of the interviewees give us a clear picture that unions are successful in providing information about courses but also in terms of making participants feel confident enough to apply for these courses. Moreover, they raised another point that the good quality service offered by unions also created a reputational value that is attractive to participants. In addition, all the participants in these interviews expressed the belief that the large number of course offerings, responsible tutors and administrators and the nearness of training centres, are attractive points for employees.

8.2.2.4 Value-added training service meeting employee demand

As mentioned in the last paragraph and in the data presented in Chapter 7, the various kinds of courses on offer and the flexible training arrangements motivate workers to learn. Of this thematic analysis, the eight individual interviewees are all familiar with the training provision of unions due to their daily contact and close working relations with union training centres. They are in a good position to understand in depth, the daily operations of union training centres.

The interviewees pointed out that the unions' provision of both interest and working knowledge related courses meets the employees' needs in their daily lives and in their career progression. Interviewee 1 pointed out that unions are strong in providing interest courses, which he believes can be a strong tool to help employees in their personal development. He believes these courses can include health elements for employees to enrich their daily lives and should be good for society as a whole. In addition, in the view of the other interviewees, some courses such as psychology courses can help the students release stress resulting from work pressure, and some courses are good for health, such as Chinese massage. They appreciated that unions play a significant role in raising the employees' social responsibilities to society. In

this commercialised society, few other organizations or institutions are willing to do so.

In addition to the function of personal development, all the interviewees pointed out that interest courses can help employees explore their potential and were aware that a lot of employees eventually turned their interests into working skills and professions. They believed that as unions can provide such courses at a very low course fee, employees can afford to attend the courses. Another point made is that tutors are very professional in union centres. The other institutions cannot offer courses at the same course fees and at the same professional level.

The variety of choice is also reflected in the vocational training offered by unions. Dr Leung emphasized that unions should help employees to equip themselves with multiple skills to face challenges in the ever-changing economic situation. Having commented on the universities not putting much effort into CE for low-level employees in the last 20 to 30 years, Dr Leung appreciated the unions' efforts in this aspect. He pointed out that courses provided by unions are different from those provided by the VTC or universities. In addition to the interest courses, unions mainly provide practical working skills and knowledge. He believes these kinds of courses indeed meet the needs of employees. He emphasized that there must be a market differentiation in the CE field. A monopolistic situation is not sustainable in the training market. Unions are playing the correct role in providing CE to meet the employees' needs. He believes that hands-on knowledge is important to employees as well.

The interviewees emphasized that unions have many professional tutors from different industries and disciplines. This is a union strength that other institutions or universities

cannot replicate. As the FTU can make use of their resources across their affiliated unions, their courses can cover a very wide range of subjects. The big pool of professional tutors provides ultimate support to the unions.

Interviewee 1 and Dr Leung pointed out that tutors are willing to contribute to the workers' enterprise, including offering training. With their personal experience acquired from the daily contact with union training programmes, they thought the tutors are very skilful and full of enthusiasm to deliver their knowledge to their course participants in union training centres. Many tutors see themselves as their brothers and sisters in this big family.

Dr Chan and Mr Wong are union centre tutors from different professional disciplines. They have been teaching in training centres for more than ten years. They proudly expressed the view that they love, and they are willing to contribute to, the unions. They are loyal to unions as they believe that unions are doing the right thing for employees. They know many workers are underprivileged and unions can help workers. Unions help them solve many problems both in their daily lives and in their working rights. They, together with the majority of tutors, are willing to teach for unions as volunteers or for low pay. They are paid less than the market price. They asked the researcher not to disclose their teaching fee offered by union training centre, the FTU because they are worried that other institutions would also underpay them.

According to the analysis of all the interviewees, given the loyal and professional tutor pool, plus the union premises being turned into teaching venues, unions can offer a large number of courses to their members and the public, ie employees in Hong Kong, meaning that society as a whole benefits through being provided with more learning

opportunities. This in turn can help unions attract employees to become their members. As a positive domino effect, both unions and CE can develop.

In addition to the various courses and the different disciplines of professional tutors, unions help employees overcome the study barriers by providing convenient study venues, flexible study time, classes suiting to the participants' availability for study and low entry requirements in comparison with the formal education institutions.

8.2.2.5 Helping workers overcome barriers to study

The interviewees expressed the view that employers in Hong Kong are not willing to allocate resources for their employees to study. Mr Lin, as an employment agent, Interviewee 1 with a Labour Department working background, and Dr Leung, a senior staff member in the VTC, all agreed that most employers are very short-sighted in terms of providing training for employees. They are reluctant to support their employees to learn, as they are afraid that employees will then have stronger bargaining power to ask for a higher salary or leave the company once they have finished their studies and qualified. Mr Lin provided many examples to illustrate the fact that employers demand that their new employees have the skills and knowledge compatible with the needs of the company and the position applied for when they enter the company. Dr Leung made use of his experience in the management of the SUS to elaborate his observation. (The SUS scheme encourages employers to support employees to study and upgrade their skills. The SUS industrial working committee comprised of representatives from the employers' association, the unions, training bodies and the government departments concerned). He pointed out that in this scheme, students being supported by their employers in terms of subsidy and release from working time, constituted only a small percentage of participants in SUS. The main effort that employers put into this scheme is to inform employees about the

scheme, which counts for nearly 40 per cent of the students as a whole. This is why Dr Ho emphasized that unions can help employees overcome barriers to study, as unions make use of their own resources to offer study opportunities for employees.

In addition to charging a lower tuition fee, the flexible entry requirements also help employees to overcome the institutional barriers. Dr Leung stated that unions do not hesitate to accept employees who do not meet the entry requirements. A low entry point does not equate to low outcome quality. Dr Leung and Dr Ho both felt that employees can make use of their daily working experience to digest the knowledge acquired in the classroom and that they study under proper teaching and care. Dr Leung asserted that union tutors can understand the employees' situations and their backgrounds well so they can use the workers' own language in their teaching. He said that unions can tightly control the exit standard so course participants in union centres can also obtain recognized qualifications.

All the interviewees agreed that union training centres have adopted a policy to create study opportunities for workers. This measure helps employees overcome the institutional barriers. Another barrier workers face is the psychological barrier. Employees, especially those with low education attainment, dare not study in formal education institutions. However, they regard the tutors and classmates at union centres as part of the same flock; this helps them overcome their worries and nervousness in study.

According to the union leaders in these interviews (two of the interviewees), in spite of the lack of resources, unions make use of their existing premises, considerable human capital and development involved to offer the educational service to its members and the public. Although their premises are small, the large number of premises

everywhere in Hong Kong saves travelling time. “No time to study” is usually an excuse given by employees for not attending CE. The unions’ provision of courses at different locations helps to address this issue, saving their time in travelling to school.

According to the analysis of all the interviewees, given their historical background and nature, unions give priority to encouraging employees to upgrade their skills and build up their confidence in their engagement in the labour market. The lack of employer support to motivate employees to study and the entry barriers from the formal learning institutions may frighten off employees. Unions offer an alternative path in helping them to obtain proper training. Facilities in the centres, the proper measures, the professional and loyal tutors all help employees overcome their psychological and prepositional barriers in study. Indeed, unions have been playing a significant role in encouraging and facilitating employees to study.

Based on the history and the current performance of the unions, the interviewees provided reasons why unions can play a useful role in providing courses and encouraging working adults to study. Meanwhile they also provided suggestions to unions about future development, including a consideration of the opportunities and threats that unions are currently facing.

8.2.3 Opportunities and threats faced by unions

The unions have a good reputation for providing training for employees. The questions raised are whether employees still need this service or whether there is still a gap between the training needed and the present training provided for working adults in Hong Kong. In the discussion, the interviewees were invited to use the SWOT tool – strengths, weaknesses, opportunities and threats – to analyse the situation of the unions in the context of the provision of CE as has emerged in the last two chapters. All the

interviewees were familiar with this tool, so the researcher did not explain to them how to use it. In the following section, the thematic analysis is based on the discussions in interviews and the application of the SWOT tool. The following thematic analysis elaborates the two themes: (i) opportunities; and (ii) threats, to the unions.

8.2.3.1 Opportunities

Following on from the discussion of the attitude of employers towards the provision of training for employees, a common view observed by the interviewees was that it was negative. As the economic situation is still difficult and uncertain, especially the introduction of minimum wages, there is a very low probability that employers will support their employees for study. The majority of employees have to find their own way to upgrade themselves. As Interviewee 1 disclosed, some employers involved in the Qualifications Framework clearly expressed the belief that it is appropriate to ask employees to use their own resources to undertake study for the purpose of equipping themselves to tackle their work problems. Most of the employers indicated that they would not pay for their employees to study, as they are worried that their employees will then pursue better employment in other companies. Mr Lin and Mr Wong concurred with Interviewee 1 and Dr Leung. Mr Chau and Mr Lau, both with union backgrounds, had a strong impression of the discussion and meetings with individual employers and employers' associations, and believed that companies would not support employees to study. They said that good employers would encourage employees, especially the young ones to study, without subsidizing them. Some employers are willing to support employees by subsidizing part of the fee. Mr Chau said some employers even asked their employees to study in union centres. He suggested that this might be partly due to the low tuition fee and partly because of their confidence in the unions.

All the interviewees stated that with the accelerated extension of the knowledge-based economy, employers do not provide training to their employees; workers are forced to learn to cope with changes in society. This is a reality that every working adult has to face.

All the interviewees believed that “Qualifications”, of course, are regarded as the benchmark of skills and knowledge in contemporary society and an indicator for employers to select their employees. But the interviewees agreed that qualifications could be defined as a certificate, a diploma or a degree as well as some practical skills. Interviewee 1 and Dr Leung both used the example of a chef to illustrate their philosophy that a skilful Chinese chef is not recognized as a professional as there is no common system to accredit their skills and knowledge. In fact, this is not a unique case. This similar situation occurs in different disciplines and industries. So Interviewee 1 pointed out the government has realized that there is a strong need to set up a Qualifications Framework to recognize the skills and qualifications of workers and to grant their holders a right social status.

All the interviewees stated that as the global and internal competition with talent from Mainland China is becoming more intense, there are good reasons to obtain a qualification. The QF offers an alternative path for workers to obtain qualifications. It is more suitable for those occupations emphasizing hands-on skills and practical studies. Interviewee 1 and Dr Leung both pointed out that the government has made it a firm policy to require government subsidized programmes, such as the SUS and ERB schemes, to obtain accreditation under the QF. All the interviewees agreed that continuous study to acquire qualifications is the only direction in which all Hong Kong employees should go; otherwise they will find themselves discarded as a result of the fierce competition in the labour market.

All the interviewees pointed out that in addition to qualifications, employers will welcome people with multiple skills. They said that everybody could feel the effects of both the global competition and the local competition within Hong Kong. Employers have to earn profits. The two union leaders believed that cutting labour costs is one measure that most employers adopt to guarantee their profits. So many employees complain that their employers force them to take up multiple duties that were undertaken by different colleagues before. Union leaders note the current situation and predicted that it would be a future trend, especially when the minimum wage policy is implemented in Hong Kong. Employers would insist on cutting labour costs and increase their demands for the higher work quantity and quality of the retained staff. Mr Chau and Mr Lau both stated that their unions continue to disseminate this message to their members and encourage them to insist on learning multiple skills and obtaining various qualifications.

Some of the interviewees considered that the future economic trend and the increasing demands from society and ever-improving technologies will certainly push employees to study. This will absolutely make CE become a necessity in society. Employees have to study for higher qualifications and be multi-skilled.

Some of the interviewees acknowledged that after the handover to China in 1997, the Hong Kong government put more resources into CE, especially skills training for employees. Interviewee 1 and Dr Leung both opined that the government had put, and will continue to allocate, resources to support employees to learn, as it is one of the ways to ensure that competent employees meet the increasing needs of the knowledge-based economy. The interviewees gave an example of government funding support to the ERB from HK\$4 billion for three years in years before 2007 to HK\$40 billion in 2008 (ERB, 2008) to prove that the government genuinely supports CE. They

admitted that the funding would supplement unions to conduct courses for employees as the unions can bid for the tender from ERB.

Besides, another issue put forth by the interviewees is the work opportunities in Mainland China. The enormous Mainland China market is a magnet to everyone, including entrepreneurs and employees in Hong Kong. Mr Lin used to work in China trade and he is an employment agent in Mainland China. He expected that there will be more and more Hong Kong employees moving north to work in different provinces in Mainland China. He reckoned that qualifications and job entry requirements (trade licences) are, to a certain degree, different from those in Hong Kong. Mr Wong and Mr Lin both advised that Hong Kong employees should obtain qualifications and trade licences issued by the concerned departments in Mainland China in order to work there. The trade test system is applied to a wide range of job positions and industries in Mainland China, including chefs, trainers, human resource practitioners, accounting practitioners, gardeners, and tourist guides. These jobs are popular for Hong Kong employees in Mainland China. They said that as the FTU has a close relationship with the mainland central government, it can make use of this channel to offer relevant courses and trade tests to employees. In their view, there is certainly a big demand from Hong Kong employees.

However, the data gathered for this project would seem to show that no other organisation beyond the FTU can provide such services to Hong Kong employees. Interviewees predicted that institutions and NGOs would not be accredited by the China (PRC) authority to run Mainland Authority recognized courses and trade tests in Hong Kong. For the current Mainland China Government, every policy is politically-oriented (Chan, 2001; Tunner et al., 1980). Mr Chau, a union leader of FTU believed that the current China Government empowers the FTU to run the courses

because of its patriotic background and its relationship with Mainland China. Some of the interviewees believed that the Chinese authority tries to encourage the FTU to make use of this educational service to recruit members into the FTU. According to their analysis, this is a golden opportunity for the FTU to extend its service in CE and attract members.

All the participants have the belief that apart from training related to skills upgrading and qualifications, the quality of life is also a concern for our society. Interviewee 1 believes that a high quality of life contributes to work quality and good work behaviours. He believes that in the contemporary society, living standards have been upgraded to a level that affords the citizens the space to be concerned about ones living environment and living quality. Meanwhile, health is also a concern of urban residents. This knowledge is different from those with traditional qualifications, although it is useful to daily lives. Everybody needs skills to handle daily work, deal with problems in daily lives and take care of oneself. The interviewees pointed out that if everybody knows how to take care of their health and how to respect other people and love our society, then we can have a harmonious society. Everybody can live in a healthy environment. There is a need to increase our knowledge relevant to our daily lives. As Dr Leung pointed out that the universities and the VTC cannot allocate large amounts of resources to conduct interest courses, and community centres do not have such resources to run those training courses, he felt that it is the responsibility for unions to conduct those personal development and interest courses. There is still a potential market to be explored.

However, the most important assets on the union balance sheet are their own members. They do not have sufficient financial assets to run their courses on a commercial basis even if they wanted to. They have neither academic status nor a proper administrative

team to run training for higher qualifications such as bachelor's degree. They face many opportunities as well as threats. The next section will discuss the threats the unions will face in the provision of CE.

8.2.3.2 Threats

According to all the interviewees, Universities, the VTC, institutions and NGOs are aware of the need to target areas where demand is large. The interviewees knew that universities were seriously competing with each other. The interviewees saw universities also stretch their services to cover the lower-end training courses. Although Dr Leung commented that universities should concentrate on the higher education level, it is a reality that universities are conducting courses that only NGOs or unions used to provide before, as they have to extend their sources of revenue. The interviewees believed Hong Kong universities have sufficient resources and good facilities. Their competitive ability is much higher than that of unions. But Dr Leung commented that it does not mean universities can play a good role in the low-end courses.

According to the analysis of the interviewees, in addition, community centres are also competitors to unions. They provide similar courses in training venues that are close to the residential area. This arrangement provides convenience to learners to overcome travel problems.

From the perspective of accreditation, according to four of the interviewees from government and academic background, unions face a challenge due to the accreditation practice adopted in the Qualifications Framework. It has been pointed out that the QF offers a new way for unions to organize recognized training programmes for employees. However, it is also a threat to unions as unions do not have excellent

administrative teams with appropriate abilities and academic background to deal with the accreditation procedure and the academic requirement. Interviewee 1 and Dr Leung pointed that according to the requirement of the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ), the accreditation process is full of challenges for unions, as it requires the institutions applying for accreditation to prepare a huge volume of documents and have sufficient financial resources and tutors with professional background. Moreover, the expensive accreditation fee makes unions reluctant to submit their programmes for accreditation. Mr Chau and Mr Lau even pointed out that they do not have confidence in successfully passing the accreditation process. There is no guarantee that they can enrol sufficient numbers of students to cover the cost. They commented that universities have an advantage in putting their programmes on the Qualification Register without a need to go through an accreditation process. So universities can easily turn their programmes to be recognized under the QF but unions have to put in a great effort to have their programmes accredited. However, for the consideration of the lack of the resources , but the needs of employees to pursuing the courses accredited by HKVAAVQ, Interviewee 1 and Dr. Leung also suggested that the unions can make use of the subsidy from government to offer the courses with the accreditation from HKCAAVQ but not to offer the courses in full range of the QF. They suggested that the unions have to offer the courses within their ability. As a whole, unions have to face threats from universities to compete for their targeted students.

There is a big market need for CE in which unions can play a part to allow employees to have opportunities to better equip themselves for survival in the labour market. There are also challenges coming from competitors with strong academic backgrounds in competition for students. The interviewees offered their opinions on the future

direction that unions could follow in order to provide training to employees. Employees can really benefit from the service of unions. A SWOT analysis is presented first to provide information for discussion about the future direction.

As mentioned before, at the end of each interview, the interviewee was asked to use the SWOT tool to provide their comments on the four aspects of strengths, weaknesses, opportunities and threats. This was for the purpose of guiding the interviewees to review their analysis on a common basis using an analytical tool with the same categories. The following is an analysis of the union centres in the provision of CE using the SWOT analysis.

Table 8.1: Hong Kong union training centre situation analysed by individual interviewees using SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> • Special historical background paves the way for unions to provide welfare services to their members and workers in Hong Kong. • Hong Kong employees have confidence in unions due to their traditional image and the good service unions have provided. • Apart from the nature of unions and the office bearers' attitudes, unions provide a caring environment to workers to help overcome their psychological barriers in learning. • Unions create conditions to ease workers' tension in study because they can study with people of similar backgrounds in union centres. • The big pool of loyal tutors gives valuable support to unions to run programmes. • The spirit of solidarity in unions creates conditions, including many training venues, professional tutors, and huge numbers of programmes designed to serve their members and employees. • Low entry requirements create opportunities for employees to study. • Strong connection with the Mainland central government paves the way for collaboration with the Chinese authorities and institutions, to provide proper training to those 	<ul style="list-style-type: none"> • The image of being for low-level workers is too strong. • The administrative team dealing with low-level workers was considered insufficiently equipped to manage the programmes for higher qualifications. • Tutors are professional but without good academic background, so it is difficult to develop courses with qualifications attached. • A lack of resources makes it difficult for unions to organize some activities with specific facilities. • Some employers do not like to cooperate with unions and do not support their employees to study in union centres.

<p>employees who want to obtain qualifications recognized on the Mainland of China.</p> <ul style="list-style-type: none"> • Given the strong political background (there are three guaranteed seats in the Legislative Council) and the current political need, the Hong Kong SAR government supports unions in allocating school premises at a nominal rental and providing funding for courses provided by unions. • Close connection and working relationship with the HKSAR government creates a channel to talk with the government authorities concerned. 	
<p>Opportunities</p> <ul style="list-style-type: none"> • Increasing demand for qualifications will speed up the further development of the knowledge-based economy. • Requirement for multiple skills and cross-industry knowledge is being imposed on employees. Employees have to study continuously to keep up with the changes in the commercial world. • Introduction of the QF system in Hong Kong encourages employees to make use of the RPL (Recognition of Prior Learning) system to have their skills recognized as qualifications and to pursue further study based on the recognized qualifications. • The QF paves the way for young 	<p>Threats</p> <ul style="list-style-type: none"> • Strong competitors like universities and the VTC also provide lower-end CE courses. • Qualifications and professional requirements for tutors and the administration team are raised, the pressure is higher because of need to go through the accreditation process, and obtain government funding support. • Demands from students for higher training quality and more advanced facilities are also increasing. • Contemporary employees need higher qualifications that cannot be provided by unions at this moment.

<p>people with no proper formal education to pursue a prosperous future along the ladder of the QF system.</p> <ul style="list-style-type: none"> • Promotion of the CE concept from the government gradually cultivates a culture that employees should pursue further study and keep up with the pace of progress of society. • The larger public funding to support Hong Kong employees to study, is an encouragement for them to pursue further studies. • Working opportunities in Mainland China offer opportunities for the CE sector to expand its training service coverage in this respect. 	
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The value of Table 8.1 is to articulate the conclusions and analysis of the eight individual interviews of the four themes. The analysis in the above table gives a comprehensive picture of the responses of the interviewees on the features of unions in the context of CE. Based on the above SWOT framework analysis, the interviewees provided their analysis of the future direction of the unions. The following section relates to the broad recommendation that unions should aim to operate their training services with a view to narrowing the gap between the needs of employees and the provision of CE.

8.2.4 Recommendation on future work of unions

A common conclusion derived from the discussion with the interviewees positively affirmed that unions have played a significant role in offering training opportunities for employees. Owing to Hong Kong's history, the political background of unions and

their experience in the provision of CE, all the interviewees were adamant that unions should continue to provide proper training for employees. However, facing the ever-changing economic and social developments in the new era, they confirmed that unions can and should continue to play a significant role in CE but with the policy adjusted, and facilities and tutors' qualifications improved, to cope with the new challenges.

The ideas the interviewees provided are considered in the context of the following themes: (i) maintaining traditional programmes; (ii) developing programmes under the QF context; (iii) working with the local and overseas universities to offer award-bearing training; (iv) continuing and extending training related to Mainland China; and (v) putting effort into helping the government formulate proper policies to upgrade Hong Kong's labour quality.

8.2.4.1 Maintaining traditional programmes

All the interviewees believed that Hong Kong employees still need the traditional programmes, including interest courses and skills training. The interviewees felt that employers are still unwilling to provide proper training to employees. Universities cannot offer similar courses at a low cost. The role of unions cannot be easily replaced in the near future. Interviewee 1 and Dr Leung stated that employees still need unions to provide skills training for them. As mentioned before, the various kinds of courses, the cross-use of resources within the union camp, the loyal, professional, and caring tutors are still advantages of unions to encourage employees to study. The union leaders and the tutors stated that low-level employees can find their value and faith through studies in union training centres.

All the interviewees thought that owing to the rapid growth of GDP and technological innovations, employees have to keep updating their knowledge of the new technologies or products in the market. They believed that the unions' edge is to have a close contact and connection with industries. The FTU leader, Mr Chau, thought that his union group, FTU, can quickly react to the market and easily source the right professional tutors from their tutor pool to deliver the knowledge to employees. He pointed out that it seems that universities, the VTC, and formal education institutions cannot easily copy this practice. Indeed, as Dr Leung said, "it is not worthwhile for universities to do so, as they should invest their resources in higher education" (I2 02/06/2008). So this kind of skills training still constitutes a major proportion of trainings offered by unions.

According to all the interviewees, in addition to the courses mentioned above, unions should not discard their interest courses, as these are concerned with personal development, the building of ethical conduct and the daily enrichment of life. The improvement of the ethical standards of the population will be beneficial to society as a whole. Unions encourage and facilitate the working population and their families to learn. The union leaders emphasized that the norms and beliefs of unions can influence employees and their families through attending interest courses. This is still a need in society. All the interviewees stated that community centres and other institutions cannot compete with unions in this respect, due to the specific nature of the unions.

Moreover, all the interviewees believed that unions have a strong communication network with the working population in Hong Kong. They can make use of this network to encourage their members and their families to study.

Given the strong background of unions, the interviewees believed the unions should continue to apply for government funding to offer more programmes to employees in Hong Kong. However, as mentioned before, the weakness of the unions' position is that they cannot offer recognized qualifications in Hong Kong. All the interviewees, but Dr Chan, pointed out that unions should make use of the QF system to improve their service in this respect. Employees need unions to provide them with recognized qualifications. However, as shown in the weaknesses quadrant of the SWOT analysis table, the interviewees had different points of view on the role played by unions in the high-end courses. Some of the interviewees thought that as the union image is too strongly associated with the grass roots, they believed that the employees who want to achieve higher qualifications, will not attend the union courses even if the unions can get the approval from the HKCAAVQ to provide the courses. The other interviewees had different views on that point, believing that given the image of unions providing courses at a low cost, so the unions can also provide the high-end courses if they wish to. However, they also had the worry about how the union training centres can commit the huge resources required, such as money, facilities, campus and professional administrative teams. So the common point of all interviewees on this matter is to insist the unions need to organise the traditional programmes and upgrade to the QF accredited courses to level IV or below.

8.2.4.2 Developing programmes under the QF context

Based on the analysis of some of the interviewees, it can be seen that the employees with a long working history but without any recognized qualification, can utilise the QF system to help them obtain the necessary qualifications as recognition of their skills through the RPL (Recognised Prior Learning) system. Some interviewees believed that quite a lot of employees demand qualifications through this RPL system

to recognise their status in the industry. The QF system gives them a proper channel and this gives the unions the opportunity to obtain accreditation to offer courses under the QF system for workers who have placed their trust in the unions. Interviewee 1 and Dr Leung stated that as the government develops the system with the employees and employer representatives, and the accreditation is conducted by the HKCAAVQ, the QF system will serve as a benchmark or common standard for individual industries and disciplines. Employees can make use of this system to improve their status and obtain recognized qualifications. Unions should put their efforts into undertaking the accreditation process of its courses. All the interviewees stated that the basic point is that unions can make use of this accreditation practice to prove that they are actively involved in the discussion with various stakeholders to fight for the rights of employees. Second, they can inform the employees that they can make use of this channel to obtain qualifications useful for their career advancement. The unions also need to show the employees that the unions will continue to support them to study in the union centres in which they have trust. Once employees obtain a qualification through the QF, they can proceed to further study, should they wish to do so.

8.2.4.3 Working with local and overseas universities to offer award-bearing training

To encourage employees to continue to study, unions can go further to collaborate with other institutions to offer courses leading to higher or professional qualifications, as they indicated that unions have an edge in helping employees overcome the barriers. All the interviewees pointed out that the union training centre can make use of the self-accrediting status of universities and their good image to jointly offer courses to employees. This is a significant way to encourage employees to study.

However, as mentioned before, all the interviewees stated that the administration teams of union training centres are weak, without sufficient knowledge to manage high-level programmes and provide counselling services to students. Mr Chau and Mr Lau, both union leaders, admitted this point and emphasized once again that unions should seriously work on this issue and take action to re-engineer and build a new administration team.

8.2.4.4 Continuing and extending training related to Mainland China

It seems a trivial but essential point that unions should provide training to help Hong Kong employees obtain a licence to work and practice in Mainland China. All the interviewees, except Dr Chan, stated that the FTU in particular has a close connection with the Chinese central authority. For the sake of Hong Kong employees to have licences to work and practise in Mainland China, the unions should take up the responsibility to work for them and pave the way for them to take the trade test. It is of course not merely the provision of courses; it is also a matter of policy. The FTU can fight for the right to have the trade test conducted in Hong Kong to provide convenience for Hong Kong employees who want to work in Mainland China.

8.2.4.5 Putting effort into helping the government formulate proper policies to upgrade Hong Kong's labour quality

Last but not least, to have an influence in government policy making should always be on the working agenda of unions. Union leaders emphasized during the interviews that labour rights should include working rights and study rights. Union leaders participating in formulating policy relating to CE, especially the QF with a direct bearing on employees is of significant importance, as they share the same voice, the same view, and the same employee demands. They emphasized that the unions know the difficulties that employees face, so their input in policy deliberations can help the

government formulate the right policy direction in continuing education. This viewpoint was supported by Dr Leung and Interviewee 1. The interviewees stated that in the discussions during the last five years regarding the QF system, it has been rightly proven that the participation of the unions in the discussions was a good move. Unions should continue to participate in policy formulation in respect of vocational education for the Hong Kong SAR Government.

Finally, a comment made by Mr Chau is used to conclude this part of the discussion: “Do not forget our pre-eminent traditions in employee training, but open our minds to adopt new ideas and extend our service to employees” (I8 01/09/2010). The next section concludes the thematic analysis by the eight individual interviewees.

8.3 Conclusion

This chapter considers the viewpoints and analyses of the eight individual interviewees, each having different social and academic backgrounds. They were discussing the role of unions in the context of CE in Hong Kong. The conclusions can be summarized in two parts: the role played by unions in the provision of CE, and the threats to them in that context.

First, the interviewees shared the common view that against the historical background of Hong Kong, the lack of investment by government in CE, created the opportunity for the unions to fill the need and engage in the provision of CE for employees. The union leaders emphasized that the unions should protect the working rights of employees and foster their workplace opportunities by providing study mechanisms using the unions’ own resources. With the image of unions protecting workers and their shared common voice and language, employees believed that the unions could

provide their best chance to study and psychologically feel confident in dealing with the union centres.

Second, the interviewees from government and related organizations pointed out that the Government of Hong Kong SAR has a policy to consider unions as their partner in the policy making and provision of courses in the context of CE. This background accords the union with the means to serve the employees. Dr Leung and Interviewee 1, based on their own working experiences, illustrated this point that the employees chose to study in a union centre rather than the universities even though the universities and union training centres provided the same course accredited by SUS.

Moreover, the interviewees stated that as the unions can help the employees to overcome study barriers, so they could attract the employees to study in the union centre. They pointed out that the low tuition fee and the flexible entry requirement helped employees to overcome institutional barriers, while the union image invoking the same language and a conducive study atmosphere in union training centres, helped to overcome psychological barriers. As well, the convenient training centre locations, large numbers of premises throughout Hong Kong and the variety of courses combined with convenient times, locations and disciplines, helped the employees to overcome the dispositional barriers.

The interviewees believed that with the advent of the knowledge-based economy, the ever-changing technology, the needs of multi-skilled labour in Hong Kong and the establishment of the QF, it can be affirmed that employees need to study to maintain their ability to achieve success in the labour market. To the unions, the huge study needs of the employees create the opportunities for the unions to provide courses to employees.

On the other hand, unions are facing challenges from the universities and the NGOs. Given the grass roots image of the union, it cannot attract the employees who need the higher end courses and qualifications. The interviewees noted that the Hong Kong unions lack resources, have inadequate funds and facilities, and lack a competent administrative team to provide and manage the high end courses. Even though there is an opportunity for the union to organize the recognized courses under the QF system, the unions lack the professional administrative team to advocate and document the courses to be accredited. Thus, opportunities may eventually resolve as threats if unions are unable to solve these problems. The interviewees stated that the unions can negotiate with government for the resources. However, they thought that although the government rented two school buildings to two union groups at a peppercorn rate of HK\$1 per month, respectively, it was uncertain whether the government would continue to give unions other resources for CE.

In conclusion, the interviewees thought that the unions still had their strengths and opportunities to sustain the provision of traditional programmes to employees, as the demand for the courses is still strong. It was suggested that the unions should explore more resources to extend their educational services to employees, as the employees clearly need the unions.

In the preceding three chapters analysing the outputs from the different groups of people surveyed, there emerges a clear picture of the viewpoints of stakeholders in CE. They basically shared a common view but with some differences of detail. The unions in Hong Kong have indeed played a significant role in helping employees to study and improve their skills and knowledge, and in this endeavour they should continue to play this role. The following chapter will outline the findings of the research, articulating a comprehensive analysis of the outputs of the focus groups and individual interviews.

The findings provide a comprehensive picture of the role of the union in the context of CE currently, and in the future.

Chapter 9

Summary of Findings

Based on the discussion and the analysis from different angles and taking into consideration the issues presented in the focus group sessions, individual interviews and the literature review, the chapter will present conclusions regarding the roles of Hong Kong unions in lifelong education. The thematic analysis that emerged in the last three chapters is the result of the analysis in the two focus group meetings and the eight individual interviewees; the discussions and the analysis were guided by the questions presented by researcher. The main questions were: (i) background and history of the unions in the context of CE; (ii) why employees participate in the CE; (iii) why employees choose to study in the union training centres and how these help them overcome any study barriers; and (iv) the expectations of the union regarding the provision of CE in the future. The analysis of the findings will be presented in the order in which the questions emerged.

9.1 Background and history of Hong Kong unions in context of Continuing Education

Previous chapters confirmed that unions have been playing a significant role in helping Hong Kong employees in the last 50 years. In Chapter 3, the difference between Hong Kong and western unions was discussed. The conclusion was drawn that the unions' practices are different in Hong Kong due to its different political background and the employees' needs. The analysis of the different focus groups and individual interviews bore out this conclusion. Because of the special historical and political background of Hong Kong, which had been under British Colonial rule, government policy was short-sighted and did not invest enough in adult education. This created a chance for

unions to offer CE and even formal education to Hong Kong employees. Hong Kong's special political background has persisted to the present day. Hong Kong's policy with regard to Hong Kong living standards and situation has remained unchanged for 50 years and has the blessing of the Basic Law. The Basic Law, Article 2, states that the National People's Congress authorizes the Hong Kong Special Administrative Region to exercise a high degree of autonomy and enjoy executive, legislative and independent judicial power, including that of final adjudication, in accordance with the provisions of this Law. Article 5 also states that the socialist system and policies of Mainland China shall not be practised in the Hong Kong Special Administrative Region, and that the previous capitalist system and way of life shall remain unchanged for 50 years.

As a consequence the traditional practices of unions can continue, including providing CE to employees in Hong Kong. With this special historical and political background, Hong Kong unions, especially the FTU, have adopted a policy to fully utilize their resources and their networks to serve their members and offer study opportunities to employees.

The common points raised by the interview participants regarding the unions' historical background are as follows:

(i) Prior to 1997 the Hong Kong Government did not provide suitable education opportunities to low-level employees. There was a lack of suitable CE for low-level employees. Given the caring nature of unions and the urge to fight for workers' rights, Hong Kong unions see it as their duty to offer vocational skills training and general education to employees. Such provision is also a proper channel for attracting employees to become union members.

(ii) The spirit of union solidarity pushed unions to make use of their own resources, including union premises, volunteers and money, to start the first generation of CE in Hong Kong and they kept on improving their services in line with social and economic changes. They provided updated study programmes to meet the needs of employees.

(iii) The Hong Kong Government and employers were not willing to allocate resources to provide suitable vocational training, not even interest courses for low-level employees. This created opportunities for unions to discharge their responsibility to take care not only of their members but of all employees, improving their working conditions and their daily lives. Their 60-year service – the FTU celebrated its 60th anniversary in 2009 – in Hong Kong impressed Hong Kong people deeply and gave employees confidence in what they do.

It is obvious that the special historical and political background of Hong Kong unions creates the opportunity for unions to make use of the education service to get employees to study in union training centres. However, the thematic analysis also revealed what pushed employees to participate in CE.

9.2 Employees' reasons for participating in Continuing Education

The thematic analysis showed that, with the advent of the knowledge-based economy, globalization and ever-changing technology, employees are forced to learn if they want to survive in the labour market. In the focus groups and individual interviews, the stakeholders affirmed that there is always a need to upgrade their work-related knowledge in the era of Post-Fordism. As focus groups, interviews and the documents, such as Phase Two Survey on the Effectiveness of the Skills Upgrading Scheme (Policy 21 HKU, 2006) and the Thematic Household Survey Report No.13: Employment concerns and training needs of labour force (Census and Statistics

Department, 2003b) revealed, most employers, especially those running small and medium-size enterprises, are not willing to invest in training for their employees. However, the employees are required to be multi-skilled and qualified employees, so they have to continue to study in order to acquire day-to-day work-related knowledge and skills to catch up with the ever-changing technology and work knowledge. Moreover, there is a need to get proper qualifications, as some interviewees stated that the employers ask them to present their qualifications to prove they have the required knowledge. So having a document that attests to their qualification is also very important for the employees in the Hong Kong labour market. To acquire work-related knowledge and qualifications is therefore one of the reasons employees study.

Other significant reasons are a desire to enrich one's quality of life and to improve one's social network. The thematic analysis presented in chapters 6, 7 and 8 also showed that many employees undertake courses as part of their leisure activities and to learn ways of improving their health. This is also supported by the surveys carried out by HKU SPACE (Hong Kong University, School of Professional and Continuing Education, 2001, 2006, 2008). In fact, the focus group of participants studying at union training centres declared these to be their first priority. The analysis showed that leisure courses can help employees find release from work stress, improve their health and eventually turn out to be beneficial in their work. Moreover, it is commonly agreed that knowledge acquired in the leisure courses can be plowed back into day-to-day work-related skills.

To extend their social network is one of the employees' significant reasons for participating in further study. This was the conclusion reached by focus groups of students and of CMs, all of whom confirmed that undertaking one of the courses provided by the unions was a way of extending their social network, of making more

friends and of increasing their contacts with people belonging to a different social group and different disciplines. A strong social network can increase their quality of life, upgrade their work-related knowledge and even extend their working opportunities. The interviewees and the focus groups participants stated that to become a volunteer is an achievement that increases their self-esteem. One of the reasons for studying is to acquire techniques that help them serve the community. As the analysis by the members of the focus group of CMs shows, this is the way to push Hong Kong into becoming a civil society (Cox, 1995). The analysis also shows that the union training centres provide the opportunities to meet employees' study needs and overcome any study barriers.

9.3 Union efforts to encourage to participation in Continuing Education

According to the analysis presented in chapter 6, 7 and 8, unions make use of their networks to provide fit-for purpose vocational training and courses for everyday purposes not provided by formal educational institutions or community centres. The interviewees estimate that each time when the union group, the FTU promotes its courses more than one million Hong Kong people can get the message and quite a large number of employees have benefited from such courses provided by the unions. Unions help workers overcome psychological, institutional and dispositional barriers to study. The great variety of courses, convenient teaching venues, professional tutors speaking the same language as the employees, and classmates coming from the same background all combine to encourage them to study in union centres.

Unions are active in providing courses in the following categories: (i) quality of life, health and social relations for the benefit of employees and society at large; some students turn their interest into a profession; (ii) work skills and knowledge to help

employees upgrade horizontally and vertically to meet the multiple skills requirements of the knowledge-based economy; (iii) vocational qualifications, such as those awarded by the C&G or LCCI, to help employees obtain qualifications needed in the labour market; (iv) accreditation by the HKCAAVQ and with QF recognition to help employees obtain recognized vocational qualifications.

In addition, there are communication channels built up from a boundary-less network within the union groups – there are more than 250 unions affiliated with the FTU, and nearly 100 in the FLU and the CTU respectively – with more than 2 million people in the network, spreading the message to employees who need this kind of training. This communication network makes employees aware of what they should do to sustain themselves in the labour market and where they can find a service, which has been extended to cover more areas and more employees, proving that it meets the learning needs of employees. The government also makes use of this communication channel by inviting unions to disseminate the training message and the existence of training opportunities to Hong Kong people.

Comparing the Profile of Hong Kong People Engaged in CE, presented in Chapter 4 with the features of the education service provided by unions, the conclusion can be drawn that union training centres play a significant role in motivating employees and overcoming study barriers to the CE. Fit-for-purpose training courses, flexible entry requirements and a good reputation as course provider appeal to employees when it comes to considering CE. In addition, the flexible arrangements of courses (the course participants can find classes which suit their availability for study and which conveniently located), the variety of courses provided and the intensive course contents help to remove the study barriers of “no time”, “inconvenient meeting place”, “inconvenient meeting time” and “no suitable course/programme”. The tutors’

professional knowledge of industry, their friendly attitude towards the course participants and the sense of sharing the same union “language” help to overcome psychological barriers to study, while the communication channel at the unions’s disposal is effective in getting information to employees. According to the survey by HKU SPACE (Hong Kong University, School of Professional and Continuing Education, 2008), “no money” is ranked first as barrier to study, while “low fee” is noted by participants in focus groups and interviews as the most important feature of the unions’ provision of CE and “low fee” is the important reason why the course participants choose to study in union training centres. The focus group CMs and the two union leaders interviewed gave the following reasons for the union being able to play an active role in helping employees. The ideology of the union is that workers/employees have a right to study, and the way to protect employees’ rights is to motivate and help them to study. So the unions make use of their resources and communication channels to provide study opportunities to employees, given the special political environment of Hong Kong does not provide such opportunities. They claimed that the union’s achievement in CE proves that the direction it took in helping workers/employees was the correct one.

From a policy angle, unions indeed have played a significant role in policy making to safeguard employees’ rights to education. Their representatives on the Executive Council, the supreme decision-making authority of the Hong Kong Special Administrative Region, the Legislative Council and its different committees bargain for policies that will benefit the workers. A recent example is the discussion of the QF system. The union representatives of different industries bargained in the Industry Training Advisory Committees (ITAC) managed by the QF Secretariat under the Education Bureau of the HKSAR Government. The main function of union

representatives on the ITAC is to balance the employers' representation. On the committees of ITACs and Legislative Council, union representatives speak on behalf of employees and urge the committee to consider the demands of employees for CE.

9.4 Interviews and focus groups' expectations of future directions

With the help of the SWOT analytical tool, the participants of the focus groups and the individual interviews analysed the strengths, weaknesses, opportunities of and threats to the Hong Kong union training centres in the context of CE, and these are presented below.

9.4.1 Strengths

The unions have a strong labour movement background, and have built up a good reputation that convinces employees to participate in their activities, including CE. The unions can make use of their premises as training centres, and having a large number of training venues located throughout Hong Kong helps to minimize course participants' travel problems. Moreover, the unions' successful mobilisation of professional tutors allows them to offer a great variety of courses, with a comprehensive coverage of the different needs of employees. The low entry requirements and low school fees are attractive to the employees. The friendly atmosphere in the union centres and the good attitude of tutors and administrative staff, attributed by many to union ideals, also play a role in removing any psychological barriers to study. In addition, the union leaders' participation at the policy-making level and the close connection of the FTU to the Mainland Chinese Government added to the unions' strength in organising the fit-for-purpose courses for the employees.

9.4.2 Weaknesses

The analysis of all the interviews and focus groups meetings showed that the shortage of facilities, the lack of higher level professional tutors and the academic level of the administrative staff are the main obstacle to extending the service to higher end courses. Due to a lack of the facilities needed for some courses, the union cannot provide students with the proper training. In addition, the unions' strong image among low-level workers cannot give employees the confidence to attend courses that result in the award of a qualification. The focus group of students supplemented that they will go to the formal institutions for the high-end qualifications.

9.4.3 Opportunities

Due to the accelerated extension of the knowledge-based economy, employers do not provide proper training to their employees and so employees are forced to learn to cope with the changes in society. The need for participation in CE is great, and there is a big demand for quality learning. According to the analyses of interviews and focus groups, community centres and NGOs do not have the competence to provide the training needed by employees, and the formal educational institutions are not willing and perhaps should not allocate the resources needed to provide low-level training to employees. As a consequence employees still need the unions to provide courses for them.

With the establishment of the QF, there will be a new area for the unions to develop courses targeted at employees who wish to acquire qualifications accredited by the QF system.

The FTU also has the opportunity to extend training to employees who need to work in Mainland China. According to the analysis of some of the interviewees, while the

enormous market of Mainland China is a magnet for everyone, the basic requirement for working there is a recognized qualification or licence issued by the Mainland China Government. The FTU, with its close relationship with the Mainland China Government, has obtained the right to organize training courses and trade tests in Hong Kong. The FTU provides opportunities for Hong Kong employees to obtain the licence and the work qualifications, thus extending their work opportunities in Mainland China.

9.4.4 Threats

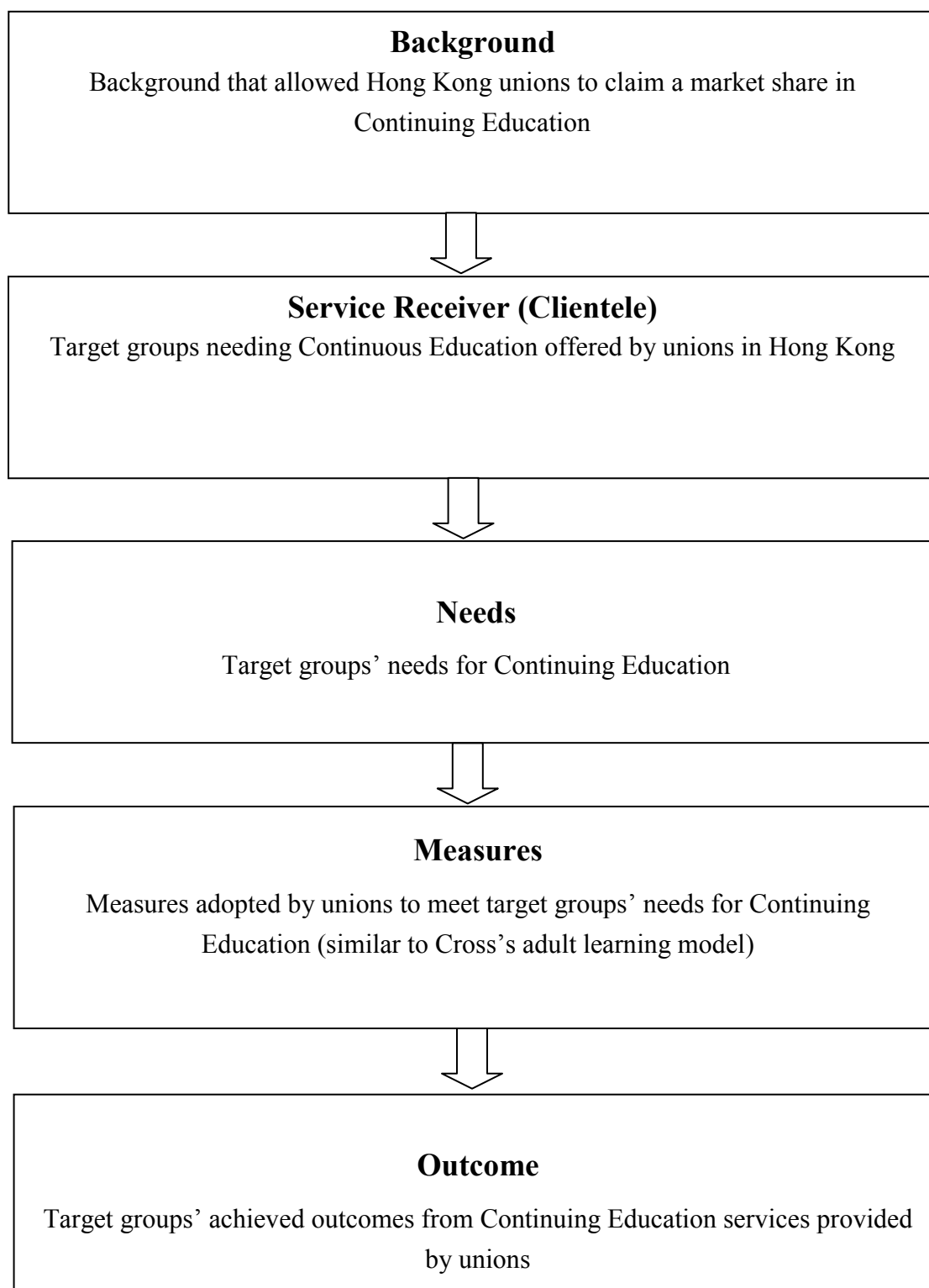
According to the analysis of the interviews and the focus groups, the unions are facing challenges from NGOs, community centres, VTC and even universities as they are all moving to include the low-end market in their provision of CE. The interview participants stated that although studying for leisure in union training centres is the main trend, the need for a qualification cannot be neglected. However, they argued that because of the establishment of the QF, the government now also required training institutions and centres to become accredited if they wanted to conduct government-subsidized courses, such as ERB courses. This is considered a threat to the unions, as they do not have great administrative teams that are sufficiently competent and have the appropriate academic background to deal with the accreditation procedure and the academic requirements. The lack of financial resources and of tutors with higher academic background prevents the unions from submitting programmes for accreditation. Even the union leaders interviewed for this study thought that they lacked the confidence to pass the accreditation process.

9.5 Conclusion

The main theme of this thesis is that unions have played a significant role in offering various courses that meet employees' needs in CE. Hong Kong is a mature capitalist society. However, the CE system is not as mature as that in the west. According to the historical review and the analyses by interviewees and focus group participants, the union services do meet the needs of employees. The analysis of likely future economic development, government management policy and employees' needs indicates that unions still need to play a significant role in providing courses and policy participation in the next ten years. However, this traditional role has to be enhanced in order to meet new challenges brought forth by the new situation. But due to insufficient resources, the low academic image of the union training centres and the targeted service groups and areas, unions cannot get involved in CE in all directions.

The next chapter will present recommendations to the unions. To conclude this chapter, Table 9.1 presents the framework of the role played by Hong Kong union in CE. For a detailed framework see Appendix 1, and for a summary of the unique role played by Hong Kong unions see Appendix 2.

Table 9.1 Framework of role played by Hong Kong union in CE



Chapter 10

Recommendations and Conclusion

This thesis has established the fact that unions have a proven track record in providing opportunities for employees to engage in a range of CE activities. However, with new challenges come both opportunities and risks. The future directions for union involvement in CE and VET are worthy of detailed exploration. The analysis highlighted in this thesis has shown that there is still a gap between the needs of employees and the present provision of study opportunities. One of the most important findings of this research is that the unions in Hong Kong can play a significant role in motivating employees to study and assist them in removing the barriers to further study. In addition, the research presented in this thesis also affirmed that due to a shortage of resources, unions should not attempt to be “all things to all persons” in terms of the courses they provide. The following are recommendations derived from the analysis of the interviews and the focus groups discussions the secondary analysis of selected relevant documents.

10.1 Recommendations relating to courses provided by unions

According to the analysis presented in Chapters 6 to 9, the possibilities for Hong Kong unions in the continuing provision of CE can be grouped under a number of themes. The ways forward for the Hong Kong unions therefore include the following options:

- (i) Continued provision of traditional programmes (non-accredited related courses);
- (ii) Continue to offer “interest courses”;
- (iii) Offer courses with QF recognition growing;
- (iv) Offer of programmes with non-degree certificate and diploma qualifications;

- (v) Offer study programmes to help employees work in Mainland China;
- (vi) Offer courses subsidized by the Government, such as ERB courses; and
- (vii) Continued participation in policy-making related to employees' training.

The following section will consider the possible ramifications of each of these options.

10.1.1 Continued provision of traditional programmes (non-accredited related courses)

In the individual interview, Mr Chau, a union leader from the FTU, stated, “We have to hold the fort and look into the future for more opportunities and development” (I8 01-09-2010). The achievements thus far should continue and the correct policies and practices maintained and developed to respond to the needs of employees. The key word is “needs”. What are their needs? How can unions continue to meet those needs? The report *Qualifications Framework: Introduction* states, “With the advent of globalization, rapid advances and popularization in technologies and Hong Kong’s further transformation into a knowledge-based economy, the local workforce should be better equipped to enhance its capabilities and competitiveness” (Education Bureau, 2008, p. 1). This document clearly outlines the concept of the Government of Hong Kong SAR’s vision and expectations for employees in the future in the new economic environment. The knowledge-based economy will continue to exert a major influence on all industries. Employers will intensify their demands for a multi-skilled workforce. Employees cannot escape this reality and they need to undertake CE in order to survive in the labour market now and in the future. Coming face to face with a rapidly shifting economic situation and a swift upgrade in technology, employees will have to continuously update their knowledge and skills. Courses or study sessions may vary in length, from a one-day seminar to several lessons in hands-on workshops or longer, to meet the requirements to cope with sudden changes in their jobs. Unions can respond

to their needs very quickly as they have a big pool of tutors who are actively working in different industries. Tutors have demonstrated a capability for keeping up with market needs. The second strength of unions is that they can make use of the advantage that their tutors are actually coming from different industries and disciplines, so they can offer various courses for employees to choose.

According to the Hong Kong Census Statistics,¹⁸ the median hours of work per week is 48 hours. The working hours of general employees are very long, making it difficult for them to fit in study time, especially if they also have family responsibilities. The long working hours are a tradition in Hong Kong. This is why unions traditionally arrange courses in short-term mode and lasting three to four hours a week. In the future, unions should continue to provide courses with suitable teaching mode to meet their study needs.

In addition, employees' budgets should also be considered, as reflected in the focus group sessions which revealed that one of the reasons employees like to study in union centres is the low course fee. According to the statistics, the current median wage of Hong Kong employees¹⁹ is HK\$10,500. Meanwhile, it is reported that 14.4% of Hong Kong employees earned less than HK\$5,000 per month in 2009. The Census Statistics (Census and Statistics Department, 2010) also showed that the salary index fell from 114 in the first quarter of 2009 to 113.1 in the same quarter of 2010. From this figure, we can predict that the salary index for employees will not improve in the near future. Therefore, unions have to consider keeping the course fee as low as possible.

However, as the analysis of the interviews and the focus groups discussion, because of the shortage of resources, unions are not able to provide training requirement complex

¹⁸ Census and Statistics Department (2010)

¹⁹ Hong Kong Year Book 2009 (Government of the Hong Kong Special Administrative Region, 2009)

facilities. So the unions can keep on the traditional training, but with aware of the upgrading of the training facilities needed. And this means that the union training centres have to solve this problems if they want to continue to provide the traditional CE.

So to conclude, the evidence presented in this thesis has affirmed that unions should continue to provide vocational training and they should retain those course features that have proven to be most popular with participants. That is, courses should be part-time and short-term, usually three months in an interval, one or two lessons per week, and each lesson lasting one to three hours.

10.1.2 Continue to offer “interest courses”

For adult learners, the issue of quality of life is as important as the quality of their work. Understanding how to have a healthy and meaningful life is potentially of great benefit to one’s daily work. In the interviews and focus group discussions, all participants stated that they like to join interest courses to have fun, to relax, to gain health knowledge and to enrich their social activities. Another important point is that the interviewees agreed that an interest can later be turned into a profession. Interest courses open doors for adult learners to pursue a second career and this is also a strength of unions’ provision of CE that has been highlighted in Chapters 6 to 8 in this thesis. Unions should therefore continue to organize these and similar courses to help workers make their dreams come true.

10.1.3 Offering courses with QF recognition

According to the analysis in Chapters 6 to 8, the growing recognition of courses accredited by HKCAAVQ under QF provides opportunities for unions to meet the study needs of employees in Hong Kong.

The QF system in Hong Kong is expected to be the qualifications bench-mark for different disciplines and industries. According to the vision of the HKSAR Education Bureau, the qualifications framework is “to ensure sustainable manpower development amidst the rapidly changing world”. It is a measure to “facilitate articulation among academic, vocational and continuing education through the establishment of a comprehensive and voluntary network of learning pathways” (Education Bureau, 2010). The QF system is aimed at allowing working adults to use the learning path to achieve the higher qualifications needed in our rapidly changing world.

The message from the government is worthy of serious consideration by unions. This message is that “the QF is a hierarchy that orders and supports qualifications of academic, vocational and continuing education” (Education Bureau, 2010). VET and CE offered by unions can be accredited under this system. Learners in union centres can obtain recognized qualifications via the QF ladder.

To encourage more training centres to obtain programme accreditation according to the requirements of the HKCAAVQ, the Government of Hong Kong SAR has relaxed the application procedure to be more user-friendly, compared with academic accreditation.²⁰ Moreover, the validation fee has also been reduced to a more reasonable level. The Education Bureau will provide a 100% subsidy to eligible organizations going through Initial Evaluation and a 75% subsidy for Program Validation, provided that the organization concerned is a non-profit-making entity, the course is self-financing and the accreditation is successful.

With the involvement of industry stakeholders, an easier pathway towards recognition under the QF will be provided. As the Industrial Training Advisory Committees

²⁰ The accredited QF programme provider needs to go through the initial evaluation and the programme validation, which is governed by HKVAAVQ.

(ITACs) are the core of the QF, the Education Bureau establishes them and acts as a secretariat to assist the committees in implementing QF. The ITACs comprise representatives from employers, employees and professional bodies in industries. The committee members of ITACs are appointed by the Education Bureau. The terms of reference of the ITACs²¹ clearly reflect the commitment of the representatives to promote and to recognize the qualifications validated on this basis. Under the terms of reference of the committee (Education and Manpower Bureau, 2004), members are invited to provide input and suggestions on the concrete contents of the Specification of Competency Standards (SCS) and have to help to promote the QF. Therefore, theoretically, employers and employees have the responsibility to recognize qualifications derived from the QF system and to promote them. There are many seminars organized by employers' and employees' associations to introduce this system and the programmes (Education Bureau, 2010). According to the Education Bureau announcement (Education Bureau, 2010), 16 ITACs have been established, and so with the increase in number of QF-recognized qualifications required by the industries, the Government also needs the concerned organization to implement the QF system in their programmes.

According to the analysis in Chapter 8, some of the interviewees stated their concern about the ability of unions to attain accreditation for their courses by the HKCAAVQ. However, as the data that emerged in the last chapters clearly show, the union can make use of the conditions provided by government to smoothly go through the accreditation procedure. Interviewee 1, in Chapter 8, mentioned that with the representatives in the ITACs, union training centres can clearly understand the contents

²¹ The terms of reference of the ITACs are: 1. To develop, maintain and update the Specification of Competence Standards (SCS), and formulate a recognition of Prior Learning (RPL) mechanism for the industry; 2. To promote the QF within the industry; 3. To advise on such other matters relevant to the QF as may be referred to the Committee by the Secretary for Education.

of the SCS for a particular industry. They can easily invite industry experts to help them draw up programmes for validation. Meanwhile, as union centres can be easily registered as non-profit-making organizations, they can obtain a subsidy from the Government and this reduces the financial burden of the programme validation fee. Therefore, with these advantages, unions should organize training programmes with reference to the contents of the SCS in order to meet the needs of employees. Dr Leung (Interviewee II in Chapter 8) also supported this point strongly. Nevertheless, both Interview 1 and Dr. Leung did not agree that unions should organize a wide catalogue of courses under the QF (see section 8.2.3.2).

As shown in the analysis presented in the previous chapters, the interviewees recognized QF to different extents, but unanimously agreed that the QF can give employees a channel to get their skills and knowledge to be recognized as qualifications and which can be a stepping stone to be promoted to a higher status.

To conclude this section, it should be stated that the discussions of the focus groups and analysis of interviews that emerged in Chapters 6 to 8 shows that the unions can afford to provide the courses with QF accreditation to the employees. As mentioned above, the unions have the status, an abundance of professional tutors and training venues, the recognition of the standards and the mission, and these in combination give the unions a strong capability to organize the courses. In addition, it has been shown that the unions have numerous experts from different disciplines and industries do draw on as consultants and they can assist the unions in navigating the accreditation procedures. The most important factor is the need of employees to attain qualifications that are within the QF, therefore to offer courses with QF recognition is a proper way for the unions in the context of CE.

10.1.4 Offer of programmes with non-degree certificates and diploma qualifications

As mentioned in the focus group discussion and individual interviews, a common request made of union centres is to offer courses with qualifications. It is easily understood that with the advent of the knowledge-based economy, qualifications are the entry requirement for a job, especially for clerical and professional work. According to the latest statistics, Hong Kong managers and administrative professionals accounted for nearly 10% of the total active workforce from 2007 up to the present. The professionals and associate professionals accounted for 26% while the clerks, service workers and shop sales workers accounted for nearly 31%. Also, 88% of people employed were working in the service sector, and 32.8% in the import/export, wholesale and retail trades.²² From these figures, we know that the current employees need recognized, on paper qualifications. As to the clerical employees, as reflected by the discussion of the participants in the focus group, a certificate is the entry requirement for the job. Craft workers and employees in related fields only need to demonstrate what skills they have. A simple example illustrated by the participants of the students' focus group is the position of an accounting clerk. No matter what academic qualifications one possesses, the LCCI certificate is the prime valid certificate that is needed to meet the job requirements.

²² Number of employed persons by industry and occupation 2nd Quarter 2007 to 2nd Quarter 2010 (Census and Statistics Department, 2010).

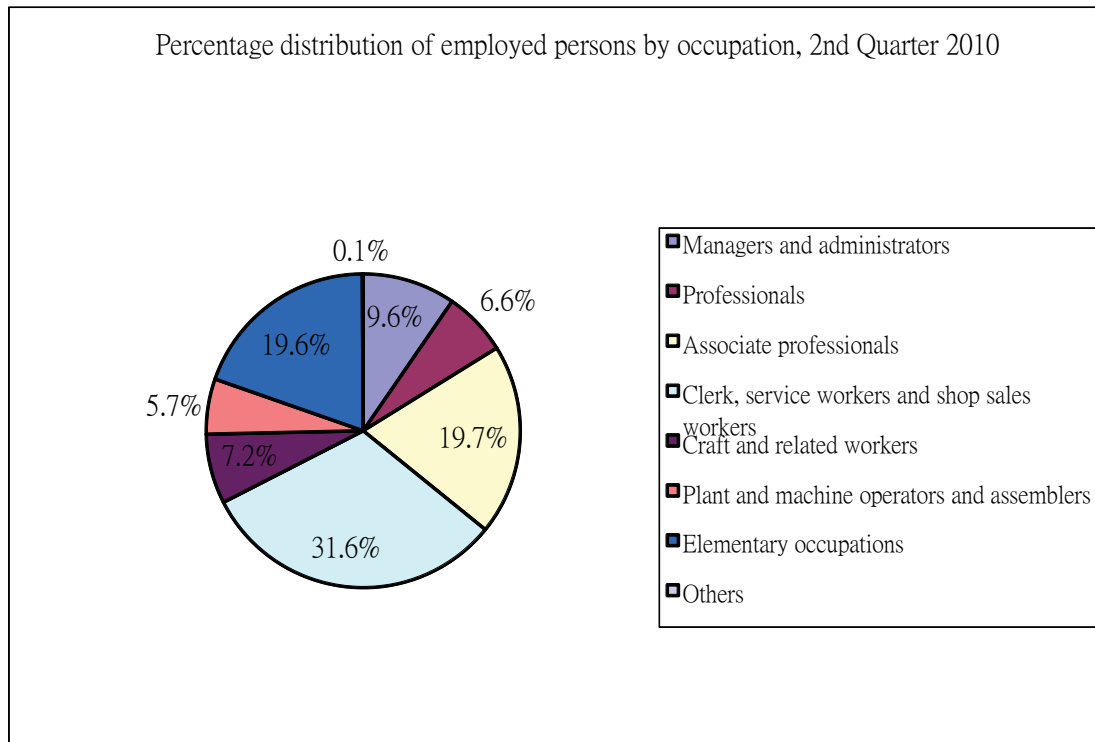


Figure 10.1 Percentage distribution of employed persons by occupation in Hong Kong, 2nd Quarter 2010

Source: Census and Statistics Department (2010)

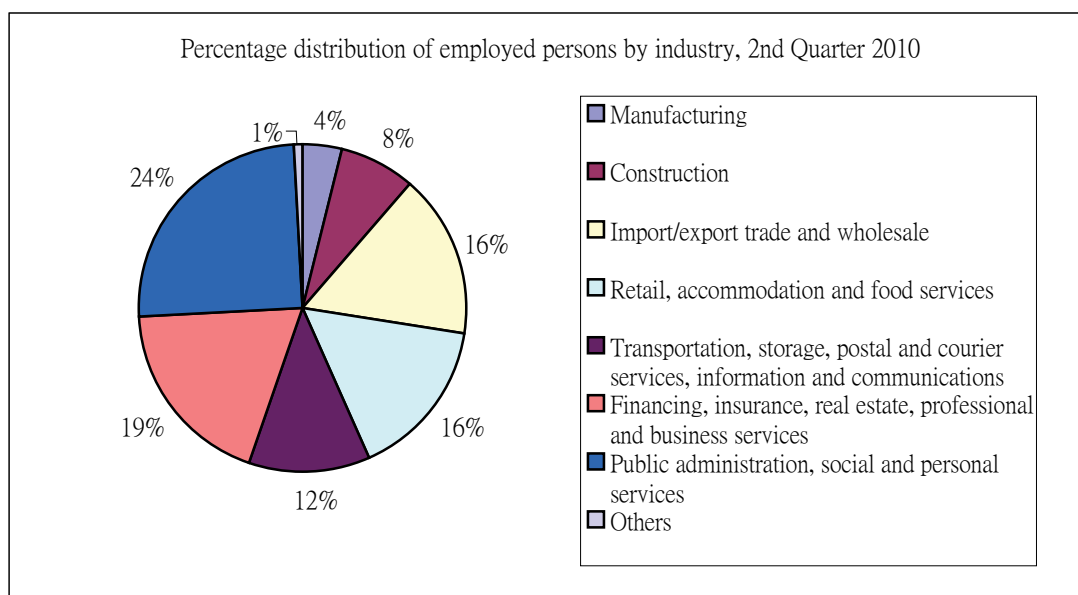


Figure 10.2 Percentage distribution of employed persons by industry in Hong Kong, 2nd Quarter 2010

Source: Census and Statistics Department (2010)

Qualifications generally required by union members are mostly professional qualifications, such as a bachelor's degree or a diploma in accounting, marketing, club management, etc. However, unions do not have the necessary academic background and recognition to organize such high level courses, and so unions can offer the course with the qualifications awarded within their capability, such as the diploma courses with the accreditation from LCCI, C&G and HKCAAVQ.

However, as employees demand that unions organize such award-bearing programmes even up to the level of a bachelor's degree programme, unions could consider collaborating with tertiary institutions to offer those programmes leading to a recognized qualification. Unions can offer the programmes to meet employees' needs for qualifications through study in union centres while tertiary institutions can widen their promotion channels and enrol more students. This consideration is based on the capabilities of unions' strong motivation to remove barriers to encourage employees to

study. Therefore the cooperation between unions and tertiary institutions can create a win-win situation.

To sum up, the offer of award-bearing programmes is one of the important ways in which unions can address the needs of employees in Hong Kong.

10.1.5 Offer study programmes to help employees work in Mainland China

Rapid economic growth in Mainland China attracts many Hong Kong job seekers to look for working opportunities there. The Government of Hong Kong SAR encourages Hong Kong graduates to work in Mainland China. The Mainland and Hong Kong Closer Economic Partnership Arrangement (CEPA) is the first free trade agreement ever concluded by the Mainland of China and Hong Kong. It opens up huge markets to Hong Kong goods and services (Economic Analysis and Business Facilitation Unit, Financial Secretary's Office, 2010). Under CEPA, the Mainland will introduce 40 liberalization measures covering 42 service sectors, such as conventions and exhibitions, banking, construction, social services, tourism, accounting, medical and dental services, as well as consulting services. These measures create chances for the workers to work in Mainland China. An official report 2010 Update of CEPA's Impact on the Hong Kong Economy (Economic Analysis and Business Facilitation unit, Financial Secretary's Office, 2010) revealed that around 90% of companies surveyed reported having staff engaged in their Mainland operations due to CEPA. According to the report, released at the end of 2009, about 40,600 jobs were created, up from some 31,300 jobs in 2008.

In addition to CEPA, there is a big labour market in Mainland China. This is a chance for unions to serve local employees who need to work on the Mainland.

According to the Mainland China labour legislation, employees who want to work there need to obtain a job entry licence. Unions, especially the FTU, which has a close relationship with the Chinese central government, can organize some relevant courses for employees and consequently secure the required licence or qualifications for work in China.

10.1.6 Offer courses subsidized by Government, such as ERB courses

Enhancement of employability is one important policy objective adopted by the Government of Hong Kong SAR and subsidizing training programmes is seen as one means of implementing this policy. In the 2007-08 Policy Address, the Chief Executive D. Tsang stated that as “employment is an issue that has to be tackled by setting long-term strategies, Hong Kong’s economic growth model has changed. The need for training and self-improvement is not just confined to low-skilled, low-educated, and middle-aged workers. We need to turn our training policy into a long-term social investment.” (Tsang, 2007, p. 73.) The Government therefore expanded the employees’ retraining scheme and provided funding of 3.5 billion to the Scheme. The ERB is mainly a funding body to subsidize training programmes offered by training bodies to help people aged 15 or above, with an education level at sub-degree or below. The ERB will also subsidize “training programs that are more diversified and geared towards market needs.” (Tsang, 2007, p. 73). The number of training places was guaranteed to be two hundred thousand by 2009-2010.

With government support for directing considerable resources to cover the training needs of employees, unions have the opportunity to continue to make use of this fund to support employees to study. As discussed above, it is of vital importance for employees to receive the message that they need to study through proper channels if

their qualification is to mean anything. Unions are well placed to provide more opportunities that encourage employees to study.

Nevertheless, there remain many barriers to employees' further study. These include self-imposed barriers such as "no time" and "no confidence to study" as well as factors beyond the control of individuals such as "no proper information", "no convenient study place" and of course "high school fee". Now, the government subsidies for fees can only remove one of the study barriers. Many of the other barriers can be addressed by the training institutions. This is why the government has cooperated with the training institutions to provide encouragement for employees to study. Unions can make use of their numerous and extensive training venues, the close contact they have with members, their families and employees, a big pool of professional tutors and the friendly atmosphere in union training centres to organize the courses for government. Their strength can counter the weakness of government. On the union side, the subsidy from government can help to reduce the weakness of unions in improving availability and quality of resources and facilities. Moreover, as the analysis in Chapters 6 to 8 showed, there does exist a weakness of union training centres in terms of perceptions of their ability to deliver higher end courses. The union training centres can make use of the government subsidy to upgrade their image in the provision of CE. The analysis of Interviewee 1 and Dr Leung in Chapter 8 showed that their experience clearly affirms that the cooperation of unions and government in the provision of CE can produce the multiple positive effects on the motivation of employees to study. Nevertheless, as the analysis in Chapter 9 showed, the capability of the union training centres to provide university level academic support is weak, so organizing the courses with higher academic qualifications, such as bachelor's degrees, presents a huge

challenge for them. It is clear that the unions can provide government subsidized courses with diploma or below level qualifications.

10.1.7 Continued participation in policy-making related to employees' training

Although this is the final recommendation, it is of great significance, as the participation of unions in government policy making means that they are in a position to promote employees' study rights. It is the mandate of the unions that they represent their members and address their problems. Past experience has shown that the roles played by unions in government policy deliberations affect employees' study opportunities and their needs. Unions' participation in the development and implementation of the Hong Kong QF is one example of unions protecting employees' study rights and it is absolutely worthwhile for unions to continue to participate in policy making intended to address employees' needs, rather than only offering courses. Unions should make use of their voices at each and every policy-making level, such as the Executive Council, the Legislative Council and different advisory boards to voice the needs of employees.

10.1.8 Summary

The seven recommendations are drawn from different perspectives to indicate the directions the unions may take to support the needs of employees in their studies. The recommendations are the results of the thesis that can be as a direction to the unions to play the roles in the context of CE. The analysis drawn from all the chapters has reflected the study needs of employees, the history and the background of the unions and the resources the unions can mobilize to invest in the provisions of courses and education services to employees. The recommendations made above have taken into

account the unions' strengths, weaknesses and opportunities and the threats the unions are facing.

10.2 Conclusion

The theme of the thesis is “The Roles Played by Unions in the Provision of Continuing Education in the Hong Kong Special Administrative Region”. The main question is how unions fill the gap between the needs of employees and the courses offered. This thesis sets out to identify the discourse and proper measures to help Hong Kong employees to update their knowledge and skills to cope with the challenges arising from the rapidly changing economic situation. The literature review defines workers' education as covering vocational training and all related activities. In the knowledge-based society, demand for multi-skills and updated work knowledge force employees to continue to study, otherwise, employees with outdated skills will be easily made redundant. However, in reality, employees face many study barriers. Unions, as the protectors of employees' rights and interests, can give employees the confidence to join their activities, including training programmes. The report of the University of Hong Kong, School of Professional and Continuing Education (2001) “*The 2001 Survey on the Demand of Continuing Education in Hong Kong*” confirmed that unions in Hong Kong have played a significant role in encouraging adults to study, showing that 8% of learners amidst all CE participants in Hong Kong studied in centres run by the biggest union group, the FTU. These data are a significant suggestion to the researcher to study why the union can play such an important role in the context of lifelong education and CE. In facing the advent of a knowledge-based economy, rapid advances in technology, etc., employees need to upgrade their knowledge and skills, and even to be multi-skilled employees, otherwise, they will easily become obsolete. However, the “*Survey on the Demand of Continuing*

Education in Hong Kong 2007/08” showed that the participation rate in CE in Hong Kong was not ideal, compared with industrialized countries (Hong Kong University, School of Professional and Continuing Education, 2008). This thesis has the aim to ascertain how the unions play their roles in the context of lifelong education and whether they can put in more effort to fill the gap between the needs of employees and the provision of courses and education services.

The analysis affirmed that it is a common aim of unions to fight for employees’ rights and safeguard their working conditions. However, due to the different cultural and political backgrounds and the diverse economic situations between western countries and Hong Kong, different ideals and measures are upheld by different union groups. In Chapter 3 the divergences between unions were analysed and the main point raised in that chapter was that “training” provided by unions in Hong Kong was a tool to attract members to join the unions. “Training, one of the rights of labour” is the core of the unions’ ideal. They treat this as employees’ right and as a direction to work for. Thus, the unions in Hong Kong offer numerous training programmes to their members and other employees in Hong Kong. These courses are welcomed by their members as reflected by the high course participation rate.

In the analysis of the student focus group, the CM focus group and the interviews with stakeholders and experts, the reasons for the high course participation rate and the rationales for the courses offered were discussed. Course participants, who are employees in different industries and disciplines, concluded that unions can offer training to meet their needs. The flexible arrangement of courses, the venues, the intensive contents, the teaching mode and the study atmosphere, especially the relationship between the centre and students, give them the motivation to study. They know the importance of CE because of the advent of the knowledge-based economy

and the continuously updating technology. They find the opportunity to study in union centres in which they have confidence and they also attain knowledge and skills related to their work and their daily lives. For employees, CE comprises elements related to work and life. They emphasized that good working skills and quality of life are of equal importance. Knowing how to relax is a major support to having a quality working life. They agreed that union training centres give them opportunities to learn both leisure and working skills. Meanwhile, they also raised the important point that they can achieve their personal aim for self-actualization, the top rung of Maslow's hierarchy of needs. In union centres, they can extend their social circles, join volunteer groups, and have more assistance from the centres. They concluded that union training centres do meet their study needs and help them explore their potential and further aims. Data have been presented to show union stakeholder reflections on how unions' training services meet their needs. This is a different perspective to indicate how unions narrow the gap between the study needs of employees and the take-up of union services by participants. The objective of the unions in offering services was further elaborated by the CMs' focus group.

The CMs are the day-to-day operators of union training centres. They have to implement union policy and they are the frontline staff in daily contact with the service receivers. They can make use of their strengths, such as the large professional tutor pool (they are also union members upholding the same ideology to serve employees), the large number of teaching venues all over Hong Kong, and the comfortable study atmosphere, all contributing to attracting employees to further their individual learning goals. They can easily ascertain the needs of students from this daily contact, and convey course information to the course organizers and tutors, and vice versa. Messages from the union authority can be transmitted to participants through the CMs.

Their engagement clearly reflects the ideology behind the provision of courses which is to serve employees, and fight for their rights, including their right to study. They believe they have a responsibility to encourage employees to study in order to equip them with proper skills to enhance their employability. The individual interviews further testified to the unions' function in narrowing this gap.

Participants in the individual interviews were drawn from different disciplines and backgrounds. However, all of them are familiar with workers' education in Hong Kong. They analysed this issue from different perspectives to confirm the role played by unions in the delivery of CE in Hong Kong. They confirmed that the unions contribute significantly to CE. They discussed this with the understanding of Hong Kong's history, including the history of the labour movement, colonial rule and Hong Kong's particular social background. The historical discussion confirmed that the unique historical background of unions provided an ideal context for the development of workers' education. Education offered by unions comprises work skills training and interest courses for enriching the daily lives of workers. The individual interviewees thought that the different strategies adopted by unions met employees' needs in different periods. Unions do not only provide courses but also measures to help eliminate study barriers for employees.

However, the data that emerged from focus groups and interviews also affirmed that the constraints faced by unions in the provision of courses included a shortage of financial resources and weaknesses in the academic profile of staff. The union leaders even conceded that they were worried about their ability to get the courses to pass accreditation by HKCAAVQ. Some interviewees believed that the unions could request the HKSAR Government to give them the resources to conduct the higher end courses as they are needed by employees. But no one can guarantee the government

will continue to give extra support to unions. So the unions should consider how to balance the needs of employees with their ability and resources.

Based upon the analysis presented in the literature review, the interviews, the focus group sessions and the SWOT analysis, carried out by the interviews, the focus groups, of the situation of union training centres, recommendations to the unions on the provision of education service have been presented in the first part of this chapter. In terms of the seven recommendations presented, the focus of the provision of courses should be on the employees' day-to-day work-related knowledge. It also needs to be reiterated that the leisure courses are also important to union members and employees in Hong Kong, as these will be beneficial to employees' daily lives and health. The continuing participation in policy making in the government tripartite consultative committee is also important to guarantee that the voice and the needs of employees in the context of life education/CE be heard by government.

To conclude this chapter, this thesis has demonstrated, through analysis of a series of interviews, focus groups and an extensive literature review, that unions can play the role of psychologically and physically narrowing the gap between employees' needs and the CE courses offered. They allow employees to access the relevant information, develop their confidence and take advantage of opportunities to study. In our contemporary society, the contribution of unions to CE helps upgrade the quality of the labour force, and guarantees the sustainable development of our society to a civil society.

Appendices

Appendix 1: Interpretation of framework

Background:

150 years of British Colonial Government of Hong Kong: based primarily on Adam Smith's "Laissez Faire" approach to government, relying on market forces: i.e., no proper investment in Continuing Education

After the Sino-Japanese War and the Chinese Civil War, deficit in education before 1970

Strong labour movement in Hong Kong since 1925

Different union camps with different political backgrounds and national sentiments: internal political struggle constituting the motivating force to attract members by means of service provision, including remedial education and Continuing Education

Advent of knowledge-based economy, globalization, and rapidly changing technology: increasing need for Continuing Education to upgrade quality of the labour force; government still lacking long term Continuing Education policy and investment.

Continuing Education institutions intending to offer profitable courses in Hong Kong

Pro-Beijing unions with close relations and connections with Mainland Central Government



Service Receiver (Clientele)

Low-level workers/employees

Low education attainment employees (mainly secondary five education attainment or below)

High education attainment but with no proper skills for current jobs

General employees needing some living skills
Employees needing to work in Mainland China
Employees wanting to serve the community
Professionals willing to contribute to society



Needs

For work:

Daily working skills, multiple skills

Workplace language skills

Communication skills and interpersonal skills

Basic management skills

Extending job search network

For social relations

Extending social contact and network

Volunteering skills to serve the underprivileged

For self-esteem and self-actualization

Recognized qualifications

Workplace skills recognition (e.g. Master Chef licence)

To enrich quality of life

To-increase basic health knowledge

To gain environmental protection knowledge

Physical exercise knowledge and practice

To overcome study barriers

To overcome psychological barriers (such as no confidence in attending courses offered by formal institutions)

To study with people of the same background

Low threshold for entry

Inexpensive tuition fee

Convenient venues

Many choices, flexible subjects combination

Short term courses, easy to commit

Others



Role played by unions

To offer a variety of courses and a large pool of competent tutors from different industries and disciplines (FTU has more than 250 affiliated unions encompassing nearly all the industries); each semester offering 2,500 different courses, with more than 6,000 classes from FTU.

FTU has more than 50 convenient venues located all over Hong Kong

Inexpensive tuition fee as tutors' receive nominal pay and teaching venues are the premises of unions, only charging a token rent.

Low threshold, no entry requirement for most subjects and no entry tests.

Tutors and centre administrative staff taking care of students' feelings and needs.

Flexible courses arrangement, many choices and many subject combinations.

To offer QF accredited courses and some courses leading to qualifications.

FTU offering courses and trade tests fit for work in Mainland China.

**Outcome**

8% of respondents in a survey of persons attending Continuing Education were attending courses offered by FTU.

The targeted service receivers pursuing study opportunities in union training centres with confidence.

Union training centres serving more than 300,000 persons/times/subjects each year.

Course participants in union training centres enjoy the study and confirm the usefulness of the studies for their jobs.

Course participants obtaining qualifications, such as the C&G, the LCCI diploma.

QF-recognized qualifications, beneficial to their career, upgrading and extending their working skills and enhancing their employability.

Course participants gaining the knowledge to enrich their quality of life.

Participants of courses leading to extension of their social and employment network.

Appendix 2: Summary of unique role played by Hong Kong unions in Continuing Education

Background

150 years of British Colonial rule in Hong Kong.

Strong union movement since 1925.

Deficit in education before 1970.

Lack of investment in Continuing Education and no long term policy.

Continuing education institutions intending to offer profitable courses.



Service Receiver (Clientele)

Grassroots workers

Low education attainment employees.

General employees need living skills.

Employees having to upgrade and enhance their working skills.



Needs

Upgrading and enhancing their working skills.

Extending social contacts and network.

For self-esteem and self- actualisation.

For Quality of life.

To overcome study barriers.



Role played by unions

To offer a variety of courses.

To arrange courses in convenient venues.

To offer inexpensive, quality courses.

Low entry threshold and no entry tests.

To offer courses leading to basic qualifications.

To take care of employees' feelings and needs, to build up their confidence.

**Outcome**

8% of respondents reported by a survey to study in FTU training centres.

Each year, union centres cater for more than 300,000 persons/times/subjects.

Course participants obtaining their qualifications and recognition.

Employees enhancing their employability as a result of study.

Appendix 3: Interview Questions

Questions asked of all participants

1. Can you describe the history of the unions in lifelong education?
2. What do you think are the educational needs of the workers?
3. By the Hong Kong Government report, 42% of the Hong Kong labour force has low education attainment (form three and below); how do you view this phenomenon? What problems they will face and what is the challenge to society?

Questions asked of union leaders

4. What do you think are the problems faced by workers wishing to participate in Continuing Education? What are your ideas to overcome such problems or barriers? How and why?
5. Do you think the unions, as the workers' representatives, should provide the proper training to the workers to help them upgrade their ability?
6. Can you think of any political, social, or demographic changes that may affect educational services?
7. In your opinion how do you think the unions participate in Continuing Education policy-making at the governmental level? (strengths, weaknesses and opportunities)
8. How does your union negotiate with the government on policy-making agendas that lead to a proper result for the union?
9. How do you perceive that the union can make use of Continuing Education as a tool of collective bargaining?
10. How do you think unions cooperate with employers to give proper training to their employees?

11. In what way do you perceive the government educational policy may affect the roles of unions in Continuing Education?
12. How do you provide training programmes to members and workers? And why do they join the training courses offered by the union?
13. What are the main strategies that your union adopts to deal with the workers' needs in lifelong education? With respect to this issue, what problems are you facing, and what strategies will you adopt to overcome them?
14. Can you describe your current service in Continuing Education to for the workers?
15. What are the changes you anticipate will affect the role of unions in relation to lifelong education in the future? What factors may need to change for unions to cope with these changes?

Questions asked of academics active in workers' education

16. How do you see the history of the Hong Kong unions in lifelong education? In what way do you perceive they contribute to the workers' lifelong education?
17. Can you give your analysis in regards to the roles unions are currently playing in Continuing Education on different levels? And why can the unions play these roles (from the political, economic, demographic and cultural angles)
18. Can you comment on how the unions will play their roles at the governmental level in the future and why?
19. Do you think that it is necessary for the trade unions provide educational services to the workers with the low education attainment, say form three or below?
20. What do you think of how the workers like to join the courses offered by unions? On what levels?

Questions asked of government officials

21. What is your comment on government policy in the field of Continuing Education? Is it working properly or is improvement needed? Is it a fully functional policy or

could adjustments and improvements be made to complement the existing policy to cater for future requirements to meet changing social and economic demands.

22. How can the government incorporate unions' opinions into the government policy in regards to lifelong education?
23. How can the government make use of the unions to encourage the workers to participate in the training, and why?
24. What is the government policy to the unions in relation to Continuing Education? Does it support the unions to participate in the policy-making and course providing or not? And why?
25. How do you think the unions running the training courses can meet the workers' needs
26. What is your comment on the QF system in relation to raising the quality of the labour force in Hong Kong? Should the unions play a significant role in implementing the system and in what way?

Questions asked of tutors

27. How do you perceive the educational service offered by the unions?
28. Do you think that there are some differences between institutions and unions? And how are they different?
29. What are the main problems the union faces in lifelong education service? (In relation to competition with the other institutions, lack of resources, image of the unions etc.)

Final question

30. Can you give an analysis, under the SWOT (Strength, weakness, opportunity, threat) framework, to outline the educational services of the union that you are serving?

Focus group discussion

Questions asked of Centre Managers

31. Please introduce yourself and your background.
32. Please introduce the situation of your centre.
33. How do you analyse the unions' involvement in Continuing Education?
34. Why do the course participants like to attend the courses offered by your centres?
35. By your experience, please provide analysis of the unions' participation in Continuing Education from the aspects of strengths, weaknesses, opportunities and the potential threats. In your opinion, what are the foreseeable changes in the roles of the unions relating to Continuing Education in the future? What factors may affect the changes?

Questions asked of current courses participants in HKFTU training centres

36. Please introduce yourself and your background
37. What courses you are taking or have you taken before?
38. Why do you choose to study in the union centres?
39. Do you think the union training centre cannot give you what the other institutions, say the Extra Mural Studies Departments of universities, offer?
40. Please use the SWOT tool to analyse the union training centre in providing Continuing Education in Hong Kong
41. How do you think the union training centre should improve to face the challenges of from the new situation, such as competition from the extra mural studies departments of universities and other institutions?

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