▶ Trade unions navigating and shaping change

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Background

▶ Introduction

During the second part of the 109th Session of the International Labour Conference in December 2021, governments and employers' and workers' organizations from around the world held a general discussion on inequalities and the world of work (ILO 2021a). The ILO tripartite constituency adopted a resolution and conclusions setting out the way forward to address multiple inequalities in the world of work of today and the future. Intracountry income inequality has been steadily increasing in most countries over the past few decades. However, the COVID-19 pandemic in 2020 triggered an unprecedented economic and social crisis, highlighting and aggravating existing inequalities.

There are important parallels between rising inequality and a global decline in the labour share of income. The distribution of income growth has been highly unequal, with a majority of the world's population receiving a smaller share than income earners at the very top. The COVID-19 crisis has disproportionately affected those who are vulnerable to discrimination. Since inequalities are more pronounced when multiple grounds of discrimination intersect, the 2 billion workers in the informal economy worldwide were among the hardest hit by the crisis (Fleming 2020).

As emphasized in the ILO Centenary Declaration for the Future of Work, "persistent poverty, inequalities and injustices ... constitute a threat" to the "historic advances in economic and social progress that have resulted in more humane conditions of work" (ILO 2019a). More recently, the ILO's Global Call to Action for a Human-Centred Recovery from the COVID-19 Crisis That Is Inclusive, Sustainable and Resilient (ILO 2021b) has underlined the urgent need for prompt action to reduce inequalities, promote inclusive growth and shape a more equitable future of work. Behind these abstractions, however, are the real lives of workers, many of whom have lost their jobs and income or are suffering decent work deficits, such as inadequate pay, job precarity, unsafe workplaces and a lack of representation.

The beneficiaries of this inequality have seemingly been one step ahead throughout, anticipating further opportunities for offshoring production facilities to the global South, riding the next wave of technological change, prototyping disruptive innovations and leveraging vast capital resources to speculate on emerging industries. In an increasingly uncertain and volatile environment, workers and workers' organizations are faced with multiple transitions, including digitalization, environmental change and the disappearance or emergence of entire economic sectors. The COVID-19 crisis has aggravated some of these challenges.

That being said, trade unions have been at the forefront in formulating policy responses to the major drivers of change in the world of work, not least during the COVID-19 crisis and the recovery phase. The emphasis of this report is on dynamic and resilient trade unionism of this kind. It presents several innovative and positive examples of how trade unions have found ways to anticipate and navigate uncertainty and change.

The research undertaken for this report indicates that many trade unions around the world are responding spiritedly to the challenges that they face. Drawing on strategic foresight, technological literacy and innovation projects, trade unions are learning to chart new paths amid the turbulence and uncertainties in the world of work. This process is pushing us all, including trade unionists, out of our comfort zones and compelling us to consider new ways of thinking and acting. While engagement with these new ideas, methods and capabilities demands courage and may meet with some resistance, we strongly believe that if such engagement takes place across the vast trade union "ecosystem", it has the potential to improve the lives of workers everywhere.

▶ About this study

Trade unions are facing a number of important transformation-related challenges. The climate emergency is prompting a major industrial transition towards a lowcarbon future. *How can trade unions ensure that this transition is just?* New technologies, referred to by some as the "fourth industrial revolution" or "Industry 4.0", are ushering in a radical reorganization of work. *How can trade unions ensure that the benefits arising from application of these technologies accrue fairly to workers and society as a whole?* Significant demographic change is challenging assumptions about who belongs in a trade union and about what is sought from union membership. *How can trade unions understand better how work and workers are changing so as to cater to the needs of new members?*

The experimentation and reorganization already taking place in the trade union movement today attest not just to the scale of the challenges involved, but also to the potential for significant change. New approaches are being adopted around the world and across several sectors.

This study was designed to explore the emerging practices, approaches, capabilities and methodologies that can help trade unions to revitalize themselves by anticipating, navigating and shaping change.

The report is based on extensive desktop research and on consultations and interviews with specialists, trade unionists and labour rights advocates. In our research we looked for high-impact approaches, practices and methods around the world that provide ways for trade unions to deal with uncertainty and change. Among these, we selected 20 notable examples from which other trade unions may draw lessons, if not adopt similar methods and approaches.

We also present a framework for considering how trade unions can navigate and shape change that we refer to as "Triple A" governance – an approach to organizational governance centred on three key pillars: anticipation, agility and adaptation. These three A's denote complementary organizational capabilities required to navigate an increasingly uncertain and volatile world. *Anticipation* is the ability to understand emerging futures; *agility* is the organization-wide ability to question and reconceive assumptions about the future; and *adaptation* is the organization's ability to translate anticipation and organizational learning into actions that are effective in creating desired change.

The report highlights how methods that support organizational anticipation, agility and adaptation are used at different levels. There are ongoing projects of this kind within specific unions, within regional confederations, at the national level, and within continental and global peak bodies.

In its concluding section, the report sets out key insights from the examples presented previously that can be used by trade unions in deciding which practices are best suited to particular contexts and needs. The new challenges of the twentyfirst century call for new approaches if they are to be addressed effectively. We cannot know for certain what will work, but we can analyse, imagine and propose. This final section reviews the innovations already adopted by trade unions to navigate and shape change, offering a straightforward framework to identify methods that can promote capacity-building.

▶ A tale of two archetypes of change

There are two fundamental tasks in any organization: running the organization and changing it. The first of these has to do with the efficient delivery of day-to-day activities for its stakeholders. Changing the organization is about providing new services and phasing out redundant ones in response to stakeholders' evolving needs. One of the leading causes of organizational failure is an inadequate approach to change. Membership-based organizations, such as trade unions, can often cope with these challenges better, but they are not immune to setbacks.

There are many ways that the balancing act between running and changing an organization can play out. Drawing on the complex research by Gunderson and Holling (2002) into adaptive systems, we present two archetypes of change that describe general conditions of organizational transition: (a) cycles of stability and conservation; and (b) cycles of decline, rapid reorganization and redesign. The examples discussed in Section 3 illustrate how trade unions have managed to navigate these two types of change. In some cases, unions have changed proactively; in others, they are reacting to external changes. On the basis of these case studies, we highlight the emerging capacities within unions and consider how their response to change could be made more effective through the application of Triple A governance.

In the **first archetype of change**, trade unions have experienced long periods of relative stability and are performing their core functions well. Changes in the external environment are not anticipated (figure a in Section 3) – for example, new technologies, changes in regulations and changes in attitudes towards methods of organizing and protesting. A gap forms over time between the union and the external operating environment. Externally, members' needs are gradually changing – for example, they expect more online services. The voices of disenfranchised groups inside and outside a trade union may coalesce around events or around new organizations better equipped to respond to the changes in members' needs.

The internal assumption is that the current success of union activity will continue and that the scope of members' needs will remain relatively similar to that of today (or the past). Over time, though, organizations can become "blind" to change. Those people in the organization who look for signs of change are likely to be either ignored or excluded from decisionmaking and the development of strategies. In the absence of anticipatory action, a disconnect arises between trade union activity and the evolving needs of workers. This is often reflected in declining membership, demands for new services and the emergence of new actors.

Eventually, the external signs are so compelling that trade unions have no choice but to recognize the need for change. Organizations in this situation are typically faced with several strategic dilemmas:

▶ Do we disrupt ourselves or wait to be disrupted?

▶ Do we manage the present or create the future?

▶ What should we preserve and take forward, and what should we cut back on?

▶ How do we maintain our existing services while developing new capabilities and services?

On the other hand, organizations that take anticipatory action are able to "see change coming" and to adjust and experiment accordingly.

The **second archetype of change** tends either to follow on from the earlier phase or to be triggered externally. In this case, there are sudden external changes to which unions are forced to react. The external conditions may seem chaotic (as during the COVID-19 crisis), innovation is radical, and smaller, less traditional actors may expand quickly, whereas more institutionalized actors, such as governments but also well-established unions, may be slower to respond. There is disenchantment with existing services, and unions may simultaneously be confronted with both existential risk and great opportunities. Internally, they may not have the capacity to respond.

Unions here face a different set of strategic dilemmas:

▶ How do we stay relevant?

▶ How do we create value in the union with and without these new partners?

▶ Do we need to change our identity and recruit new members?

▶ What assumptions that we have about our work need to be questioned in this fastchanging world?

▶ Which external actors should we partner with, and how can we tell whether they will survive?

The tipping points that may force a reaction from unions include:

▶ the implementation of new technologies and business models (consider, for instance, the implications of algorithmic management on human resource practices or emerging concerns such as data rights and the surveillance of workers);

▶ new constituents previously not catered for, including "gig" economy workers (ILO 2021c), workers in emerging economies such as the "green" and "blue" economies, and female athletes in more professionalized sports.

▶ the rapid ascendance of new actors that also provide relevant services to workers, such as civil society organizations, grassroots movements, community-based organizations, workers' centres that organize migrant workers, and cooperatives, but also lawyers specializing in private labour law (for example, when dealing with dispute resolution) or governmental actors (for example, when dealing with access to the labour market, lifelong learning and access to social security);

▶ large-scale crises such as the COVID-19 pandemic, economic restructuring (for example, the closing of whole sectors) and political instability (caused by, say, regime change or war).

Trade unions with the ability to adapt, to understand how unions or other actors might shape the "narrative" of change, and to respond with agility can cope with turbulent times more effectively.

The unions in our examples responded to change by using capabilities from across the **Triple A governance framework** (see box 1). These capabilities allow unions to mount a more adept response to changing conditions.

▶ The capabilities required to navigate change

This report is premised on the observation that when confronted with uncertain, volatile and disruptive change, the approaches traditionally used by organizations will prove inadequate. To navigate a rapidly changing world of work, a new set of approaches are required and these should be developed proactively. Organizations of all types – from businesses to government institutions and civil society organizations – have had to innovate and build new capabilities in this new context of change. Trade unions are no exception: like other organizations, they too are developing new capabilities, as highlighted in this report.

> ### ▶ Box 1. Triple A governance[1]
>
> **Anticipation** is the **capability to understand the dynamics of change** that may have an impact in the foreseeable future. It allows organizations to be prepared for change by reducing "blind spots" in relation to issues that could have a major impact and by helping them to leverage change so as to take advantage of the opportunities that it creates.
>
> **Agility** is the **capability of an organization to change its mindsets** in the light of new information about how the world is changing. Organizations, as everyone knows, are made up of people. Each of these people has a mental image of the future, of how the world is or ought to be. While in most organizations these images will be diverse, together they often make up a shared narrative or model.
>
> **Adaptation** is the **capability to translate shared notions of how the world is changing into actions** that will promote the success and viability of the organization. These may be conventional actions, such as implementing strategic plans and human resources/workforce planning. They may also include pilot projects and experiments which allow new ideas for change to be tested and scaled up into working innovations, alongside other reorganization activities such as service (re)design.
>
> [1] The Triple A governance concept was first articulated by the United Nations Development Programme (UNDP) country office in Viet Nam in 2019–20 as part of the UNDP's focus on anticipatory governance, and was later elaborated in collaboration with the authors of the present report. See Ramos, Uusikyla and Luong (2020).

The Triple A governance concept encompasses a set of capabilities (Loorbach 2007; Ramos 2014). While each "A" is useful in itself, when all three are used together they enable an organization to successfully navigate and shape change.

Anticipation alone is not sufficient. The ancient legend of Cassandra is instructive in this regard. She was able to look into the future, but her curse was that no one would ever believe her. Similarly, people in an organization may have developed knowledge of the future and its potential impact on the organization, but if this knowledge is ignored or dismissed by colleagues and managers, and if mindsets remain unchanged, they will not be able to make a difference.

Agility, then, is critical for translating knowledge of the future into new perspectives and learning in an organization. It allows such knowledge to be assimilated so that it can inform decision-makers and workers in an organization. However, even agility is not enough if, despite collective understanding of external change, the actions of an organization remain unchanged. This is a typical "deer in the headlights" situation: an organization may see change coming but it feels paralysed and unable to do anything differently. When an organization understands the dynamics of change, and how the future may be different to the present, it needs to be able to **adapt** through practical actions, campaigns, pilot projects and experiments. This allows it to progress from the anticipation of change to the assimilation of foresight through organizational learning, and on that basis to take action that ensures the organization's future viability.

Triple A governance efforts that are already under way

The idea that anticipation can lead to a shift in organizational mindsets (agility), and thence to strategic and tactical innovation (adaptation), is arguably a common-sense one. Indeed, the value of each of the three A's, even as stand-alone capabilities, is reflected in efforts already being undertaken across the trade union movement.

The urgent need for anticipation was emphasized in the *Work for a Brighter Future* report by the Global Commission on the Future of Work (ILO 2019b) and in a report prepared by the Commission on the Future of Work and Unions of the American Federation of Labor – Congress of Industrial Organizations (AFL-CIO 2019). Similarly, the European Trade Union Institute has drawn up a comprehensive guide to help trade unions to practise strategic foresight and enhance their capabilities for anticipation (Ponce Del Castillo 2019). Several studies have looked at trade union revitalization and renewal, focusing, in particular, on how unions are rethinking their strategic assumptions to navigate change. For example, the *Trade Unions in Transformation* report issued by the Friedrich Ebert Foundation (Herberg 2018) gives various examples of agility within the trade union movement, including organizational learning, cultural change and shifts in mindsets in relation to changing operational environments. Finally, as highlighted in the present report, trade unions are experimenting with and prototyping strategic innovations that allow them to adapt to a changing world. The examples provided in Section 2 illustrate the efforts that trade unions are already undertaking in terms of anticipation, agility and adaptation.

Technological disruption and labour

The COVID-19 pandemic, accompanied as it was by the widespread adoption of remote working, social distancing and other health protocols, ushered in a remarkable technological transformation of work and business. What were often abstract and "down the track" issues, such as automation, data rights, surveillance and platform work, have become "here and now" realities for workers and trade unions across the globe.

We have seen first-hand how businesses have embarked on radical digitalization by turning physical goods, knowledge and experience into data and online services. As a result, many of them are demanding new skills and tasks, and in some instances they are "augmenting" the workforce through technology or substituting workers altogether. Moreover, the "datafication" of work, along with large-scale remote working, is transforming the relationship between workers and employers. As remote work arrangements expanded for many workers during the COVID-19 crisis, so too did organizations' investment in digital monitoring and analysis tools that either support or replace decision-making with artificial intelligence-based or algorithmic management.

At the receiving end of all these changes are workers, who often enjoy limited data protection, privacy and rights. In a survey of over 7,500 workers, Prospect Union found that 48 per cent of the participants were not confident that they knew what data their employer collected about them, while 34 per cent were not confident that this data would be used appropriately (Prospect 2020). Algorithmic management practices nowadays play a major role in companies' monitoring of workers' behaviour and union organizing efforts.

All of these changes are occurring against a backdrop of longer-term and systemic technological transformation. We are now witnessing, for instance, the full expression of digital labour platforms, the number of which has increased fivefold over the past ten years (ILO 2021c). On the one hand, such platforms have provided workers, especially those outside the formal labour market, with more income-generating opportunities. On the other hand, these new business models allow organizations to often bypass the investment required to formally engage workers as employees, ultimately denying them labour protections and bargaining rights.

As argued by Mwamadzingo, Kisonzo and Chakanya (2021), "before COVID19, most trade unions (particularly those from developing countries) were relaxed in their uptake of digital technologies and platforms to execute their mandate, continuing to rely mostly on physical interactions and high mobility." However, with workers' livelihoods at stake, concerns among the public, workers and trade unions regarding the impact of technological change are growing in urgency, as are expectations for positive action by trade unions to ensure an equitable future of work.

Technological change through the lens of Triple A governance

As various technology-driven challenges impact on the world of work and workers, trade unions are responding in novel ways. For example, they are increasingly using digital technologies to help restructure operations, advance and expand membership services, and improve communication and advocacy. Trade unions are also beginning to play a more active role in helping to manage the integration of technologies into the workplace while leveraging them to amplify the voice of workers.

In this subsection we offer the Triple A governance framework as a useful lens through which trade unions can view technological change. One key insight is that the adoption of technology alone, such as the digitalization of communications with workers, is insufficient. A strategy to protect, support and upskill workers in an increasingly digitized and "datafied" world requires the full range of Triple A governance capabilities, methods and knowledge.

Anticipating the impacts of new technologies on trade unions and labour organizing

The field of futures studies has for many years included technology forecasting as a subfield. Many governments around the world have programmes or even dedicated ministries dealing with science, technology and innovation that practise foresight through a variety of methods (Miles 2010). Given the detrimental consequences of solely reacting to technological transformation, it is essential that trade unions should proactively anticipate how new technologies may impact their respective sectors in the coming years. Applying foresight in this way ensures that trade unions are better equipped to defend workers' rights.

Technological anticipation in action

The European Trade Union Institute conducts high-level dialogues on the impacts of technology on labour issues and trade unions (see example 4).

The consultancy Why Not Lab is working to equip unions and workers worldwide with the requisite skills and knowledge to anticipate and manage collective rights in the digital age (Why Not Lab, n.d.).

The IndustriALL Global Union has produced a report on the fourth industrial revolution, which examines the potential short- and long-term impacts of technological change on trade unions (IndustriALL 2017; see also example 7).

Agility in navigating emerging technologies

Technological forecasting will often identify the emerging technologies that may have an impact on an organization, thereby helping to prioritize the technologies that should be examined in greater depth. However, this does not ensure that an organization is able to respond. For a start, the implications of specific technologies may not be well understood and further research may be required. In most cases, though, the settings are very specific and trade unions need to understand the impacts of emerging technologies on their sectors, industries and particular groups of workers.

As discussed, agility in this report is understood as the ability to assimilate foresight and shift mindsets and perspectives when confronted with changing conditions. In relation to technology, this means promoting technological literacy in organizations, engaging in continuous dialogue on which technologies pose threats and which create opportunities, and fostering a culture that is open to learning and the acquisition of skills relevant to new technologies.

Technological agility in action

The Singapore National Trades Union Congress has worked together with the Government, companies and the education sector to develop innovative training models under the "Future Ready Members" programme. This has resulted in an online learning platform with a broad catalogue of "just-in-time" learning products covering a range of current and emerging technologies, such as data science, cybersecurity, blockchain, the Internet of things, artificial intelligence and quantum computing (see example 5).

A Twitter bot was launched through the account @PayGapApp to raise public awareness of the extent to which companies are paying female employees less than their male counterparts, contributing to a growing social conversation about the need for gender pay equity (see example 8).

Adaptation in engaging with emerging technologies

As already pointed out, even when people across an organization are aware of societal or technological changes, this is still not enough to ensure future viability. An organization needs to translate its knowledge into new actions and activities that create new outcomes. In a trade union context, this can refer, for example, to the organizational capacity to resist union-hostile technologies that businesses wish their workforces to adopt. With sufficient anticipation and preparation, unions can take countermeasures against the introduction of new technologies that threaten unionizing and pro-labour activities. However, adaptation may also involve the use of new technologies that support union activities, organizing and labour rights.

The adoption of new technologies requires teams to have sufficient technical knowledge and skills to devise solutions. In particular, they need to have service design skills so that they can work with end users to test and refine the solutions. This process relies on a mindset that is prepared to experiment and that can turn failure into learning, since technological prototypes usually move through many experimental iterations before a definitive model is arrived at. It is also important to be able to scale up solutions when these are ready.

Technological adaptation in action

The Palestinian General Federation of Trade Unions has developed an app to support its members in dealing with incidents and problems, to create awareness of legal rights and to improve working conditions (see example 16).

Prospect Union has created tools to promote data literacy among its members, including tools that allow workers to take charge of their own data (see example 17).

Described as a "Fitbit for workers", WeClock is a new open-sourced app designed to help workers to track and manage their own data (see example 18).

▶ 2

Trade union experiences from around the world

As part of this study we looked for examples worldwide of how trade unions, but also labour rights organizations and networks, coalitions and platforms, have demonstrated transformation capabilities across the three A's of anticipation, agility and adaptation. This section showcases some of the more illustrative examples that we found. First of all, though, we present a framework that sets out how the examples were classified according to a number of variables.

▶ **Framework for categorizing the examples**

Archetype of change	Growth, stability and conservation			Rapid reorganization and redesign
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other (e.g. networks, coalitions, platforms)

Archetypes of change

One of the key premises of this study is that trade unions face two generic transition contexts: (a) growth, stability and conservation; and (b) rapid reorganization and redesign:

▶ Growth, stability and conservation – for instance, the long-term stability in energy and mining sectors that are increasingly challenged by climate change and energy transition needs. Our examples show unions using anticipation capabilities and, in some cases, methods to anticipate change and avoid rigidity.

▶ Rapid reorganization and redesign – for instance, in response to the COVID-19 crisis. Our examples show unions rapidly adopting technologies and new modes of engagement during the crisis.

The strategies and methods used to navigate and shape change are most likely to be successful if they take into account the nature of these two archetypes.

Triple A governance

There are three capabilities that are essential for navigating change: anticipation ("capability to understand change"), agility ("capability to change mindsets") and adaptation ("capability to act"). We looked for examples of trade unions undertaking projects that explicitly demonstrate one of these capabilities or a combination of them.

Geographic scale

Trade union movements operate within a complex ecosystem, where local union chapters, regional or sectoral federations, national confederations, and continental and global peak bodies and institutions interact and harness synergies (or not as the case may be). By examining the dynamics of these various organizations working at different levels, we can understand better what a robust future ecosystem should look like.

Type of organization

Although this report focuses on trade unions, we also looked at a broader set of civil society actors, such as labour rights organizations, networks, coalitions and platforms. We believe that the examples of this kind presented below may point to opportunities for strengthening inter-organizational learning and capabilities in the trade union movement.

▶ Examples : Anticipation

The following examples illustrate the capability of anticipation as displayed by trade unions and in related organizational projects.

Example 1. South African Typographical Union: Adjusting to changing times[1]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The South African Typographical Union (SATU) launched a multi-year futures research process in 2019 with the support of the Institute for Futures Research at the University of Stellenbosch Business School. The head of SATU had attended one of the seminars regularly conducted by the Institute and asked its staff if they could help in implementing such a process.

Like many trade unions, SATU was facing a decline in membership and uncertainty about how to organize, serve and represent future members. In general, the publishing industry had undergone dramatic change in recent years, partly owing to ongoing technological developments, and SATU therefore wanted to prepare and plan properly for future change within the industry.

SATU took an anticipatory approach, using strategic foresight methods to navigate current and future uncertainty. The first phase consisted of a thorough scoping exercise, which covered both union-specific changes and wider changes to the publishing industry and their implications for workers. A research colloquium was organized, which generated method- and content-related insights. Subsequently, a robust "three-dimensional" horizon-scanning exercise was undertaken to identify drivers of change, defenders of the status quo, and "bombs" (issues that can disrupt the whole system).[2] The SATU team then used a timeline approach to map past, present and future trajectories. Drawing on a distillation of key factors and applying the "intuitive logics" approach, they developed three scenarios for the printing industry. Once these scenarios had been generated, they asked: *"Where is the printing industry going and what are we as a trade union doing in each of these futures?"* Following on from this, two scenarios (one utopian, the other dystopian) for the future of SATU itself were developed. Interestingly, the scoping involved government representatives, employers and industry bodies as observers. Despite not driving the process as such, they were able to provide feedback and input.

The research process had both tangible and intangible outcomes. A report was produced and the country's main trade association for the printing industry was so impressed that it invited SATU to deliver a presentation on the findings at its annual conference. Strong interest was expressed by commercial partners in conducting a follow-up study, in which SATU would play an administrative role. The research undertaken had a strong impact in terms of shifting mindsets in the union itself, notably with regard to how SATU engages with its members. Previous assumptions about union membership were challenged – in particular, it was found that a causal relationship between a growing publishing industry and growing membership could not be taken for granted. The findings enabled SATU to both identify potential new members and offer innovative services, such as legal and professional support, to new members based in smaller companies. This repositioning has provided SATU with a clearer picture of its future trajectory and viability.

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1   Sources: interview with Doris Viljoen conducted online by José Ramos on 8 February 2022; Viljoen and Samson (2019).

2   Section 3 of this report discusses in more detail existing methods that can be used to address the various capabilities for dealing with uncertainty and change.

Example 2. CISL Veneto foresight project[3]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

CISL Veneto is a regional branch of the Italian Confederation of Trade Unions (CISL) representing the region of Veneto, which comprises multiple provinces. The union has an extensive scope spanning 19 economic sectors. Over the past three years, CISL Veneto has been implementing an ambitious foresight project involving all sectors and provinces covered by the union. Widespread job loss since the global financial crisis of 2008 had prompted a defensive posture by the trade union, which focused on preserving jobs. However, sensing the need to be more proactive and inspired by a workshop on the use of strategic foresight organized by the European Trade Union Institute (see also example 4), CISL Veneto launched a foresight project in 2019 with the dual purpose of preparing the organization for the future and training younger union members in strategic and long-term thinking.

▶ **Box 2. Key internal and external challenges faced by CISL Veneto**

The CISL Veneto foresight project identified four main internal and external challenges for the trade union:

(a) relaunching participation and collective bargaining;

(b) enhancing the trade union welfare system;

(c) strengthening organizational risk management;

(d) improving the management of relationships and communications.

The project brought together almost 20 unionists, most of whom were under 40 years of age, from five provinces and 14 sectors to form the core team. Other organizations were also involved, including the Tarantelli Foundation, the CISL Study Center, the European Trade Union Institute and the Corazzin Foundation, as were various experts and academics. Initially, 2035 was the project's horizon year, but after the onset of the COVID19 crisis it was felt that change would take place more rapidly and that working towards 2025 would be more appropriate.

Using the "prospective analysis" methodology and supported by a foresight practitioner, the project team started off with the research question: *"How do we represent workers in a changing world?"*. However, this was later adjusted to: *"How must the union (CISL Veneto) change to expand its representative capacity and leadership?"* Proceeding from this question, the team explored trends and weaker signals of change, which were grouped into key internal and external challenges facing the organization (see box 2 above). This was followed by a strategic planning stage with ten macro-level objectives, lines of action to achieve those objectives, and innovation projects to respond to the challenges faced by the union.

The CISL Veneto foresight exercise has been characterized by a highly participatory approach, involving different governance levels (that is, Executive Committee, General Council, Secretary General, sectors and territories) at the various stages of the project (see box 3).

▶ **Box 3. Project phases**

The CISL Veneto foresight project consisted of the following phases:

(a) training course and related activities dealing with strategic thinking about the trade union's representation (May–November 2020);

(b) presentation to the Executive Committee of CISL Veneto involving the participants in the training activities (January 2021);

(c) discussions within the Executive Committee of CISL Veneto (February–July 2021);

(d) presentation of a strategic plan within the General Council of CISL Veneto, which is shared with the CISL Secretary General, Luigi Sbarra (September 2021);

(e) dissemination of the strategic plan among trade union sectors and territories (ongoing).

The fruit of this collective and participatory process, completed in September of 2021, was the development of a common strategic framework – a map for strategic thinking that can be used by the various sectoral and provincial leaders within CISL Veneto. The process helped to shift mindsets and to introduce young leaders and others in the union to new ways of thinking and planning. It has provided a strong stimulus for capacity-building and leadership development. The various innovation projects have the potential to enhance the union's activities in a number of areas. Significantly, the CISL Veneto foresight project has garnered interest from other regional unions, which are considering adopting the same approach. This is also being considered at the level of the national confederation.

Example 3. International Federation of Professional Footballers' Associations: Getting ahead of the game[4]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The International Federation of Professional Footballers' Associations (FIFPRO) is the voice of professional footballers and their national unions. It represents footballers worldwide, ranging from those playing for the most famous teams to those playing in minor leagues.

FIFPRO had noticed in recent years that players' concerns were not being met by its services, including mental health concerns, future-oriented concerns about playing conditions in extreme weather resulting from climate change, and concerns about career opportunities once players hung up their shoes for good. A growing disconnect between the interests of players and changes in the industry could be sensed. Many of the ideas being promoted about the future of soccer did not incorporate any player perspectives. FIFPRO faced becoming less effective and increasingly irrelevant to players. How could the Federation manage the present and shape the future for itself and its members?

A change in management led to a more "entrepreneurial" approach at FIFPRO, which began to look at how consultancies address similar future-oriented issues. This served to highlight the importance of initiating foresight processes and considering trends and possible future scenarios. The increased activity at FIFPRO was accompanied by an increase in the number of people working for the Federation, a focus on upskilling staff and enhanced research capacity. A key driver of this change is a renewed focus on players' needs and views. Another impetus is the upcoming renegotiation of the global playing calendar in 2024. Accordingly, FIFPRO added a unit tasked with anticipation to its research division.

"Innovation labs" at various football clubs currently shape the innovation agenda on behalf of these. Foresight work is carried out at the national or international association level, but it is driven by commercial interests and the perspectives of clubs, rather than those of the players. In response, FIFPRO aims to use its futures work to:

▶ bring players' perspective to the fore;

▶ inform players through foresight reports to assist them in taking decisions;

▶ provide options in negotiations rather than "just complaining";

▶ make available material in areas of interest to players, such as the emergence of Meta (previously Facebook) with the potential for virtual spaces in which players may be able to interact with one another.

FIFPRO is seeing the benefits of taking a futures approach in negotiations. It plans to expand and deepen its futures research capacities and is looking for opportunities to collaborate with other global unions in this field. FIFPRO also intends to integrate the research findings of national unions and localize its futures work so that it is relevant at the national level as well.

Another advantage of futures work is that it makes it possible to explore options for change that might be politically controversial if they were to be tested directly.

FIFPRO's response to the problems that it had been facing was, as in the case of the South African Typographical Union (see example 1), to adopt a member (player) perspective and use anticipation to shift mindsets and shape internal and external narratives of change.

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4   Source: interview with Alexander Bielefeld and Michael Leahy conducted by Gareth Priday and Reanna Browne on 9 March 2022.

Example 4. The European Trade Union Institute's Foresight Unit[5]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The European Trade Union Institute (ETUI) is the independent research and training centre of the European Trade Union Confederation. It focuses on industrial relations; economic, employment and social policies; working conditions; and health and safety. Concerned by the steady decline in union membership, the ETUI decided to set up a dedicated Foresight Unit, which is tasked with studying the long-term challenges facing the European trade union movement.

The Foresight Unit conducts research into major disruptors and their impacts on trade unions – for example, the future impacts of climate change and new technologies – with a view to mitigating risk and uncertainty. It has adapted the foresight methods of the Manchester Institute of Innovation Research to the trade union context. Since 2019, the Foresight Unit has organized training courses for trade unionists from across the European Union (EU). There are two types of course: one is directed at union leaders and focuses on building capacity for long-term thinking and its application in the trade union context; the other deals with foresight methodologies and is intended for those who want to implement foresight projects in their own organizations. Over 80 trade unionists have participated in these training courses since 2019.

The Foresight Unit has published a number of reports, including one entitled "Anticipating Change, Staying Relevant: Why Trade Unions Should Do Foresight" (Ponce Del Castillo 2019). Its training courses have helped to bring about foresight projects implemented by EU-based trade unions, such as the CISL Veneto project (see example 2).

The establishment of the Foresight Unit was an anticipatory response by the ETUI to investigate the widening gap between the trade union movement and the operating environment for unions in Europe. Moreover, it was a collective response at the regional (EU) level, since such research work could not easily be performed by national or sectoral unions.

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5   Source: interview with Aída Ponce Del Castillo conducted by José Ramos on 3 February 2022.

► Examples : Agility

The following examples illustrate the capability of agility as displayed by trade unions and in related organizational projects.

Example 5. Singapore National Trades Union Congress: Future-ready members[6]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The National Trades Union Congress (NTUC) is a national confederation of trade unions covering most economic sectors in Singapore.

In 2019, the NTUC recognized that it was approaching a strategic crossroads: it had to either disrupt itself or be disrupted. Like many federations of trade unions elsewhere, the success of its original organizational model was nearing its limits given the significant changes in the macro-environment (for example, industries in decline, or "sunset industries"), changes in the labour market (as reflected in growing numbers of professional and freelance members) and changes in the needs of its members (with regard to, say, digital literacy and workforce development).

Seeking to ensure its continued relevance, the NTUC worked together with education bodies and employers to study the changing skills landscape over the next ten years. This research work comprised both agility and anticipatory aspects. The NTUC had to change its internal culture and identity so as to be able to play a broader, more proactive role vis-à-vis its members. The insights obtained from the research were used to inform the updating of the NTUC's training model (both in terms of delivery and content) with a view to improving the current and future employment prospects of workers (box 4).

> ► **Box 4. Training model innovation: Ensuring that workers are future-ready**
>
> As part of its transformation agenda, the National Trades Union Congress wanted to take a more proactive role in shaping the futures of workers, beyond the provision of traditional support in areas such as collective bargaining and job protection. Working in partnership with the Government, companies and the education sector, it established the Learning eXperience Platform (LXP) on the NTUC LearningHub. The LXP is Singapore's largest subscription-based mobile application for online learning. It provides short-form learning content intended to promote the acquisition of indemand skills and "just-in-time" learning for workers, employers and the general public.
>
> The learning catalogue features 75,000 courses across 135 categories, including course material from global tech firms covering current and emerging capability development areas, such as data science, blockchain, cloud, cybersecurity, the Internet of things, artificial intelligence and quantum computing.

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6   Source: interview with Frederick Ho and Eng Kie Ng conducted by Reanna Browne on 14 March 2022.

Example 6. Congress of South African Trade Unions: A deeper transition[7]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The Congress of South African Trade Unions (COSATU) commissioned the Institute for Economic Justice to explore the nature of a just transition in the South African context. In view of likely near-term changes affecting members as a result of industrial transformation, the unions were faced with the challenge of, on the one hand, addressing the transitions involved and, on the other, helping members to find employment with similar or better conditions and pay. The study undertaken by the Institute for Economic Justice was aimed at answering five principal questions posed by COSATU:

▶ What is a just transition?

▶ Why do workers need to be concerned about a just transition?

▶ What are the key conditions for a just transition in mining and energy, transport and agriculture?

▶ What broad opportunities are available to workers as the result of a just transition?

▶ What opportunities open up for sectors through the relevant value chains?

The study was based on inputs from an expert panel, documentary analysis, data review and, most importantly, focus group discussions with workers. A robust participatory process was used to enable stakeholders to have a say in the design and implementation of the methodology. The research team focused on a just transition for mining and energy, agriculture and transport not only because these are significant employers but also because of the interlinkages between the sectors (for example, a reduction in mining activity has a direct impact on the transport sector). The effects of climate change were also considered, particularly its effect on young women who have responsibilities such as collecting water for their families or who work in industries, such as tourism, that are expected to be highly impacted by climate change. The study covered both sectoral transition and the broader environmental and societal context. By both informing workers and being informed by them, the research undertaken helped to shift mindsets. Agility was reflected in the study's crosssectoral approach, which made it possible to break out of traditional siloed patterns of thought.

A preferred vision of the future was developed by COSATU on the basis of the research findings. It involves a "deep transition" approach that not only considers the perspective of workers changing jobs but also seeks to promote a more profound societal transition guided by the values of equity, social ownership and decent work. The COSATU vision includes proposed short-, medium- and long-term actions in each sector and a nationwide "bill of rights".

The report prepared by the Institute for Economic Justice on behalf of COSATU also addresses the change in union power that is likely to occur if there is an expansion of sectors, and proposes mobilization strategies to increase awareness, union membership and commitment to a just transition.

This example illustrates both anticipation and agility. The concept of a "just transition" is future-oriented, but the research commissioned by COSATU has facilitated a reassessment of trade union identity in the here and now.

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7   Source: COSATU (2021).

Example 7. IndustriALL: A global union taking on global challenges[8]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Representing workers in multinational organizations is a challenge for national and sectoral unions, which are constrained by geographical boundaries. Moreover, such unions were proving unable to adequately address common concerns arising from industrial transition and globalization. By organizing only at the national level, unions risked competing with one another across countries. In response, global union federations were created, such as the IndustriALL Global Union in 2012. IndustriALL currently represents around 50 million workers in the mining, energy, manufacturing and heavy industry sectors across 140 countries.

IndustriALL is engaged in cross-sectoral activities and is globally organized. Recognizing the importance of multinational enterprises in global employment, it has concluded global framework agreements with international companies such as Bosch, Ford and Siemens. More recently, in 2019, it withdrew from its agreement with Volkswagen when the company failed to provide US workers with the same rights as those in other countries, as stipulated in the agreement.

At that time, IndustriALL did not have its own anticipatory capabilities but used foresightbased materials produced by others, notably the *Work for a Brighter Future* report of the Global Commission on the Future of Work (ILO 2019b), to inform its own approach. The *Work for a Brighter Future* report tied in with the efforts of IndustriALL, highlighting the need for crossborder collaboration and for unions to reconsider their identity. In an article commenting on the report, IndustriALL set its members the following challenge: "Can we re-define trade unions as spokespersons for fairness, justice and equity, not just in the workplace but broadly? The two words that we need people to associate with trade unions are relevant and credible" (Kohler 2019, 21).

Affinity with the vision presented in the *Work for a Brighter Future* report is also reflected in the guide on a just transition for workers prepared by IndustriALL: "The objective of a Just Transition is to provide a hopeful and optimistic future for all workers, especially for those in industries that may be impacted by efforts to limit greenhouse gases or by the introduction of new technologies." (IndustriALL 2019, 2) As a practical illustration of this approach, trade union representatives from Denmark, Germany and Ukraine shared their experiences with counterparts from Georgia to help them formulate their own response to energy transition. Similar energy transition strategies are being implemented in Australia and Spain. Although change can sometimes seem remote, IndustriALL is encouraging all national sectoral unions to engage with such efforts so that they have "a seat at the table" in navigating change.

Sectoral unions resolved a global problem by creating a new entity with common values and concerns that they could align with. This agility-driven response paved the way for adaptive measures, such as global framework agreements, and anticipatory approaches at the global level.

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8   Sources: interview with Diana Junquera Curiel conducted by Gareth Priday and José Ramos on 9 February 2022; IndustriALL website, hiips://www.industriall-union.org/.

Example 8. @PayGapApp: Calling out companies on social media[9]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

International Women's Day gained momentum following the dramatic worldwide expansion of the #MeToo movement in 2019, which made visible, through social media, the precariousness of women in the workplace, where they are faced with challenges ranging from wage disparities to sexual abuse.

The rapid spread, via social media, of awareness of the need for gender equality and greater representation of women in various industries prompted companies to improve employee benefits, promote inclusion, raise salaries, and support and create spaces for women at the workplace. Many of them began using Twitter and other social media to advertise their efforts in this regard on 8 March every year.

International Women's Day in 2022 was no exception. This time, however, several brands and companies based in the United Kingdom were exposed by the Twitter account @PayGapApp, which revealed the extent to which they were in fact paying female employees less than their male counterparts. When a company tweeted #IWD2022, the bot would automatically reply with data highlighting its gender pay gap.

The automated system behind @PayGapApp draws on publicly available information from a government database that identifies pay differences between women and men in UK companies with 250 employees or more. The list also includes public sector organizations, universities, schools, councils and charitable trusts.

This is a direct and immediate response to "gender washing" by companies and organizations. It brings inequity to the attention of social media users, including probably many workers from the entities concerned, who might not otherwise be aware of the publicly available information on gender pay gaps. This example highlights the potential of social media to educate people and enable them to access information at the press of a button. Public online forums are one of the primary spaces where long-held assumptions about the world and the future can be challenged and revised – a critical aspect of social agility.

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9   Gender Pay Gap Bot (@PayGapApp), hiips://twitter.com/PayGapApp , accessed on 10 March 2022.

Example 9. Georgian Trade Union Confederation: International pressure for local change[10]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Georgia's sudden transition from a state-owned economy to a market economy in the early 1990s confronted the Georgian Trade Union Confederation (GTUC) with multiple challenges. In Soviet times, unions had effectively been run by the State, rather than working in members' interests. Now legislation was drastically amended in ways that undermined workers' rights, including rights under international agreements that Georgia had previously signed up to. Legal action against discrimination or to challenge dismissal on the grounds of work performance was of little use, as there were no laws or enforcement bodies to protect workers. Even health and safety concerns were disregarded. Despite the introduction of a labour inspection system, the implementation of safety recommendations by employers was on a purely voluntary basis. The transition to a market economy forced an internal shift in trade union leadership and led to a renewed focus on established union activities such as legal support. However, in such an adverse environment, activities of this kind were pointless. The GTUC had to change its own culture and adopt approaches that had not been considered before.

Accordingly, the GTUC began to form coalitions with other federations, such as the American Federation of Labor – Congress of Industrial Organizations (AFL-CIO), and peak bodies such as the ILO and certain EU institutions. By working together with these organizations over an extended period, the GTUC ensured that the pressure to amend Georgian laws to comply with international norms grew, albeit slowly. It took around ten years of work – which attests to the tenacious, long-term approach adopted by the GTUC – before the first small concession was secured, namely the introduction of onsite health and safety inspections, though these were still voluntary. The "logic" of international agreements started to be enforced, as the GTUC received legal support outside the country, which helped to increase its standing. Aspiration to EU membership is bringing further momentum for standards to be improved. The sharing of experience with other national federations continues to be a cornerstone of internal capacity-building at the GTUC and enables it to apply external pressure on the Government.

The GTUC has undertaken some novel interventions to support the rights of workers in the gig economy and of market workers. In the case of market workers, the focus has been on non-financial benefits (since these are own-account workers), such as preventing intimidation by the authorities, ensuring the availability of adequate sanitary facilities and providing parking space. The GTUC has also assisted informal workers in joining accumulative pension schemes and helped workers who were left without jobs and income during the COVID-19 crisis to access benefits.

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10   Source: interview with Raisa Liparteliani conducted by Gareth Priday on 7 April 2022.

Example 10. Australian Council of Trade Unions: Future Network[11]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

At the 2016 forum of the Australian Council of Trade Unions (ATCU), union leaders agreed that existing approaches were not working. The unions in the country were faced with a hostile legislative agenda and dwindling membership numbers, and they were perceived as reactive. Accordingly, the ATCU acknowledged the need to become more proactive in response to a changing environment. A Future Network was set up with the aim of reinvigorating membership growth. This was at first a space for trade unions to share case studies and examples of practical successes and failures. In 2019, the Network established its own innovation hub, which produces research-based publications that are distributed to the ATCU's 36 affiliate unions and organizes webinars with speakers from outside the union movement. The research carried out by the innovation hub implies engagement with academia – something that had previously been limited.

One study indicated that younger adults shared trade union values, but that the vast majority of them had never joined a union. As part of the agility-based response to this problem, a youth engagement team was set up to look into how unions were perceived and determine what they could do to encourage younger adults to become members. As a result, there are now several new trade union models, and unions have become more active in sectors dominated by young people.

A case in point is Hospo Voice, an online union for hospitality workers set up by the United Workers Union. Based on a low-fee model, it offers one month's free trial membership. Through an online app, members can receive chatbot-enabled advice from a professional if they have any concerns. Using other tools, members can learn about their rights at work, record their working hours, report incidents and check pay rates. They can also evaluate employers, with their input feeding into the Fair Plate campaign, an online platform that allows the public to look up hospitality venues and read staff reviews based on pay and working conditions. Hospo Voice was first trialled in Melbourne and then rolled out to the rest of the country.

Two similar examples of ACTU member unions set up to organize gig economy workers and sectors with a higher number of young people are Hair Stylists Australia and the Swim Instructors Association, both managed by the Australian Workers' Union. The Swim Instructors Association is a non-traditional model, since it operates as a unionbacked peak body. This collaboration has helped to resolve several disputes, resulting in increased pay for swimming coaches and teachers.

11   Source: interview with Paul Doughty conducted by Gareth Priday on 24 March 2022.

Example 11. IndustriALL: Affiliates in sub-Saharan Africa

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The COVID-19 crisis triggered a number of changes among the IndustriALL Global Union's affiliates in sub-Saharan Africa. Unable to organize in the traditional way, unions had to rapidly deploy digital technologies to maintain their activities. This was very important in the mining sector, for example, since many mines are in geographically remote areas. Apps were developed to provide online support and training and to facilitate the reporting of issues. Those working in artisanal and small-scale mining were a particularly difficult group for unions to reach. Many such workers live in communities where there are also miners working in large scale mines. Funds were set aside from existing union membership dues to launch initiatives aimed at engaging with artisanal and small-scale miners, identifying potential organizers, and supporting them through education, training and recruitment into the union. Among other factors, this engagement was driven by:

▶ worldwide interest in minerals that are critical for the transition to renewable energy, many of which are mined by artisanal and small-scale miners;

▶ growing awareness of the Safety and Health in Mines Convention, 1995 (No. 176);

▶ miners' concerns about health and safety.

As a result of the above initiative, many younger adults became involved in the union movement for the first time, bringing with them such assets as familiarity with information technologies and new ways of campaigning. A learning management system has been set up in which leading young union members from four countries, supported by mentors, can develop and add new training materials. These new approaches should be seen in the context of a wider move by unions towards proactive research and engagement with governments and employers as regards policy design.

In the sub-Saharan affiliates of IndustriALL there has also been a re-engagement with feminism in recent years. Women in these countries' unions are using digital technologies to share case studies and reading material about feminist ideas. They are asking what it means to be a feminist in their country's context, including its cultural and religious background, and, very often, as a woman of colour. In this way, women are able to understand better what role they can play within the union movement. IndustriALL is supporting the first regional conference on feminism in sub-Saharan Africa, which is due to take place later this year.

The COVID-19 crisis prompted unions in sub-Saharan Africa to focus at first on community engagement in order to reach new sectors such as artisanal and small-scale mining. However, they subsequently also began to support the broader movement of feminism, which has an impact in and beyond the workplace.

▶ Examples : Adaptation

The following examples illustrate the capability of adaptation as displayed by trade unions and in related organizational projects.

Example 12. UNI Global Union: Young Workers' Lab[12]

Archetype of change	Growth, stability and conservation			Rapid reorganization and redesign
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The Young Workers' Lab is a "pop-up" research centre in the Future World of Work Division of UNI Global Union. Established in response to the prevalence of digital surveillance and control being exercised over young workers around the world, it seeks to democratize digital technologies with a view to improving the lives of young workers.

The Lab's methodology is based on a co-design approach (building and testing new digital tools together with union partners), a strong commitment to informed consent, and "data minimization", which means storing as little user data as possible. Its partners for research and development include young workers, trade unions of all sizes, technologists, governments, civil society, business, academics and activists.

The Young Workers' Lab has a focus on:

▶ supporting communication among young trade unionists;

▶ using data sensing technology to support collective bargaining;

▶ exploring "interoperable" options for data governance.

The Young Workers' Lab can be considered an adaptive response, since it intends to prototype technologies and services that can subsequently be scaled up. A case in point is its collaboration in the creation of WeClock (see example 18).

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12   Source: UNI Global Union (n.d.).

Example 13. Coworker.org: Organizing the un-unionized[13]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign
Capability in Triple A model	Anticipation	Agility	Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization	Other

Coworker.org defines itself on its website as a "laboratory for workers to experiment with power-building strategies and win meaningful changes in the 21st-century economy". It was established to test and build digital tools and platforms that can help workers in mostly ununionized and anti-union environments to organize and advance labour rights and unionization. It is a non-profit organization whose staff and offices are distributed across the United States of America.

The founders of Coworker.org had a background in labour organizing and had been active on the Change.org platform, which was designed to initiate petitions calling for broader societal change. They had noticed a surge in demand among workers looking for digital tools that would help with labour organizing. For example, some workers in ununionized environments were using platforms such as Facebook groups and subreddits for that purpose, but, in addition to functional limitations, one problem with these platforms is that they are owned by Big Tech companies. The groups would often peter out before making it to the stage of union formation. The idea behind Coworker.org was therefore to provide a suite of digital platforms tailored to labour rights advocacy and union organizing, together with active support and mentoring.

While not a union itself, Coworker.org works closely with unions on key campaigns and has been receiving some funding from unions over the years. Coworker.org allows both individuals and unions to set up campaign pages on its website. Both local and national unions actively use the platforms that it offers. In some cases, petitions have been launched through Coworker.org that ultimately led to improvements in working conditions at various companies, including Wells Fargo, Albertsons–Safeway, Starbucks, Publix and REI (Coworker.org, n.d.).

Coworker.org has had a great impact on a wide variety of sectors, in particular the gig economy. Moreover, it has undertaken several research projects, such as a comprehensive analysis of what it refers to as "Little Tech", that is, the various technologies used by employers to monitor and control workers, which have significant implications for labour rights and organizing in the twenty-first century (Negrón 2021).

Coworker.org exemplifies a rapid and strong adaptive response based on the analysis and prototyping of technologies to support workers. One important challenge for trade unions is how to use new techniques such as online campaigning for the benefit of existing members and to engage new members. Trade unions also need to consider which services they can offer that create additional value and are consistent with the ways of organizing that the Coworker.org site supports and that most new members are likely to expect.

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13   Source: interview with Tim Newman conducted by José Ramos and Gareth Priday on 21 February 2022.

Example 14. Action Network and Actionbuilder.org: Campaigning in action[14]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Actionbuilder.org is an app-based union-organizing tool that supports campaign tracking and leadership development. Developed in collaboration with union organizers (from the AFLCIO, for example), the app provides users with geographic, organizational, taskbased, membership and campaign data and analysis in a convenient format. It was designed to support more effective and easier organizing, in particular by giving organizers autonomy and protection from workplace surveillance systems.

Actionbuilder.org is a project of the Action Network, a nonprofit organization focused on "building power in the progressive movement through the use of digital organizing tools". The Action Network has developed a sophisticated digital organizing toolset, which includes mobile messaging, automation, email and user analytics, digital mobilization, petitions, letter and telephone campaigns, fundraisers, events, a user database and networking.

Example 15. Hashtag revolution drives union gains

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Social media hashtags were created in 2007 by Twitter users to share and classify their tweets. Since then, hashtags have become one of the most popular methods for sharing content and reaching a broader audience on Instagram, TikTok and Twitter. They have also become a key mechanism for galvanizing workers around a common cause, drawing attention to labour issues, and connecting unions with workers' emerging needs in real time.

In 2011, the National Writers Union used social media and, in particular, hashtags to organize a campaign against several US online media outlets that was aimed at securing improved working conditions and fair remuneration for freelance journalists. The Union offered information, resources and advice directly to its members through a dedicated Twitter account.[15]

In Latin America, trade unions are relying on hashtags to disseminate information about labour laws and recommending apps and tools to workers to help them form unions or organize. In Mexico, for instance, hashtags are being used to establish a collective voice against unfair treatment by employers. This is important because employers in Mexico often adopt illegal strategies to prevent employees from organizing or forming unions (de Buen 2011). Social media is helping to reveal the systematic abuse endured by many Mexican workers.

The most relevant examples from 2019 to date are listed below:

▶ **#MeTooMexico –** The worldwide #MeToo movement highlighted how important it is for countries to ensure that employers have policies addressing workplace violence and harassment, including risk

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14   Sources: Crusinberry (2019); Action Network (n.d.).

15   NationalWritersUnion (@paythewriter), hiips://twitter.com/paythewriter .

assessments, prevention measures and training (Begum 2019). In Mexico the movement has raised awareness of sexual violence and harassment experienced by women in the country, especially in the creative industry (ILO 2020). Dedicated Twitter accounts were set up, such as @MeTooAgenciasMx and @MeTooEscritoresMX, while the #MeTooMx account was used to aggregate relevant allegations, leading to the establishment of a "cooperative of support" for women in their workplaces.

▶ **#TerrorRestaurantesMX** – Restaurants, bars and cafeterias were among the first establishments to close their doors when the COVID-19 pandemic struck Mexico because their services were considered non-essential activities. This highlighted the precarious situation of restaurant workers in Mexico as the food sector with the highest informality rate in Latin America (García 2021; Quicaña 2021). In January 2021, Rodrigo Díaz published an account of his work experience in various restaurants on his personal Twitter account using the hashtag #TerrorRestaurantesMX, which led to numerous replies from other users sharing similar stories. This prompted him to create, together with a team, the Twitter account @TerrorRestMX, which seeks to disseminate information, facilitate worker organizing and help workers in the restaurant and services industry to publicly denounce poor working conditions and unfair pay (Ramírez 2021).

▶ **#NiUnRepartidorMenos[16]** is a collective that has successfully brought together over 3,000 delivery drivers across Mexico City to form a support network. They organize through social media and WhatsApp groups, and have established key relationships with organizations and authorities in order to improve their working conditions. The network assists people who are injured in bicycle or motorcycle accidents, even if they are not delivery riders. Because of the network's quick response and expanding coverage across the city, it has been able to save lives. Members help one another by offering guidance on how to pay their taxes or how to deal with difficult clients, and by providing technical assistance with the repair of vehicles (Nosotrxs 2019).

Several initiatives aimed at amending federal labour law in relation to digital platform employees and, in particular, at recognizing an employment relationship between platforms and delivery riders have been submitted to the national congress. Although there is still a long way to go, Mexico City has become the first city in Latin America to regulate digital platform services (González Cuevas 2021; Hernández 2021).

The use of social media may not seem so innovative given that more developed countries are already deploying more sophisticated technology, such as the Internet of things and artificial intelligence, to automate certain processes. Nevertheless, the most popular digital activities in Latin America are those involving social media, games, films and e-commerce (Ramírez, Tepfer and García Jiménez 2022).

According to the industrial relations scholar Richard Hyman, trade unions need to face up to the effects of digitalization. It is important to recognize that although there is no crisis of trade unionism as such, traditional union hierarchies have to give way to networks of workers and move towards a "virtual union" (Ramirez, Tepfer and García Jiménez 2022).

Social media can help to address the challenges related to the future of work and design a pathway towards anticipatory governance (Ramos, Uusikyla and Luong 2020) based on the pillars of the Triple A framework:

▶ anticipation – imagining a "virtual union" that includes all workers, but also the obstacles to its realization;

▶ agility – understanding the future needs of workers by using social media to share and discuss their concerns;

▶ adaptation – creating a space for experimenting with proto-unions, which will eventually lead to the establishment of official unions.

Example 16. Palestinian General Federation of Trade Unions: Applications across borders[17]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The Palestinian General Federation of Trade Union (PGFTU) supports Palestinian workers, many of whom work across the border in Israel. This work may take place in a hostile environment, and Palestinian workers' rights are often ignored. Traditional "shop floor" methods of organizing were failing. The PGFTU realized that it needed to devise new mechanisms to communicate with workers. Workers expect a modern and advanced mobile application, like those they might use in other aspects of their lives. Accordingly, the PGTFU developed an app that enables workers to report incidents and communicate directly with the Federation across borders. In response to demand, the PGTFU introduced a legal representation service, which workers can access via the app or a call centre. This more direct approach allows the PGTFU to support its members much more quickly when incidents and problems arise.

The app is complemented by additional material hosted on Facebook, Twitter and YouTube that seeks to raise awareness of labour laws, relevant agreements and labour rights. This education material can be shared through the aforementioned sites.

The app and supporting sites are creating awareness, providing direct support and improving working conditions for Palestinian workers.

Example 17. Prospect Union: Protecting workers and their data[18]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Based in the United Kingdom, Prospect is a member-run trade union supporting more than 150,000 workers across a diverse range of professions, including agriculture, broadcasting, creative industries, data and technology, defence, education, energy, environment, heritage, public services, shipbuilding, telecommunications and transport.

Calling for a positive and rewarding future of work, Prospect is carving out a new path of worker protection, focusing on how technology and data analytics have transformed the relationship between workers and employers. Prospect has launched a broad range of initiatives to ensure that workers have the central role in determining how their data is collected, used and managed.

17   Source: correspondence with Shaher Saed and Rana Shaheen conducted by Gareth Priday on 20 April 2022.

18   Sources: Prospect Union (n.d.); Prospect Union (2020).

The efforts by Prospect include:

▶ negotiating for collective data rights at work and effective regulation to protect and safeguard workers' data;

▶ championing a "right to disconnect" to address the "always-on" culture and blurred boundaries between work and personal life;

▶ ensuring that there are constraints on surveillance and monitoring software;

▶ ensuring that skills and training are readily available;

▶ developing its own data tools and resources.

In addition, Prospect has joined forces with a coalition of unions, technology specialists and researchers to develop new approaches that can help workers in taking control of their own data.

Prospect has launched a new online tool called Lighthouse to encourage trade unions to think about how they use and handle data in their projects.[19] Lighthouse uses a quiz format to help trade union staff and leaders gain a better understanding of data oversight and risk so that they can become more responsible stewards of data. The tool can also be used to help in the evaluation of data or technology projects run by unions and/or in the review of a union's data practices.

Example 18. WeClock: Making data work for workers[20]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign
Capability in Triple A model	Anticipation	Agility	Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization	Other

WeClock is a new open-sourced app developed to help workers track and manage their own data. Designed through a collaboration of trade unions and activists (the UNI Global Union's Young Workers' Lab (see example 10 above) together with Guardian Project and their design partner Okthanks), WeClock draws on research carried out by the Berkman Klein Center for Internet & Society at Harvard University, as well as on the insights of worldleading digital experts and trade union organizers, to enable workers to quantify their workday.

Sometimes described as "a Fitbit for workers", the free and open-source app allows workers to build (and manage) their own data profiles, which can then be used in campaigns. For instance, the data collected allows workers to measure how long they are commuting for, what distance they travel at work and when they are doing work on their phone outside office hours. Once aggregated, this data can be used to obtain information on unpaid overtime or to provide objective evidence of the pressures that workers feel to answer or check emails at night.

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19   See the Lighthouse website, hiips://lighthouse.prospect.org.uk/ .

20   Source: WeClock (n.d.).

Example 19. Building and Wood Workers' International (Africa and Middle East region): Targeting young workers[21]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

The Building and Wood Workers' International (BWI) had enjoyed a long period of stability in Africa and the Middle East supporting the union's members. That being said, young adults and women are under-represented in many BWI affiliates in the region. The COVID-19 crisis presented the union with an opportunity as well as a challenge: since BWI could no longer organize and protest in traditional ways, new methods had to be found.

In Africa and the Middle East, BWI turned towards digital and social media for the purposes of recruiting and protesting. This opened up the opportunity to engage with young people, who were also among those worst affected by the crisis. Accordingly, BWI encouraged its trade union affiliates to recruit more young adults and women into their ranks, using, for example, music videos that were posted online. This method of engagement proved successful, especially when it addressed the concerns of young people, such as occupational health and safety. In view of the success achieved but also because of the ongoing pandemic, the use of digital technologies was intensified further, including:

▶ online classrooms for capacity-building activities;

▶ online spaces for organizing;

▶ online conferences and exchange programmes, both regional and global.

Such opportunities had previously been open only to a limited number of people. Thanks to the online format, many more could attend and participate in these activities. In particular, more young people and women were able to learn and find their voice within their trade unions. It also helped them to understand better the role and influence of unions, especially in times of crisis. Some BWI affiliates benefited from a rise in membership and increased legitimacy due to a more diverse membership base. The exchange programmes resulted in regular meetings to develop approaches for engaging with state-owned and private multinational companies. These have led to the conclusion of crossborder agreements with some multinationals.

The exchange programmes also prompted a renewed emphasis on anticipatory capabilities, such as those required to address the transition to Industry 4.0 and the energy transition. BWI is engaging with other federations and unions, businesses, academia and government stakeholders to understand the implications of these transitions and plan for the skills that will be required for work in the future.

In parallel, the technology development continues as the BWI office for Africa and the Middle East tests a new app to train and assist union health and safety officers.

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21   Source: interview with Garikanai Shoko conducted by Gareth Priday on 3 March 2022.

Example 20. Unidapp: Reimagining union governance in Colombia[22]

Archetype of change	Growth, stability and conservation		Rapid reorganization and redesign	
Capability in Triple A model	Anticipation	Agility		Adaptation
Geographic scale	Local	Regional	National	Global
Type of organization	Trade union	Labour rights organization		Other

Owing to the loss of traditional jobs, digital platforms have exploded in recent years. These offer new job opportunities coupled with the promise of flexibility, greater independence, more sustainable and efficient use of resources, and economic benefits, especially for immigrants. In practice, though, such platforms tend to contribute to precarious employment (ILO 2022).

Rappi, which entered the Colombian market in 2015, is an example of such a platform, as are Uber, DiDi Food and iFood. From 2018 onwards, Rappi began to disregard the agreements that it had with its workers and even to block them from the app. It should be noted that those working for Rappi do not have a contract as such, only a page setting out terms and conditions of work, which are not actually visible. During the COVID19 pandemic, these workers' precariousness increased because, among other factors, they were not provided with appropriate equipment to protect them from potential exposure to infection.

In view of these negative developments, Andrés Barbosa filed a complaint with the authorities. Since no action was taken by these, he issued a public complaint through WhatsApp and Facebook groups, which included Rappi couriers and delivery workers from other platforms. A National Movement of Digital Platform Delivery Workers was established which led the protests for labour rights on digital platforms in Colombia in 2020 (Padilla Quevedo 2020). Some of the key demands made by digital platform workers are:

▶ to be acknowledged as employees rather than "partners";

▶ to ensure that digital platforms improve security for their employees;

▶ to secure the adoption of legislation regulating the employment relationship between platforms and employees.

In a complex trade union environment, the Labour Observatory at the University of the Rosary in Bogotá, the National Trade Union School and the Solidarity Center of the largest labour federation in the United States (AFL-CIO), among other organizations, proposed to Mr Barbosa and other leaders of the movement to set up a union through an app. This led to the creation of Unidapp, which is funded by the AFL-CIO Solidarity Center, and currently has around 2,000 members.

Unidapp was created in response to rapid change in the labour market and thus serves as an example of an adaptive response to the second main archetype of change considered in this report. Concerns about the challenges involved in the transition to Industry 4.0 are widespread (Ramírez, Tepfer and García Jiménez 2022). In Colombia, as in other parts of the world, platform workers are still not recognized as "employees" by the Government or companies. Nevertheless, Unidapp is preparing its members by educating them about their labour rights. It has also anticipated the emergence of workers' concerns regarding diversity and migrant labour.

Unidapp has catalysed Colombian trade union reform in several sectors, contributing to the creation of more unions to help guide the digital revolution in the country and the Latin America region as a whole. A support cell comprising sectoral union leaders from various parts of Colombia has been established. Union fees can be paid through the app, which has been tailored to the needs of workers in the gig economy, many of whom do not have bank accounts. The app accepts SMS payments through providers such as DaviPlata and Ahorro a la Mano.

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22   Source: interview with Sandra Muñoz conducted by Abril Chimal on 27 April 2022.

3

Towards new capabilities for navigating and shaping change

▶ Key insights from the examples

The examples presented above illustrate first-hand how trade unions are coming up with responses to key challenges. In reviewing these examples, we have identified a number of insights that relate to each of the Triple A governance capabilities.

Anticipation

Anticipation is the ability to understand the dynamics of change that may impact organizations in the long term. Anticipatory activity is often associated with more formal strategic foresight methods. Such "futures literacy" concepts and approaches offer a structured and systematic way of anticipating change, exploring a range of plausible futures and identifying the implications of each for action in the present (Miller 2018).

Anticipatory capabilities were used by a number of the trade unions discussed – for example, the South African Typographical Union (SATU), the European Trade Union Institute, CISL Veneto, the Singapore National Trades Union Congress (NTUC), IndustriALL and the International Federation of Professional Footballers' Associations (FIFPRO). Such efforts have generally been undertaken by peak bodies or similar regional/global organizations, which focus on a longer time horizon. Anticipatory activity was often centred around four principal aims: (a) anticipating change more effectively (such as the evolving needs of members and new business models); (b) challenging current assumptions and ideas about the future (for example, with regard to membership cohorts and the role of unions); (c) identifying options for innovation and the associated risks; and (d) stress-testing existing or proposed strategies, services and programmes.

We also saw connections between anticipatory work and the context in which trade unions operate. On the whole, unions that sought to overcome their own rigidity rather than addressing change in the external environment (the first archetype of change) were more likely to employ anticipatory capabilities. These unions are using strategic foresight to shape preferred futures in the present. Or, to put it differently, they are anticipating change with a view to disrupting themselves, rather than being disrupted.

Agility

Agility, as defined for the purposes of this study, is the ability of people in organizations to change their mindsets and assumptions about the world and the future as conditions change. This can be a challenging task in any organization since it has to do with something that is intangible, namely culture. The research on a just transition commissioned by the Congress of South African Trade Unions (COSATU) illustrates how a multi-organizational and participatory process can cause stakeholders to reconsider their assumptions. Organizations with a culture of openness, dialogue and sharing – what some refer to as "learning organizations" (Senge 2006) – have a greater capacity in this regard.

An organization's identity can be very difficult to reassess. Although many unions have an established status in a particular sector, the ongoing changes in the world of work require them to be able to "hack" their own identities – that is, to unlearn and relearn the definition of who a worker or a union member is and might be, and how they represent or serve their members. Similarly, it is often difficult to question existing governance patterns, management styles and organizational cultures that are deeply entrenched.

Except for a few cases (COSATU and SATU), we did not find examples of specific methods being used to support unions in enhancing their agility. Anticipatory projects can help to shift mindsets, but they are not necessarily geared towards the assimilation of new attitudes across an organization. In addition, as discussed in the subsection on archetypes of change, agility is even more necessary in a context of rapid change and reorganization. All too often there is a knee-jerk response of seeking to "bring in fresh thinking" quickly, but what is actually required is to invest time in designing and building a learning organization.

In the Triple A framework, agility is the mediating factor – that is, an organization proceeds from anticipation to agility and thence to adaptation, or the other way round. Under the first archetype of change, where there is an element of stability and rigidity, trade unions respond with anticipation (for example, FIFPRO) to identify change and gradually reshape their identity. An agility-based response and then adaptive changes may follow. In the second archetype, adaptive responses lead to agility-based change as the organization develops new internal capabilities and its outwardfacing identity shifts as a result of the new approaches.

Adaptation

Adaptation is the ability to translate an organization's learning about a changing world into actions that drive new outcomes. Many of the examples discussed highlight the role of adaptation in trade unions' response to rapid external change, such as economic restructuring or the impacts of the COVID-19 crisis. In other words, adaptation is the principal capability in relation to the second archetype of change, where rapid reorganization and redesign are required.

Adaptive responses typically focused on technology adoption and on new partnerships and service offerings. The use of Facebook or WhatsApp, for instance, allowed the Palestinian General Federation of Trade Unions and the Building and Wood Workers' International to create new mechanisms for communicating more directly with members. The establishment of non-traditional partnerships, such as with governments, and increased engagement with civil society actors have influenced the development of organizational platforms like Actionbuilder.org. These adaptations have enabled a more tailored interaction with members, more sophisticated organizing and/or the provision of new services and support, such as online legal advice or novel forms of training.

Adaptive responses have also brought a wide variety of non-traditional benefits to members, including retraining programmes (NTUC) and health insurance (Georgian Trade Union Confederation). New technologies have been used to support training, such as skills development in the case of the NTUC.

One of the benefits for unions arising from the use of new technologies is that they can communicate more directly with their members and ensure that these are involved in a greater number of events. This was especially important during the COVID-19 pandemic, when many events moved online. Technology adoption has helped to attract new members, particularly younger adults and women. The greater involvement of union members in events ensures that knowledge and agency in decision-making are shared, though this can sometimes challenge traditional roles such as that of local shopfloor steward.

We also identified instances of non-technological adaptation, including the use of agreements at the global and regional level to address transitions and manage relationships with companies operating across borders.

▶ Building on the insights

Towards a Triple A set of capabilities

Most of the examples presented in Section 2 showcased activities in just one of the three areas of the Triple A framework: anticipation, agility or adaptation. Trade unions typically had some capacities in the relevant area, but formal methods tended not to be used. The examples indicate that in each response to change there was a Triple A capability that predominated: multiple capabilities were rarely integrated.

In Section 1 we discussed two archetypes of change that encompass general characteristics of organizational transitions: (1) cycles of stability and conservation; and (2) cycles of decline, rapid reorganization and redesign. The examples subsequently discussed point to a pattern linking the archetype of change and the capability prioritized by trade unions in their response. Thus, organizations that described their current situation as similar to the first archetype were more likely to focus on anticipation, whereas those that identified with the second archetype were more likely to emphasize adaptation.

In the subsection below we set out an approach for selecting a response to change and associated methods based on the archetype of change and/or the context that a trade union finds itself in. Ideally, this should be seen as a step towards developing a more integrated set of capabilities that can help trade unions to navigate and shape change irrespective of the conditions.

Methods applicable to the first archetype of change: Growth, stability and conservation

If the challenges faced by your trade union resemble most closely those described for IndustriALL, COSATU or FIFPRO in Section 2, you are likely to be in a situation where there is still time to think about the longer term and engage with your members and other stakeholders in change. Your union may be experiencing a transition in the relevant industrial sector or suffering a decline in membership because members' needs are being met through other means.

In this case, an "anticipation first" response may help the union to attain a more dynamic understanding of how the world is changing and enable it to question its own assumptions and identity (agility). The ensuing adaptations can be small and based on learning and trial and error.

▶ **Figure a. Triple A settings for the first archetype of change**
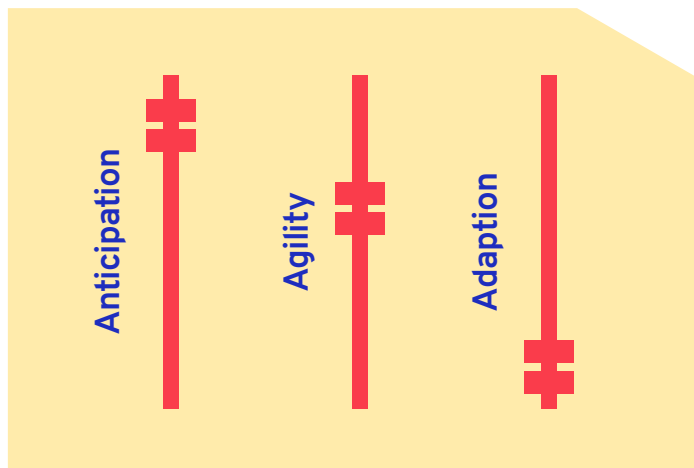
Step 1. Anticipation: Engaging with the future

Although the trade union has some time to anticipate, and react to, change, this should not be overestimated. Anticipatory activities are characterized by their long-time horizons and wide scope. There is a tremendous range of foresight methods that can be employed – more than this report could possibly cover. Here we provide just a sample that should be useful for those trade unions embarking on more formal capability-building (box 5).

▶ **Box 5. Anticipation-related methods**

Horizon scanning

This is an approach for identifying and mapping signals of potential change. It includes desk research, interviews and surveys. A scanning frame, such as PESTLED ("political, economic, social, technological, legal, environmental and demographic") is often used to ensure broad coverage and prevent the research from being concentrated exclusively on, say, technology. Horizon scanning can involve seeking information from sources beyond those that would normally be used in the organization, and looking for emerging signs of change as well as established trends. It provides input into other foresight processes and analysis frameworks. For example, analysis of emerging issues, *S*-curve analysis or system mapping could be used as a complementary next step.

Three horizons of change

The "three horizons of change" model (Curry and Hodgson 2008) is a very popular and user-friendly method for exploring long-term change. The *x*-axis in the model shows time, which extends from the present into the future, with the timescale depending somewhat on the rate of change in the area being explored. The *y*-axis represents the strategic fit, or prevalence of a system. Values high up on the *y*-axis indicate that a system, or "way of doing things", is very established. Three lines are drawn. The Horizon 1 (H1) line stands for the established system, which is high on the *y*-axis at the start; it is assumed that the system will lose usefulness over time, with maybe some residual functions remaining. The Horizon 3 (H3) line represents the idealized far future, where a new system or way of doing things is prevalent. This is often foreshadowed by small signs of change in the present. The Horizon 2 (H2) line denotes the "transition space", where a battle of ideas is often going on; events take place that trigger change, and both emerging and more established innovations are used. This method integrates well with horizon scanning but can also be used independently as a powerful tool for considering the implications of long-term change.

Participatory futures

While foresight or futures work usually involves some degree of participation, Ramos et al. (2019) call for participation on a large scale. There are examples of this in councils and even in crosscountry settings. Exercises of this kind often combine the provision of information to the community with the collecting of creative ideas about desired futures from the community. For trade unions, this is a novel way of working with large membership groups to interrogate the future, build up an understanding of members' preferred futures, and develop collective intelligence that can be used to bring about change.

Step 2. Agility: Examining culture and identity

The second step in the process is to link the findings from the anticipatory activities to agility – that is, for the organization to think about and "unlearn" its identity and culture. As the example of FIFPRO showed, this can happen directly, since the use of scenarios (see box 6) as an anticipatory process can create a "safe space" for conversations about future paths that might otherwise be taboo. The approaches discussed in box 6 below all provide similar benefits and your trade union may need to use one or several. This is just a place to start, not an exhaustive list.

▶ **Box 6. Agility-related methods**

Causal layered analysis

Causal layered analysis (Inayatullah 2008) is a foresight method that also considers questions of identity. It has four layers: "litany", "social causes/systems", "worldviews" and "myth/metaphor". Litany can be thought of as the everyday conversation that people in an organization might have – for example, about what is in the tabloid news. The layer of social causes (or systems) is one level deeper, the equivalent of moving from a tabloid to *The Economist* or *New Scientist*. It provides a level of insight into events in the form of an identified systemic pattern or social analysis. Worldviews underpin the earlier levels of understanding – for example, capitalism underpins the analysis used in a publication such as *The Economist*. Finally, there is a leap to metaphor, which serves to encapsulate the issue in question. Reframing allows a group to explore new perspectives and discourses that provide new strategic pathways. This approach provides a deep understanding of the present and unspoken identities, and of how these might change.

Theory U (unlearning)

Theory U (Scharmer 2009) is a change method that helps organizations to "see themselves" by challenging unproductive patterns, identifying resistance and co-creating preferred futures. Groups use curiosity, compassion and courage first to identify limiting patterns in the present and then build visions, prototypes and performance as a whole. The method is also designed to help leaders and managers to break through behaviours that stop them from empathizing with their clients and to overcome ineffective decision-making processes.

Collective impact

Collective impact (Kania and Kramer 2011) is an approach to creating multi-organizational collaborations so as to tackle systemic problems that an organization cannot address on its own. It helps to create a shared vision and organizational agility in understanding deeply ingrained problems, thereby enabling responses that draw on an organization's diverse strengths. There are five conditions for collective impact:

▶ common agenda – this defines the problems and visions to solve them;

▶ common measures – agreeing on how to tackle the issue;

▶ mutually reinforcing activities – integrating different organizations' activities so as to maximize the result;

▶ continuous communication – building trust and relationships; and

▶ resource commitment – bringing together resources to coordinate and manage actions towards the collective goal.

Trade unions often work together to achieve collective goals. Challenges such as ensuring a just transition and other future issues will increasingly require collaboration with governments, nongovernmental organizations and other actors. The "collective impact" approach provides a framework for dealing with systemic challenges that require tripartite, multi-actor and networked responses.

Step 3. Adaptation: Small bets for big gains

With longer time horizons for change, an organization can start to make small "bets", or incremental changes, that help it to learn along the way and are comparatively inexpensive (see box 7). In helping to anticipate change and reform an organization's culture and identity, adaptation does not necessarily have to be rapid. The organization can explore the spaces that emerge during adaptation, which serves to further inform its overall direction and decision-making.

▶ **Box 7. Adaptation-related methods**

Prototyping

Prototyping is a way to imagine, model and test new services, strategies, technologies and organizational forms. These can include low-fidelity prototypes (conceptual and modelled – for example, made from resources such as Lego). Prototyping requires a process of experimentation. Methods such as "A/B testing" help organizations to learn and adapt at a low cost. It is the first step in broader efforts such as service design (see box 8 further down).

Co-creation

Co-creation (Keirnan, Priday and Pedell 2019) consists in involving customers or members of an organization in the innovation process from the very beginning all the way to implementation. Cocreation recognizes people as experts in their own lives and as legitimate participants and actors in any innovation process. There are many methods that can be used for cocreation. Engaging a wider set of stakeholders means that more needs can be identified and that it is more likely that the resulting new service will be adopted by members. Although often "messy" at the start, the results are more readily accepted and the overall process is less costly.

"Wind-tunnel testing" of scenarios

Wind-tunnel testing of scenarios is a foresight approach. In this context, it can be used as an adaptive mechanism to test strategies and policies. Scenarios (see box 10 further down) are representations of different possible futures. They can be developed in-house or, alternatively, one of the many scenarios presented every year in relevant publications can be used. Strategies and policies are tested against these different scenarios, often with supporting questions. For example, how does this scenario challenge the assumptions behind this policy? What changes do we need to make so that this policy works better in the future? Using wind-tunnel testing, we can apply adaptive capabilities to non-service-oriented functions.

Methods applicable to the second archetype of change: Rapid reorganization and redesign

If the challenges faced by your trade union resemble most closely those described for Actionbuilder.org and the UNI Global Union in Section 2, you are likely to be dealing with a rapidly changing environment, which in turn requires a rapid union response. For instance, you may be facing rapid changes in technology, structures, jobs and membership, changes as to which workers are represented and changes in the expectations of members.

In this case, an "adaptation first" response may help to orient the union towards action leading to agility-based changes by doing new things and changing mindsets. Anticipatory capabilities are deployed to address immediate challenges, such as the use of scenario planning and implication analysis to guide short-term action.

▶ **Figure b. Triple A settings for the second archetype of change**
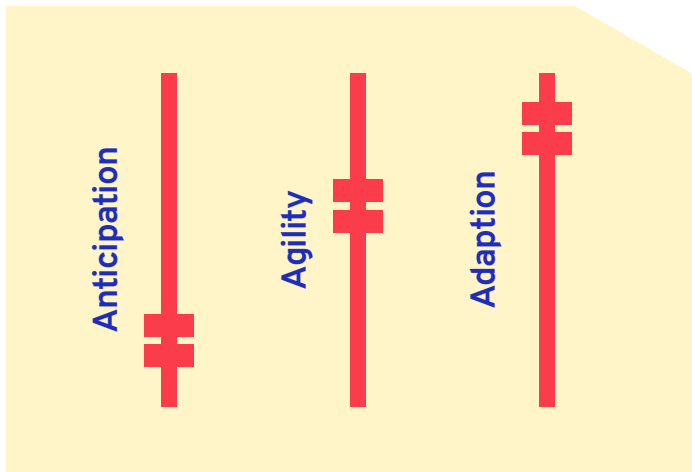
Step 1. Adaptation: Responding to change

Prototyping, experimenting and co-creation can be incorporated into service design processes (see box 8). We include service design here because it is often necessary to devise a solution quickly.

▶ **Box 8. Adaptation-related methods**

Cynefin

The Cynefin framework uses data from social contexts to make sense of the states of a "social system". These can be simple, ordered, complex or chaotic. Generally, managers have their own preferences and respond on the basis of assumptions rather than the data. In Cynefin, the data reveals the state, while the sense-making framework supports decisions about how to react and engage with the system – for example, whether to apply good, best or emerging practices.

Service design

Service design is about how an organization designs and implements a holistic service (Stickdorn et al. 2018), which could be for the organization's clients or its staff. In either case, it involves designing all the touchpoints of the service, both software-based and human. It includes frontofhouse engagement and backstage support for the processes and data that facilitate the service as a whole. Service design can use co-creation activities. A wide range of tools are available to support a service design process. Ideally, the relevant capabilities should have been built before they are actually needed but this is often not the case. Using these tools can improve outcomes and provide direction when there is limited time.

Warm data labs

"Warm data" (Bateson 2017) is about interrelationships in complex systems. "Warm data labs" are an exercise aimed at promoting an understanding of living systems and of how people see themselves as part of such systems. The exercise ensures that the data remains contextualized and relevant to the place and people involved. It is a group process and does not require any prior systems theory or knowledge.

Step 2. Agility: Changing beliefs, changing by doing

As trade unions react to change by doing new things, so their identity changes together with the mindsets and beliefs within the organization (see box 9).

▶ **Box 9. Agility-related methods**

Strategic questioning and challenging the "used future"

Strategic questions are a straightforward approach to thinking about change (Peavey 1994) in a rapidly evolving environment. Some typical examples are: Where is this taking us? Is this what we want to be? How will this change us in five- or ten-years' time? Another important question has to do with the concept of a "used future", that is, where the default or preferred image of the future has been "borrowed" from a different context without considering whether it fits the one in which change is occurring (Inayatullah 2008). Are our actions taking us towards a used future? Inayatullah (2008) proposed six basic questions:

▶ What do you think the future will be like?

▶ Which future are you afraid of?

▶ What are the hidden assumptions of your predicted future?

▶ What are some alternatives to your predicted or feared future?

▶ What is your preferred future?

▶ And finally, how might you get there?

These questions provide a simple starting point for a future oriented discussion.

Immunity to change

The "immunity to change" method (Kegan and Lahey 2009) is an approach to tackling change in organizations. Individual and collective belief systems can create obstacles to change, or an "immune response" that prevents change from happening. This approach provides diagnostic tools and techniques for individuals and teams to understand their immune response and develop new patterns that can transform organizational dynamics. As one of the authors explains, it is "a way of helping people take a kind of mental X-ray, a picture of your own mindset, … [allowing you to see] the ways in which your mental system may actually be … making errors or distortions that keep you from letting new ideas come into your head which in fact can allow you to change your behavior."[1] The process uncovers hidden commitments that may be holding back change. Resistance to change has to do with inertia arising from competing commitments, which is rather like having a foot on the brake and the accelerator pedals at the same time.

Hope theory

Hope theory is often used in individual contexts, where "hope" may be defined as "the perceived capability to derive pathways to desired goals, and motivate oneself via agency thinking to use those pathways" (Snyder 2002, 249). Here this general approach is used to support a group context. Hope is about having goals, exploring pathways to achieve them, and building the necessary agency and confidence to do so. This approach can be used as a complement to the strategic questions presented above. The first step is to set goals. Strategies are then developed to assess possible ways of achieving the goals, and agency or motivational thinking is applied to identify the strengths that can be employed. Example questions include: What pathways can we use to achieve our goal? When we have achieved similar goals, what can we learn from this?

[1] **See https://www.gse.harvard.edu/hgse100/story/changing-better.**

Step 3. Anticipation: Focus on near-term futures

In this case, anticipation has a shorter time horizon and it is potentially narrower in scope. The relevant methods (see box 10 below) may be used to assist in answering some of the agility-related questions discussed in box 9 above.

▶ **Box 10. Anticipation-related methods**

Scenarios

Scenarios describe different possible futures and are usually produced in sets of three to five. They can be very detailed and based on comprehensive research and analysis. In this case, where there is a rapidly evolving context, we would suggest using archetype scenarios such as the four futures discussed by Dator (2009). These provide a quick approach to the development of scenarios without much additional data analysis, but the scenarios can still be used to test assumptions and future challenges. The four futures are:

▶ Growth – "business as usual" economics drive growth;

▶ Constraint – there are financial, environmental or social constraints on society;

▶ Collapse – the collapse of environmental or financial systems typically triggers a wider societal collapse;

▶ Transformation – realization of being close to the brink prompts a spiritual, economic or societal transformation.

Futures wheel

The "futures wheel" (Glenn 1972) involves assuming that a particular future state "X" is true (for example, that some new labour legislation will be in place or that a new technology for workplace surveillance will have been adopted) and then considering what the implications are. Starting with a central theme, the first immediate implications (or impacts) are noted. The process is repeated to consider the second-order impacts of the first-order ones. The diagram grows out from the central point like an expanding web. Once the third-order implications have been considered, patterns and reinforcing loops can be determined. This is a useful way to rapidly examine the implications of future states.
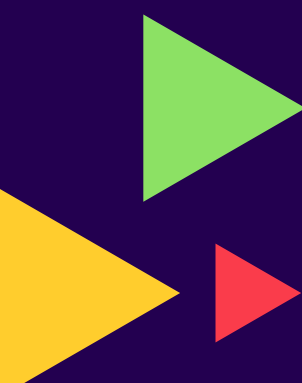
Futures games

There are many "futures game" card decks that can be used to explore possible futures and open up participants to future-oriented thinking, even if the game is not directly about the subject of interest. Card games can be used as an exercise leading to more general thinking about the future or strategic activity. Examples include "The Thing from the Future" (Candy and Watson 2014), which supports different ways of thinking about the future across many topics; the "Our Futures" games hosted by the Participatory Futures Global Swarm, which can be used to develop a participatory futures exercise or investigate future topics; and the Work Futures Trends Deck, which is both a card game and toolkit: each deck includes a collection of futures-of-work trends (cards) accompanied by a series of strategic questions that help users move from foresight, through insight, to action.

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