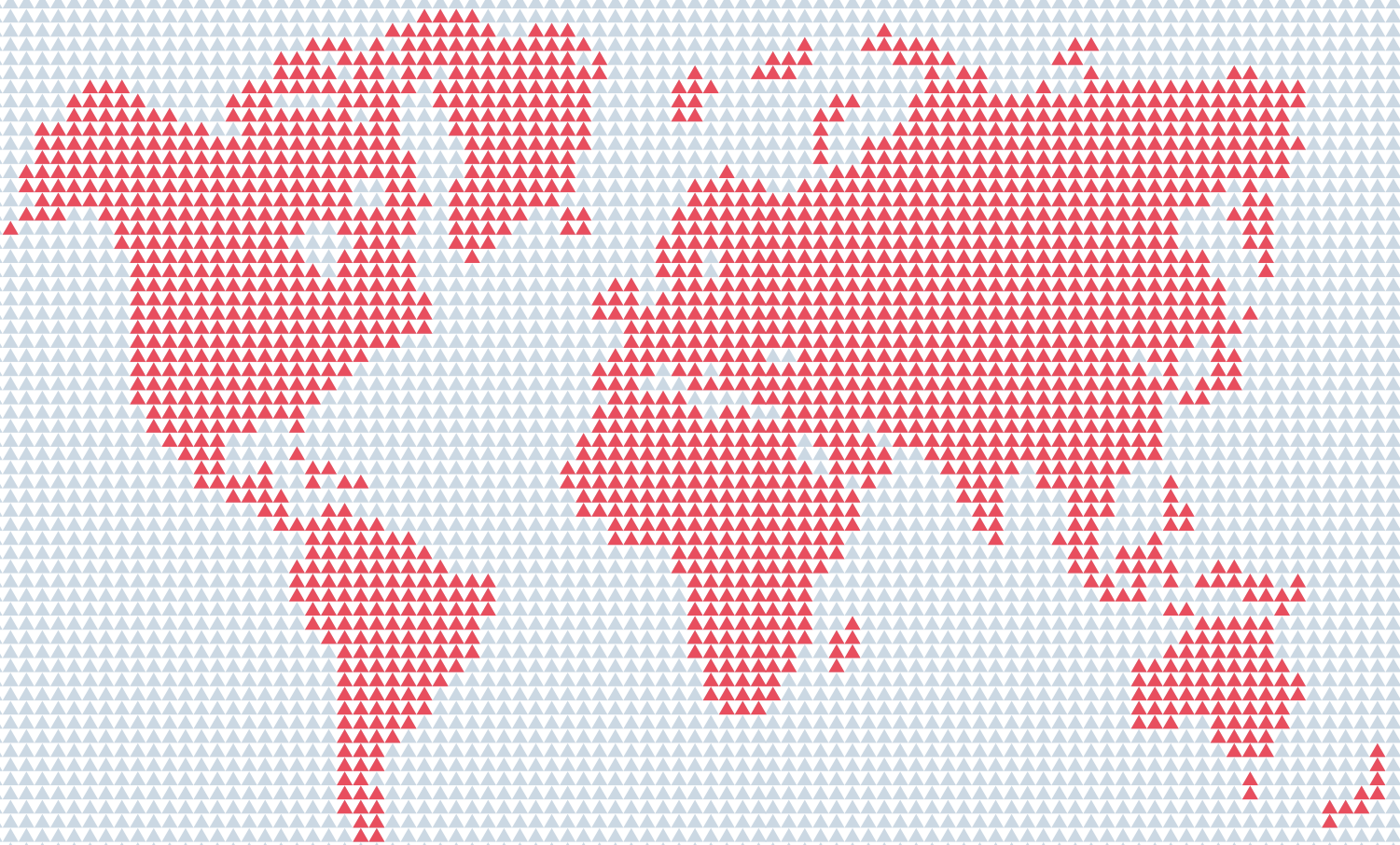




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# COVID-19 and Recovery: The Role of Trade Unions in Building Forward Better



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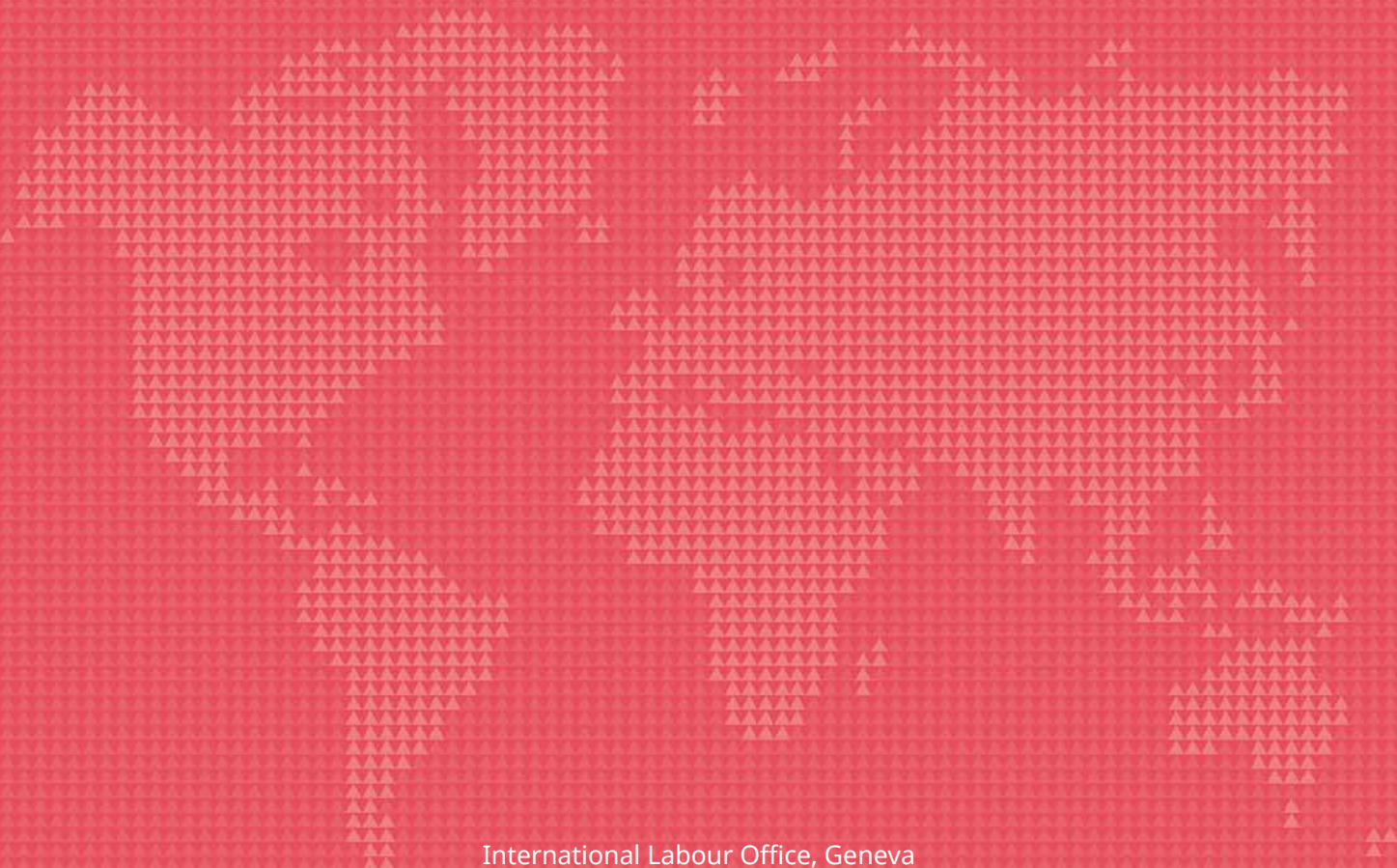
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# International Journal of Labour Research

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## COVID-19 and Recovery: The Role of Trade Unions in Building Forward Better



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- **Towards a just transition for all: Lessons from the pandemic** 51  
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This article focuses on the possibility of “just transition” in the health sector following the COVID-19 pandemic. Analysing just transition from two aspects, breadth and depth, the authors look at the current situation in the United States to argue that all transitions should be just, and that when they are unjust, transitions, regardless of sector or region, breed resentment and nativism, resulting in opposition to any kind of structural change.

- **Macroeconomic policies for jobs-led growth and recovery following the COVID-19 pandemic, with emphasis on sub-Saharan Africa** 65  
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This article aims to identify policy responses that would promote short-term recovery from COVID-19 and long-term inclusive growth in SSA countries. It proposes policy initiatives that would allow an employment-led economic recovery, and hence support policymakers, specifically finance and labour ministries, as well as aligning social partners to promote job creation, job quality and job access interventions in both the short and long term.

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Trade unions in South-East Asia have faced particular challenges in protecting workers during COVID-19, including unemployment and underemployment as well as the rural demographic of many workers in the region. In this article the authors examine South-East Asian unions’ fight for survival during the pandemic, their specific engagement with governments, workplaces and members, and their opportunities and challenges post-COVID.

- **Gender inequality during the pandemic: Perspectives of women workers in Latin America and the Caribbean** 91  
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This article seeks to inform the debate on the unequal impact that the COVID-19 pandemic has had on men and women in the Latin America–Caribbean region. Focusing on women’s working conditions, increased unpaid care work, increased violence against women and the effects of teleworking, it recommends priorities to address these issues for governments, employers and worker organizations, including contributions from women workers and trade union representatives from 13 countries.

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▶ **Digitalize, adapt and innovate: Challenges and opportunities for trade unions amidst the COVID-19 pandemic and the recovery period**

*Mohammed Mwamadzingo, Sylvester Kisonzo and Naome Chakanya*

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This article explores the emerging challenges for workers' organizations that intersect with digital technology deficits at national level and growing informalization, as well as the impact of the COVID-19 pandemic. Although specific reference is given to Africa, these challenges are generally applicable across the globe. The article suggests solutions and recommends actions, arguing that the adoption of these technologies by trade unions provides opportunities and benefits which might not otherwise be realized through physical meetings, conferences and interactions.

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# Preface

***Maria Helena André***

Director, Bureau for Workers' Activities (ACTRAV), ILO



The past 18 months have seen a tremendous upheaval in the world of work following the outbreak of the deadly COVID-19 virus, which spread the globe in a matter of weeks and impacted lives and livelihoods of billions of workers and their families.

Indeed not even two years ago with the adoption of the ILO Centenary Declaration on the Future of Work in June 2019, governments, employers and workers could not have imagined that the COVID-19 crisis would have such a profound impact on the world. However, what we have seen since is that despite such a severe shock unlike anything we have seen for a hundred years, this pandemic has shown in a dramatic fashion that the challenges, which were highlighted two years ago, are still so relevant throughout the current crisis. Ultimately, growing vulnerabilities and inequalities in the world of work have greatly reduced the resilience of societies to respond effectively to such a crisis and to ensure that recovery efforts will reach all especially the most vulnerable. There can be no social justice and decent work for all without a human-centred roadmap and the strengthening of institutions in the world of work.

As such, the adoption of a *Global Call to Action for a Human-centred COVID-19 Recovery* by the 109th Session of the International Labour Conference of this year confirms this vision of the Centenary Declaration and the urgency of its implementation to accelerate the process of a fully inclusive, sustainable and resilient recovery to this crisis.

In this edition, the *International Journal of Labour Research* contributes to the ongoing deliberations at the ILO and beyond by focusing on the contribution of workers and their organizations in the fight against the pandemic while accentuating the important role trade unions play in achieving a truly human-centred recovery.

*"COVID-19 and Recovery: The Role of Trade Unions in Building Forward Better"* explores strategies for workers and their organizations to shape COVID-19 response policies as well as adapting internally to provide vital services to workers and continue fulfilling their societal role as advocate for social justice and workers' rights. As such, the journal reveals key findings on various topics that are of special interest to trade unions and provide guidance on policies in building forward better.

There are three main lessons learned from this issue of the journal.

First, **trade unions matter** and are still relevant in combating the pandemic and ensuring a human-centred recovery. The ILO Centenary Declaration was rightly calling for strengthening and revitalizing the institutions of work including workers' organizations as prerequisite for a more equitable and just world of work. The latest research confirms that, despite the challenges associated with the crisis, the surge in violations of trade union rights, loss of members and a hostile environment in some countries, trade unions have stood their ground and helped to better protect workers and their jobs around the world.

Secondly, **social dialogue remains a major vehicle** for the effective design and implementation of a robust and inclusive recovery strategy. Subsequently, the importance of having a strong labour movement, which actively shapes economic, social and environmental

policies as well as supports workers and their rights, has become imperative. By involving employers' and workers' organizations in national recovery plans, governments will be better equipped to find appropriate and inclusive solutions to the pandemic.

Finally, this issue of the journal confirms that **the COVID-19 crisis can be an opportunity for trade union revitalization**. In times of huge transitions, trade unions need to extend their support to all workers in order for the labour movement to keep and build on its position and relevance. And the transitions are multiple: the economic shift from manufacturing towards service sectors in many countries, environmental change, the growing informal economy, automation and technological change determine the capacity of trade unions to organize and provide essential services to workers. In ACTRAV, we have launched a programme called "*Trade Unions in Transition*" which aims to promote trade union revitalization worldwide. Unions should target, organize and provide services towards workers that are not in a formal employment relationship such as those who are in the informal economy or in new and emerging forms of work, for example platform workers. ACTRAV stands ready to assist unions to better address global challenges such as a just transition, universal access to social protection, occupational safety and health at work or the continued fight to achieve gender equality.

I would like to congratulate all authors of this issue, who have provided the latest insights on timely and relevant topics linked to the world of work, especially in the context of the pandemic. We hope that the contents of this journal will stimulate discussions and reflections within the trade union movement in building a better post-COVID-19 world. I would also like to thank the ACTRAV colleagues who contributed to the production of this issue.

After the hardship and pain caused by the pandemic, it is time for action, to build not the new normal, but the better normal based on equity and dignity. Greater efforts on vaccinations have provided a glimmer of hope in recent months, however the unequal distribution of vaccines and the consequences this has for ultimately defeating COVID-19 are just one example of how we must act together in solidarity, within and across borders to build a world of work with social justice and decent work for all.

With this, I wish a happy reading to all!

Maria Helena ANDRÉ



# COVID-19 and Recovery: The Role of Trade Unions in Building Forward Better

## Executive summary

For each article in this issue of the International Journal of Labour Research, a short summary is given followed by key findings and points of special interest to trade unions.



## Trade union membership dynamics amidst COVID-19: Does social dialogue matter?

*Owidhi George Otieno, Dickson Onyango Wandeda, and Mohammed Mwamadzingo*

### Introduction

This article applies an econometric approach using data on the state of trade unions amidst COVID-19 to explain the contributions of social dialogue in increasing and enhancing trade union membership during the pandemic. The econometric result has established that social dialogue has a significant and positive impact on trade union membership. It thus recommends that, in order to increase membership, trade unions need to respond to the pandemic using all the tools of social dialogue at their disposal throughout all levels of communication.

### Key findings

- ▶ For trade unions across all countries surveyed, social dialogue used as a means of consensus between workers and employers contributed to about a 26% increase in membership overall. Among these unions:
  - 82% have experienced changes in membership resulting from COVID-19.
  - 83% have adopted social dialogue as a response to the pandemic, with about 89% engaging in tripartite consultations.
  - 100% reported that their respective countries adopted lockdown and restrictive measures to contain the pandemic.
  - 85% have conducted various capacity-building measures during COVID-19.
  - 76% have experienced a decline in their other sources of income.
  - 75% have offered advisory services on work issues to their members in response to the pandemic.
  - Nearly 58% reported having received support from either the ILO or other international agencies to help them in mitigating the negative effects of the pandemic.
  - About 56% reported experiencing inadequate funds amidst COVID-19.
  - 76% conducted virtual meetings during the pandemic.
  - 65% engaged their members through virtual education.
- ▶ A change in membership fees has a statistically significant negative effect (decrease of 1.3%) on trade union membership.
- ▶ Membership registrations and recruitment through media positively influence trade union membership (probability of 51% increase if trade unions are engaged in membership registration during COVID-19 ).
- ▶ Overall, limited access to internet, inability to organize members and inability to hold meetings have negative but insignificant effects on membership.

- ▶ Additional services to members during COVID-19, advisory services and virtual education have positive but non-significant effect on membership.
- ▶ Workers' organizations need to engage in strong, influential and inclusive mechanisms of social dialogue by:
  - strengthening the capacities of labour relations institutions and processes for effective social dialogue;
  - engaging governments in stimulating their economies by harnessing potentials for technological progress and productivity growth towards the creation of decent working opportunities;
  - engaging governments and development partners in supporting sustainable businesses, jobs and incomes by developing sustainable social protection policies and employment services that can resist shocks;
  - protecting workers by developing and harnessing policies towards promotion of all the fundamental rights and freedoms of work, including for youth, women, workers with disabilities, migrant workers, gig and informal economy workers as well as for other new and emerging forms of work in the future of work; and
  - embracing policies towards environmental protection, climate change and just transition, including trade union engagement in the multilateral system.

## **Workers' rights and human rights: Resolving historical tensions through a multi-tiered social security agenda**

*Alexandra Barrantes and Shea McClanahan*

### **Introduction**

COVID-19 has challenged all actors engaged with the social protection system to (re) consider their roles and responsibilities in a post-COVID world. The social protection policy and institutional infrastructure in place prior to a crisis is the main determinant of how well a system is able to offer meaningful mitigating and corrective measures. Traditionally, social security in the Global South has been divided: social insurance and social assistance (small, tax-financed and typically means-tested schemes) have been characterized as mutually exclusive systems. The crisis has made clear that a more universal and inclusive social protection system is much better prepared to address shocks.

### **Key findings**

- ▶ Social insurance and social assistance have been presented as mutually exclusive options, a false choice. The development of both instruments can and should be placed under the same strategic policy framework, avoiding fragmented delivery of social protection.

- ▶ “Last-resort” safety nets are more complex and expensive to govern than lifecycle individual entitlements guaranteed by the right to social security and an adequate standard of living; the latter contribute to more inclusive, better governed and truly rights-based social protection systems.
- ▶ Building integrated, *multi-tiered* systems can harmonize the goals of so-called “horizontal” extension (extending entitlements to newly covered individuals and groups) with “vertical” extension (improving the comprehensiveness or adequacy of entitlements) in a way that achieves universal coverage by *design*. Multi-tiered social security systems help to resolve the historical tension between human rights and workers’ rights through a clear incentive structure built on universal basic guarantees.

### The role of trade unions

- ▶ Trade unions were already expanding services before COVID-19 to provide support to those working in the informal economy. A lifecycle and multi-tiered social security framework can help them structure their understanding of roles and responsibilities vis-à-vis the overall national social protection system, enabling them to visualize how their own entitlements fit within an overall rights-based framework.
- ▶ Moving toward this vision, workers’ organizations can pursue three potential axes of action:
  - Avoid lobbying against expansion to uncovered groups: it is imperative that trade unions avoid outright opposition of reforms that introduce non-contributory benefits to those with low or no capacity to pay contributions.
  - Invest in raising awareness of the rights-based principles embedded in inclusive social security systems.
  - Proactively engage in coalition-based pursuit of common interests within a lifecycle framework.

## Work-related injuries and diseases, and COVID-19

*Jukka Takala, Sergio Iavicoli, Seong-Kyu Kang, Claudina Nogueira, Diana Gagliardi, and Jorma Rantanen*

### Introduction

Few workers have been unaffected by COVID-19. At all levels and across all sectors, organizations have developed policies, legislative updates, technical guidance, training materials, official statements, risk assessment tools, standard operating procedures, action frameworks and return-to-work guidelines, to assist workers and their families in coping with the pandemic. Additional responsibilities and workloads have been placed on health



practitioners and on occupational health and medicine professionals who are required to ensure the safe return of workers to their workplaces and livelihoods, as the global economy restarts to re-open. This article draws on data from various reliable sources together with experiences of COVID-19 in Italy, the Republic of Korea and South Africa to present lessons learned and suggest future action for global and regional institutions and for workers' organizations.

## Key findings

- ▶ Workplaces are important arenas for early detection of epidemic risk and for early actions in primary prevention and management.
- ▶ Globally, the 1.7 billion workers in service occupations are considered as risk populations, as they may become vectors of infection towards others.
- ▶ Around 14 per cent of COVID-19 cases reported to the WHO are among health workers (in some countries as high as 35 per cent). However, diverse occupational groups are recognized as being at risk, not only health workers.
- ▶ Before COVID-19, of the 2.4 million deaths caused by work-related diseases, infectious diseases accounted for 9 per cent. In 2020, 15.99 million work-related COVID-19 non-fatal infections were estimated, but the final number is likely to be higher.
- ▶ Direct costs include those to stakeholders, victims, employers and society, as well as production losses. Costs in monetary terms can be calculated but do not cover indirect or intangible costs. The social value of life and health at work and beyond can only be partly measured.
- ▶ A major concern of many workers is the fear of job loss or loss of income; lower socio-economic workers have less access to PPE, fewer options to work from home and a higher risk of losing their jobs.
- ▶ COVID-19 is experienced unequally, with higher rates of infection and mortality among the most disadvantaged communities: it is not socially neutral.
- ▶ The prevalence and severity of the pandemic is magnified by pre-existing chronic diseases – themselves associated with social determinants of health such as housing, work conditions and access to quality healthcare.
- ▶ Lessons from the pandemic have emphasized the need for better prediction and preparedness, including research, human resources, hospital and material preparedness and updating of regulations for crisis management. The pandemic has highlighted the need for close trans- and multi-disciplinary collaboration between various professionals to inform better decision-making by organizations.
- ▶ If poorly controlled, emerging infections have the potential to cause epidemics and pandemics with a high socio-economic impact and will continue to be real threats to the world. We must remain vigilant to be ready and able to respond effectively.

## The role of trade unions

- ▶ Competent inspectors should have the right to enter workplaces for risk identification at the earliest possible stages.
- ▶ Detailed and practical action should be initiated to identify priorities for related risks and their prevention, and to collaboratively plan and implement activities.
- ▶ Special attention should be given to preparedness for potential new hazards including new global pandemics and possible occupational risks from new technologies and climate change, among others.

## Towards a just transition for all: Lessons from the pandemic

*Dimitris Stevis, Dunja Krause, and Edouard Morena*

### Introduction

This article focuses on the possibility of “just transition” in the health sector after COVID-19. Analysing just transition from two aspects, breadth and depth, the authors look at the current situation in the United States to propose four types of just transition policies – status quo, managerial reforms, structural reforms and transformative policies. The pandemic has highlighted inequalities in occupational safety and health (OSH) in the healthcare sector. Is this a technical OSH issue or is it a broader social and environmental health issue? The debate continues to divide workers, employers and administrators but it is becoming apparent that OSH is also an environmental health issue.

### Key findings

- ▶ Transitions vary even when driven by common forces such as automation.
- ▶ A just health transition should not be separated from a more comprehensive eco-social transition project. It is possible for a policy to be broad to the point where it covers all people and nature affected, but also socially inequalitarian and ecologically damaging.
- ▶ Although the “social” sectors contribute to the unfolding ecological and climate crises, they also play an important role in mitigating and adapting to them. Green transitions in services, including specific sectors such as health, care and education, drive profound changes in energy and manufacturing.
- ▶ Responses to the pandemic combine limited global policies with national policies. North-South inequalities in tracking, managing and recovering from the pandemic are very pronounced, yet there is strong evidence that poorer countries can develop effective local healthcare systems.

- ▶ Leaving the care sector out of just transition would be leaving out a substantial and growing part of the world of labour. Privileging some over others breeds resentment and opposition.
- ▶ The labour force in the health sector is diverse, with many women and immigrants who are neither unionized nor organized and do not enjoy adequate occupational health and safety standards, social protections or workplace rights.
- ▶ There is a need for a “just transition into the future” and towards a more protected and empowered workforce, as well as “a just transition from the past” for those whose employment will be affected by technological innovations or the socialization of healthcare.

### The role of trade unions

- ▶ Although effective social dialogue gives the weaker more voice, dialogue without the possibility of some redistribution renders voice a formality. Leaving the service sector out of the just transition strategy is to leave out some of the most vibrant and important elements of the world of labour and, consequently, to narrow and weaken the alliances necessary to achieve just transitions for all.
- ▶ Even amongst those who are unionized there is a need for stronger social dialogue (e.g. the debate over whether frontline personnel dealing with COVID-19 patients are more vulnerable to infection, or personnel dealing with emergency procedures).
- ▶ Workers' organizations must choose between sectoral and largely ad hoc transition programmes and comprehensive and proactive just transition policies. Such policies will require a great deal of initial effort but are likely to deliver more in the longer term.

## Macroeconomic policies for jobs-led growth and recovery following the COVID-19 pandemic, with emphasis on sub-Saharan Africa

*Mohammed Mwamadzingo, Michael U. Akuupa, and Lawrence N. Kazembe*

### Introduction

While the outlook for the global economy is uncertain, developing countries in particular are projected to suffer substantial losses in productivity and reversed gains per capita GDP, leaving a long-lasting legacy of increased household poverty. Appropriate macroeconomic policy strategies to create employment are required as well as responses to maintain and protect livelihoods. Presenting different macroeconomic scenarios with a focus on sub-Saharan Africa (SSA), this article identifies the main areas where policy support will be needed in the near term to buttress the recovery and address longer-term scars from the crisis. A

more holistic approach to employment promotion is essential and calls for employment policies which include and go beyond labour market policies.

## Key findings

- ▶ Stringent measures to contain the spread of the virus have led to disruptions to labour supply, productivity and consumption, with consequent severe falls in economic growth, sharp rises in unemployment and falls in working hours. Teleworking, on the increase in developed economies, is not a viable answer for all.
- ▶ With weak fiscal positions severely constraining government support measures in many countries, ambitious reforms are needed, but many countries do not have sufficient financial, monetary and social instruments for the necessary immediate and long-term responses.
- ▶ Policies that are simply growth-oriented, that have worked for developed economies, have not worked to create productive employment in SSA. Proceeding with the same policies will maintain the same poor employment outcomes in the coming decades.
- ▶ Addressing the fundamentals of job creation implies policies to promote:
  - employment targeting through fiscal, monetary and financial supports, encouraging industrialization and making use of ALMPs;
  - the important role of the public sector, sustainable enterprises (including the social and solidarity economy) and SMEs;
  - sectoral support, both short- and long-term;
  - job accessibility and inclusiveness; and
  - social protection
- ▶ Joint coordination is essential between those responsible for national development, education and training, demographic transitions, wage policies and employment laws, collective bargaining for social protection and decent jobs, economic and social policies, and labour market policies and institutions.

## The role of trade unions

- ▶ Workers' organizations must engage further with governments and employers' organizations at every stage in the formulation and implementation of economic policies.
- ▶ Workers' organizations will need to champion a social contract and concerted actions by all stakeholders if the effects of the policies are to endure beyond the current crisis.

## South-East Asian unions respond to the pressure of COVID-19

*Michele Ford and Kristy Ward*

### Introduction

In protecting workers during COVID-19, trade unions in South-East Asia faced particular challenges, including hostility, unemployment and underemployment as well as the rural demographic of many workers in the region. In this article the authors examine South-East Asian unions' fight for survival during the pandemic, their engagement with governments, workplaces and members, and their opportunities and challenges post-COVID.

### Key findings

- ▶ Unions struggled to convince governments and employers to provide workplace protection and social security for those who needed it, in some cases while experiencing a rapid decline in membership as a result of the large-scale job losses caused by COVID-19. In several countries their efforts to protect members were hindered by attempts on the part of employers – and some governments – to undermine workers' rights.
- ▶ South-East Asian unions' engagement with governments, workplaces and members saw some successes and some failures. Successes include those by construction sector unions in Cambodia in negotiations with the Government on coverage of informal workers; in Singapore by contributing to containing the workplace spread of COVID-19 through the introduction of new measures to protect workers during crew changes, while not burdening those who were travelling from designated low-risk countries with long periods in isolation or quarantine; and in Viet Nam where unions worked with employers to secure workers' access to protective measures such as masks, hand-washing facilities and sanitizers, often through joint management-union committees or taskforces. However, union efforts failed to stop adverse legislation passing in Indonesia, or in halting redundancies and changes to contracts in the Thai airline industry.
- ▶ Some unions managed to find new ways to support their members; and the pandemic has exposed areas of union operations that demand change if they are to prosper in the post-COVID-19 world.
- ▶ With the exception of Singapore, Brunei and Malaysia, South-East Asian countries have relatively large rural populations and informal sector workforces, and relatively low proportions of waged employees. Many also have high levels of under- and unemployment.
- ▶ Many countries are highly integrated into global supply chains, especially in labour-intensive manufacturing which was affected by disruptions in the form of cancelled orders and reduced availability of inputs.

- ▶ The impact of these disruptions was exacerbated by low levels of social protection, which made both informal sector workers and those who lost their formal sector jobs even more vulnerable to the pandemic's impact on their countries' economies.
- ▶ Factors playing a role in shaping union responses to COVID-19 include: high levels of informal employment in some countries with many formal sector workplaces little touched by regulatory requirements, leading to limited union coverage; whether unions can operate free from government or employer control; and whether they are reliant on international support.

### The role of trade unions

- ▶ The pandemic has confirmed the potential of digital technologies not only for communication between union officials and members, but also for the provision of services, including consumer benefits and professional development. Due to the restrictions imposed, union members were forced to become better acquainted with digital technologies other than social media, and better equipped to use them to engage with their unions. Teachers' unions were at the forefront of this move, although adopting online teaching platforms challenged many teachers with low levels of digital literacy despite their high levels of formal education. Unions' responses to the pandemic have revealed the extent to which strategic agency can be exercised even in very challenging circumstances.
- ▶ Some aspects of union operations limit their capacity to safeguard their members' interests. Among these are the challenges unions face in convincing governments to consider workers when determining public policy; in maintaining membership at a time of mass job losses; and in ensuring that their internal operations and governance structures work so as to facilitate quick and effective responses to unexpected problems as well as to longer-term, more structural challenges.

## Gender inequality during the pandemic: Perspectives of women workers in Latin America and the Caribbean

*Maria Bastidas Aliaga*

### Introduction

This article seeks to inform the debate on the unequal impact of the COVID-19 pandemic on men and women in the Latin America and Caribbean region (LAC). Focusing on women's working conditions, increased unpaid care work, increased violence against women and the effects of teleworking, it recommends priorities to address these issues for governments, employers and worker organizations, including contributions from women workers and trade union representatives from 13 countries.

## Key findings

- ▶ It is estimated that another 47 million women and girls will fall into extreme poverty due to the pandemic, bringing the total up to 435 million and reversing gains that have advanced gender equality and obstructing efforts to achieve Goal 5 of the SDGs.
- ▶ Cultural prescriptions and role distributions have led to women and girls shouldering a heavier burden of unpaid care work than men.
- ▶ Women are primarily active in the sectors most economically vulnerable to the pandemic—including commerce, tourism, and hospitality, as well as healthcare institutions – but hold disproportionately fewer decision-making positions, whether in hospitals or government bodies. They are most often employed in segregated, inferior and more precarious labour markets, diminishing the economic resources they need to face the current crisis. This precariousness has increased during the COVID-19 pandemic.
- ▶ The division of labour along gender lines has increased women’s exposure to the virus. Women make up a large share of the frontline workers responding to the COVID-19 health crisis, especially in healthcare and social work, but also in childcare at nurseries, adult care at nursing homes, social services, cleaning and private homes (paid domestic work), among other settings. Viral exposure is elevated in these lines of work due to the social contact they entail. Data indicate that 75 per cent of infected healthcare workers are women, many of whom say that the lack of suitable protocols and adequate personal protective equipment was responsible for their infection with the virus, which they later transmitted to family members.
- ▶ Many companies imposed teleworking without establishing rules or satisfactory conditions for this mode of work. As a result, actual teleworking conditions have increased workloads for women.
- ▶ Gender and domestic violence in the region has risen during the pandemic, while isolation has reduced the ability to obtain protection. Also increased during the pandemic is workplace violence and harassment faced by healthcare workers, the majority of whom are women.

## The role of trade unions

- ▶ The pandemic has impacted men and women in trade unions differently, intensifying gender inequality already present in these organizations, since women trade unionists have been forced to bear greater loads in their triple roles as homemakers, workers and union members. This sometimes eroded their physical and mental health.
- ▶ There is a need for innovative measures directed towards achieving gender equality in trade unions, boosting the capacity to integrate new groups of workers. The Trade Union Confederation of Workers of the Americas (CSA) calls for extending coverage to workers in informal and precarious settings.

- ▶ Women trade unionists from various LAC countries have made various recommendations including:
  - Comprehensive reform of the social security system, including domestic, informal and migrant workers in social programmes; and regulate teleworking, taking care work into account.
  - Continue to inform constituencies about social and labour developments in the country, and train them in standards of biosafety with technological support.
  - Continually advise and defend workers' rights in labour courts.
  - Take action against gender violence and discrimination, and campaign for the ratification of the ILO Violence and Harassment Convention, 2019 (No. 190).
  - Ensure capacity building and empowerment for trade union members, equipping them to deal with new labour market strategies; and offer capacity-building courses on COVID-19.
  - Offer guidance to employees of online businesses; form alliances with governmental and non-governmental entities to obtain more support for trade union members; and secure technical support through international cooperation.
  - Support women workers by sharing expertise and advice on personal and professional matters.
  - Ensure that legal support and health advice are available to network service professionals who are working outside or responsible for maintenance, customer service, or technical support for landlines and cell phones.
  - Draft and adopt agreements to: (a) maintain workers at home until pandemic conditions are safe enough for a return to the workplace; and (b) establish procedures for that return.
  - Identify discrimination against migrant workers, and keep going after companies that exploit them.
  - Address situations in which, nothing having come of documents that have been drafted, statements of protest, and proposals for social dialogue, the State has only favoured business recovery, putting it before health.
  - Come to the aid, and acknowledge the expertise, of domestic workers' organizations, which have acted in solidarity to provide support, including on mental health issues, food poverty, and training in online tools.
- ▶ With regard to women workers, immediate priorities include:
  - recognition of unpaid care work, tapping into its potential to create decent work opportunities, improving working conditions, and recognizing that domestic workers are entitled to the same rights as others;
  - reduction and fair distribution of unpaid care work between men and women in households, government, businesses, and the community;
  - greater coverage and effectiveness of social security for women, especially domestic and informal workers;
  - granting of maternity, paternity, and other parental leave; and
  - promotion of fairer legislation furthering the economic empowerment of women.



# Digitalize, adapt and innovate: Challenges and opportunities for trade unions amidst the COVID-19 pandemic and the recovery period

*Mohammed Mwamadzingo, Sylvester Kisonzo, and Naome Chakanya*

## Introduction

This article explores the emerging challenges for workers' organizations that intersect with national digital technology deficits and growing informalization, as well as the impact of COVID-19. Although with specific reference to Africa, these challenges are generally applicable across the globe. Digital technologies, especially virtual meetings, threaten the traditional model of industrial relations. The article suggests solutions and recommends actions, arguing that the adoption of these technologies by trade unions provides opportunities and benefits which might not otherwise be realized through physical meetings, conferences and interactions.

## Key findings

- ▶ For developing countries in particular, there are two main challenges to online working: unaffordability and lack of connectivity:
  - High costs for mobile data in developing countries driven by the lack of infrastructure, the high level of taxation in the mobile sector and low competition in the sector. In most African countries the cost of a gigabyte is more than US\$1, too expensive for the majority of workers in both the formal and informal economies.
  - Limited internet infrastructure and perennial power cuts in some countries also cause poor connectivity.
- ▶ The pandemic has further disrupted jobs and incomes at a time when workers needed to be more engaged online. Trade union officials rely more on internet connection at offices than at home, so that the closure of offices during lockdowns has limited them in effectively connecting with membership online.
- ▶ Working from home carries other challenges for trade union officials:
  - limited space in homes leading to sub-optimal delivery and performance, with difficulty of tracking these;
  - lack of business quality internet facilities, with limited smart gadgets and financial resources for the long connections needed in negotiations;
  - lack of privacy and data protection, with potential exposure to hackers;
  - challenges for collective bargaining negotiations: setting up meetings is mainly in the hands of employers who can mute or unmute speakers as they wish and thus control communication;

- communication misunderstandings due to less “reading” of body language and tone;
  - increased difficulty of team-building and coordination;
  - increased difficulty of managing workers’ education and training online; and
  - increased gender-based inequality (and violence) due to most home tasks including home schooling for children during lockdowns being carried out by women workers in addition to their work, and leading to loss of promotion opportunities.
- ▶ There are also opportunities, including increasing youth membership, reaching a wider audience, and increasing gender participation in trade union activities.

## The role of trade unions

COVID-19 has made it more apparent that trade unions need to:

- ▶ Recognize information technology as a critical force in shaping their relevance in the future and strategically plan for higher visibility of ICT in trade union structures.
- ▶ Escalate their interconnectedness and solidarity, mobilizing and uniting workers around demands that challenge negativities arising from global capital operations.
- ▶ Ensure that provisions for digitalization and technology diffusion are integrated into collective bargaining agreements and in workplace social dialogue structures such as workers’ committees and works councils.
- ▶ Develop their own applications (apps) and databases accessible to their membership.
- ▶ Develop and experiment with different virtual ways of communicating with and reaching out to new and younger potential members, the majority of whom are now online.
- ▶ Escalate e-campaigning and e-mobilization of membership and non-members (workers and general citizens) including workers in the informal economy, through social media and other online platforms.
- ▶ Take ownership of organizing and setting up of virtual meetings, particularly for collective bargaining and workers’ education.
- ▶ Push for policies that entrench a flexible work culture where workers are encouraged to freely choose where to work.
- ▶ Reconstruct worker education and training to be compatible with online learning.
- ▶ Continue to support women’s participation in online programmes and social media platforms through funding women-only webinars and other programmes that challenge patriarchal norms and systems in trade unionism.
- ▶ Engage governments to address the connectivity challenge.
- ▶ Overcome the cost constraints by a variety of means including accessing open-source solutions, non-profit pricing options, high net worth individuals, solidarity support funding and cloud-based collaboration solutions, as well as by creating a hybrid work culture, digitizing documents and business processes, and empowering the trade union workforce.

# ► COVID-19 and Recovery: The Role of Trade Unions in Building Forward Better

## ► Social dialogue



- **83%** of unions have adopted social dialogue as a response to the pandemic, with about **89%** engaging in tripartite consultations.



- Social dialogue used as a means of consensus between workers and employers contributed to about a **26%** increase in trade union membership overall.



- In order to increase membership, trade unions need to respond to the pandemic using all the tools of social dialogue at their disposal throughout all levels of communication.

## ► Social protection



- The crisis has made clear that a more **universal and inclusive social protection system** is much better prepared to address shocks.
- A lifecycle and multi-tiered social security framework can help unions to structure their understanding of roles and responsibilities vis-à-vis the overall national social protection system, enabling them to visualize how their own entitlements fit within an overall rights-based framework.



- **Workers' organizations can pursue three potential axes of action:**
  - Avoid lobbying against expansion to uncovered groups: it is imperative that trade unions avoid outright opposition of reforms that introduce non-contributory benefits to those with low or no capacity to pay contributions.
  - Invest in raising awareness of the rights-based principles embedded in inclusive social security systems.
  - Proactively engage in coalition-based pursuit of common interests within a lifecycle framework.

## ► Work-related injuries and diseases, and COVID-19



- Globally, the **1.7 billion workers** in service occupations are considered as risk populations, as they may become vectors of infection towards others.



- Around **14 per cent** of COVID-19 cases reported to the WHO are among **health workers** (in some countries as high as 35 per cent). However, **diverse occupational groups are recognized as being at risk, not only health workers.**



- Unions should give **special attention to preparedness for potential new hazards** including new global pandemics and possible occupational risks from new technologies and climate change, among others.



## ▶ Just transition



- ▶ Although the “social” sectors contribute to the unfolding ecological and climate crises, they also play an important role in mitigating and adapting to them. Green transitions in services, including specific sectors such as health, care and education drive profound changes in energy and manufacturing.
- ▶ Workers’ organizations must choose between sectoral and largely ad hoc transition programmes and comprehensive and proactive just transition policies.

## ▶ Macroeconomic policies



- ▶ With weak fiscal positions severely constraining government support measures in many countries, ambitious reforms are needed, but many countries do not have sufficient financial, monetary and social instruments for the necessary immediate and long-term responses.
- ▶ Joint coordination is essential between those responsible for national development, education and training, demographic transitions, wage policies and employment laws, collective bargaining for social protection and decent jobs, economic and social policies, as well as labour market policies and institutions.
- ▶ Workers’ organizations will need to champion a new social contract and concerted actions by all stakeholders if the effects of the policies are to endure beyond the current crisis.

## ▶ Gender inequality during the pandemic



- ▶ It is estimated that another 47 million women and girls will fall into extreme poverty due to the pandemic, bringing the total up to 435 million and reversing gains that have advanced gender equality and obstructing efforts to achieve Goal 5 of the SDGs.
- ▶ Cultural prescriptions and role distributions have led to women and girls shouldering a heavier burden of unpaid care work than men.
- ▶ There is a need for innovative measures directed towards achieving gender equality in trade unions, boosting the capacity to integrate new groups of workers.

## ▶ Digitalization



- ▶ Digitalization brings opportunities, including increasing youth membership, reaching a wider audience and increasing gender equality in trade union activities.
- ▶ For developing countries in particular, there are two main challenges to online working: unaffordability and lack of connectivity.
- ▶ Unions must ensure that provisions for digitalization and technology diffusion are integrated into collective bargaining agreements and in workplace social dialogue structures such as workers’ committees and works councils.

# Trade union membership dynamics amidst COVID-19: Does social dialogue matter?

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## Introduction

The effects of the COVID-19 pandemic on workers are impossible to overestimate. The seventh ILO Monitor (ILO 2021a) on COVID-19 and the world of work indicates that 93 per cent of the world's workers reside in countries with some form of restriction including workplace closures due to the pandemic. About 8.8 per cent of global working hours was lost in 2020 relative to 2019 and equivalent to 255 million full-time jobs. With such high magnitude of employment losses and increased inactivity among workers who remained employed, trade unions were staring at unprecedented loss in membership due to COVID-19. Over and above this, the socio-economic disruptions in the world of work due to the pandemic have led to increased vulnerability of workers globally, especially young workers, women, migrant workers, informal economy workers, and workers with disabilities, among others.

Recognizing that the ILO Centenary Declaration for the Future of Work (2019) calls for a human-centred approach to the future of work by putting workers' rights, needs and aspirations at the heart of economic, social and environment policies, many trade union organizations responded swiftly to address the challenges of COVID-19 by supporting a human-centred recovery. Trade union responses were hinged on the ILO recognition that social dialogue contributes to the overall cohesion of societies and is crucial for a well-functioning and productive economy. In reshaping the recovery and the role of workers' organizations, utilizing social dialogue is therefore the surest effective mechanism for policy responses to the COVID-19 crisis.

A recent ILO study entitled *A Global Trend Analysis on the Role of Trade Unions in Times of COVID-19* (ILO 2021b) shows that the better results are in countries where social dialogue functions effectively. The study of 133 countries reveals that trade unions are playing a pivotal role in responding to the COVID-19 pandemic through strengthening their capacity to call for national policymaking and developing a longer-term strategy to combat the effects of the crisis at the national and international level. It shows that trade unions are collaborating with governments and employers' organizations in using effective social dialogue processes to design and implement appropriate strategies and policies to address the negative impact of the COVID-19 crisis and to build inclusive societies.

This article applies an econometric approach to data from the ILO global survey on the state of trade unions to examine the role of social dialogue in reshaping recovery, focusing on trade union membership as the engine for workers' organizations. Based on the econometric results, we propose policy interventions for effective participation of workers' organizations in reshaping the recovery. In doing so, trade unions will further buttress the ILO mandate for social justice and decent work, and ensure that the organization continues to play a leadership role in the international system in advancing a human-centred recovery from the COVID-19 crisis that is inclusive, sustainable and resilient.

The article is organized as follows: first, we review literature on how important workers are to trade unions (membership) and the relevance of social dialogue in reshaping recovery

towards well-functioning and productive economies. The methodology used is then presented, together with the data and an analysis thereof, followed by a summary and conclusions. Finally, the article presents recommendations for policy interventions.

## Literature review

### *Reclaiming trade union membership*

The **ILO Future of Work Discussions** identified four main drivers that impact the world of work: globalization, and demographic, environmental and technological changes. These drivers profoundly affect the labour markets of today and tomorrow, and with that the future of trade unions: their potential of organizing and servicing workers, and of speaking with one voice to participate in inclusive and effective social dialogue.

Whereas important challenges existed before the ongoing pandemic, **COVID-19** has further aggravated existing social deficits and inequalities. Think of massive job losses, whole sectors that may disappear, or people in precarious employment with no access to unemployment benefits or healthcare. The current pandemic, and trade union responses, will determine the future of trade unions. ILO guidance for tackling the socio-economic impact of the Covid-19 crisis has been structured around four pillars, based on international labour standards: stimulating the economy and employment; supporting enterprises, jobs and incomes; protecting workers in the workplace; and relying on social dialogue for solutions.

Social, economic, environmental and developmental changes affect the future of trade unions. The shift from manufacturing towards services, environmental change, the informalization of the economy, automation and technological change determine the capacity of trade unions to organize and service workers. Today, legal restrictions and violations of trade union rights, such as the right to organize and to bargain collectively for all workers, are widespread. Not surprisingly, trade union membership is lower where there are violations of trade union rights, but is declining in both developed and developing countries. This in its turn also erodes legitimacy in collective bargaining and social dialogue. Such decline in trade union influence has a strong impact on people in non-standard or precarious types of employment, such as temporary and own-account workers or workers in the informal and gig economies. In other words, the changing employment relationship is not only a threat to workers, but also to workers' organizations.

In this context, the ILO Bureau for Workers Activities (ACTRAV), on the occasion of the ILO Centenary celebration, published a report on the current state of trade unions in the world (Visser 2019) and dedicated ACTRAV's *International Journal of Labour Research* to the issue of "The Future of Work: Trade Unions in Transformation" (ILO 2019b). Both publications aim at supporting the labour movement in its own deliberations on how workers' organizations can react to the fundamental changes that are affecting the world of work.

One of the contributing factors leading to the reduction in trade union power is the decline of membership levels, both in absolute as well as in proportional terms. The scope of action a trade union enjoys is to a great extent determined by the size of its membership base (Riley 2003). This refers to a union's capability for financial and organizational survival as well as to its ability to influence employers, to be heard by the general public and to have an impact upon society. What therefore drives decline in trade union membership?

First, trade unions are always vulnerable to erosion of their membership and influence, but particularly during difficult situations (Bryson and Forth 2010). The COVID-19 pandemic presents one of the worst vulnerable situations for such erosion. To avert this, trade unions must respond to the pandemic.

A second factor is decline in worker demand for union representation. Such was the case in the United States between 1977 and 1999 (Farber and Krueger 1992). With this understanding and with the millions of jobs lost due to the COVID-19 pandemic, workers need representation more than ever before. Trade unions must therefore rise up and represent workers who continue to be declared redundant after workplace closures occasioned by the COVID-19 pandemic.

Third, trade union membership may decline either due to structural changes (environmental determinants such as business cycles) or from interventions (for example, through involvement of union officials in recruitment) (Mason and Bain 1993; Riley 2003). A further decline in trade union membership due to COVID-19 could be due to two causes: first, the virus having been predicted to have originated from human-animal interactions is a structural threat; and second, trade union activities have been reduced due to the restrictive measures put in place by governments to contain the pandemic, thereby reducing to a minimum trade union recruitment and organizing opportunities and opening up a Pandora's box for a decline in trade union membership.

Fourth, a change in the labour market also reduces trade union density (Bockerman and Uusitalo 2006). On this understanding, the new labour market dimensions presented by the COVID-19 pandemic (including remote working, observing social distancing at workplaces, and automation, as well as workplace closures) reveal evident labour market uncertainties that prompt union membership decline.

### ***Dynamics of social dialogue***

From the onset, the ILO Centenary Declaration on the Future of Work recognized that social dialogue contributes to the overall cohesion of societies and is crucial for a well-functioning and productive economy. However, the COVID-19 pandemic has destroyed the social fabric and economies are currently neither functioning well nor effectively producing. The pandemic therefore threatens human dignity and social justice. To combat this crisis, trade unions must harness the fullest potentials of technological progress and productivity growth through social dialogue. This is because social dialogue, including collective bargaining and tripartite cooperation, contributes to successful policy and decision-making. Indeed, the ILO



Global Jobs Pact (ILO 2009) following an earlier world crisis emphasized that social dialogue is a “strong basis for building the commitment of employers and workers to the joint action with governments needed to overcome the crisis and for a sustainable recovery”. To stimulate the economy and labour, including supporting businesses, jobs and incomes, job losses could be avoided while enterprises could be supported in retaining their workforce through well-designed schemes implemented through social dialogue and collective bargaining (ILO 2009). The ILO further emphasized that in times of heightened social tensions (as now presented by the COVID-19 pandemic), strengthened respect for and use of mechanisms of social dialogue including collective bargaining are vital to address a crisis in a socially responsible manner. Enhanced social dialogue is therefore the cornerstone restoring social order in a sustainable manner from the debris of the COVID-19 pandemic.

In times of crisis, tripartite cooperation between governments and social partners in pursuit of sustainable and effectively negotiated solutions is both inevitable and viable (Rychly 2009). To enhance employee competitiveness during a crisis at company level, creative win-win strategies are necessary in addressing reduced demand (Hyman 2010), thereby calling for trade union engagement in social dialogue. Tripartism has enormously contributed to shaping the world of work (Fashoyin 2005). Hyman (2010) as well observed that in countries with weak social partners and more liberal traditions, firms adjusted to the crisis by laying off workers. This is therefore a call for trade unions to stand up and be counted to avoid this – as has been witnessed since the outbreak of the COVID-19 pandemic.

Recent research as well joins the call for social dialogue given the implications of the crisis on wages. Uhlerova (2020) has found minimum rates of pay increases in selected production and non-production sectors in Slovakia during the pandemic. In this regard, participation in effective social dialogue would provide an opportunity for trade unions to enhance wage negotiations towards a better and sustainable recovery, given the wage cuts being imposed on workers due to the pandemic.

In a nutshell, the reviewed literature has shown heightened threats of declining trade union membership in times of the COVID-19 pandemic, coupled with the contributions of social dialogue in shaping the world of work in times of crisis. Based on these observations, we examine the determinants of trade union membership using the data collected by the ILO during its global survey on the state of trade unions amidst the COVID-19 pandemic (ILO 2021b) with a view to investigating whether social dialogue really matters!

## Methodology

### Theoretical model

There are two outcomes (either as a benefit or as a risk) associated with a change in trade union membership: (i) a strong trade union resulting from growth in membership; or (ii) a weak trade union resulting from a decline in membership. The theory of expected utility, on which this study is based, assumes that each trade union strives to maximize its membership subject to a number of constraints, or to minimize the risk of a decline in membership. In the ILO survey monkey on the state of trade unions amidst COVID-19, the respondents were asked the following question: "Has your organization experienced any changes in membership due to the COVID-19 pandemic? 1 = Yes, 2 = No". Given the binary nature of this question, a trade union faces the possibility of an increase or a decline in membership as a result of COVID-19.

Change in trade union membership ( $y$ ) is therefore modelled as a function of social dialogue and a number of control variables ( $X$ ). *Trade union membership* =  $f(\text{social dialogue}, X)$ , where  $X$  is a vector of control variables, as defined in table 1.

Given the nature of the dependent variables, logistic regression model is adopted as the econometric method. The model:

$$P(Y = 1 | x) = P_i = \frac{e^{x'\beta}}{1 + e^{x'\beta}} \dots\dots\dots(1)$$

Equation 1 presents the probability of a change in trade union membership due to explanatory variables contributed by presence of COVID-19.

The probability of trade union membership not changing due to covariates influenced by the COVID-19 pandemic is given as

$$P(Y = 0 | x) = 1 - P_i = \frac{1}{1 + e^{x'\beta}} \dots\dots\dots(2)$$

When there are  $k$  explanatory variables the logit of the probability is given by logarithm of the odds ratio,  $P_i/(1-P_i)$ , which follows a linear model:

$$\text{logit}(p) = \log\left(\frac{p}{1-p}\right) = \log(p) - \log(1-p) = x\beta = \beta_1 + \beta_2 X_1 + \dots + \beta_k X_k \dots\dots\dots(3)$$

If  $\beta_i=0$  then the corresponding factor ( $x_i$ ) has no effect; if  $\beta_i > 0$  then the factor increases the probability of the event to occur; and if  $\beta_i < 0$ , the corresponding factor reduces this probability.

### Empirical model

To determine the probability of change in trade union membership, the following model was estimated:

$$\text{Trade union membership} = \beta_0 + \beta_1 \text{Social dialogue} + \beta_i X + \mathbf{u} \dots\dots\dots (4)$$

Where ( $\beta_0$ ) is the intercept term; ( $\beta$ 's) are the estimated coefficients; and  $\mathbf{u}$  is the stochastic error term. The explanatory variables included in the model are defined in table 1.

### Data and definition of variables

Data were sourced by ACTRAV from the survey data collected through the survey monkey to assess the status of trade unions amidst the COVID-19 pandemic. The survey was undertaken globally among all the worker constituents of the ILO for the period 23 April 2021 to 24 May 2021. The variables included in the model are defined in table 1.

▶ Table 1. Definition of variables	
Variable	Variables description
Change in trade union membership	1=if trade union membership has changed due to COVID-19, 0 otherwise
Social dialogue adopted	1=if trade unions adopted social dialogue during COVID-19, 0 otherwise
Containment measures	1=if countries adopted containment measures during COVID-19, 0 otherwise
Capacity building	1=if trade unions have conducted capacity building during COVID-19, 0 otherwise
Change in union income	1=if trade unions have experienced change in income, 0 otherwise
Type of dialogue	1=if trade unions adopted tripartite dialogue, 0 otherwise
Additional training	1=if trade unions conducted additional training
ILO support	1=if trade unions received support from the ILO, 0 otherwise
Inadequate fund	1=if inadequate fund is a challenge to trade unions, 0 otherwise
Limited mobility	1=if trade unions experience inability to move because of lockdown, 0 otherwise
Inability to hold meetings	1=if trade unions are unable to hold meetings, 0 otherwise
Advisory services	1=if trade unions offered advisory services, 0 otherwise
Membership training	1=if trade unions offered trainings to its members, 0 otherwise
Virtual meeting	1=if trade unions meet members through virtual meetings, 0 otherwise
Membership registration	1=if trade unions conduct membership registration, 0 otherwise
Virtual education	1=if trade unions conducted virtual education, 0 otherwise

**Descriptive statistics.** Table 2 presents the percentage distribution of dependent variables and control variables. The findings show that overall, 82 per cent of trade unions have experienced changes in membership resulting from COVID-19, while 83 per cent of trade unions adopted social dialogue as a response to the pandemic; 100 per cent of trade unions

across all countries reported that their respective countries adopted lockdown and restrictive measures to contain the pandemic; 85 per cent of trade unions conducted various capacity-building measures during COVID-19; globally, 76 per cent of trade unions experienced a decline in their other sources of income; about 80 per cent of trade unions globally were engaged in tripartite consultations; 75 per cent of trade unions offered advisory services on work issues to their members in response to the pandemic; nearly 58 per cent of trade unions reported having received support from either the ILO or other international agencies to help them in mitigating the negative effects of the pandemic; and about 56 per cent of trade unions reported experiencing inadequate funds amidst COVID-19. Results further show that 76 per cent of trade unions conducted virtual meetings during the pandemic while 65 engaged their members through virtual education.

► Table 2. Percentages for explanatory variables

Variable	Mean	Standard deviation
Change in trade union membership	0.828283	0.379054
Social dialogue adopted	0.826531	0.380599
Containment measures adopted	1.000000	0.000000
Capacity building	0.846939	0.361898
Change in union income	0.986111	0.117851
Type of dialogue	0.804819	0.406023
Additional training	0.762887	0.427522
ILO support	0.580645	0.496128
Inadequate fund	0.561404	0.498406
Inability to move due to lockdown	0.412281	0.494419
Limited mobility	0.605263	0.490952
Inability to hold meetings	0.473684	0.501512
Advisory services	0.754386	0.500272
Membership training	0.447368	0.499418
Virtual meeting	0.763158	0.427022
Membership registration	0.587719	0.494419
Virtual education	0.649123	0.479352

Source: Computed from ILO survey monkey data set (May 2021).

**Regression analysis.** Table 3 presents the marginal effect, coefficients, standard errors and probability values of the logistic regression output. The coefficient ( $\beta$ ) of the estimated binary logit model measures the impact of a one-unit change in an explanatory variable on the log of odds of a trade union membership, holding other explanatory variables constant. The marginal effect predicts the magnitude in probability of change in trade union membership attributed by the change in explanatory variables. The coefficients for social dialogue, capacity building, membership fee, dialogue type, ILO support, and membership registration are statistically significant at 95 per cent level of confidence.

► Table 3. Logistic model regression results

Variables	Marginal effect	Coefficients	Se	P-value
Social dialogue	0.261	0.217	0.069	0.048
Capacity building	0.142	0.258	0.069	0.005
Membership fee	-0.013	-3.290	0.982	0.010
Dialogue type	0.020	0.169	0.057	0.021
Additional services	0.242	1.764	2.140	0.410
ILO support	0.149	0.259	0.084	0.031
Inadequate fund	0.054	2.028	1.503	0.177
Inability to move	0.000	-0.008	1.766	0.996
Limited access to internet	-0.198	-3.824	2.358	0.105
Inability to organize members	-0.152	-3.436	2.437	0.159
Inability to hold meetings	-0.004	-0.212	1.937	0.913
Advisory services	0.069	2.294	2.300	0.319
Membership registration	0.517	6.271	3.051	0.040
Virtual education	0.017	1.387	1.801	0.441
Constant		-8.987	5.056	0.076

Note: \*P-value<0.05 implies the coefficients are statistically significant at 95% confidence level, based on two-tailed test. Some variables were dropped from the model.

## Discussion

Social dialogue is defined by the ILO to include all types of negotiation between, or among, representatives of governments, employers and workers, on issues of common interest relating to economic and social policy. It can exist as a tripartite process, with the government as an official party to the dialogue, or it may consist of bipartite relations only between labour and management (or trade unions and employers' organizations), with or without indirect government involvement. The main goal of social dialogue itself is to promote consensus building and democratic involvement among the main stakeholders in the world of work.<sup>1</sup>

The econometric result has established that social dialogue has significant and positive impact on trade union membership. The probability of trade union membership increasing amidst COVID-19 is 26 per cent in the event trade unions engage in social dialogue as a means of consensus between workers and employees during the pandemic.

Capacity building had a statistically significant positive effect on trade union membership. In particular, trade union membership is more likely to increase amidst COVID-19 by 14 per cent if capacity building is conducted. Such capacity building includes training on COVID-19 awareness at the workplace, financial management during COVID-19, occupational and health measures, response to government measures to address COVID-19 and the ILO policy framework in response to COVID-19.

<sup>1</sup> <https://www.ilo.org/ifpdial/areas-of-work/social-dialogue/lang--en/index.htm>%20%20a.

A change in membership fees has a statistically significant negative effect on trade union membership. A change in such fees resulting from the effect of COVID-19 is likely to cause a decrease in trade union membership of 1.3 per cent. On the other hand, social dialogue has a positive significant effect on trade union membership; the econometric result indicates that trade union membership is more likely to increase by 2 per cent if tripartite cooperation is adopted as a mechanism of social dialogue. Membership registrations and recruitment through media positively influence trade union membership. The probability of trade union membership increasing is 51 per cent if trade unions are engaged in membership registration during COVID-19.

Overall, limited access to internet, inability to organize members and inability to hold meetings have a negative but insignificant effect on trade union membership. Equally, additional services to members during COVID-19, inadequate fund, advisory services, and virtual education have a positive but non-significant effect on trade union membership.

## Summary and conclusion

This article has applied an econometric approach using data on the state of trade unions amidst the COVID-19 pandemic to explain the contributions of social dialogue in increasing and enhancing trade union membership amidst the COVID-19 pandemic. The results have shown that social dialogue contributes about a 26 per cent increase in trade union membership during a crisis. The findings are consistent with other studies that have also proved the role of social dialogue in shaping the world of work in times of crisis (ILO 2009; Rychly 2009; Hyman 2010; Fashoyin 2005). We conclude that social dialogue is critical in shaping the recovery from the COVID-19 pandemic and trade unions have no choice but to embrace effective social dialogue, as this provides an essential foundation for successful policy and decision-making processes that will enable these workers' organizations to address all the fundamental principles and rights of work in the future of work, including amidst crises such as the COVID-19 pandemic. Throughout all levels, trade unions need to embrace strong, influential and inclusive mechanisms of social dialogue.

## Recommendations for policy interventions

This study has shown that social dialogue provides constructive processes that maximize the impact of crisis responses to the needs of the real economy. Social dialogue, including collective bargaining and tripartite cooperation, therefore contributes to successful policy and decision-making. It is a strong basis for building commitment of employers and workers to the joint action with governments needed to overcome the crisis and for a sustainable recovery. In reshaping the recovery and the role of workers' organizations, we propose that workers' organizations need to engage in the strong, influential and inclusive mechanisms of social dialogue in the following ways:

- (i) Through social dialogue and in a human-centered approach, engage all stakeholders in strengthening the capacities of social partners and governments, including labour relations institutions and processes for effective social dialogue.
- (ii) Through social dialogue, engage governments in stimulating their economies by harnessing the fullest technological progress and productivity growth potentials in developing effective and sustainable fiscal and monetary policies for a jobs-led recovery for all, leaving no one behind.
- (iii) Through social dialogue, engage all governments and development partners in supporting sustainable businesses, jobs and incomes by developing sustainable social protection policies and employment services that stand out in times of shocks.
- (iv) Through social dialogue, engage all social partners in protecting workers by developing and harnessing occupational safety and health policies towards the promotion of all the fundamental rights and freedoms of work for all workers including youth, women, workers with disabilities, migrant workers, gig economy and informal economy workers as well as other new and emerging forms of work in the future of work.
- (v) Through social dialogue, engage all social and development partners in embracing environmental protection, climate change and just transition, including trade union engagement in the multilateral system.

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# Workers' rights and human rights: Resolving historical tensions through a multi-tiered social security agenda

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## Introduction

For far too long, social security in the Global South has been divided against itself: social insurance and so-called “social assistance” (small, tax-financed and typically means-tested schemes) have variously been characterized as mutually exclusive systems or meant for decidedly different population groups. Neither of these assumptions is accurate.

The impacts of COVID-19 on economies and societies around the world have forced a reckoning for social security systems. The choices that were once confined to back-room high-level policy circles have thrust themselves into public debate, and stakeholders have been asked to take positions on issues that affect them, from the immediate social protection responses to the vision for the future. Within this context, organizations representing workers are called to consider how their own interests align with the interest of broad swathes of society, in the context of the social security system and the broader social and economic development goals for recovery and beyond.

This article considers the historical development of social security systems; the mixed messaging and false choices in contemporary policy circles; the potential for resolving these tensions through a return to inclusive, lifecycle multi-tiered frameworks; the evolving role of workers' organizations within this context and some potential axes for action in a post-COVID world.

## Historical development of social security systems and its limitations to address changing trends and COVID-19

The historical development of social welfare systems (in particular in Western Europe) saw a gradual coverage expansion through a basic social protection floor across the lifecycle and an attempt to consolidate social security policies to expand coverage after the Second World War. In many cases, social security systems came to be based on social justice principles and a solidarity pillar, across different age groups, those working in the formal and informal economies, and among high- and low-income workers. Nonetheless, as most individuals were working in formal employment, these social security systems were tailored to such labour market context, and social insurance schemes were accompanied by other benefits and increased investments in universal health and education.

The post-war period also spurred a wealth of human rights treaties and conventions, that in many instances included social and economic rights. The rights to social security<sup>1</sup> and an adequate standard of living are enshrined in both universal and regional human rights

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<sup>1</sup> According to Sepúlveda (2014), the concepts of the right to social protection and social security are considered in this article as synonyms, based on the work of the United Nations Committee on Economic, Social and Cultural Rights (CESCR).

frameworks,<sup>2</sup> and are, in many instances, incorporated into national legal frameworks and constitutions that guarantee these rights (Barrantes 2020). International normative frameworks set out the content of the right to social security and some of the principles by which States are to guarantee that everyone, as a member of society, has the right to social security and the right to an adequate standard of living (UN 1948, Articles 22 and 25). Among others, it is considered that everyone should have income security in the event of unemployment, sickness, disability, widowhood, old age or other lack of livelihood in circumstances beyond his control, as well as special care to motherhood and childhood (UN 1948, Article 25), and social insurance (UN 1966, Article 9). As individuals of all ages are right holders and might become vulnerable to shocks and risks of different types (including pandemics such as COVID-19), States – as duty bearers – should ensure that people are covered throughout their lifecycle, making sure that dignity is at the core of any social protection system.

In contrast to the experience of most high-income countries, low- and middle-income countries in the Global South have seen a more fragmented development of their social security systems. Many countries have large portions of their population working in the informal labour market, leaving large coverage gaps for social insurance schemes. In addition, in several of these countries a large percentage of the population experiences poverty and vulnerability, which has subsequently seen the implementation of tax or donor funded social protection schemes targeted at the poor. Taken together, the design of these systems resulted in fragmentations that undermine the achievement of the right to social security for the vast majority of people around the world.

Before COVID-19 became a global pandemic, around two billion people in the world were in informal employment (OECD and ILO 2019). When looking at total population in informal households by quintile (percentage of total population living in informal households in the subgroup), most recent data shows a disproportionately high informality in the bottom 20 per cent of the population, as seen in table 1 for a selected group of countries (OECD, n.d.). The numbers of this selected group of countries shows that large percentages of those working in informal employment are within the poorest households. It is noteworthy that none of these figures reflect COVID-19 impacts on the economies of any of these countries, so one can only assume that these informality percentages have spiked since.

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<sup>2</sup> Including the following universal instruments: UN Universal Declaration of Human Rights, 1948 (Articles 22, 25); UN International Covenant on Economic, Social and Cultural Rights, 1966 (Articles 9, 10, 11); UN Convention on the Rights of the Child, 1989 (Article 26); ILO Social Protection Floors Recommendation, 2012 (No. 202), and regional human rights instruments.

▶ Table 1. Total population in informal households, by quintile

Country	Bottom 20%	Top 20%
Argentina (2010)	73.7%	18.2%
Chile (2017)	34.9%	9.4%
Colombia (2018)	91.9%	21.6%
Honduras (2019)	98%	39.4%
Egypt (2015)	80.2%	35.6%
Kyrgyzstan (2016)	48.5%	26.2%
Viet Nam (2016)	95.4%	43.5%

Source: OECD, n.d.

Current widespread informality on the one hand leaves a large portion of the population vulnerable and unprotected with no social protection coverage, and on the other hand also diminishes the capacity for governments to increase their public revenues and hence finance sustainable social security systems through taxes and contributions (OECD 2020).

High rates of informality have been recognized as a key risk for socio-economic development in the Global South, and policy recommendations for a transition to a formal economy have been taken up by several countries, such as through the ILO Transition from the Informal to the Formal Economy Recommendation, 2015 (No. 204). The Recommendation encourages countries to progressively extend to all workers in the informal economy, social security, maternity protection, decent working conditions and a minimum wage that takes into account the needs of workers; to build and maintain national social protection floors within their social security system and facilitate the transition to the formal economy; and to progressively extend the coverage of social insurance to those in the informal economy and adapt procedures, benefits and contributions, taking into account their contributory capacity.

The COVID-19 pandemic has only increased the vulnerability of millions of workers in both the formal and informal employment markets. In a region such as Latin America, in which social protection system programmes cover around 61.8 per cent of total workers, approximately 65.8 per cent of people working in the informal economy do not have access to any form of protection. It has also been estimated that this region could lose around 17 million formal jobs due to the negative impacts of COVID-19 (OECD 2020).

Given these circumstances, and the uneven development of social security in the Global South, a tension has resulted between the *human right* to social security – which is inherent, fundamental and universal – and *workers' rights* to specific and legally defined formal entitlements – which have been crystallized within a relatively narrowly prescribed framework of formal employment. COVID-19 has the potential to either sharpen or blur this division, depending on the policy choices countries make.

### ***Social protection, yes, but what kind and for whom?***

So far, social protection has been widely embraced as a necessary and appropriate response to the crisis, but the responses have varied widely in ambition and design, reflecting long-standing challenges and debates.

On the one hand, governments have been encouraged to “prioritize support for those who are particularly vulnerable to the crisis, including workers in the informal economy” (ILO 2020, 1). Some have interpreted this in narrow terms, employing surgical approaches in an attempt to reach specifically defined groups, for example by transfers to those deemed poorest or most vulnerable, often using databases that pre-dated COVID-19 which have almost certainly resulted in very high exclusion errors. Indeed, it is increasingly recognized that the methods typically used to identify “the poor” in many low- and middle-income countries,<sup>3</sup> in addition to being ineffective at the best of times, are wholly inadequate in times of crisis, so that calls for universal responses have increased (Rutkowski 2020).

At the same time, and seemingly paradoxically, the crisis has made clear that a more universal and inclusive social protection system is much better prepared to address shocks such as COVID-19:

The comparative advantage of a universal social protection system that reaches everyone is that it is automatically primed to protect all those affected by a shock. Social protection transfers can be scaled up quickly and with relative administrative ease. In complex, fast moving and unpredictable crises like COVID-19, universalism is preferable to targeted approaches. This is especially true where targeting capacity is more limited and a very high proportion of the population is vulnerable. Universalism makes more practical sense than ad hoc efforts to “effectively” target, the limitations of which are well documented. (ILO 2020, 6)

However, generally speaking, these more ambitious, broad-based solutions to reaching the so-called “missing middle” have not been forthcoming (see for example Sibun 2021), beyond a handful of stand-out cases such as the United States.

In addition, even where governments may have been predisposed to pursue more ambitious solutions, the practical challenges of reaching people in a crisis have required them to graft responses onto the existing system, which means that support can end up being concentrated among those who already enjoyed relatively generous protections prior to the crisis.<sup>4</sup> Indeed, because of this, many trade union representatives have expressed scepticism, pessimism or ambivalence about the likely impacts of COVID-19 on the social protection pillar of the Decent Work Agenda (ILO 2021a). Even so, there have been certain

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<sup>3</sup> Besides inherent design flaws, which have been well documented, proxy means tests are built upon the flawed logic that “the poor” is a fixed and stable category that can be accurately identified and reached. In reality, people’s incomes and circumstances are highly dynamic, making it virtually impossible, especially in low-resource environments, to pinpoint a delineated group at any given moment (Knox-Vydmanov 2014).

<sup>4</sup> According to one respondent to an ILO-ACTRAV survey on the likely impacts of COVID-19 on social protection: “Social protection measures are largely restricted to [the] formal sector and [the] informal economy, which employs 70–80 per cent of the workforce, is not covered” (ILO 2021a).

noteworthy examples of coverage extension to informal workers through contributory systems. For example, some countries have introduced new benefits or extended them to new populations to incentivize registration.

This reminds us of the perils of fragmented social protection systems, that leave many of the most vulnerable behind and fare badly in the event of a pandemic. Although social protection systems are an essential part of the needed policy responses to the COVID-19 pandemic, many countries in the Global South do not have effective social protection systems in place that provide universal coverage and are, hence, less prepared to respond to the negative impacts of this global crisis.

### ***Resolving the false choice between tax-financed and contributory schemes through multi-tiered social security systems***

Even prior to COVID-19, many countries were already making the case for transformative social policies, and specifically an inclusive and lifecycle social protection system based on human rights principles and standards, that can support governments in ensuring that no one is left behind (Cichon 2013; Cichon and Hagemeyer 2007; Kidd 2017, 2013; Mkandawire 2006, 2004). However, defining what exactly that means in terms of particular policy and institutional arrangements has proved elusive even for well-intentioned national governments and other stakeholders.

Social insurance systems have long been out of fashion in international development circles, given the challenges with high (and often – though not always) growing informality in low- and middle-income countries.<sup>5</sup> The UN-wide policy on Social Protection Floors (SPF) was a response to this perceived “ill-suitedness”<sup>6</sup> of traditional employment-based social protection systems to adapt to the persistent challenges of poverty, social exclusion and labour market informality. The solution, as encapsulated in the ILO Social Protection Floors Recommendation, 2012 (No. 202), is a set of *basic* social protection guarantees — which have been widely interpreted to be best delivered through tax-financed schemes in countries with low social insurance coverage. The growing support among governments and development partners for the expansion of tax-financed social protection schemes is understandable and appropriate.

However, in the rush to embrace “cash transfers” targeted at the poor many governments, development partners and other stakeholders have failed to appreciate the fundamental qualitative differences between different types of transfers and their implications for the long-term development of social security systems. In particular, the distinction between

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<sup>5</sup> Recent work by the ILO (2018) has shown that informality is far from inevitable and, prior to COVID-19, had been on a downward trend in much of Latin America and a number of other countries such as Viet Nam, strongly suggesting that it can be addressed through serious and concerted policy efforts.

<sup>6</sup> As the World Bank (2019, 113) noted: “this contributory approach is not a good fit for developing countries, where formal and stable employment are not common. Indeed, because eligibility is based on making mandatory contributions, this form of social insurance excludes informal workers, who account for more than two-thirds of the workforce in developing countries ...”

small, “last-resort” safety nets, which tend to be delivered at the household level and are based on proxy means tests, versus a set of core lifecycle guarantees (such as child benefits or old-age pensions) that are provided as individual entitlements (individuals as right holders entitled to the right to social security and an adequate standard of living), has been under-appreciated among both scholars and practitioners. Evidence is mounting, however, that the former are more complex and expensive to govern at all levels, are often associated with high exclusion errors, and jeopardize the realization of the right to social security, while the latter contribute to more inclusive, better governed and truly rights-based social protection systems (Barrantes 2020; Kidd, Gelders and Bailey-Athias 2017; Kidd and Athias 2019; McClanahan et al. 2021).

In addition, dispensing with social insurance as a fundamental component of a rights-based and inclusive social security system has been premature. The reality is that social insurance systems have shown surprising resilience in the face of complex challenges, evidenced by the steady introduction of new schemes and reform of existing schemes in low- and middle-income countries. Indeed, social insurance schemes and agencies have strong institutional legacies that continue to shape national social protection policy spaces; their purported fiscal neutrality still appeals in resource-strapped societies; and despite challenges, they remain the most effective instrument for financing higher-level benefits (vertical extension) in a relatively equitable way. Importantly, the resilience of contributory systems is owed in no small part to actions taken by trade unions to preserve the entitlements enshrined in these systems. And, crucially for them, they have a direct interest in expanding membership to help address serious challenges to the financial sustainability of the funds.<sup>7</sup>

Too often, tax-financed solutions and contributory schemes have been presented as mutually exclusive options. However, this is a false choice. In fact, the development of the two instruments can and should in tandem be placed under the same strategic policy framework, avoiding a fragmented delivery of social protection.

Building integrated, *multi-tiered* systems can harmonize the goals of so-called “horizontal” extension (extending entitlements to newly covered individuals and groups) with “vertical” extension (improving the comprehensiveness or adequacy of entitlements) in a way that achieves universal coverage by *design*. Unlike in fragmented systems in which “social assistance” (narrowly targeted) programmes are haphazardly tossed about as solutions to an array of social ills with no real logical connection to the contributory system and the large gaps in coverage, a truly multi-tiered system would combine core lifecycle tax-financed guarantees with mirror-image social insurance provisions for the same contingencies – typically those backed by international frameworks such as the ILO Social Security (Minimum Standards) Convention, 1952 (No. 102) – in a coordinated way. In this way, for a given contingency, universal coverage of the *system* is achieved through social insurance

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<sup>7</sup> Recognizing this, the ILO has consistently supported governments and social partners in introducing needed reforms to strengthen the long-term sustainability of social insurance funds, as well as to make them more attractive and better adapted to the evolving needs of workers in a changing labour market.

combined with either universal or benefit-tested tax-financed programmes, but not with poverty-targeted ones.<sup>8</sup> Smaller, last-resort “safety-net” schemes then supplement, but cannot replace, these core schemes (ILO and UNICEF 2021).

In addition, multi-tiered systems, when designed in a way that builds an incentive structure that both ensures basic, adequate protection for everyone – fulfilling the *human right* to basic social security – while preserving the incentive to join social insurance – fulfilling the *workers' right* to specifically defined higher-level entitlements – ensure that social protection systems are more directly aligned with broader development goals such as decent work, gender equality, formalization and economic growth. Indeed, registration with social insurance is, for workers, often indistinguishable from formalization – by definition – in many countries (ILO 2018). Therefore, multi-tiered social security systems help to resolve the historical tension between human rights and workers' rights through a clear incentive structure built on universal basic guarantees.

### ***The (evolving) role of workers' organizations in social protection***

Against this backdrop, workers' organizations have often found themselves somewhat awkwardly positioned in national discussions around social security extension, both before and during COVID-19. While trade unions have in many cases called for “universal health care, extended sickness, unemployment and family benefits, cash transfers, job and income security” (ILO 2021b), because contributory schemes reflect and cater to formal employment relationships, these organizations' interests are typically aligned most closely with the preservation of contributory entitlements.

COVID-19 has challenged all actors engaged with the social protection system to (re) consider their roles and responsibilities in a post-COVID world. Those organizations representing workers find themselves at the nexus between, on the one hand, preserving and promoting their own hard-earned entitlements in the face of extreme pressures on their own livelihoods and state resources, and on the other hand, confronting the very clear reality that large sections of society – workers, families, individuals – living alongside them are almost completely without basic income and health security.

In this context, a lifecycle and multi-tiered social security framework can help trade unions and other stakeholders to structure their understanding of roles and responsibilities vis-à-vis the overall national social protection system, enabling them to visualize how their own entitlements fit within an overall rights-based framework.

Moving toward this aligned vision of universal realization of the right to social security in the post-COVID world points to three potential axes of action that workers' organizations can pursue.

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<sup>8</sup> The potential for synergies between tax-financed and contributory tiers has long been recognized in the context of old-age pensions, but the application of the concept to other contingencies has rarely been pursued (see for example Duran 2018; ILO and UNICEF 2021; ILO 2010; Kidd 2015; McClanahan and Gelders 2019).



***Follow the “do no harm” principle: Avoid lobbying against expansion to uncovered groups***

It should go without saying, but it is imperative that trade unions avoid outright opposition of reforms that introduce non-contributory benefits to those with low or no capacity to pay contributions. In most places, entitlements to contributory benefits have been hard won. As a result of these efforts, trade unions enjoy a privileged statutory place on the boards of many social security agencies, and indeed, calls for the establishment of these kinds of official vehicles for stakeholder representation, – and specifically tripartite representation – are enshrined in ILO Convention No. 102 and Recommendation No. 202.<sup>9</sup>

However, in contexts of high informality, organized labour represents relatively small or narrowly defined populations, and competition over scarce resources has frequently been framed as a zero-sum battle. While it is essential that coverage extension efforts respect the integrity of social security funds and their associated entitlements, stakeholders must be open to dialogue around sensitive financing questions and, rather than taking an inflexible and defensive stance, engage proactively in search of solutions that benefit everyone, including themselves.

For example, universal tax-financed entitlements guarantee minimally adequate benefits for everyone while simultaneously – if carefully designed – reducing the level of mandatory contributions required to finance higher rate benefits provided through the contributory system. Alternatively, pension- or benefit-tested tax-financed benefits offer a way for the State to honour its obligation to provide minimally adequate, rights-based benefits to those who have not earned entitlement under the contributory system. This can be done in an affordable and administratively simple way without threatening the integrity of the contributory system. On the contrary, in both cases (universal or pension-tested benefits), if well-designed as discussed previously, the extension of tax-financed guarantees can and should actually *encourage* growth in coverage under contributory schemes, with potential for knock-on effects on informality and, by extension, union membership. Even if coverage of contributory schemes does not grow, bringing the two instruments closer administratively (if not financially) ensures that coverage remains stable in the face of increasingly dynamic attachments to the labour market, as individuals and workers move between the two tiers. Without open spaces for social dialogue, however, these nuances are unlikely to be fully appreciated, making resistance to reforms more likely.

Proper coordination of different social protection schemes is also at the very core of ensuring a rights-based social security system for all.

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<sup>9</sup> Notably, Recommendation No. 202, Article 3(r) calls for “tripartite participation with representative organizations of employers and workers, as well as consultation with other relevant and representative organizations of persons concerned”.

### ***Invest in raising awareness of the rights-based principles embedded in inclusive social security systems***

Many trade unions and workers' organizations have invested in developing and disseminating extensive knowledge about core issues that affect them, such as occupational safety and health and design of pension systems. However, there is a need to improve understanding, particularly (but not only) in low- and middle-income countries about how their own priorities fit within the social protection system writ large.

It is worth noting, however, that sometimes the position of trade unions vis-à-vis social security reforms, including their perceptions of their own interests, is not due to a lack of awareness but rather stems directly from gaps in the design of the systems themselves. For example, in Uganda, the national provident fund, like most defined contribution systems, is unable to provide basic protections for working-age contingencies. Trade unions in Uganda have demanded that a reform bill "expand the scope of benefits to allow individuals with various challenges such as unemployment, sickness, and school fees to help them solve their issues ... without waiting for retirement" (see Ahimbisibwe 2019). However, in a savings-based system, early withdrawal drains individual accounts leaving little to cover long-term risks. Rather than early access, broader structural reforms would be required to enable the introduction of short-term lifecycle benefits – such as sickness, unemployment or family benefits – which, if provided, could also make the system more attractive to new potential contributors (McClanahan et al. 2021). In situations like this, improved awareness of the functions and potential of an inclusive, lifecycle social security system could better direct the passions, energy and political capital of the labour movement toward a longer-term, strategic goal of a more comprehensive and sustainable system.

### ***Proactively engage in coalition-based pursuit of common interests within a lifecycle framework***

Building rights-based, lifecycle social security systems requires building support among broad sections of society for core tax-financed interventions – such as child benefits, disability benefits, and old-age pensions. As economic interest groups, organizations representing workers have particular demands that correspond to their position in the labour market and, with respect to social security, their role as both contributors and – eventually – as beneficiaries of contributory schemes. In contrast, the voices of those who currently do, or would stand to, benefit from the extension of tax-financed social protection are much more diffuse. This has been identified as a key challenge for ensuring effective stakeholder representation of beneficiaries in the management of these schemes, as called for in international frameworks (Cotinguiba et al. 2020; McClanahan et al. 2021; UNDP and African Union 2019). Yet, because they stand to gain from the development of comprehensive and sustainable social security systems, and given their comparative advantage in terms of organizational capacity and resources, trade unions have both an interest and an obligation to incorporate the demands of the broader population into their platforms and to lobby on their behalf.

Moreover, their own efforts to engage in effective national dialogue toward the realization of the universal right to social security is enhanced by aligning with groups representing broader segments of society, including issue-based or public interest groups. It is especially important to seek common ground with those representing “lifecycle-based” cleavages, such as groups representing children, older people or persons with disabilities who would have a clear interest – even if it is not yet on their radar – in supporting the introduction of tax-financed child benefits, a social pension or a disability allowance. Indeed, it was precisely this type of cross-sectional alliance to address the needs of older persons that led to the passage of a Law on Older Persons and the introduction of the Social Pension Scheme in Fiji (McClanahan and Hillson 2021).

Workers in the informal economy are also typically excluded from formal tripartite and bipartite negotiation, and pre-COVID recommendations have included ensuring freedom of association and the right to collective bargaining in the informal economy so that engagement in social dialogue can be facilitated, and as part of formalization efforts. Before the COVID-19 pandemic hit, global evidence suggested that trade unions were increasingly expanding services to also provide support to those working in the informal economy, such as in the case of Argentina and South Africa (OECD and ILO 2019, 122). Furthermore, during COVID-19 responses informal worker organizations in these two countries have taken steps to foster productive dialogue spaces with their respective governments around the social protection needs (Devenish and Afshar 2020). One key lesson learned during the COVID-19 pandemic is that the more established these structures and relationships are (between informal workers organizations and governments) the smoother the negotiations and resulting social protection solutions will be for any forthcoming crisis (Devenish and Afshar 2020).

## Conclusions

If COVID-19 has taught us anything, it is that the social protection policy and institutional infrastructure in place prior to a crisis is the main determinant of how well a system is able to offer meaningful mitigating and corrective measures (Kidd and Sibun 2020; Razavi 2020; Razavi et al. 2020). Perhaps never before has the need for a set of universal basic protections been so apparent, but equally, the COVID-19 crisis has revealed the continued relevance of employment-based measures. These are not competing spaces, and workers' organizations have a vital role in setting the terms of national debates to orient them around lifecycle benefits within a multi-tiered framework. Integrating a multi-tiered perspective into national policy frameworks requires a high-level strategic vision, and it is vital that countries nurture the space for social dialogue to generate consensus for the transformative changes necessary to “build back better” (ILO 2021c, para. 9).

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# Work-related injuries and diseases, and COVID-19

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Developed countries have done well over recent years in reducing occupational injuries caused by accidents, despite their increasingly complex environment (Hämäläinen, Takala and Saarela 2006; Hämäläinen, Saarela and Takala 2009; Hämäläinen, Takala and Tan 2017). Work-related diseases are more complicated to measure as no global statistics are available, although estimates by the International Labour Organization (ILO) show an increasing trend. Globally, when populations in various regions gradually extend their life expectancy and work-life expectancy, many short-term workplace problems will be gradually reduced. Poverty reduction cuts back short-term consequences but these are replaced by more long-term and long-latency diseases and disorders. This can be easily seen in emerging economies such as those in the South-East Asian and Western Pacific regions (Takala et al. 2014; Takala et al. 2017).

In many developed countries, and increasingly in developing countries, the health component of workplace safety and health is rapidly increasing in importance compared to the safety component. This relatively higher importance placed on health at work is mainly due to improvements in safety and the reduction in the number of workers in traditionally hazardous industries.

In developed countries, another major component in reducing accidents has been the shift in economic structures. Hazardous and labour-intensive workplaces, such as those in manufacturing sectors, have decreased in developed countries since much of such work takes place in other locations, in particular in rapidly developing countries in Asia, for example. In developed countries more than two-thirds of all workers are often already working in service occupations. The rapidly evolving processes of mechanization, automation and pre-fabrication also means that many jobs are becoming less exposed to the risk of injury. Improvements in reducing occupational injuries in the developed countries have been made possible partly through better prevention activities and partly through the trend of transferring much industrial activity to poorer parts of the world.

This transfer to developing countries carries its own associated risks, such as the negative impacts on the health and safety of workers in these countries, where injuries are increasing and so are the long-latency diseases and disorders. Technology transfer is technically not overly complicated, but changing unsafe and hazardous work methods and learning best practices has not followed the technical transfers. Unskilled workforces have been left to learn everything from scratch, so that health and safety risks and negative outcomes have continued to increase rapidly.

Major work-related risks include: occupational carcinogens; circulatory diseases caused, for example, by stress, night work, high levels of carbon monoxide and noise; other non-communicable diseases caused by inhaled vapours, dusts and fumes; physically demanding or repetitive jobs leading to musculoskeletal disorders; and communicable diseases caused by pathogens at work leading to malaria and other communicable and tropical diseases – and more recently COVID-19, the disease caused by the novel coronavirus SARS-CoV-2.



We are living in unprecedented times across the globe, where every country is experiencing the tragic and far-reaching impacts of the pandemic due to the SARS-CoV-2 virus and COVID-19. This situation and its impacts are anticipated to continue for many months and even years to come, and to affect many sectors.

There are probably very few workers worldwide who can say that they have not been affected by COVID-19. At international, regional and local levels, and across all sectors, organizations have mobilized their resources and skills to develop and share all they can about COVID-19 for the benefit of their workers, their families and their communities. These include policies, legislation updates, technical guidance documents, training materials, official statements, risk assessment tools, standard operating procedures, action frameworks and return-to-work guidelines, among many others.

The global pandemic has placed additional responsibilities and workloads on all practitioners involved in health services in general, and also on occupational health and medicine professionals who are required to ensure the safe return of workers to their respective workplaces and livelihoods, as the global economy restarts in a phased approach following the lockdowns in many countries.

Globally, the 1.7 billion workers in the various service occupations are considered as risk populations. If infected, workers in some occupations may play an important role as vectors of infection; examples include workers in the health sector, other service occupations, food industries, and many more. Several occupational activities have exposed workers to the SARS-CoV-2 virus particularly in sectors with high rates of human-to-human contact or contact with animals.

Workplaces in economic sectors such as animal husbandry, food processing and food markets, health services, various social services such as care of the elderly, community services such as waste handling and many others are possible sources and origins of potential epidemics. Workplaces should therefore be considered important arenas for early detection of epidemic risk and for early actions in primary prevention and management. This requires effective regulation for inspection and advice on good preventative practices.

The ongoing global crisis of chronic diseases and the failure of public health to curtail the upsurge in highly preventable risk factors have left populations vulnerable to acute health emergencies such as COVID-19. Furthermore, a majority of the working population is exposed to “new and emerging” work risks related to long-term health effects, such as psychosocial factors.

This article reviews the latest global and country numbers of occupational accidents and work-related illnesses and related economic costs in selected countries and regions, and recommends action to be taken by various stakeholders.

## Objectives

Our objectives in this article are to:

- ▶ Create a better understanding of the short- and long-term health risks caused by work and of the expected serious consequences to working populations and to economies.
- ▶ Based on recent estimates, compare data from available reliable sources to understand, by means of commonly used indicators, the magnitude of occupational problems and disorders. Analysis of existing estimates from different countries and regions, and differences between countries and estimates, can provide a roadmap for setting priorities and informing policies.
- ▶ Identify the main targets for the elimination and reduction of exposures to negative workplace factors causing long-term serious outcomes and deaths related to work.
- ▶ Provide facts and evidence for priority action and emphasizing the role of governments, workers and employers and their organizations related to workplace safety and health policies, strategies, regulatory measures, enforcement, engagement, and the building of a mind-set and culture of “zero harm” at work.

## Methodology, and sources of data on the burden of injuries and illnesses at work

The authors reviewed employment figures, mortality rates, data on the occupational burden of diseases and injuries, reported accidents, surveys on self-reported occupational illnesses and injuries, attributable fractions ( $AF_{work}$ ; these quantify the contribution of a risk factor to a disease or a death in a population) and economic cost estimates of work-related injuries and ill-health, and the most recent information on occupational health and safety issues published in scientific papers, documents, and electronic data sources of international and regional organizations, in particular the ILO, the World Health Organization (WHO), the European Union (EU), and the Association of Southeast Asian Nations (ASEAN), as well as institutions, agencies and public websites. Data collection systems for these sources still vary so their comparability has limitations.

The ILO has calculated global estimates of occupational injuries and diseases for the last 20 years and the methods used and respective results have progressed with time. The estimates are based on two distinct processes, one for occupational injuries (accidents) and the other for work-related diseases. The ILO's statistics contain collected data from its Member States for injuries, WHO data on diseases, and scientific documentation on work-relatedness used as baselines for calculating the number of deaths and estimating the magnitude of disability, both temporary and permanent.

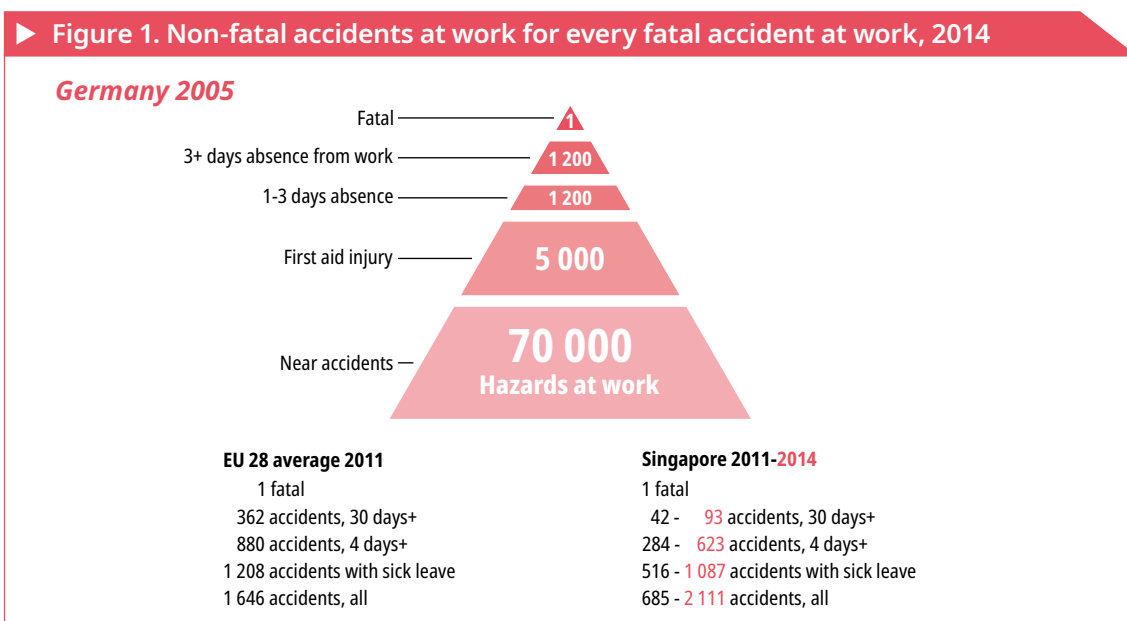
Pre-COVID-19, it was estimated that globally 2.78 million workers died annually from causes related to work (Hämäläinen, Takala and Tan 2017). Of these, work-related diseases accounted for 2.4 million (86.3 per cent) of deaths, while 380,000 deaths (13.7 per cent)

occurred as a result of occupational accidents. The global economic impact of the failure to adequately invest in occupational safety and health was “roughly equal to the total GDP of the poorest 130 countries in the world”, said ILO Director-General Guy Ryder (ILO 2017). In addition, some 3.74 million non-fatal accidents took place and 123 million disability adjusted life years (DALYs) were lost due to work-related injuries, diseases and disorders every year (Hämäläinen, Takala and Tan 2017). DALYs are calculated by adding together the years of life lost (YLL) due to premature mortality and the years lived with disability (YLD). Total health loss (measured in DALYs) is a consolidated indicator of the global burden of disease (GBD). Based on these calculations, the economic loss due to all diseases, disorders and injuries at work was 4.94 per cent of GDP in 2020 (IHME/GDB Risk Factors Collaborators 2020).

### Injuries caused by accidents

While it is difficult to compare national data related to occupational injuries (due to differences in legal and compensation criteria), the comparison between the numbers of *fatal* injuries (accidents) is easier and the data can be relatively comparable when the recording criteria, denominators and economic structures are well documented. Fatal injuries are expressed per 100,000 employed population in national statistics, or per one million working hours (accident frequency rate), which may be converted to 100,000 full-time employed (accident incidence rate).

However, while fatal occupational injuries are better recorded, non-fatal cases – serious, permanent and less serious cases – are seriously under-reported in most countries and it is these cases that create a much heavier burden on workers and economies than estimated earlier (Betti et al. 2020). Fatal cases are just the tip of the pyramid (figure 1). A similar pyramid can be drawn for diseases at work.



Source: Takala et al. 2014.

Table 1 shows the approximate outcomes related to the comparative analysis. The recorded reference numbers and rates in the table from the year 2014 (ILOSTAT and EUROSTAT) will be valid also for well-populated ILO Member States globally. In small countries the random character of fatal accidents in any year could be balanced by taking average values for several years, as for the reference values of ILOSTAT and EUROSTAT. The estimates released by ILO Director-General Guy Ryder (ILO 2017, from Hämäläinen, Takala and Tan 2017) had already used an adjustment of the non-fatal cases and these were already better than raw reporting data but still seriously underestimated. The best reporting countries appear to be Finland and Germany,

The results of a new under-reporting study on EU countries show clearly higher numbers; these are practically more than doubling the raw reported numbers, from 2.4 million to 6.9 million of non-fatal accidents in the EU-28, causing more than three days of absence from work. Against every fatal accident the adjusted numbers show one fatal case per 2,050 non-fatal cases (Betti et al. 2020). As seen from the ILOSTAT numbers, the applicability of the method is global.

▶ Table 1. Comparative analysis of fatal and non-fatal accidents in the EU-28

Country	Total employment	Occupational injuries in 2014 reported to ILO Fatal	Occupational injuries in 2014 reported to ILO Non-Fatal	Accidents at work in 2014 reported to Eurostat Fatal	Accidents at work in 2014 reported to Eurostat Non-Fatal	Global estimates of occupational accidents (at least four days absence) Lower limit (eq. j) (0.14) ILO 2014	Global estimates of occupational accidents (at least four days absence) Upper limit (eq. j) (0.08) ILO 2014	Global estimates of occupational accidents (at least four days absence) Selected ILO 2014	Non-fatal accidents based on the EU-28 under-reporting study, all sectors, annual average of years 2015-17
<b>EU-28</b>	218 336 000			3 379	2 414 073	2 413 571	4 051 944	3 548 302	6 936 092
<b>Austria</b>	4 113 700			119	52 968	85 000	132 222	108 611	221 047
<b>Belgium</b>	4 544 500			45	46 704	32 143	50 000	46 704	121 935
<b>Bulgaria</b>	2 981 400	115	2 289	110	1 772	78 571	137 500	108 036	175 403
<b>Croatia</b>	1 565 700	36	13 785	22	8 999	15 714	27 500	21 607	65 206
<b>Czech Republic</b>	4 974 300		45 058	101	36 622	72 143	126 250	99 196	217 135
<b>Cyprus</b>	3627 00	5	1613	4	1 359	2 857	4 444	4 563	7 173
<b>Denmark</b>	2 714 100			28	31 770	20 000	31 111	31 770	58 685
<b>Estonia</b>	624 800	16	4619	13	5 393	9 286	16 250	12 768	33 255
<b>Finland</b>	2 447 200			28	42 162	20 000	31 111	42 162	41 773
<b>France</b>	26 396 400			517	467 869	369 286	574 444	471 865	776 729
<b>Germany</b>	39 871 300	639	955 280	471	704 819	336 429	523 333	704 869	862 016
<b>Greece</b>	3 356 200			25	3 152	17 857	27 778	22 817	60 641
<b>Hungary</b>	4 100 800	78	19 583	74	15 918	52 857	92 500	72 679	162 362
<b>Ireland</b>	1 913 900			45	13 103	32 143	56 250	44 196	88 028
<b>Italy</b>	22 278 900	396	305 246	459	251 769	327 857	573 750	388 929	983 300
<b>Latvia</b>	884 600			39	1 409	27 857	48 750	38 304	55 425
<b>Lithuania</b>	1 319 000	60	3 232	51	2 599	36 429	63 750	50 089	79 551
<b>Luxembourg</b>	245 600			10	6 154	7 143	12 500	9 821	29 343
<b>Malta</b>	181 700			4	2 273	2 857	5 000	3 929	8 477
<b>Netherlands</b>	8 236 100			39	56 377	27 857	48 750	56 377	232 132
<b>Poland</b>	15 861 500			225	59 414	160 714	281 250	220 982	532 730
<b>Portugal</b>	4 499 500			148	111 134	105 714	185 000	145 357	286 253
<b>Romania</b>	8 613 700	224	3 351	253	3 101	180 714	316 250	248 482	494 258
<b>Slovakia</b>	2 363 100			39	7 365	27 857	48 750	38 304	93 244
<b>Slovenia</b>	916 700	25	12 914	20	10 016	14 286	25 000	24 554	34 559
<b>Spain</b>	17 344 200	246	423 106	247	287 809	176 429	308 750	287 809	624 018
<b>Sweden</b>	4 772 100	41	30 319	36	21 343	25 714	45 000	40 268	74 986
<b>United Kingdom</b>	30 672 300			207	160 700	147 857	258 750	203 304	516 428

Sources: Based on ILOSTAT and EUROSTAT data adjusted by the EU-28 under-reporting study (Betti et al. 2020). ILO data are classified by WHO regions (alphabetical in two groups). Year 2014 is used as the latest available international reference.

## Work-related diseases and disorders

Work-related diseases are even less properly recorded, notified, reported and compensated than work-related accidents. The ILO's List of Occupational Diseases (ILO 2010) is an important tool to guide its Member States.

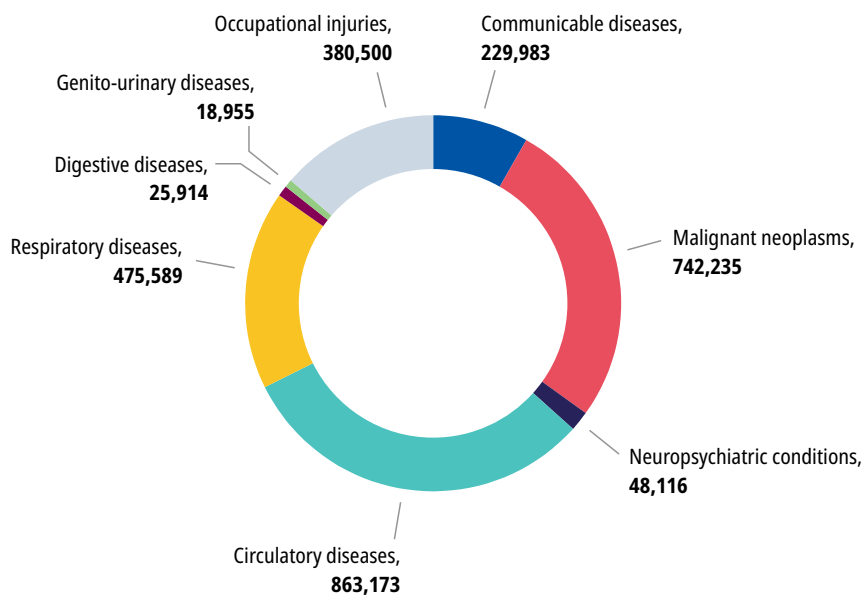
While the countries that report most occupational injuries are Finland and Germany, the number of occupational diseases per 100,000 workers is highest in Denmark and Sweden. Poor reporting is not an indicator of decent and safe work. Due to widely differing practices in terms of occupational diseases and their compensation and reporting systems (where applicable), the term "*work-related diseases*" is used here in preference. While one country may report a wide selection of diseases as occupational, another may have exactly the same problems at a high level but does not report them. When using the term "*work-related diseases*" we refer to diseases that are both identified and reported – based on the country's list of compensable *occupational diseases* – as well as similar diseases that are not reported. Although the magnitude and number of *work-related diseases* may not necessarily be found in statistical reports, epidemiological methods can be used to estimate them accurately enough.

Globally, of the 2.4 million deaths caused by work-related diseases in the 2017 estimates, the top illnesses responsible for the majority of deaths from work-related diseases were cardiovascular (circulatory) diseases and cancers, at 31 and 26 per cent respectively. These were followed by occupational injuries caused by accidents (14 per cent) and infectious diseases (9 per cent). Occupational cancers accounted for 742,235 deaths in the 2017 estimates (figure 2), compared with 489,000 deaths reported by the corresponding GBD 2015 study (see IHME/GBD Risk Factors Collaborators 2020). The main reason for the difference in the number of deaths is that the GBD 2015 study covered selected International Agency for Research on Cancer (IARC) Group 1 agents only (i.e. confirmed carcinogens), while the 2017 estimates covered IARC Group 1 and 2A agents (confirmed and probable carcinogens) (IARC and WHO 2020). There is a slow but gradually increasing trend in the coverage of IARC agents, where probable carcinogens are moved into the confirmed carcinogens list when sufficient scientific evidence is gathered. For example, diesel exhaust was added only relatively recently (2012) to the IARC list of Group 1 agents, although the exposures to diesel exhaust and the related cancers have been evident for decades.

Industrialized countries (WHO High Income Region) had a higher burden from cancers, at 52 per cent, and a much smaller attribution from accidents and infectious conditions, each at 2.3 per cent (figure 3). This indicates that average life expectancy in high-income economies (typically the highest share of cancers, and work-related cancers, particularly) will increase with increasing life expectancy. The African Region of WHO had the highest relative share of work-related communicable diseases. The Western Pacific Region estimates are dominated by China, and the South-East Asian estimates are dominated by India. The European Union estimate for occupational cancer deaths was 107,600.

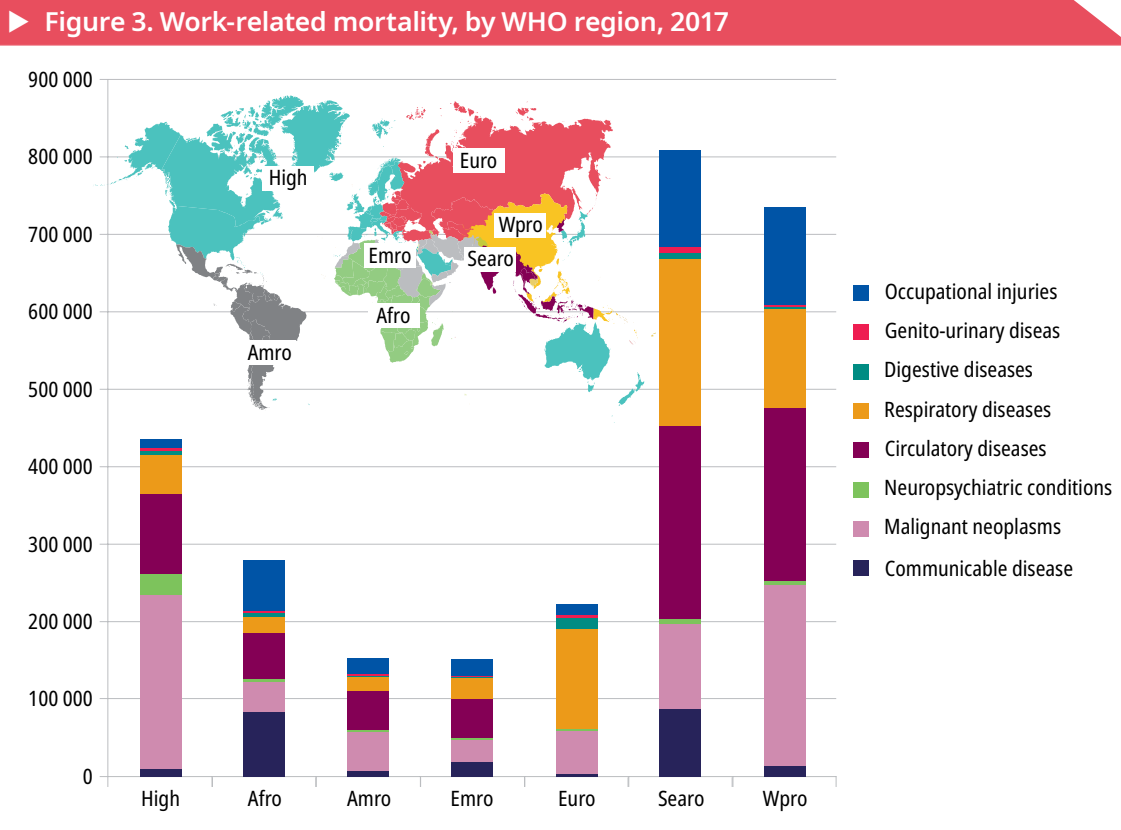
The corresponding number of the GBD 2015 study was 75,279 deaths based on selected carcinogens, and the latest GBD 2019 study indicated 101,633 deaths in the EU-28 (IHME/ GBD Risk Factor Collaborators 2020). These do not cover ultraviolet and ionising radiation, specific work processes, shift work or sedentary work. Taking the omitted components into account, these results match well with or exceed the 2017 estimates. Data for ILO Member States that report, recognize and compensate occupational diseases and injuries are reasonable but this is, unfortunately, not a common practice. Therefore, estimates for all ILO Member States and regions have been made on all health- and safety-related diseases, disorders and injuries (Takala et al. 2017; Hämäläinen, Takala and Tan 2017). Work-related communicable diseases were responsible for 230,000 deaths a year; tuberculosis, silico-tuberculosis, pneumococcal diseases, malaria and tropical diseases, and virus-related influenzas etc. were already included in the past ILO global estimates. The ongoing COVID-19 pandemic is further aggravating the morbidity and mortality risks to workers. However, the latest data show that the work-related mortality fraction for COVID-19 at work is relatively low (see note to figure 2). Using the latest knowledge from Italy (Marinaccio, Guerra and Iavicoli 2020) related to attributable fraction for work ( $AF_{work}$ ) and mortality from Finland (Finnish Institute for Health and Welfare 2021) for populations ranging in age from 15 to 65 years, the  $AF_{work}$  was calculated to be 3.0 per cent (table 2). However, the Italian experience is that the *infection*  $AF_{work}$  rate is considerably higher at around 19.4 per cent.

► **Figure 2. Estimated global work-related mortality, by cause, 2017**



Note: COVID-19 deaths at work in 2020 are estimated at 60,000, in comparison with the total number of 2,844, 465 work-related deaths shown in figure 2. Of these deaths, only a limited number were considered as recognized and compensated occupational disease.

Sources: Takala et al. 2017; Hämäläinen, Takala and Tan 2017.



Note: 'High' refers to high-income areas.

Source: Takala et al. 2017.

► **Table 2. Work-relatedness ( $AF_{work}$  rate) of selected diseases and disorders, 2020-21 (percentages)**

Type of disease	Percentage
Communicable	4.8 (male)-32.5 (female)
COVID-19 working age/death <sup>1</sup>	3.0 male/female
of which working age 15-65/disease <sup>2</sup>	30
of which attributable to work ( $AF_{work}$ ) <sup>3</sup>	19.4
Cancer/death	13.8
Neuropsychiatric/death	6.6
Circulatory/death	14.4
Respiratory/death	
COPD	18
Asthma	21
Other respiratory diseases	1
Digestive diseases/death	2.3
Genito-urinary diseases/death	3.0
Musculoskeletal/disorders	37
Mental health/disorders (Stress, night work, psychosocial)	10-30

Notes: <sup>1</sup>The median age of all COVID-19 deaths is 84 years (Finnish Institute of Health and Welfare 2021).  
<sup>2</sup>From Marinaccio, Guerra and Iavicoli 2020. <sup>3</sup> $AF_{work}$ : Attributable fraction, or percentage of disease caused by work.

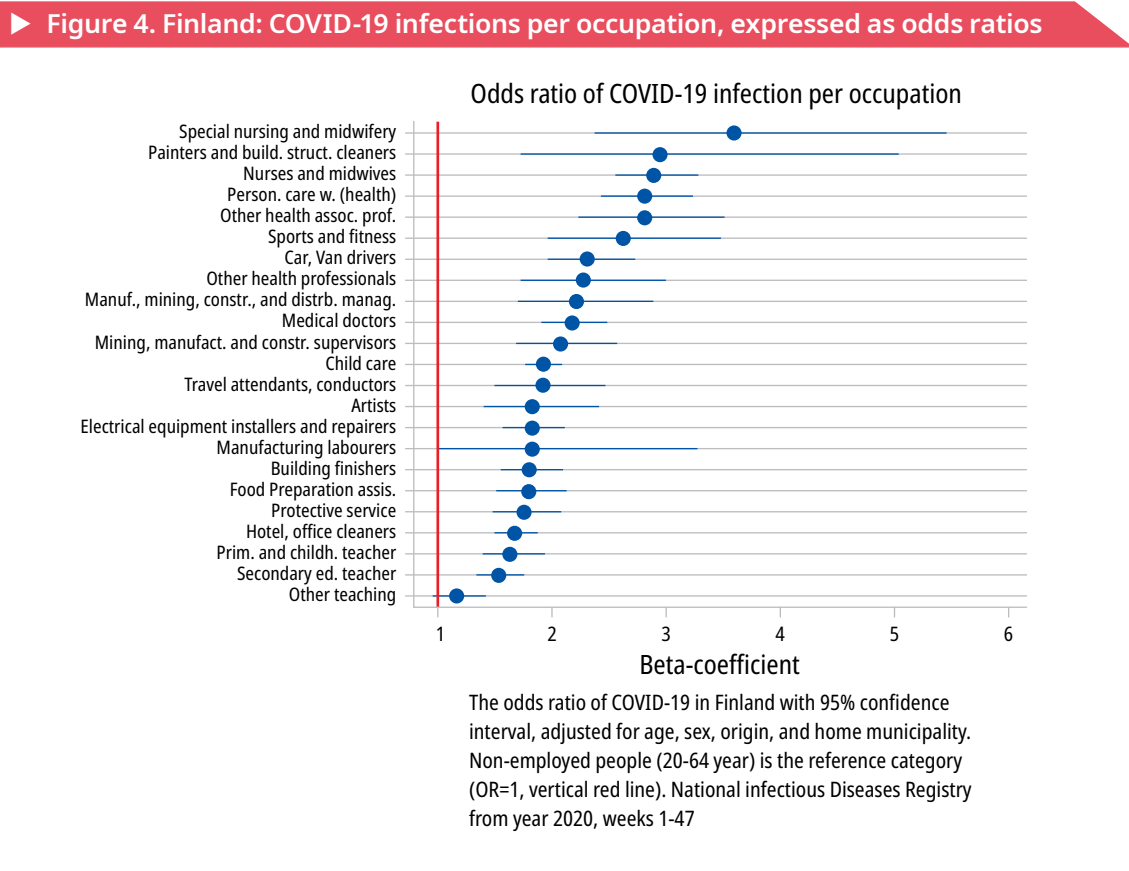


The COVID-19 infection rates – not mortality – estimated at 19.4 per cent in 2020 can be used to estimate the total number of *work-related* infection cases in that year. The WHO gave a total number of 82.4 million cases – a number likely to be much higher if never-tested disease cases were better known. As a result, 19.4 per cent of 82.4 million equals 15.99 million work-related COVID-19 non-fatal infections. While not necessarily considered as compensable occupational disease by ILO Member States, the work-related value and economic loss add considerably to the losses of work-related deaths. As of 24 February 2021 there were 111,593,583 total confirmed COVID-19 cases with 173,594 new cases that day, and 2,495,020 fatalities (WHO 2021). The real burden is clearly much higher.

Figure 4 shows the main differences between various occupations and jobs at risk of exposure to SARS-CoV-2, in Finland. The common belief that health staff are a seriously affected group holds true, but at the same time a fair number of jobs in other sectors are also at risk of exposure to the infection.

Simply put, an odds ratio (OR) is a measure of association between an exposure (in this instance, exposure to the SARS-CoV-2 virus) and an outcome (in this instance, acquiring the COVID-19 infection or disease). The OR represents the odds (or likelihood) that an outcome will occur given a particular exposure, compared to the odds of the outcome occurring in the absence of that exposure. More specifically,  $OR > 1$  means greater odds of an association between the exposure and outcome;  $OR = 1$  means there is no association between exposure and outcome; and  $OR < 1$  means there is a lower odds of association between the exposure and outcome.

Hence, in figure 4, the respective ORs indicate, for example, that special nursing staff have a 3.6 times higher risk of acquiring the infection, while painters and cleaners of buildings have 3.0 times the risk of developing COVID-19, when compared to the reference population of non-working people. It is also important to bear in mind that exposure to new variants of the SARS-CoV-2 virus, like the UK variant, may lead to a 1.3–1.7 times higher risk of developing COVID-19, when compared to the “normal” (original) virus.



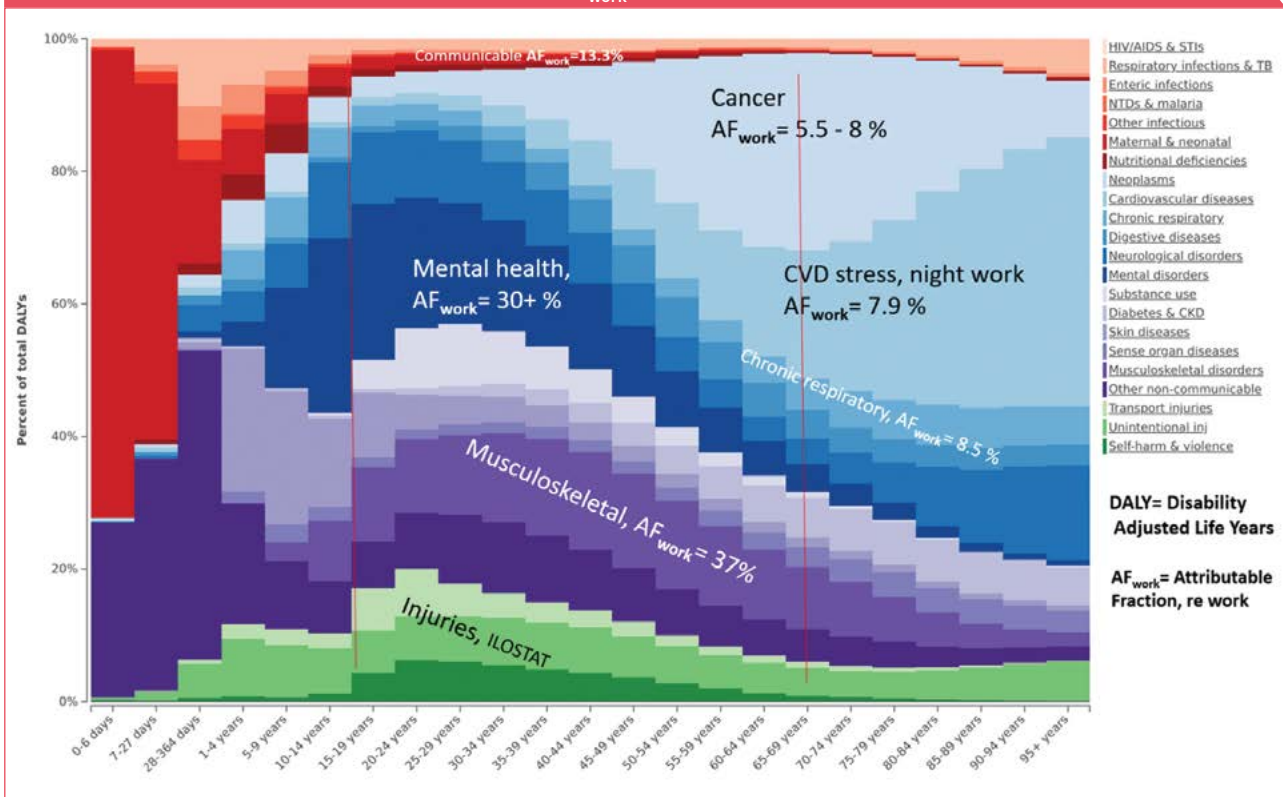
Note: The data presented cover all people between the ages of 20 and 64 living in Finland, in a sample size of just over three million.

Source: Helsinki GSE 2021.

### Cost estimates and the social value of occupational safety and health

The economic costs of poor occupational safety and health measures can be estimated at both workplace and national levels. The economic impact of injuries and diseases at work includes direct costs to stakeholders, victims, employers and society, as well as production losses. Figure 5 shows the share of diseases and injuries related to age. The figure is from the Institute of Health Metrics and Evaluation (IHME) covering all causes, and the added estimated attributable fraction ( $AF_{work}$ ) by the present authors shows the share of the work-related component of each disease. COVID-19 is not included in this figure, which dates from 2019. Red lines indicate working age.

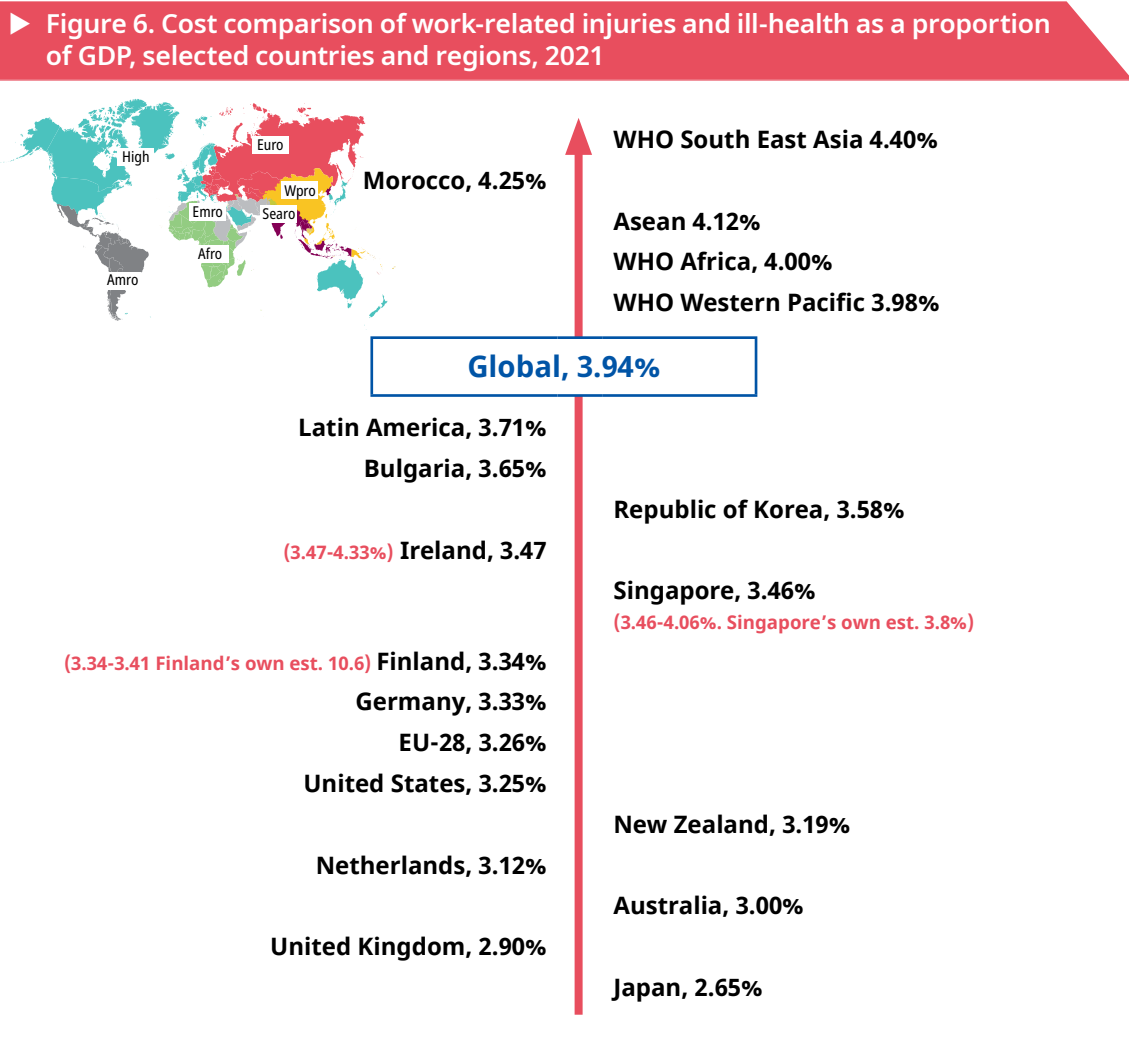
► Figure 5. Disability Adjusted Life Years (DALYs), major disease and disorder groups, European Union, by age, and estimated  $AF_{work}$ , 2019 (COVID-19 not included)



Source: IHME 2019, with added estimated attributable fraction ( $AF_{work}$ ) by the present authors.

Based on the quantification of the number of injuries and diseases at work one can establish the number of years of life lost (YLL) and years lived with disability (YLD) caused by work; adding together YLL and YLD results in the measure known as DALYs.

Costs in monetary terms can be calculated for a country, region or globally (see figure 6). Cost comparison is possible, when details about DALYs caused by injuries and diseases at work are available. The annual GDP of a country or region is considered representative of the total work (or labour) input, whether in primary industries, manufacturing, or the service sector. Even company profits and individual investors' incomes have been generated originally by work (Elsler, Takala and Remes 2017).



Source: ILO, ICOH and EU 2017.

The extent of the costs is largely defined by what factors are taken into account when calculating the estimates. Costs in percentage of GDP can be obtained by dividing the DALYs value for a specific country or region (in years) by the maximum hypothetical number of years that could have been saved if nobody died, or had temporary or permanent disability. This is obtained through the number of years worked by those employed, that is, the full employment number.

The annual economic loss is then calculated as:

$$\text{Annual costs as \% of GDP}_{\text{country}} = (\text{work-related}) \text{ DALYs}_{\text{country}} / \text{Total work years}_{\text{country}}$$

Monetary loss can be calculated by multiplying the obtained percentage by the GDP in monetary terms of the reference country or region, for the same year.

Using the DALYs method as an indicator of wider work-related harm is practically the only way to compare economic costs with the available global information in all countries. Including just the fatal cases would only provide the tip of the iceberg, and would exclude factors that are known to cause major absences from work, such as musculoskeletal

diseases, psychosocial risks, and a huge number of non-fatal occupational injuries caused by occupational accidents. In combination, these factors create major losses of social value to women and men at work, and massive losses in terms of economic costs to workers, employers and the society as a whole (Elsler, Takala and Remes 2017).

A common way of counting the economic costs (as a percentage) does not cover any indirect costs, intangible costs or the “value of statistical life”. When considering the total cost more carefully, by including data from several sources (if available), the total costs are likely to be considerably higher. For example, the above-mentioned method when applied to Finland produced costs of 3.34 per cent of GDP in 2015, or 7.68 \* US\$10<sup>9</sup>. The more detailed calculation that covered all related costs for Finland by the Ministry of Social Affairs and Health (Rissanen and Kaseva 2014) amounted to a total cost which was three times higher: €24.45–24.95 10<sup>9</sup>, or 10.6 per cent of annual GDP.

Further detailed comparable calculations have been made by the European Union (EU-OSHA 2018). And there are still more expenses to be taken into account.

In most developed countries the legal retirement age is around 63–68 years, but according to the Organisation for Economic Co-operation and Development (OECD), *the real materialized retirement age* can be much lower; for instance, in Finland it is 61.5 years. However, in other countries with a comparable economy to Finland’s, such as Iceland, Japan, Republic of Korea, and Norway, the retirement age is much higher; in Iceland, for instance, it is 70.5 years (Sauré and Zoabi 2012). Such differences in effective retirement ages affect substantially the calculated numbers of working years which can be lost by work-related injuries, diseases and disorders.

The GDP difference – if the whole workforce worked for nine more years – would roughly increase GDP by 25 per cent. The jobs and occupations that have the lowest real retirement age are in those such as construction scaffolding, where workers retire at the age of 50. It is clear that poor working conditions and premature retirement are strongly associated. Aligned with legislation, people cannot be forced to work until the age of 70 if they have already lost their health and ability to work by the age of 50.

Many other aspects could be taken into account: monetary measures, or value of life, narrowly or widely as a social value, or as a social loss if life or health are lost due to work. The value of nature or climate does not have a price tag. The social value of life and health at work and beyond work can be only partly measured by market prices.

## Experiences of COVID-19 and lessons learned

What is important to note is that work-related problems and losses are not caused by unavoidable situations, such as pandemics or natural disasters. Even effects of natural disasters can be eliminated, or their impact minimized, by proper preparedness and management. For example, lightning from the sky can be prevented at work by lightning rods, and by measuring the rising voltage tension in construction sites and stopping work

when risk levels increase. Global pandemics may be seen as unpredictable risks, but over time several nations have shown the world that by taking drastic measures it was possible to avoid a high number of casualties and other negative impacts; unfortunately, many more nations have not been prepared. Boxes 1, 2 and 3 describe the experiences of three countries: Italy, the Republic of Korea, and South Africa respectively. The lessons from the COVID-19 pandemic have already emphasized the need for better prediction, and improved preparedness (including research, human resources, hospital and material preparedness and updating of regulations for crisis management). Box 4 lists some of the lessons learned. The roles, resources, capacities and collaboration of international organizations, including WHO and ILO, must also be strengthened, and so this article concludes with recommendations for international and national organizations as well as for other stakeholders.

#### **Box 1 Experiences of COVID-19: Italy**

According to the Italian legislation on workers' compensation, cases of infectious and parasitic diseases are included in the category of accidents at work because the virulent cause is equated to the violent one.

Between 21 February 2020 (first case reported in Italy) and 31 December 2020, the Italian Workers' Compensation Authority (INAIL) received 131,090 reports of accidents at work from COVID-19, representing 23.7 per cent of accident reports received since the beginning of the year and 6.2 per cent of the total COVID-19 cases reported by the National Health Institute (ISS) in the same period.

Women registered the highest proportion of cases (69.6 per cent). Out of the total number of claims, 42.2 per cent are among the 50–64 age group, followed by the 35–49 age group (37.0 per cent), under 34 years (19.0 per cent) and over 64 years (1.8 per cent).

Healthcare services were the most affected sector (68.8 per cent of claims), followed by the public administration service (9.1 per cent of claims); the latter includes the territorial health services. Percentages of less than 5 per cent were recorded for security services, cleaning services, manufacturing sector, hotel and catering services, wholesale and retail trade, transport, and storage and other services.

In the same period of time, INAIL received also 423 reports of fatal accidents from COVID-19, which is about one-third of the deaths reported since the beginning of the year with an incidence of 0.6 per cent of the total COVID-19 fatalities at national level reported by the ISS.

Unlike non-fatal injuries, fatal cases were more frequent among men (83.2 per cent); the average age is 59 years (56 for women, 59 for men), notably lower than the average age of COVID-19 fatalities in the general population (82 years calculated by the ISS). The healthcare sector was the most affected, with about one-third of the total cases. High rates of fatalities were also registered among administrative employees (10.9 per cent) and road haulage workers (5.8 per cent); rates below 2.5 per cent were registered for sales clerks, craftsmen, security services, skilled construction and maintenance workers, catering services employees

There are some relevant differences between the first wave of the pandemic in Italy (March through May) and the second wave (October through December).

Unlike the claims as a whole, with a much higher claims rate in the second wave, the first wave had a much higher impact for fatal cases: 79.0 per cent is, in fact, the share of total deaths in the period March to May against 18.0 per cent in October to December.

### **Box 2 Experiences of COVID-19: Republic of Korea**

After being the first country outside of China to experience the COVID-19 outbreak, the Republic of Korea quickly implemented the planned action it had learned from the bad experience of the Middle East Respiratory Syndrome (MERS) outbreak in 2015. The MERS outbreak turned out to be a chaotic situation for Korean society, and far more challenging than the country could ever have imagined (Republic of Korea, Ministry of Health, n.d.).

During the MERS outbreak, the Republic of Korea failed to isolate confirmed or suspected cases, even in hospitals, and could not track close contacts of MERS patients, due to the Personal Information Protection Act. Healthcare workers were not well trained for managing highly contagious diseases and personal protective equipment (PPE) was either unavailable, or not prepared or equipped properly at home or in workplaces. These issues have been rectified, modified, and improved during the last five years. Virtual training for managing a newly emerging contagious disease has been carried out regularly at hospitals, as a legal obligation. In addition to social distancing, pro-active testing and tracing, and wearing a mask, many other actions have been implemented in the workplace. No visitors are allowed to enter workplaces without testing body temperature and registering their contact details. Workplaces have been “reshaped” via the introduction of modified work schedules, working from home practices (where applicable), online meetings, and closure of multi-use rooms. Based on the experience of MERS, workers started wearing masks voluntarily, long before this practice became a mandatory requirement.

As of 5 April 2020, the proportion of healthcare workers among all cases of COVID-19 was only 1 per cent, while that in MERS was 21 per cent (Kang 2020). As of 15 May 2020, 15.7 per cent of all COVID-19 cases had occurred at workplaces, including healthcare facilities. These statistics have not changed significantly since April and May 2020 (Kim 2020). By implementing these efforts and precautions from the beginning of the COVID-19 outbreak, the Republic of Korea has been able to continue business at workplaces without the need for a hard national lockdown, although there have been some restrictions in normal business life.

### **Box 3 Experiences of COVID-19: South Africa**

On the African continent, South Africa (along with Algeria and Egypt) was considered to be at the highest risk of the novel coronavirus (SARS-CoV-2) being imported and spreading, with a moderate to high capacity to respond to an outbreak (Gilbert et al. 2020).

From the outset of the COVID-19 pandemic, the socio-economic realities in South Africa limited the effectiveness of virus containment measures that had been effective in countries in Europe and Asia, such as frequent hand washing, social distancing, self-isolation, quarantine, testing and lockdown (Staunton, Swanepoel and Labuschaigne 2020). South Africa is an unequal society, with only 16 per cent of the population having access to medical aid, and a healthcare system that carries an elevated burden of communicable diseases such as TB, HIV, and HIV/TB co-infection, with millions on immunosuppressant drugs.

A national lockdown was declared by the South African Government at the end of March 2020, and has continued to date, with the associated impacts on the national economy and the loss of incomes and livelihoods, further exacerbating the inequalities in the country. The pandemic has also brought into sharp focus the gaps that exist in an inadequate healthcare system and in the protection of workers, and has magnified the risks which already fall disproportionately on the most vulnerable workers: ‘This virus may not discriminate those that it infects, but the effects of

**Box 3 (cont.)**

the virus will be most felt on already marginalised and vulnerable populations in South Africa for some time to come' (Staunton, Swanepoel and Labuschaigne 2020).

During February 2021, South Africa was at the tail-end of a second wave of COVID-19 and a third wave was anticipated a few months later, during the winter season. A vaccine rollout programme started in early February 2021 for health workers as a priority group, but was halted temporarily when preliminary results indicated that the vaccine of choice (AstraZeneca-Oxford University trial) was not sufficiently effective against the new COVID-19 variant identified in South Africa. The rollout was restarted once the Johnson & Johnson vaccine had shown effectiveness against a number of variants, including 501Y.V2.

The pandemic has been instrumental in making COVID-19 a priority occupational disease in South Africa. Policies were developed rapidly for occupational health practitioners, employers and employees, who have all had to adapt to emergency legislation, electronic means of communication and remote consultations as part of the "new normal" that has become an entrenched reality.

The official sources of COVID-19 information and guidance are the South African National Department of Health (NDOH) and the National Institute for Communicable Diseases (NICD). The NDOH also hosts a dedicated COVID-19 website with daily updates, a COVID-19 toll-free public hotline and a downloadable app, COVID Alert SA.

From the outset of the pandemic, the South African National Institute for Occupational Health (NIOH) has played a pivotal role in COVID-19-related education and training for employers, employees, and various other entities active in occupational health such as occupational medicine and occupational health nursing practitioners, and occupational hygienists. The NIOH has developed webinar training programmes with a number of COVID-19 resources which are available on its website and the Institute hosts the Occupational Health Surveillance System (OHSS) for COVID-19.

Changes were introduced in procedures for medical surveillance of employees carried out by occupational health practitioners (occupational medicine and occupational health nursing professionals), with the South African Society of Occupational Medicine (SASOM) playing a leading role in supporting and advising its members more specifically, and the occupational health disciplines more broadly.

In April 2020, SASOM endorsed the South African Thoracic Society (SATS) position statement on the conduct of lung function testing during the COVID-19 pandemic which was updated by SATS in September 2020 with recommendations for the re-introduction of pulmonary function tests. Over the past year SASOM has developed and disseminated its own peer-reviewed position statements, policies and directives on various COVID-19-related topics including medical records, occupational medical examinations, COVID-19 vaccination, COVID-19 antigen and antibody testing in the workplace, compensation for workplace-acquired COVID-19, and management of COVID-19 risk waste.

South Africa has been the hardest-hit country on the continent and as at 15 May 2021 (the beginning of the third wave), the COVID-19 statistics were as follows: 11,087,505 tests conducted (total population: approximately 60 million); 1,611,143 total positive cases identified; 1,523,243 total recoveries (confirmed negative, approximately 94 per cent recovery rate); and 55,183 total deaths.

Sources: Statistics South Africa (<http://www.statssa.gov.za/?p=12744>); NICD ([www.nicd.ac.za](http://www.nicd.ac.za)); NIOH ([www.nioh.ac.za](http://www.nioh.ac.za)); SASOM (<https://sasom.org>).



#### Box 4 Some lessons learned from the COVID-19 pandemic

- ▶ COVID-19 poses a threat to both public health and occupational health.
- ▶ Working in healthcare settings can be hazardous to health; however, diverse occupational groups are recognized as being at risk, not only health workers.
- ▶ Around 14 per cent of COVID-19 cases reported to the WHO are among health workers. In some countries, the proportion can be as high as 35 per cent.
- ▶ Healthcare facilities continue to be overwhelmed in many countries.
- ▶ The shortcomings in the availability and/or standards of personal protective equipment (PPE) have left large numbers of healthcare and other workers without adequate protection.
- ▶ The impact of COVID-19 extends far beyond infection.
- ▶ A major concern of many workers is the fear of job losses or loss of income.
- ▶ The work and family challenges brought on by the pandemic are unprecedented and severe.
- ▶ The COVID-19 crisis, lockdown and economic recessions have exacerbated pre-existing health inequalities.
- ▶ The prevalence and severity of the COVID-19 pandemic is magnified because of pre-existing epidemics of chronic disease – which are themselves associated with social determinants of health, such as housing and work conditions and access to quality healthcare.
- ▶ Lower socio-economic workers have less access to PPE, fewer options to work from home and a higher risk of losing their jobs.
- ▶ COVID-19 is experienced unequally, with higher rates of infection and mortality among the most disadvantaged communities: it is not a socially neutral disease.
- ▶ The COVID-19 pandemic has highlighted the critical need for very close trans- and multi-disciplinary collaboration between various professionals to inform better decision-making by organizations.
- ▶ If poorly controlled, emerging infections have the potential to cause epidemics and pandemics with a high socio-economic impact and will continue to be real threats to the world. We must remain vigilant to be ready and able to respond effectively.

## Recommendations for further action

### *For the ILO, WHO, EU and all relevant global and regional international institutions*

1. The older-than-60-years tradition of the quinquennial Joint ILO/WHO Committee on Occupational Health should be continued according to the guidelines decided by the United Nations General Assembly in 1950, in line with the United Nations Sustainable Development Goals (SDGs).
2. The ILO and WHO should urgently convene the 14th Session of the Joint ILO/WHO Committee on Occupational Health. This Committee should consider continuing to deal with the discussions on *all recent occupational health and safety issues* and initiate further

action internationally and nationally. The most recent Committee Session was organized many years ago in Geneva, Switzerland on 9–12 December 2003.

3. It is important to recognize COVID-19 as a priority occupational hazard. The most urgent task should be the discussion around WHO and ILO collaboration on policies and practices for the protection of workers' health and safety against the COVID-19 pandemic. The ILO and WHO should join forces for recognition of work-related COVID-19 as an occupational disease globally and ensure just compensation for workers who have contracted COVID-19 at work.
4. The ILO should launch immediate actions for the promotion of the ratification of the ILO Occupational Health Services Convention, 1985 (No. 161), to ensure effective responses in future for the protection of workers' occupational health, including actions for possible future pandemics.
5. The ILO in collaboration with the WHO should pay special attention to the protection of high-risk workers, such as health workers, social workers, police forces, emergency responders, cleaners, and workers in small-scale enterprises against occupational COVID-19 risk at work, giving the highest priority to health workers and other service workers with close face-to-face contact with clients in their daily work.
6. The ILO in collaboration with the WHO should undertake priority actions in developing *universal occupational health coverage* (UOHC), ensuring competent occupational health services for all workers of the world (private, public, formal, informal) in all economic sectors and in all types of workplaces, as decided by the 49th World Health Assembly (49.12).
7. The ILO in collaboration with the WHO should produce guidelines for the protection of workers against the SARS-CoV-2 virus at work, and good working practices in all workplaces and work environments. Special guidelines are needed for practices for the protection of vulnerable or marginalized groups of workers, such as elderly workers, informal workers, domestic workers, young workers, migrant workers, and those with chronic respiratory and cardiovascular diseases or diabetes, among others.
8. The ILO in collaboration with the WHO, in line with the United Nations SDGs and related objectives and specific targets on all SDGs and, in particular, SDG 3 *Good Health and Wellbeing* and SDG 8 *Decent Work and Economic Growth* should organize global, national and local action programmes related to occupational health and safety, and the coordination of such activities.
9. The promotion of ratification and implementation of ILO Conventions Nos 81, 155, 161 and 187, and other relevant instruments, need strong support from governments, workers, employers and their organizations. This includes better statistics, information and practical knowledge on prevention of occupational accidents and diseases at work, at all levels.

***For international and national stakeholders: governments, inspectorates and institutions, employers and workers and their national and international organizations***

10. Besides prevention and management of the COVID-19 pandemic at community level and in private, family and social life, the prevention and management of epidemics and pandemics require effective actions in the workplace. Such measures demand competence in occupational health and good knowledge on work practices, working environments and conditions of work. There must also be a recognition of the need to internationally regulate the risk of epidemics and pandemics at work and to afford competent inspectors the right to enter workplaces for risk identification at the earliest possible stages, thus emphasizing the critical contribution that can be made by implementing actions that prevent the exposure in the first place.
11. Considering the huge social value of efforts towards “zero harm” at work, and opportunities for economic gains in eliminating and reducing injuries, diseases, disorders and other harmful consequences of poor work environments, detailed and practical action should be initiated to identify priorities for related risks and their prevention, and based on such priorities, to collaboratively plan and implement these activities. In addition to effectively responding to the concurrent hazards and risks, special attention should be given to the prediction of and preparedness for potential new hazards including global pandemics and possible occupational risks from new technologies and climate change, among others.
12. Work-related epidemics may also cover much wider concepts than communicable diseases. One such example is the global and continuing use of asbestos that kills some 255,000 workers annually and causes some 50–70 per cent of all occupational cancer fatalities (Furuya et al. 2018). Below is a list of actions that have been shown to be efficient and practical measures:
  - a. Establish a clear and comprehensive regulatory framework based on ILO standards and codes of practice.
  - b. Maintain a capable and adequately resourced enforcement system, i.e. an occupational safety and health inspectorate.
  - c. Create and maintain a gradually expanding workplace injury compensation system based on workplace level data collection, recording and notification of occupational accidents and work-related diseases.
  - d. Provide proper occupational health services – at least basic services – that are in contact with workplace level prevention and treatment plans and early action to identify risks and their elimination and reduction.
  - e. Establish a framework for workplace level collaboration between workers and employers, including responsible safety and health representatives of workers, and their employer and top management counterparts, and active safety and health committees.

- f. Use best available information and knowledge, together with supporting bodies and expertise for enhancing workforce and public awareness, facts and scientific evidence for media use and campaigns.
- g. The fundamental workers' right to know and right to be informed about hazards and risks at work should be respected, including in situations such as COVID-19.
- h. Workers' compensation bodies and governments in collaboration with social partners should recognize and gradually enhance coverage of diseases and disorders that arise out of work as notified occupational diseases and injuries, including COVID-19 at work, following the ILO List of Occupational Diseases (ILO 2010).

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# Towards a just transition for all: Lessons from the pandemic

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## Introduction

Just transition has historically been associated with the environmental transition, initially with sectors such as logging and chemicals and subsequently with energy and climate change. More recently, the concept has expanded further to include manufacturing, Industry 4.0, food and biodiversity (TUCA 2020; Carrau, Forero and De Wel 2020; ETUI and ETUC 2021). In its general parameters this broadening is consistent with the International Labour Organization's *Guidelines for a Just Transition Towards Environmentally Sustainable Economies and Societies for All* (ILO 2015).

Having said this and given the current situation with COVID, what would a just health transition look like? How would it compare to a just energy/climate transition? How can a "just transition for all" as outlined by the ILO (2015) and others be operationalized and implemented in practice? Can we overcome tensions between social and environmental objectives and adopt a combined eco-social approach towards transitions? Drawing on an analytical scheme developed by the Just Transition Research Collaborative (JTRC) (2018),<sup>1</sup> we provide a holistic, socio-ecological examination of just transitions which we illustrate with examples from energy and health. While we suggest that a just health transition is necessary we also argue that it should not be separated from a broader, more comprehensive eco-social transition project.

The pandemic has made health a prime candidate for exploring "just transition for all" for a variety of reasons. Around the world it has highlighted the need for more robust and accessible healthcare as well as for better occupational health and safety and more work-related rights within the health sector (see, for example, National Nurses United 2020). It has also affected employment in the sector as demand rose for some skills and dropped for others (Reilly 2020). Across the world offshoring, immigration and artificial intelligence/ Industry 4.0 are driving profound changes within the health sector similar to those associated with manufacturing automation in the 1970s and 1980s and decarbonization today (Aluttis, Bishaw and Frank 2014; Bludau 2021). Changes in particular countries will have their own specific impacts. As Les Leopold, one of two people to first use the term "just transition", commented at a 2020 webinar:

Just transition is now moving into other areas where it's also critically needed. People are organizing for a single payer health care [in the United States]. We know that a couple of million people who push around paper [in insurance] and hospitals, many of them are women, lots of them are people of color, are going to lose their jobs if we go to single payer. We're not going to need 15 percent administrative costs when it can be done with six percent, or whatever it is, administrative costs. (Labor Network for Sustainability 2020)

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<sup>1</sup> The JTRC convenes experts from academia and civil society to collectively map and analyse different understandings and narratives of just transition and provides an important contribution to the science-policy dialogue around it, offering policy recommendations for the transition to equitable low-carbon development. See [www.unrisd.org/jtrc](http://www.unrisd.org/jtrc) for more information.



In the case of the United States, in fact, a just health transition is arguably as challenging as the energy transition, both in terms of employment and in terms of urgency.<sup>2</sup>

## Broadening and deepening just transition

The JTRC's analytical scheme aims at examining just transitions in a manner that fuses the social and the ecological (JTRC 2018). To that end it employs the dimensions of breadth and depth to map transitions, in general, and just transitions, in particular. It then combines these two dimensions to provide a typology of just transitions in terms of their overall ambition. Our analytical scheme aims to map differences and similarities across transitions and just transitions, as well as capture the interfaces and tensions between them. We briefly summarize the analytical scheme here and add more clarifications, as necessary, throughout the main body of this article.

Breadth denotes the scale and scope of a policy while depth denotes its social and ecological priorities. What is the spatial and temporal scale of a policy and is it aligned with the transition at hand? Does the scope of the policy cover all affected, or is it limited to certain sectors, workers or aspects of the natural environment? Does the policy enhance social justice and the voice of labour and the communities most impacted? Does it promote a cleaner environment for all? An energy or health transition may be comprehensive in scale and scope but more or less socially or environmentally just. We know the adverse environmental impacts of fossil fuels. But that should not obscure the fact that the renewable energy sector is far less unionized than the fossil fuel sector while its supply chains and siting practices create significant environmental problems (Aljazeera 2020).

On the basis of breadth and depth we have developed a typology that differentiates policies in terms of their ambition (JTRC 2018; Hopwood, Mellor and O'Brien 2005).<sup>3</sup> At one end are status quo policies that treat some of the symptoms of unjust transitions without modifying their causes. Managerial reforms aim to better control present and future crises in order to prevent further destabilization. Such were, for example, some of the financial management policies adopted in response to the Great Recession to stabilize the financial system (for an overview see Tooze 2018).

We distinguish these from structural reforms that cover a significant slice of the political economy while also modifying its rules (see, for instance, Bond 2008). Universal and

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<sup>2</sup> Given the ambitious proposals of the new US Administration and the centrality of healthcare in US politics over the last several decades we draw upon this country, particularly in illustrating ambition. Medicare for All (socialized healthcare) is a major and divisive issue within US society and labour (Labor Campaign for Single Payer Healthcare 2021). For the need for a just transition to achieve Medicare for All see DJDI 2021. However, we have sought to provide references to research and information that are applicable around the world.

<sup>3</sup> The typology reflects a range of policies and each category is better thought of as a cluster rather than a single type of policy. For the purpose of this contribution, policies consist of laws and associated implementation provisions.

socialized healthcare, for instance, was such a reform in many European countries after World War II and it could be so in the United States now. In addition to covering a vast number of people it also made healthcare a social right for all. By contrast, insurance-based healthcare is accessible to those that can afford it.

Transformative just transitions address all transitions and all those affected. They deepen and broaden the public sphere – which is not the same as enhancing the power of the State. Rather, the goal is a more egalitarian and democratic eco-social State and society. This is an important element of the JTRC’s analytical scheme. An approach to just transitions that limits the possibility of an eco-social synthesis to those sectors in which nature is “apparent” perpetuates the myth that social and environmental policies are in separate realms. Over the past fifty or sixty years, labour environmentalism has challenged this divide, whether with respect to occupational health and safety, environmental health or sustainable development (Bennett 2007; Silverman 2004 and 2006; Rätzzel and Uzzell 2013; Morena, Krause and Stevis 2019). The process towards an eco-social synthesis remains challenging but the debate has been engaged within the world of work (ETUI and ETUC 2021; TUCA 2020; Rätzzel and Uzzell 2019).

## Breadth

### Scale

The spatiality and temporality of a transition, as well as a just transition proposal or policy, require empirical research. Transitions in general, and just transitions in particular, do vary even when driven by common forces such as automation. The final consumption of almost all products, whether energy or care, is largely local. But these are produced across production networks and associated commodity/supply chains that cut across national boundaries, creating and reshaping labour and communities along the way. In addition to commodity/supply chains, linkages are also created through corporate ownership. Multinational corporations in construction, hydropower or healthcare own subsidiaries that rely more on local than global supply chains. Finally, the impacts of consumption and production may be spread around the world along networks and chains that do not close the circle, such as by dumping health or electronic waste, or via geophysical processes, such as those causing climate change.<sup>4</sup>

The responses to the pandemic combine limited global scale policies facilitated by the World Health Organization (WHO) with national level policies. More so than energy, where some producer countries are very wealthy, the North–South inequalities in tracking, managing and recovering from the pandemic are very pronounced (Twohey, Collins and Thomas 2020; Gebrekidan and Apuzzo 2021). Yet, there is strong evidence that poorer countries

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<sup>4</sup> By some measures the healthcare industry accounts for about 10 per cent of global emissions and is one of the largest sources of single use waste, often toxic (El Murr 2021; Eckelman and Sherman 2016).

can develop effective local healthcare systems (Jensen, Kelly and Avendano 2021; Jones and Hameiri 2021). One aspect that distinguishes health from energy, however, is that there is nothing in health akin to the United Nations Framework Convention on Climate Change (UNFCCC).<sup>5</sup>

What about temporal scale? This depends on whether we think of disasters and pandemics as exceptional events or as integral, if not fully predictable, elements of the society–nature nexus. If the latter, then the specific tactics and strategies in response to them must be embedded within longer-term and broader policies (DeBruin, Liaschenko and Marshall 2012). In fact, the existence of emergency agencies and disaster planning around the world suggests that this is already the case. Insurance schemes as well as military planning, for example, show that societies are willing to invest enormous resources in anticipation of crises. The absence or presence of framework policies that deal with labour and vulnerable communities, therefore, is a matter of political choice. The impacts of the pandemic on the broader political economy and the world of work – often accelerating existing transitions – are already the subject of debate (ILO 2021a; McKinsey Global Institute 2021).

## Scope

The pandemic also forces us to reflect on the scope of just transitions – that is, who is affected by a transition and who is covered by policy responses to it. In the following paragraphs, we briefly explore scope within the health sector proper with respect to access to health; the connections between the health sector and the broader society; and the changes induced by the pandemic across the world of work.

In the United States and some other parts of the world the pandemic has made apparent the demographic diversity of the labour force in the health sector, as well as the need for just transitions and recoveries to include all workers. A just transition that focuses on physicians is both necessary and inadequate, as is an energy transition that focuses solely on the operators of coal-fired plants. The major difference is that automation has already transitioned most workers in the energy sector, while the number of workers in the health sector is likely to keep on growing until artificial intelligence, immigration and offshoring lead to deeper workforce transitions (Aluttis, Bishaw and Frank 2014; American Hospital Association 2019).

The pandemic has made apparent the maldistribution of exposure to the virus and access to healthcare across communities and countries (Jensen, Kelly and Avendano 2021). Living in close quarters, common amongst immigrants and the poor, aggravates infections. Being forced to work, whether classified as essential or afraid of losing employment, resulted in

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<sup>5</sup> Notably, however, the ILO has adopted several Conventions with respect to occupational safety and health, such as the Occupational Safety and Health Convention, 1981 (No. 155), the Occupational Health Services Convention, 1985 (No. 161) and the Promotional Framework for Occupational Safety and Health Convention, 2006 (No. 187). Here we are not suggesting the creation of another forum like the UNFCCC but, rather, the strengthening of the WHO, as well as the ILO with respect to workers.

people working while infected. In fact, a number of people interviewed for the Just Transition Listening Project (JTLP 2021) recounted that employers used the designation “essential” to force even unionized and highly paid workers in refineries and utilities to work if they were asymptomatic. These inequities are not limited to the pandemic but are evident with respect to pollution and environmental health and are very pronounced in the industrializing Global South (Gardiner 2021).

The pandemic has shown that the health sector forms part of an interconnected and intricate web that provides the various lines of defence against COVID. If education and childcare facilities close, then many workers – mostly women – have to stay at home, aggravating gender inequality. If the supply chains of protective material, ventilators and vaccines break down, the work of healthcare workers will become dangerous. If a hospital, like a coal plant, closes, then the impacts on workers and communities are profound. In the United States, for instance, the local school districts depend on taxes from industrial and commercial installations. Any decline in taxes leads to resource and personnel cuts, mostly affecting poor districts and young and part-time teachers and staff.

What long-term changes may be induced by the pandemic (ILO 2021a; McKinsey Global Institute 2021)? Hybrid employment is a possibility resulting in less driving but higher energy bills, more flexibility but also more surveillance, greater family proximity but also tensions as domestic environments also act as workplaces. While such hybrid employment is very likely to develop in some sectors (especially services) it may also extend to workers who can remotely operate machinery. One development that seems irreversible – largely because it had started before the pandemic – is the reorganization and centralization of distribution and delivery systems.

## Depth

A transition may cover all those affected, but that does not tell us what its social and ecological priorities may be. It can be largely social or largely ecological – reproducing the separation of humanity and nature. It can also fuse the two, but through a range of different instruments: from regulatory instruments to more market mechanisms such as carbon taxes or the “cap and trade” system for controlling carbon emissions and other forms of atmospheric pollution. An example of the former is the 1970 Clean Air Act in the United States, arguably one of the most successful environmental laws of all time (Gardiner 2021). It is not surprising that this and related Acts were adopted during the late 1960s and early 1970s, a period of very strong political fermentation in the United States.

## Society

We can examine the societal provisions of a just transition in procedural and distributive terms, fully recognizing that the two are mutually constituted. In terms of procedure we can ask who has a voice in the shaping of laws and policies. Effective social dialogue gives

the weaker more voice, tempering the voice of the stronger. On the other hand, dialogue without the possibility of some redistribution renders voice a formality.

A central issue with respect to healthcare is that it employs a lot of people across various occupational categories, many of them women or immigrants. While a definitive measure of the number of workers on the move is difficult to establish (Bludau 2021), based on available data from 86 countries, it is estimated that one out of eight nurses (13 per cent) was born or trained in a country other than the one in which they currently practise (WHO, International Council of Nurses, and Nursing Now 2020). Those people are neither unionized nor organized and do not enjoy adequate occupational health and safety standards, social protections or workplace rights (JTLP 2021). The key challenge, certainly in the United States, is to ensure improvement along all of these dimensions (Winant 2021). In short, there is a need for a “just transition into the future” and towards a more protected and empowered workforce, as well as “a just transition from the past” for those whose employment will be affected by technological innovations or the socialization of healthcare.<sup>6</sup>

Even amongst those who are unionized there is a need for stronger social dialogue. This was made apparent by the debate over whether frontline personnel dealing with COVID-19 patients are more vulnerable to infection, as argued by Global Nurses United, compared to personnel dealing with emergency procedures, a view supported by hospital associations (Global Nurses United 2020; Klompas, Baker and Rhee 2021; Jewett 2021). As Malinowski, Minkler and Stock (2015) have argued, unions can be considered public health institutions that significantly contribute to social and environmental health, whether in promoting the cessation of smoking or the prevention of workplace factors that cause asthma.

Social justice and voice cannot be limited to workers but must also cover frontline communities, at the very least (JTLP 2021). This is all the more so because better paid workers in polluting facilities tend to move away from the frontline communities where these are located, thus breaking any sense of common interests. On the other hand, housing near “cleaner industries”, such as universities or hospitals, can be prohibitively expensive, forcing poorer workers to commute to work. What the pandemic underscores is that just transitions require stronger and broader social dialogue to include frontline communities which, as evidence indicates, were the ones most affected by the pandemic (Jensen, Kenny and Avendano 2021; JTLP 2021). But, of course, social equality also requires the massive redistribution of benefits and the reduction of harms for everyone.

## Nature

In late 2019, Brian Kohler wrote a short review motivated by the report by the Global Commission on the Future of Work, *Work for a Brighter Future* (ILO 2019). His major argument was that IndustriALL, and labour in general, needs to fuse the three dimensions

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<sup>6</sup> In that vein it is worth noting that President Biden’s American Jobs Plan (not adopted at this point) includes US\$400 billion over the next eight years to upgrade elder care as well as the working conditions in it (White House, 31 March 2021).

of sustainable development in calling for just transitions in sustainable manufacturing and Industry 4.0 (Kohler 2019). In February 2021 the ETUI and the ETUC organized a conference entitled "Towards a New Socio-Ecological Contract" (ETUI and ETUC 2021). In what follows we highlight how the social and the ecological intersect, moving from what can be considered as interactions to what may be considered as a fusion of the two.

The pandemic has highlighted inequalities in occupational health and safety within the healthcare sector (Color of Change et al. 2021). A just health transition must certainly address these injustices. But is this a technical occupational health and safety (OHS) issue or is it a broader social and environmental health issue? The fusion between OHS and the environment has not been an easy one and it continues to divide workers, employers and administrators (Bennett 2007; Silverman 2004 and 2006). But from the early, and continuing, concerns about toxins to the current focus on climate change it is apparent that OHS is also an environmental health issue. For example, indoor air pollution is a major problem while the materials that people use to produce or work can be as harmful for them as for nature. This has long been recognized by the ILO Working Environment (Air Pollution, Noise and Vibration) Convention, 1977 (No. 148) (see also Olsen 2009).

Environmental health injustice is even more evident with respect to the causes that place people in harm's way, including the pandemic. The maldistribution of infections is driven by inequality, such as food and health insecurity or precarious employment. According to the WHO, over seven million people die from air pollution every year (Gardiner 2021). In decades past these were considered social injustices but we have increasingly come to recognize them as eco-social injustices. Food justice does not only call for enough food for everyone. It also calls for better working conditions for food workers as well as for agricultural practices that are good to ecosystems and other species. Health justice is about equal access to hospitals but also equal access to a good environment, whether that is nature proper or the elimination of toxins in what we consume. Energy justice is about access to energy and about just transition for fossil fuel workers but also the reduction of risks to humanity and nature from climate change.

Both humanity and nature are affected and modified by how we transform our world through production and consumption. Advocates of industrial ecology and ecological modernization would see this interface as a challenge to be solved by superior technology and innovations. Others see humanity as a scourge upon the planet (for varieties of perspectives see Hopwood, Mellor and O'Brien 2005; Clapp and Dauvergne 2011). From an eco-social perspective, innovations that do not account for the mutual constitution of the social and ecological dimensions of our civilization are damaging some aspect of it through a "non-policy" whose impacts can be as powerful as those of an explicit policy – as the absence of global climate policy demonstrates.

## Ambition: An illustration from the United States

As we have noted, it is possible for a policy to be broad to the point where it covers all people and nature affected, but also socially inegalitarian and ecologically damaging. Using configurations of breadth and depth, therefore, we proposed (through the JTRC) four types/ clusters of just transition policies – status quo, managerial reforms, structural reforms and transformative policies. We would like to illustrate this typology by drawing on current debates in the United States.

On 11 March 2021 the United States adopted the US\$1.9 trillion American Rescue Plan (on various US stimulus Acts see Casselman 2021). This massive plan is smaller than the March 2020 Coronavirus Aid, Relief, and Economic Security Act (CARES) adopted under former President Trump. In our view CARES was a status quo policy because it was limited to lessening despair, stimulating the economy and managing the pandemic (Wright 2021). It did not include any measures to deal either with the pandemic's long-term impacts on society and nature or in terms of planning to address pandemics in general. Interestingly, President Biden's Rescue Plan has motivated a debate over whether it marks the start of the most ambitious anti-poverty and social cohesion structural reform since the Great Society of the 1960s. These hopes are anchored on making some of the policy's provisions permanent – such as support for children and health workers. However, it appears unlikely that any of these policies will become permanent.

By distinction, a managerial reform would implement stronger and permanent measures, including how to deal with the next pandemic. The Great Recession, for instance, resulted in the adoption of permanent financial instruments to manage future recessions and stabilize the economy, albeit not in the direction of social equity or ecological health (Tooze 2018). The CARES and Rescue Acts have not set up any long-term arrangements to manage a future pandemic. For that we will need to look at the Administration's other policy proposals.

The main elements of the Administration's strategy are the American Jobs and American Families Plans (White House 2021a and 2021b). Combined they envision investing over US\$4 trillion dollars to reform the physical and social infrastructure of the country as well as strengthening its green manufacturing capacity. Do these constitute a structural reform that is both impactful in the short term and creates the foundations for more transformative change in the longer term? This is where attention to politics is necessary. The obstacles to structural reform come from two quarters. First, the US Congress is marginally Democratic and support for exclusionary and discriminatory forms of nationalism – what is increasingly referred to as nativism – continues to grow within the Republican Party, as it is doing in a number of countries around the world. Second, and more relevant in terms of our argument here, opposition also comes from within the Democratic Party. A group of conservative Democrats is opposed to some of the current proposals while mainstream Democrats consider President Biden's proposals very ambitious and, in some cases, negotiable. And the Biden Administration, itself, has not called for universal healthcare – certainly a structural

reform – nor for a Green New Deal – a potentially transformative policy. Rather it justifies its policies around unexamined growth and the United States regaining its competitive edge vis-à-vis China. And while it has placed environmental justice front and centre, it has not proposed an explicit and comprehensive just transition plan. So far, its transitional policies are limited to coal, remain fragmentary and employ an “all of the above” approach to energy that includes nuclear power and carbon capture and sequestration (CCS). Worth noting here is that questions of justice are much more prominent domestically and largely absent in the United States’ global climate policies, including the fact that it has not yet signed onto the ILO’s Climate Action for Jobs Initiative (ILO 2021b).

Given the current circumstances, what could move the United States in the direction of more profound changes? If the American Rescue Plan is successfully implemented and gains in popularity it could well shift the debate. The adoption of the American Jobs and Families Plans would also certainly change the political debate, as would the adoption of the Protecting the Right to Organize Act (White House 2021c). But for Medicare for All and the Green New Deal (which includes just transition) to be adopted there would have to be mobilizations similar to those that led to the New Deal of the 1930s and the Great Society policies of the 1960s.<sup>7</sup> That there is strong resistance to such a pathway is evidenced by the significant resources that the mainstream wing of the Democratic Party have devoted to counter the ascendant progressive wing and the formation of a political narrative that can challenge former President Trump’s nativist populism (Fraser 2017).

## Conclusions

Throughout the preceding pages, we have argued that just transitions are desirable for all, with the energy transition being particularly pressing. But leaving out the care sector – including but not limited to health, child and elder care, and education – would be tantamount to leaving out a substantial and growing part of the world of labour. Just transitions for all must include all sections of society and nature affected by unjust transitions. Privileging some over others breeds resentment and opposition. With respect to the society–nature nexus, it is important to reiterate that the “social” sectors unquestionably contribute to the unfolding ecological and climate crises. However, it is also essential to insist on the fact that they also play an important role in mitigating and adapting to them. Green transitions in services have both direct and indirect effects. They use up vast amounts of energy and other resources, as well as shape urban zoning and planning (as noted earlier, the healthcare sector alone accounts for 10 per cent of global emissions). At the same time, green transitions, including those that pertain to specific sectors such as health, care or education, drive profound changes in energy and manufacturing.

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<sup>7</sup> The New Deal took place in two waves (1933–34 and 1935–36) and consisted of a number of policies. Notably, these were more beneficial to white males. The Great Society took place from 1964–68 and addressed race as well as the environment. Key environmental policies continued to be adopted in 1969 and 1970.



If the connections between society and nature are so important in sectors that we conventionally consider “social”, then it makes sense to shift frames and recognize that all social practices are environmental, and simultaneously all environmental practices are social. It makes little sense to recognize that atmospheric pollution kills over seven million people a year, and harms countless more, without also acknowledging its underlying eco-social dynamics and root causes.

There are also strategic reasons why just transitions should be expanded. In many countries these sectors are central to the social welfare state. In other countries such as the United States, unionization of the service sector is existential for the world of labour and it is here that some of the most inspiring efforts are taking place. Leaving the service sector out of the just transition strategy is to leave out some of the most vibrant and important elements of the world of labour and, consequently, to narrow and weaken the alliances necessary to achieve just transitions for all.

Our central argument is that all transitions, and certainly the energy transition, should be just. When they are unjust, transitions, regardless of the sector or region, breed resentment and nativism, resulting in opposition to any kind of structural change. A proactive approach assumes that transitions are part of life and thus require an eco-social state and society, informed by the best practices of the social welfare state (Barry and Eckersley 2005; Koch and Fritz 2018). The world of labour must choose between sectoral and largely ad hoc transition programmes and a comprehensive and proactive just transition politics. Such a politics will require a great deal of initial effort but is likely to deliver more in the longer term.

We also recognize that transitions that are mandated by public policies, such as those associated with the environment, are more easily recognizable and thus legitimize the demand for justice. However, narrowly associating just transitions with publicly mandated transitions obscures the many transitions that are the result of corporate pressures, routinely connected with enabling, but less visible, public policies. A prime example of this are the many socially unregulated economic agreements that have shaped the global political economy since the 1970s. In our view, exempting “private policies” from just transition insulates them from democratic deliberation. The world of labour should be particularly supportive of an expanded and democratic public domain that treats corporate choices as the public practices that they are.

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# Macroeconomic policies for jobs-led growth and recovery following the COVID-19 pandemic, with emphasis on sub-Saharan Africa

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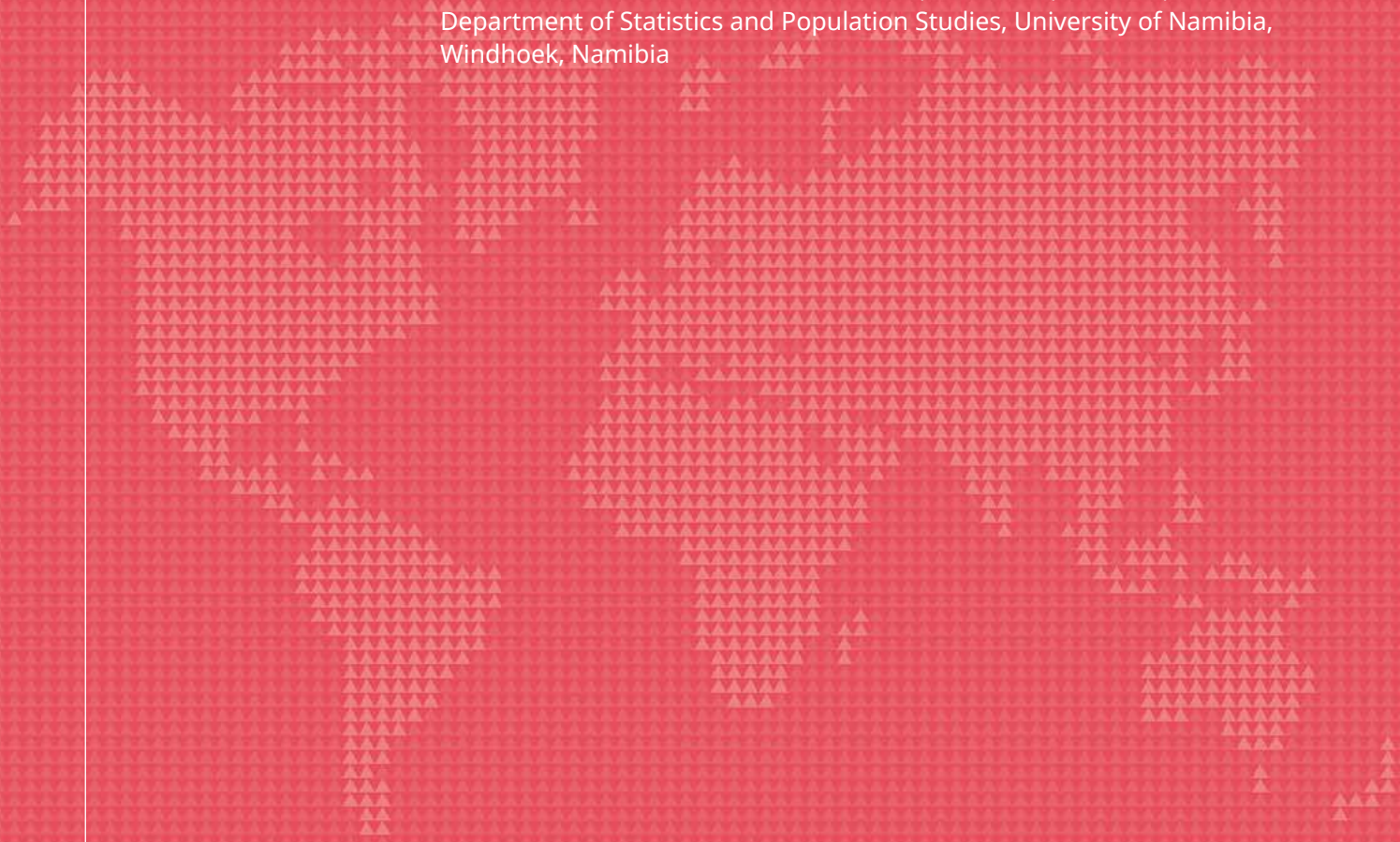
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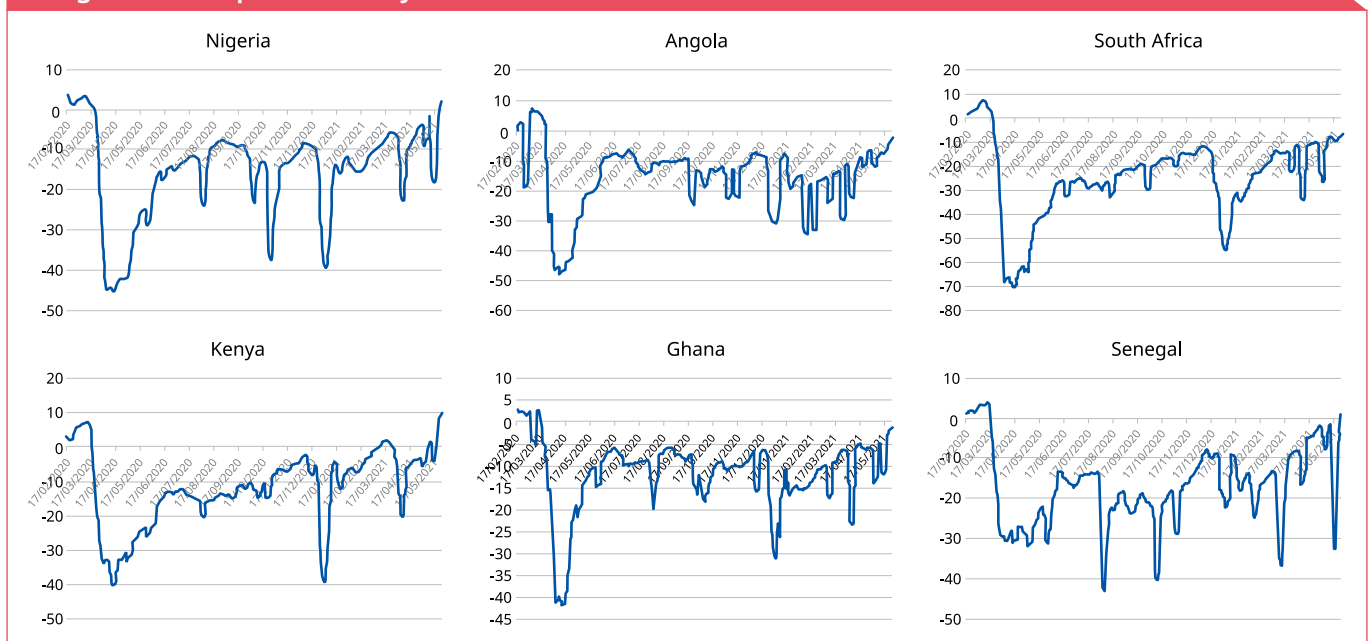
## Introduction

The economic impact of the ongoing COVID-19 pandemic is global, and resulted in an economic recession in 2020 which is projected to last until 2024 or beyond (IMF 2021a). The IMF estimates that in 2020, world GDP contracted by 6 per cent, and reported that in that year there were only 16 countries with positive growth in GDP per capita. This contrasts with the aftermath of the global financial crisis of 2008, where nearly 80 countries registered positive growth in per capita income.

Countries in the sub-Saharan African (SSA) region have not been spared. Growth in 2021–22 is forecast to resume at a moderate average pace of 3 per cent. However, there might be long-lasting impacts of the pandemic, as the rollout of vaccines in the region is expected to lag behind that of advanced economies and major emerging and developing economies (EMDEs). In addition, SSA has economic structures which impose a huge challenge to recovery. These include pre-existing high levels of poverty and inequality (Islam 2018; WEF 2020); a large share of informal workers (ILO 2020a; UN 2020); relatively small public sectors and tax revenue bases (ILO 2011; IMF 2021b); a high prevalence of within-country unrest, violent riots and civil wars; limited fiscal space (IMF 2021c); and precarious access to international financial markets (Dupor 2020; Eichenbaum, Rebelo and Trabandt 2020).

Unlike a typical macroeconomic disturbance, the COVID-19 shock and the policies implemented to contain it have brought about simultaneous disruptions to demand (consumption and investment) and supply (production of goods and services) (Fernando and McKibbin 2021; Faria-e-Castor 2020; McKibbin and Fernando 2020). A crucial element is the sharp and sudden increase in unemployment. At the onset of the pandemic governments in SSA, like others worldwide, imposed stringent measures to contain the spread of the virus. Work-related mobility was severely affected in Q2/2020, resulting in both a supply- and demand-induced recession in the region (see figure 1 for selected countries in SSA).

▶ Figure 1. Workplace mobility in SSA: Selected middle-income countries



Source: Google Mobility.

A quick look at the stringency and disease dynamics clearly shows that there was little relationship between business closures and stay-at-home orders and various measures of economic harm related to the pandemic (Gregory, Menzio and Wiczer 2020). Put differently, COVID-19 drove a number of households into poverty, presenting a threat towards meeting sustainable development goals (SDGs), particularly on SDG 8 which promotes decent work. With weak fiscal positions severely constraining government support measures in many countries, an emphasis on ambitious reforms is needed to rekindle robust, sustainable and equitable growth. Nevertheless, many developing countries do not have sufficient financial, monetary and social instruments for the necessary immediate and long-term responses to the pandemic (ILO 2011; IMF 2021b and 2021c).

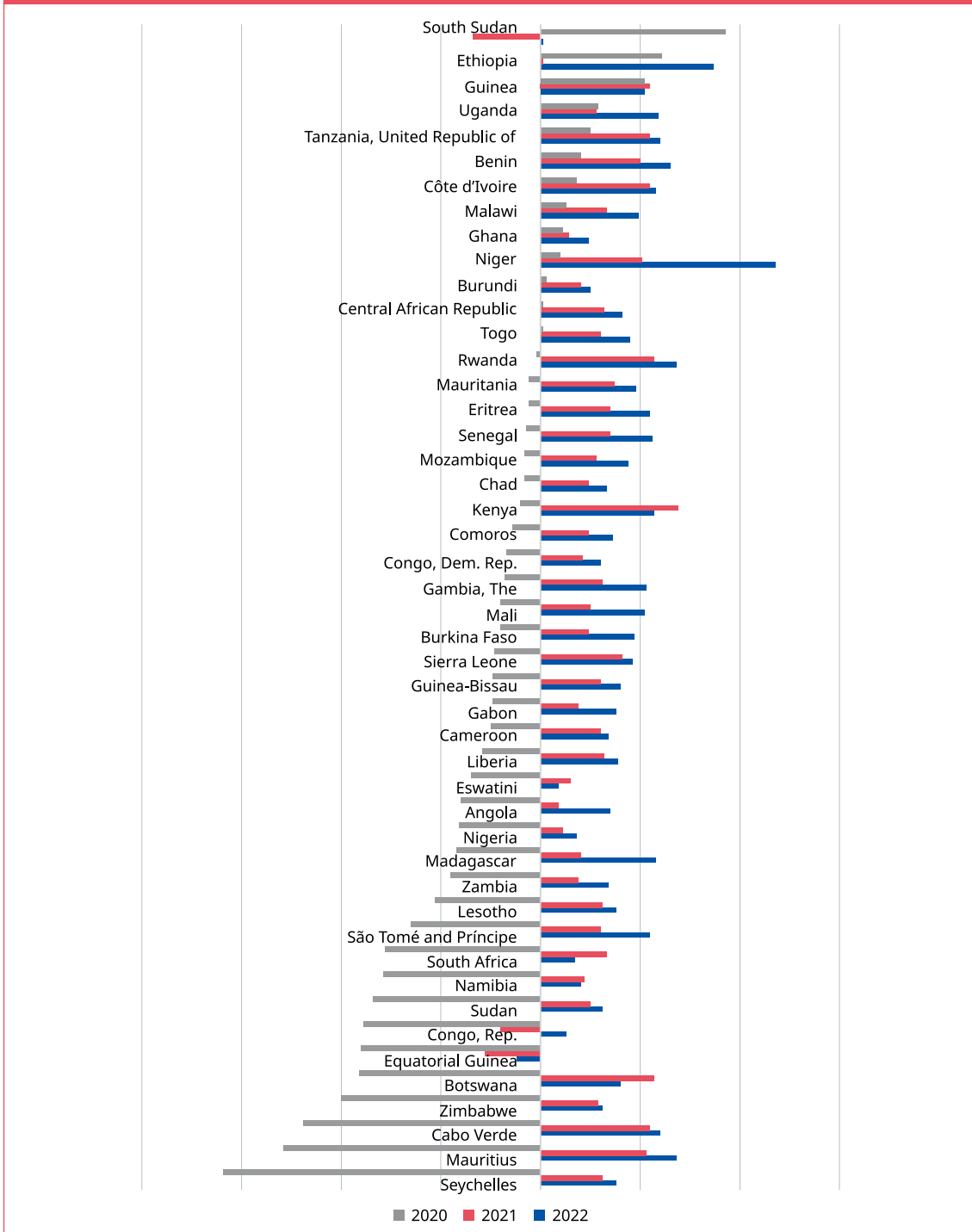
This article aims to identify policy responses that would promote short-term recovery from COVID-19 and long-term inclusive growth in SSA countries. It proposes policy initiatives that would allow an employment-led economic recovery, and hence support policymakers, specifically finance and labour ministries, as well as aligning social partners to promote job creation, job quality and job access interventions in both the short and long term.

## Macroeconomic effects of COVID-19

In an attempt to sketch economic development in sub-Saharan Africa after COVID-19, figure 2 shows that 2020 growth was the worst on record, at an average -1.9 per cent. Large economies (Nigeria and South Africa) registered a deeper decline in GDP growth, leading to a large increase in poverty which can be explained by falls in aggregate household income. This will exacerbate the already high disparities in income, where the poor, particularly

female-headed households, are disproportionately more disadvantaged in the COVID-19 era than before (UN 2020; IMF 2021b). Figure 3 shows that overall the reversal in per capita GDP is enormous and may take more than five years to recover potential. In 2021 the region’s economy is expected to expand at 3.4 per cent, but weaker than the 6 per cent for the rest of the world, amid a continued lack of access to vaccines and limited policy space to support the crisis response and recovery (IMF 2021b).

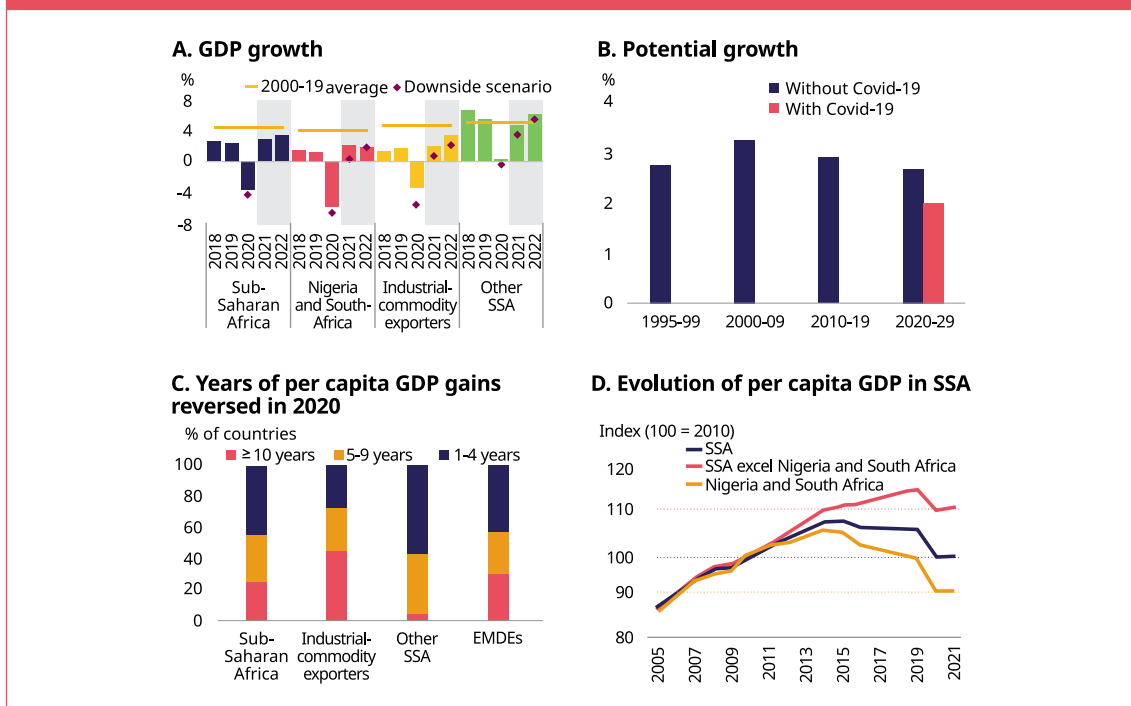
► Figure 2. Real GDP growth, SSA selected countries, 2018–22



Source: World Bank.



► Figure 3. Growth forecast in SSA: Nigeria and South Africa compared with other SSA economies



Source: IMF/World Bank.

In trying to sustain livelihoods and the economy most governments have tried to mitigate the damage caused, through varied measures ranging from fiscal stimulus or expansionary monetary policy to preservation of the incomes of workers and companies during confinement. Monetary policy was eased, with interest rate cuts, enhanced asset purchase programmes, and targeted interventions in financial market segments under extreme stress (IMF n.d.; ILO 2020b; ILO n.d.). Table 1 presents a summary of macroeconomic policy responses.

► Table 1. Share of African countries that have implemented various macroeconomic policies

Macroeconomic policy implemented	Share implementing policies (%)
<b>1. Fiscal policies</b>	
1.1 Support to households, vulnerable population, and unemployed	89
1.2 Support to businesses and SMEs	92
1.3 Support to health sector	90
<b>2. Monetary policy</b>	
2.1 Exchange rate and capital account management	4
2.2 Interest rate cuts	85
2.3 Liquidity reserve requirement ratio cut	38
2.4 Direct liquidity provision	26

Source: ILO n.d.; IMF n.d..

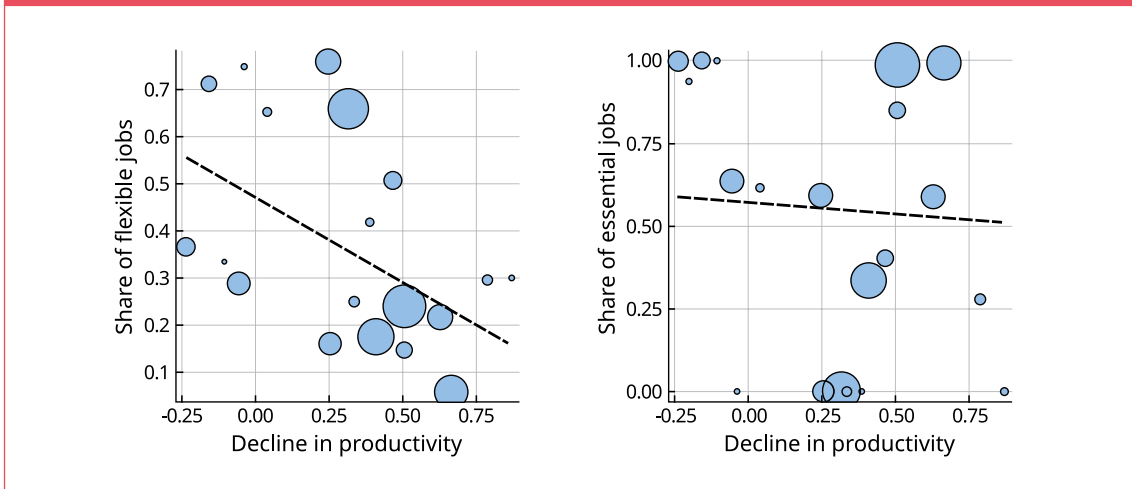
The IMF policy tracker (IMF n.d.) shows that financial market regulations were eased to support credit provision by financial institutions. Facing visible strain from the pandemic, central banks lowered the base policy rate. Banks and other lending institutions accessed support out of the emergency guaranteed credit to cushion against falling lending and non-performing loans, and large-scale guarantees of private debt. The majority of countries responded with fiscal policies to cushion households, vulnerable populations and the unemployed; they supported business and SMEs, and gave support to the health sectors. However, for the monetary policy response in SSA, only an interest cut was the most applied. In other countries, supply of subsidized food grains acted as a useful buffer keeping unemployment down and ensuring social stability. There have also been cash transfers to women and farmers, and small and medium micro-enterprises (SMMEs). Several countries created new laws to make unemployment insurance more financially attractive and inclusive to workers than it would normally be, and they also created programmes to subsidize employers with the goal of maintaining employment relationships.

### Labour dynamics as an effect of the COVID-19 pandemic

To motivate for a tailored jobs-led recovery, there is a need to understand the avenues through which the pandemic has had an impact. Fernando and McKibbin (2021) consider three ways in which labour can be impacted by COVID-19:

- (a) shock to labour supply;
  - (b) shock to total productivity; and
  - (c) shock to consumption.
- (a) *The shock to labour supply* originates from the mortality and morbidity related to the infection. Many deaths mean a loss of existing and potential labour force for an economy. The morbidity has two shocks. First, the labour force cannot work if they catch or get exposed to the infection. Better health has an essential role in the labour market, and in turn propels economic growth. Secondly, loss in labour supply will also come from a decrease in female labour participation and a loss in productive time due to caregiving for dependent children. The loss in labour supply differs by type of industry. Notable industries include tourism and hospitality, manufacturing, mining and education (ILO 2020b).
- (b) *The productivity shock* is caused by the lockdowns imposed by governments to reduce the transmission of the virus. Productivity varies between essential and flexible jobs. Figure 4 demonstrates the decline in productivity for essential and flexible types of job.
- (c) *Shock to consumption* is attributed to changes in household consumption arising from a variety of factors including changes in income from employment, changes in the value of future wealth due to the long-term implications of the current impacts from the pandemic, changes in relative prices of different sectors, changes in interest rates, and changes in the ability to consume certain goods and services as well as changes in consumer preferences.

► Figure 4. Calibrated productivity shocks vs. flexible and essential jobs (in percentage shares)

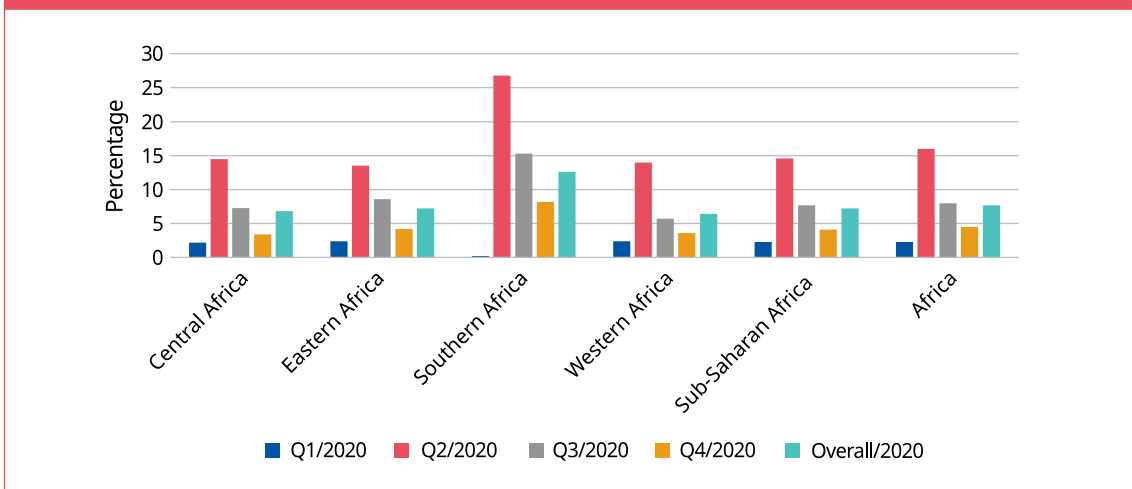


Source: Gregory, Menzio and Wiczer 2020.

### Unemployment and working hours

In the wake of COVID-19, the loss in employment is depicted in three forms: unemployment rates, inactivity rate and underemployment. Both inactivity and underemployment were the most common (ILO 2020b). The SSA region and low-income countries had lower rates of job losses, which is indicative of the share that formal waged jobs have in these economies; most people are employed in the informal economy. Figure 5 provides detailed variations in job losses based on working hours lost. The second quarter (Q2/200) was severely impacted by COVID-19. On the other hand, the southern region of SSA was the most affected compared to the other zones.

► Figure 5. Working-hour losses in SSA and by subregion, quarterly and annual estimates (percentages of full-time equivalent jobs)



Source: ILO n.d.

### Emerging forms of work

The ongoing pandemic is rapidly transforming how, and even where, people work. Three major outcomes have emerged: remote working, lay-offs, and continued commuting to work by critical workers. The share of people switching to remote work has increased. Remote working is an example of a business transformation that works on multiple levels. It serves the needs of individual employees, it provides businesses with new resilient and adaptive ways to engage with their ecosystem and deliver economic value, and it serves the larger community by addressing public health needs. Also emerging is the increase in the number of people working on digital application platforms. These changes in work and employment have immediate implications for the economy, and may lead to permanent shifts that last beyond the pandemic, but they also have implications for maintaining labour standards and maintaining tenets of decent work. But how many jobs can be carried out remotely? In most countries, the share of workers covered by teleworking or smart working arrangements (including fully working from home) in normal times is below 10 per cent. In SSA, the proportion is even smaller, compounded by the fact that there are fewer formal waged jobs. The majority will still need to go for work, clearly demonstrating the digital inequality that COVID-19 has imposed in low-income countries.

### Policies for jobs-led growth and recovery

Continued uncertainty about the duration of the health crisis affects all aspects of the recovery path. Once the pandemic is over, a speedy recovery would require not only solid and informed policies, but also continued advances towards structural economic policy reforms (Fernando and McKibbin 2021).

Recovery plans for SSA must consider the prevailing structure of its economies. The reality is that much of the SSA economic growth in the last four decades did not translate into more and better jobs. Several structural rigidities impede further improvement in SSA's job outcomes. Policies that are growth-oriented, that have worked for developed economies, have not worked to create productive employment in SSA. Proceeding with the same policies that focus on economic growth will maintain the same poor employment outcomes in the coming decades (Ajakaiye et al. 2016).

Policy remaking should address the key challenges of quantity, quality and accessibility of jobs. The ILO proposes four pillars that are key to promoting and achieving decent work through job creation, job quality and job access (figure 6). The *first pillar* addresses stimulating the economy and labour, which entails concrete proposals on how to make use of all the macroeconomic tools at our disposal. Fiscal and monetary policies have to work hand in hand to support workers and enterprises, especially in those sectors which are hardest hit, as well as to support the creation of decent work as a prerequisite for a "jobs-led" recovery that benefits all.

The *second pillar* relates to supporting businesses, jobs and incomes as governments strive to provide financial support to enterprises and workers. This includes social protection and employment services for those who lost their jobs and livelihoods during the crisis.

The *third pillar* focuses on the protection of workers in the workplace through the reinforcement of occupational safety and health policies and the promotion of labour rights with regard to new and emerging forms of work and working arrangements.

The *fourth pillar* focuses on utilizing social dialogue for solutions regarding a human-centred recovery. This pillar calls for strengthening the capacities of social partners and governments as well as strengthening social dialogue, collective bargaining and labour relations institutions and processes.

► Figure 6. ILO policy framework: Four key pillars in tackling the COVID-19 crisis on the basis of international labour standards



Source: ILO 2020b.

## Motivating for employment-led macroeconomic policies

The post-pandemic recovery provides an opportunity for pro-employment policies that will alter productive transformation patterns. Required are prioritized economic policies (macro, sectoral/industrial, fiscal, monetary, trade, investment) that are targeted on employment and jobs. The policy-remaking should address the key challenges of quantity, quality and accessibility of jobs (Islam 2018; Parisotto and Ray 2017).

## **Strengthening the fundamentals of job creation**

### *(i) Addressing employment targeting through fiscal, monetary and financial supports*

Implementing the right macroeconomic policies (fiscal, monetary and financial supports) can enhance strong growth and job creation in the medium to long term. Investments in human capital must be accompanied by robust public and private investments in physical capital, and the adoption and maintenance of monetary and exchange rate policy stances that are conducive to growth. This requires analysis of employment needs in connection with output growth, coupled with the macroeconomic policy framework to promote sustainable growth.

**Fiscal policies.** Working mainly through taxes, public expenditures and subsidies, fiscal policies can have important implications for employment through their impact on economic activities. Adopting a more flexible fiscal policy to increase impact on job creation is desirable. Some of the options may include:

- ▶ Pro-employment budgeting that would allow investment in infrastructure that creates jobs directly while contributing to the longer-term development objective. Hence, countries that allocate a higher share of their government expenditure to infrastructure should be able to create a bigger impact on employment.
- ▶ Expenditures for supporting businesses (for example, cash incentives to specific sectors). These can help maintain profitability, but only indirectly contribute to preserving jobs or creating new ones.
- ▶ Targeted tax regimes at SMEs to increase their survival and growth. For example, SMEs can be exempted from corporate income tax for the infancy years (e.g. 3 to 5 years), or exempt from the requirement to operate withholding, or could implement reduced tax rates for 3 to 5 years. Such initiatives would increase SME growth and in turn grow jobs in the sector.

**Financial policies.** The fiscal policy framework through its tax revenue and expenditure instruments can be complemented by the role of financial policies (which are closely related to at least monetary and exchange rate policies). Financial systems can play a vital role in supporting growth in employment generation and a poverty reduction strategy. SSA countries should enable a banking environment that would support both for capital allocation and credit provision, which are important employment-generating sources in low-income countries. A range of measures to support financial inclusion include:

- ▶ Access to finance for agriculture, using interest rate subsidies for direct commercial bank lending.
- ▶ Access to finance for SMEs based on credit lines by directing commercial bank lending to SMEs.
- ▶ Using the public banking system and development banks to leverage resources to support investment projects in basic infrastructure and job-generation activities.

**Monetary policies.** These work through interest rates and exchange rates. Pro-employment monetary policy elements include:

- ▶ Credit allocation policies, including concessionary loans and increased capitalization for development banks, loan guarantees, and asset-based reserve requirements.
- ▶ Capital management policies, by insulating domestic interest rates and exchange rates from international factors while avoiding financial instability, thus allowing more expansionary policy. Hence, the employment-targeting framework can use capital controls, which if they are properly implemented can reduce instability, help maintain an appropriate exchange rate level, and enhance macroeconomic autonomy.
- ▶ Setting targets for inflation within a range, or adopting a dual mandate for the central bank encompassing price stability and full employment.
- ▶ Strengthening supervisory and regulatory functions to promote effective and efficient systems of financial intermediation, ensuring an adequate supply of credit for small and young firms and start-ups.
- ▶ Enhancing financial inclusion of poor “unbanked” households and household enterprises.

Exchange rate policy and capital account management should aim at a competitive exchange rate to support both the export sector and import-competing industries. Pro-employment exchange rate policy and capital account management elements include:

- ▶ Using a managed float to gear towards a stable real exchange rate and avoid overvaluation.
- ▶ Building up foreign exchange reserves as a prudential buffer for self-insurance against market volatility, avoiding excessive accumulation.
- ▶ Engaging in active capital account management by reducing the impact of disruptive short-term capital flows and thus reducing exposure to international financial volatility and speculation.
- ▶ Monitoring external borrowing and currency mismatches by resident firms and banks.
- ▶ Ensuring conditions for cross-border long-term financial and productive investments that can stimulate structural transformation and employment creation.

An employment-targeting framework will work best if it is part of an overall employment-targeting macroeconomic strategy, and if the central bank is committed to cooperating with the government to implement such policies as make an employment-targeting approach effective. This was demonstrated in South Africa (Epstein 2008).

#### *(ii) Promoting industrialization*

To achieve maximum value emanating from the industrialization policy, countries must develop and prioritize industrial clusters. This would ensure competitiveness and create requisite jobs, skills learning and business opportunities. Alignment and integration of industrial policies requires strong collaboration between local, national, regional and international entities to maximize synergies. For example, linking export-oriented trade to an industrialization strategy should be designed to leverage the recently launched African Continental Free Trade Agreement.

### *(iii) Active labour market policies (ALMPs)*

Active labour market programmes can be used to help people transition from inactivity to work or to access better jobs. ALMPs can be considered as part of the fiscal policies, but cover a wide range of interventions that can target labour supply with, for example, training programmes; and labour demand through, for example, public works projects or employment subsidies such as productive inclusion programmes (PIP) or the ILO's Employment-Intensive Investment Programme (EIIP). Through PIP and EIIP, an economic stimulus payment of smaller size and targeted to a larger share of disadvantaged families and communities would provide a stronger boost to aggregate consumption.

### ***Favourable fiscal and policy environment to promote sustainable enterprises***

While macroeconomic conditions affect the overall economic performance of a country, the business environment has a direct bearing on the ability of enterprises to start and operate a business, and thus create jobs. However, the private sector in SSA is not sufficiently dynamic or sufficiently strong to create the numbers of firm-based wage jobs needed to absorb the available labour supply. Policies must exploit opportunities to create new and better paid jobs at different stages (production, processing, and marketing of agricultural produce) of the value chain, by providing development of an efficient processing industry. The role of publicly-owned, solidarity and social economy enterprises is also crucial for employment creation and income generation. Existing public-owned enterprises should be oriented, through appropriate policy, to embark on a pro-employment agenda.

### ***Policies for sectoral employment creation to improve productivity and earnings***

Sectoral employment creation can be achieved through several avenues, particularly targeted at the clusters identified in the industrialization strategy. Short-term sectoral policies, such as immediate financial support for investments in sectors that have been hit particularly hard by the COVID crisis, may take the form of financial relief, bailouts, bridging loans or grants (ILO 2021). A high rate of growth in productive sectoral employment would offer expanding opportunities for workers in low-productivity sectoral employment to move into better jobs (ILO 2011).

### ***Policies to promote job access and inclusiveness***

#### *(i) Promoting job access to the vulnerable through employment and training programmes*

These are particularly aimed at connecting vulnerable groups, such as women and youth, to better jobs, with high levels of investment designed with vulnerable populations as target beneficiary groups. Solutions should be based on a thorough understanding of youth livelihood and employment realities, so as to achieve adequate impact and scale. ALMPs are able to improve the labour market prospects of the workers. ALMPs can be combined with income support to be more effective in tackling poverty and helping laid-off workers find decent work.

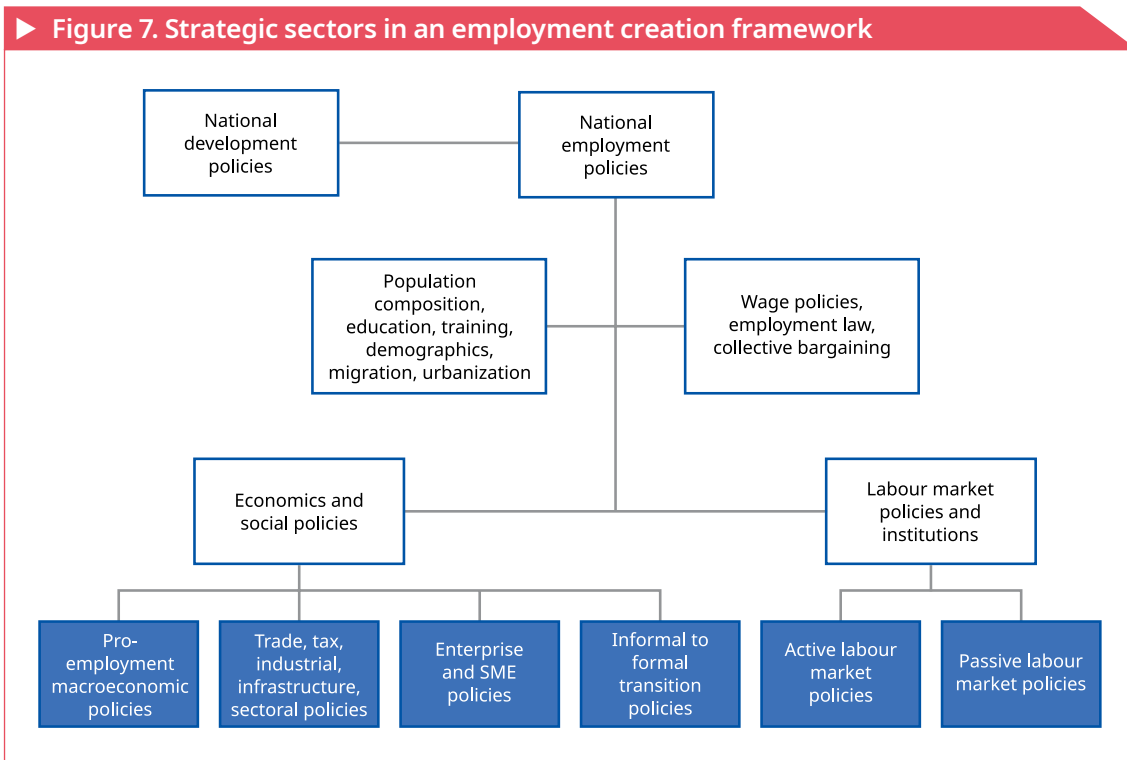


(ii) Support to SME development for jobs in services and across other sectors

SMEs are active across the SSA economies, including in service sub-sectors with short-term jobs potential, such as transport, IT, tourism, food and beverages, and retail trade. With the scaling-up of infrastructure and agriculture value chains, SMEs will be able to seize some opportunities and create new jobs through backward and forward linkages, while promoting job access inclusiveness and access to the vulnerable.

### Actualizing the pro-employment agenda

The promotion of integrated policies and programmes for a pro-employment agenda should, at the outset, be supported by structures for joint sector coordination in the development and implementation of pro-employment macroeconomic strategies. Policy implementation will involve aligning a number of enabling policies. Figure 7 identifies several such policies including those on national development, education and training, demographic transitions, wage policies and employment laws, collective bargaining for social protection and decent jobs, economic and social policies, and labour market policies and institutions.



Further, a number of key strategic actors or stakeholders are required. Table 2 summarizes strategic actors that must coordinate the various policies to achieve the pro-employment agenda. These include government, businesses, trade unions, academics, civil society organizations and development partners.

► Table 2. Policies and strategic actors required to coordinate a pro-employment agenda

Policy	Strategic actors
Pro-employment macroeconomic policies	Ministry of Finance, Ministry of Economic Planning, Central Bank
Trade, tax, industrial, infrastructure, sectoral policies	Ministry of Trade, Ministry of Industry, Ministry of Economic Planning
Enterprise and SME policies	Ministry of Trade, Ministry of Labour and Employment, Ministry of Education, social partners
Informal to formal transition policies	Ministry of Trade, Ministry of Education, Ministry of Labour, social partners
Active labour market policies	Ministry of Labour and Employment, Ministry of Finance, Ministry of Ministry of Education, social partners
Passive labour market policies	Ministry of Labour and Employment, social partners

## Conclusions

The COVID-19 pandemic is having a profound impact on economic and labour markets in all countries and is underscoring the interdependence of humanity. It has devastating impacts on the world of work and has led to increased unemployment, underemployment, losses in income, and supply chain disruptions. This article is premised on the fact that a right policy mix would ensure that employment-led economic growth would reduce poverty, while ensuring delivery of the Decent Work Agenda. This should give more reason for workers' organizations to engage further with governments and employers' organizations at every stage in the formulation and implementation of economic policies. Workers' organizations will need to champion a social contract and concerted actions by all stakeholders if the effects of the policies are to endure well beyond the current crisis and ensure profound implications for the achievement of social justice and decent work for all. The social contract has the potential to place people and the work they do at the centre of economic and social policy and business practice.

The bottom line to this process is the need to ensure a broad-based, job-rich recovery with decent work opportunities for all through integrated national employment policy responses, recognizing the important role of the public sector and sustainable enterprises (including the social and solidarity economy) in the formulation of macroeconomic and industrial policies.

It is argued therefore that a more holistic approach to employment promotion calls for employment policies, which include and go beyond labour market policies. The right policy mix is essential. Economic diversification policies, measures to facilitate formalization and expansion of enterprises, and the enforcement of labour standards can all contribute to broad-based development and the promotion of decent work. Productive transformation is underpinned by an enabling environment for enterprises and supportive macroeconomic policies. Labour and social protection institutions are equally important ingredients of economic growth, quality jobs and human development.

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# South-East Asian unions respond to the pressure of COVID-19

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Around the globe, the COVID-19 pandemic has posed an enormous challenge for workers and employers alike. As the virus spread, national economies faltered. In some countries, all but the most essential workers were forced to work from home – or take time off work – while they sheltered in place. Elsewhere, workplaces were forced to reimagine the ways in which they operate if, indeed, they managed to keep their doors open. In too many parts of the world, workers faced a terrible choice: to brave the risk of contracting the disease or stay home and starve.

The pandemic has also tested the robustness of labour movement organizations, nationally and internationally. In South-East Asia, unions suddenly found themselves fighting not only for their members' right to decent work, but also for their right to survive. They struggled to convince governments and employers to provide workplace protection and social security for those who needed it. In some industries, they had to do so while experiencing a rapid decline in membership as a result of large-scale job losses caused by the pandemic.

In several countries, unions' efforts to protect members were hindered by attempts on the part of some employers – and some governments – to undermine workers' individual and collective rights. Despite these very serious obstacles, some unions in the region managed to dig deep and rise to the challenge posed by the pandemic, finding new ways to support their members as they move into the post-pandemic era. In other cases, the pandemic has exposed areas of union operations that demand change if they are to prosper in the post-COVID-19 world.

### **The impact of COVID-19 in South-East Asia**

The COVID-19 pandemic had an enormous impact on the jobs, lives and livelihoods of workers across South-East Asia in the 15 months after China reported the first case of the disease. The direct disease burden varied dramatically across the region. At 10,632 cases per million, Malaysia had recorded the greatest density of cases as of 1 April 2021, followed closely by Singapore at 10,278.3. At the other end of the spectrum was Laos, which had recorded just 6.7 cases per million, and Viet Nam, with 26.7 (Worldometer 2021).

However, the virus itself was just one element of the pandemic's impact on workers. South-East Asia is a region with a complex employment landscape. With the exception of Singapore, Brunei and Malaysia, South-East Asian countries have relatively large rural populations and informal sector workforces, and consequently relatively low proportions of waged employees (table 1).

► Table 1. Employment context, selected South-East Asian countries

	Cambodia	Indonesia	Malaysia	Myanmar	Philippines	Singapore	Thailand	Viet Nam
Population (millions)	16.9	276.4	32.8	54.8	111.0	5.9	70.0	98.2
Urban %	24.7	57.3	77.7	31.4	52.3	100.0	52.2	38.1
Rural %	75.3	42.7	22.3	68.6	47.7	0.0	47.8	61.9
GDP per capita	1 512	3 894	11 373	1 418	3 252	65 233	7 295	2 567
GDP (US\$ billions)	25	1 042	359	76	347	372	507	245
Exports goods/services as % GDP	61	18	65	30	28	174	60	107
Labour force (millions)	9.3	135.8	15.8	24.2	45.1	3.6	38.7	57.3
Males % labour force	51.1	60.5	61.5	59.8	60.7	58.3	54.3	52.1
Females % labour force	48.9	39.5	38.6	40.2	39.3	41.7	45.7	47.9
Total in employment (millions)	9.1	129.6	9.3	22.0	42.2	3.4	37.6	47.8
% in agriculture	38.2	28.5	10.2	48.9	22.9	n/a	31.4	27.8
% in industry	25.5	22.4	27.9	16.9	19.1	14.0	22.8	33.3
% in services	36.3	49.1	61.9	34.2	58.0	84.9	45.7	38.9
Informal employment % total	93.6	80.4	n/a	79.9	n/a	n/a	64.4	67.0
Waged workers % of employed	53.0	48.3	72.6	35.1	63.9	85.9	49.7	45.7
% males employed	58.8	53.0	73.5	35.1	66.0	82.5	49.7	49.9
% females employed	46.8	41.1	71.3	35.1	60.5	90.9	49.8	41.1

Note: Figures are the latest available. Figures for labour force, employment, informal employment and waged workers are modelled ILO estimates. Estimates for informal employment are not available (n/a) for Malaysia, the Philippines or Singapore. Totals in different categories may not add up to 100% as a result of rounding errors.

Sources: ILO 2021; World Bank 2021.

Much of South-East Asia is also characterized by relatively high levels of under- and unemployment. At the same time, many of these countries are highly integrated into global supply chains, especially in labour-intensive manufacturing. This high level of supply chain integration has generated large numbers of formal sector jobs but also left these countries vulnerable to global economic shocks. It is not surprising, then, that – in addition to the social and economic disturbance caused by preventative measures – these countries were affected by supply chain disruptions in the form of cancelled orders and reduced availability of inputs in the early months of the pandemic (Ford and Ward 2021a). The impact of these disruptions was exacerbated by low levels of social protection, which made both informal sector workers and those who lost their formal sector jobs even more vulnerable to the pandemic’s impact on their countries’ economies.

## Trade union responses to COVID-19

The impact of COVID-19 on people's livelihoods was exacerbated by the fact that the region's employment relations systems have a relatively poor reach – not only as a result of high levels of informal sector employment, but also because many formal sector workplaces are little touched by regulatory requirements. As most unions operate within the formal sector, their coverage of workers is necessarily limited in these countries. In addition, colonial and post-colonial legacies have shaped the contours of the region's organized labour movements, including the extent to which they are politically or economically oriented; whether they can operate free from government or employer control; and whether they are reliant on international support (Ford 2014). These factors all played a role in shaping union responses to COVID-19. Yet while the impact of this engagement with government, at the workplace level, and with their members was necessarily constrained by different unions' level of structural embeddedness and internal capacity, it nevertheless demonstrated a commitment to their core mission of supporting and representing their members even in very difficult circumstances.

### *Engagement with governments*

A key domain of union action was public policy. In many countries across South-East Asia unions have a hostile, or at best distanced, relationship with government. In many sectors – most visibly, the global apparel manufacturing sector – unions have worked around hostile States by engaging with a range of other actors to pressure governments to enforce their own labour regulations (see, for example, Amengual and Chirof 2016). The pandemic disrupted these asymmetries of power, forcing unions to look and work within their own borders to effect change.

In Indonesia, the State has always been a key focus for union activity (Caraway and Ford 2020). During the pandemic, the Government tried to avoid union backlash by introducing a draft law, known as the Omnibus Law on Job Creation, into the legislature at a time when social distancing provisions limited the capacity to take to the streets in protest (Ford 2021). Despite unions' attempts to stave off the legislation, the law – which reduced not only protections for workers but also the capacity of unions to bargain for higher minimum wages and represent workers in the industrial relations courts – was signed into law in November 2020 (Ford and Ward 2021a).

In other cases, the pandemic saw an intensification of union focus on the State, in some cases to good effect. Prior to COVID-19, Cambodian unions had struggled to convince employers and the State to extend the National Social Security Fund – a social protection scheme which provides employment injury, health insurance and pension benefits – beyond garment manufacturing. Informal workers are not covered by the Labour Law, and the absence of an employer for own-account workers, who comprise a large percentage of informal workers, meant that fund coverage was not possible. In the context of the pandemic, unions in the



construction sector (where many workers are classified as informal due to the nature of subcontracting arrangements) engaged the Government in dialogue about extending the National Social Security Fund and minimum wage protections to all construction workers (*The Phnom Penh Post* 2021). Following this process, the Government announced that all informal workers would be covered by the fund, with the Ministry of Labour and Vocational Training and registered worker associations assisting workers to register in lieu of employers (*Voice of Democracy* 2020).

In another less successful example, the Airport Alliance of Thai Trade Unions, the State Enterprises Workers' Relations Confederation and the Thai Labour Solidarity Committee called on the Government to ensure the health and safety of Thai aviation workers and to protect jobs following Thai Airways' announcement of the suspension of its operations in early 2020 (AATTT, SERC and TLSC 2020). In the May of that year, the Government removed the airline's status as a state-owned enterprise (*Bangkok Post* 2020). Unions did not oppose the change to the airline's status. In March 2021, however, union leaders met with the Labour Minister to request an intervention, as well as filing a formal dispute, after the Government announced a restructuring plan that potentially affected a large percentage of the workforce through redundancies and changes to employment contracts (*Bangkok Post* 2021a). These efforts were unsuccessful, with the airline retrenching a further 4,000 employees and forcing remaining workers to sign contracts with much-reduced benefits from May 2021 (*Bangkok Post* 2021b).

### **Engagement at the workplace level**

A second domain of union action in the context of the COVID-19 pandemic was the workplace. Although workplaces are often imagined as comprising the primary domain of union activity, South-East Asia's unions have relatively low levels of workplace presence, tending instead to rely on street-based protest and engagement with government to secure benefits for workers (see, for example, Caraway and Ford 2020). However, unions played an important role in demanding, monitoring and supplementing protective measures at the workplace level across the region, and especially in countries where they are most closely controlled by government. At the same time, employer responses to the economic pressures brought by the pandemic threatened unions' bargaining power at the workplace level, forcing them to make concessions they might otherwise not have been prepared to make.

In Singapore, unions made a substantive contribution to efforts to contain the workplace spread of COVID-19. In one example, the Singapore Maritime Officers' Union and the Singapore Organisation of Seamen participated alongside the International Maritime Employers' Council, the Singapore Shipping Association and Maritime and Port Authority of Singapore in the Singapore Crew Change Workgroup to introduce new measures to protect workers during crew changes, while not burdening those who were travelling from designated low-risk countries or regions with long periods in home isolation or quarantine (MPA 2020).

According to the President of the Singapore Organisation of Seamen:

The streamlined crew change procedures and dedicated facility for sign-on crews are practical solutions to keep the supply chain open and to protect the rights of seafarers. Singapore has sent a strong message to the world that we recognise seafarers as essential workers and [that] we appreciate the crucial role seafarers play in the global economy. (cited in Nautilus 2020)

However, unions were also forced to make concessions. For example, the United Workers of the Petroleum Industry of Singapore agreed that its members could take on manual tasks normally undertaken by migrant workers in return for promises that local jobs would be protected (IndustriALL 2021).

Enterprise unions affiliated to the Vietnam General Confederation of Labour (VGCL) also worked with employers to secure workers' access to protective measures such as masks, hand-washing facilities and sanitizers, often working through joint management-union committees or taskforces (Buckley 2020a). These actions were largely supported by the VGCL at the central level, which had tasked unions at all levels with monitoring and reporting employers who were not complying with government requirements. In contrast to Singapore, however, strikes were held in a number of factories – some with the VGCL's blessing – to demand that employers provided a safe working environment and payment for quarantined workers (Buckley 2020b). In addition, its industrial zone unions monitored layoffs to ensure that employers were not using the pandemic as an excuse to fire workers.

### ***Engagement with members***

The third domain of union action was communication with members. Government-imposed restrictions on mobility and concerns about the spread of the disease greatly affected the ability to hold face-to-face meetings and events, which remain most South-East Asian unions' primary communication channels. However, work-at-home protocols requiring many workers to engage with digital platforms on a daily basis had some unexpected positive effects, forcing union members to become better acquainted with digital technologies other than social media, and better equipped to use them to engage with their unions.

Teachers' unions were at the forefront of the push for increased digitalization during the pandemic, as governments rushed to find ways to deliver education remotely to students in lockdown. According to a survey conducted for Education International (EI) in 2020, many or some new digital technologies were introduced in close to 70 per cent of respondents' education systems in the Asia-Pacific region. While this was not as high a proportion as in most other regions, it constituted a significant change for teachers in a region where only 6 per cent of respondents had previously used digital technologies in teaching and learning, and only 50 per cent of teachers usually have access to the internet at work (Colclough 2020).

In South-East Asia the push to adopt online teaching platforms challenged teachers, many of whom had relatively low levels of digital literacy despite their relatively high levels of

formal education.<sup>1</sup> Like the schools that employed their members, teachers' unions had also been relatively conservative in their use of digital communication tools. Some had embraced social media well before the onset of the pandemic, but many had maintained one-way flows of information even where their communication strategies had a digital component. What the pandemic confirmed was the potential of digital technologies not only for communication between union officials and members, but also for the provision of services, including consumer benefits but also professional development.

An example of the former is the Alliance of Concerned Teachers (ACT), a key teachers' union in the Philippines. Established in 1982 when the Philippines was still under martial law, ACT serves as an umbrella organization for public sector education unions and union federations. It also has a political wing that represents education sector workers in Congress. ACT already had a relatively strong social media presence before the pandemic, which it used to reach out to teachers in general, as well as its own members. An important aspect of ACT's use of social media is its impact on two-way communication within the union. As one branch-level leader reported:

In the time of social media, all teachers have access to information. Before, they only just read our memos, but now they can directly engage, comment on posts, or bombard our inboxes with different concerns. We are reading that and validating that through our union leaders. But I can say it's very democratic. In fact, members can be very demanding on social media – they ask what our stance is, about what are we doing.

In the context of the pandemic, ACT – like many other teachers' unions in the region – extended its use of digital platforms to facilitate meetings between officials, recruitment activities and membership renewals.

The digital transformation has been even more far-reaching in neighbouring Indonesia. The Indonesian Teachers Association (Persatuan Guru Republik Indonesia, PGRI), also an EI affiliate, has long embraced social media, and especially Facebook. In addition, its president had established a dedicated WhatsApp channel where she can be contacted directly by members. Managing this channel allows her to gain insight into members' struggles, which she then communicates through PGRI's other digital channels. As elsewhere, however, the pandemic forced the union to shift many of its internal processes, including many meetings, online. For the top leadership, this constituted an opportunity to rapidly progress the digitalization process. As PGRI's vice president told us, "Whether they like it or not, our grassroots leaders have had to get used to technology. The organization is now turning into a digital organization."

As part of this push, PGRI rolled out a whole suite of additional digital tools to help it engage better with its members. One key initiative involved a partnership with Microsoft and a local university to run a webinar-based professional development programme that was

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<sup>1</sup> This section draws on research commissioned by Educational International (Ford and Ward 2021b). Quotations used in this section are drawn from interviews and focus group discussions conducted for this research projects in October and November 2020.

delivered both in real time and asynchronously on topics ranging from online assessments to students' use of mobile phones for educational purposes. By mid-October 2020, these materials had been accessed by over 500,000 individual users. PGRI also rolled out a smartphone app called "Helping Teachers" (Bantu Guru). The app, which was developed by a branch official in Riau Province, provides access to a range of services including professional development and requests for industrial support, but also incidental consumer benefits including discounts on goods and services, as well as a toll payment facility. This embrace of digital technology during the pandemic increased not only the frequency of information exchange between unions and members, but also deepened opportunities for meaningful member engagement.

### Opportunities moving forward

Unions' responses to the COVID-19 pandemic in a region characterized by limited industrial relations mechanisms and hostility from government and employers towards independent labour movement actors have revealed the extent to which strategic agency can be exercised even in very challenging circumstances. Not all South-East Asian unions found ways to respond to the pandemic. However, as the discussion above has demonstrated, there are examples from across the region where unions managed to leverage the opportunity structures available to them in order to do so.

The pandemic also confirmed the importance of addressing a number of aspects of union operations that limit their capacity to safeguard their members' interests. Among these are the challenges unions face in convincing governments to consider workers when determining public policy; in maintaining membership at a time of mass job losses; and in ensuring that their internal operations and governance structures work in such a way as to facilitate quick and effective responses to unexpected problems – like those that emerged in the context of the pandemic – but also longer-term, more structural challenges.

While some unions had considerable success in influencing workplace-level practice around COVID-19, the pandemic also revealed the inherent limitations on their capacity to influence government policy, with many examples emerging where unions' pleas for government to safeguard job security and workers' health fell on deaf ears. On the one hand, this outcome was not surprising given the pressure on governments to protect their economies from collapse in the face of the pandemic; on the other hand, it was undoubtedly also a consequence of unions' low levels of embeddedness, as independent actors, in these countries.

A second weakness confirmed by the pandemic was unions' vulnerability to changing economic conditions, and in particular, pressures on formal sector employment. The pandemic saw mass lay-offs across the region, further reducing opportunities for formal sector employment in countries where it was already relatively low. And, while some unions succeeded in protecting "core" workers, their inability – and, in some cases, unwillingness –

to support non-permanent employees was only too evident. This was perhaps most obvious in cases like that of the United Workers of Petroleum Industry in Singapore, which was all too happy to sacrifice migrant workers' jobs to secure those of its core members (IndustriALL 2021). In other examples, local workers employed on a contract basis, or under outsourcing arrangements, were readily sacrificed to maintain positions for permanent workers. While this strategy makes short-term sense, it reflects a longer-term threat to unions' bargaining strength as the proportion of workers employed on a permanent basis continues to shrink.

The third major weakness confirmed by the pandemic pertains to the representativeness and efficiency of unions' internal operations and governance structures. In many cases, unions' slow responses to COVID-19 reflected a level of internal resourcing that hindered their capacity to make strategic and timely decisions. It is well-known that most unions in the region struggle to collect dues. In part, this reflects low levels of automation within the banking system, as well as the decreasing availability of employer-managed check-off systems in countries where these were formerly in place. In addition, dues are often set at very low levels, in some cases just a few US cents per month per member. In a world where unions require computers and other expensive assets to run effectively, the lack of strong internal financial flows is a major inhibitor to effective operations. What is more, it means that many unions cannot afford to employ basic professional staff, let alone researchers and strategists able to provide evidence-based advice to elected officials.

Union governance structures themselves can also constitute a barrier. In many cases, a lack of engagement with the base means that officials have little understanding of member perspectives. This can also result in a lack of diversity and representativeness within unions' governance structures. The limits of top-down approaches that are not informed by member perspectives become all too apparent during times of crisis, when unions may struggle to mobilize a membership that understands their union as a service provider rather than an organization driven by member participation. And while the COVID-19 pandemic has presented unions with an opportunity to engage and involve its membership in new ways, there is still much to be done in this respect if unions are to position themselves as a key player in a post-pandemic world.

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# Gender inequality during the pandemic: Perspectives of women workers in Latin America and the Caribbean

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The Latin America–Caribbean region is fragmented by extreme and persistent inequalities. One of the most deeply rooted is that between men and women, whose structural causes are related to factors originating in patriarchal relationships and the different roles assigned to men and women, which leave women more vulnerable. Acknowledging and resolutely addressing these causes is essential for adequately responding to the complex challenges posed by the historical legacy and the cumulative effects of the COVID-19 pandemic. Public policy must play a critical role in contending with sources of inequality, especially those associated with the distinct ways in which men and women are impacted, by considering gender responsiveness as an element of analysis.<sup>1</sup>

This article seeks to inform the debate on the unequal impact that the pandemic has had on men and women in the Latin America–Caribbean region due to the gender divide. It includes valuable contributions made by both women workers active in various labour sectors, and trade union representatives, from 13 countries via an online survey conducted in March 2021.<sup>2</sup>

After examining the background to the persistent gender inequalities in the region, the article focuses on the impact of the COVID-19 pandemic on women’s working conditions, their increased burden of unpaid care work, the increase in violence and harassment targeting women, and the challenges and effects of teleworking. ILO priorities for furthering gender equality in general and for bringing gender issues to the fore during the pandemic are then examined, including the challenges for the trade union movement. Proposals include the perspectives of women workers in the region as well as recommendations addressed to the tripartite actors – governments, as well as employer and worker organizations. Our aim is to help to orient the debate within the trade union movement, to serve as a reference during negotiations with employers, and to help shape government policy on these issues.

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<sup>1</sup> The gender analysis to which this article refers is limited to the binary construct of male and female; it does not account for all the forms the social construction of gender may take.

<sup>2</sup> Bolivia (Plurinational State of), Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Honduras, Mexico, Panama, Paraguay, Peru, and Venezuela (Bolivarian Republic of). We wish to extend our gratitude to the participants in the survey.



## Background

One of the largest gender gaps concerns unpaid domestic work: “Worldwide, women spend over twice as many hours as men doing unpaid work, limiting the possibilities of paid employment” (Durán Heras 2012). Cultural prescriptions and role distributions have led to women and girls shouldering a heavier burden of paid or unpaid care work. As a result, they are a key component of communities’ response to the pandemic and its ill effects. Whether in the formal or informal economy, the greatest responsibility falls on women. Globally, without exception, time spent by women on domestic activities and care work is estimated to be three times that of men, accounting for 76.2 per cent of the total hours spent by both sexes (ILO 2018a).

According to the United Nations (UN), the impacts of the pandemic may reverse gains that have advanced gender equality and obstruct efforts to achieve Goal 5 of the 2030 Agenda for Sustainable Development, making it harder to close gender gaps and worsening the situation in various countries.

Data from the Gender Equality Observatory for Latin America and the Caribbean of the Economic Commission for Latin America and the Caribbean (ECLAC) show that in that region, even before the pandemic: (a) one in three women had no income, as opposed to one in ten men; (b) women were doing 70 per cent of all unpaid domestic work; and (c) 24 per cent of women were occupied exclusively with (unpaid) domestic work, whereas less than 1 per cent of men were in the same situation. Lockdowns have only increased this burden on women, resulting in less time spent on self-care and more on mental health issues. They have also hindered professional development and increased the risk of labour exclusion (Fernández-Luis et al. 2020).

The existence of a clear imbalance in the distribution of leadership roles in response to the pandemic is alarming. Women are finding themselves relegated to the front lines of care work provision and are primarily active in the most economically vulnerable sectors – including commerce, tourism, and hospitality, as well as healthcare institutions – but they hold disproportionately fewer decision-making positions, whether in hospitals or government bodies. For example, only 25 per cent of the highest positions in the Latin American healthcare sector are occupied by women (UN Women 2020a). World Health Organization (WHO) data indicate that women make up only 24 per cent of the Emergency Committee on COVID-19.

In the political sphere, there is currently no woman president of a Latin American nation. Relying on 2020 data from the Inter-Parliamentary Union (IPU), UN Women (2021a) has calculated that, on average, stateswomen account for only 33 per cent of parliamentary membership in the region.

*The Review and Appraisal of the Implementation of the Beijing Declaration and Platform for Action and the Outcomes of the Twenty-Third Special Session of the General Assembly* (UN 2020a)

stated that another 47 million women and girls would fall into extreme poverty due to the pandemic, bringing the total up to 435 million. The consequences of the pandemic thus threaten to reverse decades of progress and many hard-won victories (UN Women 2020b).

### Impact of the pandemic on women's working conditions

According to the ILO report *Labour Overview* on Latin America and the Caribbean (ILO 2020a) women are most often employed in segregated, inferior and more precarious labour markets, diminishing the economic resources they need to face the current crisis. This precariousness has increased during the COVID-19 pandemic, resulting in the loss of jobs and social protection. The decrease in labour force participation was proportionately greater for women (-10.4 per cent) than for men (-7.4 per cent). Women working in those sectors marked by decreased job security are thus left in an especially vulnerable situation.

In the current crisis, unlike previous ones, women's jobs are disproportionately more threatened than those of men. A recent ECLAC report (2021a) warns that the crisis fomented by the COVID-19 pandemic has harmed the employment and working conditions of women in Latin America and the Caribbean, undoing more than a decade of progress in matters of labour. It states that, in 2020, the rate of female participation in the labour force stood at 46 per cent, versus 69 per cent for men. (The 2019 rates were 52 and 73.6 per cent respectively.) Furthermore, according to ECLAC calculations, the female unemployment rate reached 12 per cent in 2020. This rate rises to 22.2 per cent if we assume the same labour force participation rate as in 2019. The report also highlighted a major exodus of women from the labour force, the need to attend to care work in their homes preventing them from resuming their employment searches. A participant in our survey noted:

In my family life, it affected our health: we were all positive for COVID-19. It had a professional impact too: without income, our savings were depleted. There is no job security now. So many years of service to one company, and at any moment I can find myself without work – despite 20 years of service ... For the most part I and other women in my country have been affected because we work in the service industry, commerce, and education. We've taken on more care work, and more informal work. (Panama)

The division of labour along gender lines has also increased women's exposure to the virus. Data from the Pan American Health Organization (PAHO 2020) indicate that 75 per cent of infected healthcare workers are women. Many of these women say that the lack of suitable protocols and adequate personal protective equipment was responsible for their infection with the virus, which they later transmitted to family members. Women make up a large share of the frontline workers responding to the COVID-19 health crisis, especially in the healthcare and social work sectors. Many are struggling with professional demands and a greater unpaid workload, finding it difficult to reconcile paid work and family responsibilities (ILO 2020b). The so-called "new normal" has brought with it major changes in modes of schooling and work, as public infrastructures are not compatible with needs for social distancing (UN Women and ECLAC 2020). It is therefore not surprising that socio-economic

analyses reveal a greater loss of income and employment among women, along with more precarious informal employment. This has a direct impact on women's work, employment and income, as one female worker explains:

Everything is in chaos: less income, lack of medical care, and kids without schooling or childcare, but we still have to go to work. I work in the health sector, so I got sick with COVID and contaminated various members of my family. Many more women than men have found themselves without work, because when it comes to choosing who stays at home, it's women who stay, and then they are fired for not showing up at work. (Paraguay)

Women work not only in the health sector, but also in childcare at nurseries, adult care at nursing homes, social services, cleaning and private homes (paid domestic work), among other settings. Viral exposure is elevated in these lines of work due to the social contact they entail, as has been indicated by the European Institute for Gender Equality (EIGE n.d.).

Worthy of special mention are women doing domestic or care work or working in the informal economy, who face losing their jobs in conditions that doom them to poverty. Between 11 and 18 million people in the region (ECLAC 2019; ILO 2016) are paid domestic workers, 93 per cent of whom are women. Incomes in this sector are the lowest in the economy. These jobs often lack social recognition and offer little to no protection. The ILO (2020a) reports that 70.4 per cent of women domestic workers are affected by lockdown measures due to diminished economic activity, unemployment, lost hours and pay cuts, as described in the following testimony:

When it comes to labour, the government and employers took advantage of the pandemic to pass the Ley Humanitaria [Humanitarian support law] which serves business owners and not the working class. This law has resulted in thousands of mass lay-offs of women employed as domestic workers. Monthly salaries were reduced to \$220 for women who have employment contracts. Those without a contract have had their salaries lowered to between \$100 and \$150, whereas the market basket is around \$716.14, meaning that the level of poverty has risen in our sector and for all Ecuadorians. (Ecuador)

This is in part due to the precarious nature of paid domestic work, which is characterized by low wages and lack of welfare assistance to help these workers make ends meet and support their families in the event of lay-offs or reduced incomes (UN Women 2020c). In addition, women workers in this field face the double risk of infection, if they continue working, and poverty, if they stop. Hence the crisis has gravely affected the well-being and economic security of female migrant domestic and care workers.

They let me go because of the virus. I had fewer hours cleaning as a live-out domestic worker. Now I'm trying to sell odds and ends. Sometimes they call me for a little bit of cleaning work. Now they don't want to give me a contract because there's no money. They are looking for live-in workers, but that doesn't suit us now. Furthermore, when we're old, we're not as reactive as younger people any more. My health was fragile, but social security doesn't cover the other medicine: social security just takes care of basic medicine. Last year we didn't know what to do: sister workers became seriously ill. As we were unemployed, we had nothing to pay with. (Bolivia)

In nearly 75 per cent of Latin American countries, according to the ILO (2016, 2018b), women are more exposed than men to informal employment. A report by UN Women (2015) indicated that women in the informal economy often lack social protection and work daily for low wages in unsafe conditions, which includes the risk of sexual harassment. The latest publication by Women in Informal Employment: Globalizing and Organizing (WIEGO) (Ogando, Rogan, and Moussié 2021) states that female informal workers in 2020 took on more responsibility tending to domestic needs and caring for children and sick or elderly family members in their own homes, which meant fewer days of work outside the home, reducing their purchasing power relative to other informal workers. The coping strategies they have adopted are consuming their resources, deepening intergenerational poverty and narrowing their horizons. The authors of the publication note that the greatest gender imbalance is seen among street vendors, 80 per cent of whom are women.

### Increased burden of unpaid care work

Growing care work requirements and a shrinking range of services, as a result of lockdown and social distancing measures adopted to contain the health crisis, have worsened the situation of women. For example, school closings and the neglect of care and education needs by public institutions in the region have translated into shorter formal working days for women. Domestic and care workloads have often grown, and have primarily been shouldered by women.

The situation is all the more serious for women who are heads of households, unemployed, or dependent on precarious employment. The lockdown has lessened the support many households received for tending to care work – through hiring of domestic workers, reliance on public care services, or assistance from neighbours and family members – thus increasing the number of hours spent at home caring for young and elderly individuals with some level of dependency or disability, or completing domestic tasks (Bergallo et al. 2021). This has led to overwork and has impacted health and emotional well-being, as woman workers recount:

I have seen the effects mirrored in my health and emotions, as I had to take on housework and childcare tasks while also meeting the responsibilities of my job and postgraduate studies. Struggling with all of this has left me feeling more tired than normal, as if I were on autopilot. I've had to turn to my family for help. (Peru)

Confinement affects you psychologically. (Chile)

Working class women keep on dying. (Brazil)

### Increase in violence and harassment targeting women

One of the most devastating consequences of lockdowns has been the increase in the number and severity of episodes of sexual, physical and psychological violence, which was already widespread in Latin America. A report by the UN Development Programme (UNDP

2020) based on data for 2019 and 2020 indicates that gender and domestic violence in the region has risen during the pandemic. Isolation has reduced the ability to obtain protection. This process has been shaped by reduced contact with extended family and other contacts outside the home, more hours spent with abusers, and tension within households born of their deteriorating socio-economic situations.

Another element that should not be overlooked is workplace violence and harassment faced by healthcare workers, the majority of whom are women. The ILO's COVID-19 Observatory "COVID-19 and the World of Work" (see ILO n.d.) describes different dimensions of the discrimination, violence and vulnerability observably threatening women in various countries and production sectors, such as the Asian garment industry. The ILO Bureau for Workers' Activities (ACTRAV) has drafted emergency recommendations for protecting women from increased workplace harassment and violence due to the COVID-19 crisis (ILO 2020c).

### Challenges and effects of teleworking

Many companies have imposed teleworking rather than on-the-job presence, without establishing rules or satisfactory conditions for this mode of work. As a result, actual teleworking conditions have increased workloads for women, as described by one worker:

It has turned everything upside down, because now I do everything at home: I'm on call 24 hours a day for household tasks, but at the same time fulfil my professional and union obligations from my home, by telecommuting, leaving less time to spend with the family. So it means doing everything at the same time. (Mexico)

In the face of this reality, an especially worrisome aspect is the digital divide between men and woman. Only 45 per cent of women worldwide have internet access, and most cell phones are in men's hands. In Latin America, 40 million homes are not connected to the internet, and while women have more opportunities for teleworking than men, lack of connectivity doesn't allow it (UN Women 2021b). This is also described by female trade unionists:

We rural women trade unionists have been limited when it comes to use of technology. Not having modern cell phones or Internet has hindered our professional and trade union activities. (Peru)

Finally, it is important to point out that the consequences of the coronavirus pandemic have not been neutral, impacting men and women in trade unions differently. The crisis provoked by the irruption of COVID-19 has only intensified gender inequality already present in these organizations, since women trade unionists have been forced to bear greater loads in their triple roles as homemakers, workers and union members, which has sometimes eroded their physical and mental health:

In home life, a lot of stress; in work life, too much physical and mental fatigue, and a little bit of frustration and anxiety. In union life as well, some physical and mental fatigue. (Costa Rica)

Work piling up: more hours, more stress. (Peru)

The lockdown made it impossible for me to effectively honour my commitments within my organization's Office of Education. (Paraguay)

With regard to trade union matters, many processes previously initiated with the executive organs and the constituencies have been delayed. (Honduras)

In general, one can see how the pandemic has exposed the serious difficulties, risks, and tensions that woman trade unionists face due to increasing volumes of care work.

### **ILO priorities for furthering gender equality and placing gender issues at the centre of attention during the pandemic**

The clear vision of the ILO's Centenary Declaration for the Future of Work (2019) gives gender responsiveness a concrete historical projection. The Declaration looks at the deep transformation the world of work is experiencing and states that efforts must be focused on:

achieving gender equality at work through a transformative agenda, with regular evaluation of progress made, which:

- ensures equal opportunities, equal participation and equal treatment, including equal remuneration for women and men for work of equal value;
- enables a more balanced sharing of family responsibilities;
- provides scope for achieving better work-life balance by enabling workers and employers to agree on solutions, including on working time, that consider their respective needs and benefits; and
- promotes investment in the care economy. (II.A.vii)

Accordingly, recovery measures must be gender-responsive, taking into account the diverse realities shaping the region. Thus, urgent action needs to be taken to tackle the social and economic consequences of the COVID-19 pandemic, acknowledging the fundamental importance of sound health and care work for our well-being, and to safeguard human existence. This is all the more so if we consider that care work, as Gálvez Muñoz (2016) writes, "is recognized as a human activity that is also economic in nature, insofar as it entails the use of scarce material and non-material resources, energy, and time, with evident direct and indirect costs, and the performance of real work that meets basic human needs. Care work is also recognized and analysed as a specific, fundamental element [bearing on] social problems, economic policies, and economic analysis itself."

As demonstrated in previous sections of this article, the pandemic has affected women and men in dissimilar ways and compromised gender equality. It therefore demands comprehensive, inclusive responses that, on the one hand, meet the needs of women and, on the other, integrate gender responsiveness into all aspects of how the crisis is being handled. In this regard, the UN Secretary-General has stated that "gender equality and women's rights are essential to getting through this pandemic together, to recovering faster, and to building a better future for everyone" (UN 2020b).

## Challenges for the trade union movement

Confronted with the combination of negative impacts described above, trade unions, which represent the interests of the world of labour, face the major challenge of bolstering their capacity to organize and collectively represent an increasingly more diverse group of workers.

There is a need for innovative measures directed towards achieving gender equality in trade unions, labour systems and society, boosting the capacity to integrate new groups of workers. Here it is important to spotlight the Joint Statement by the International Trade Union Confederation (ITUC), the UNI Global Union, Public Services International, Education International, the International Domestic Workers Federation, and WIEGO, who “demand government action to build more inclusive, accessible, resilient, and caring economies” (ITUC et al. 2020).

On the continental scale, the Trade Union Confederation of Workers of the Americas (CSA) has established its position and priorities vis-à-vis the pandemic and points out, among other key points, that “informal workers are present in various sectors of activity: platform economy, domestic work and care economy, [street vending], retail, [and] self-employ[ment], among others”. It calls for extending coverage to workers in informal and precarious settings for “policies and benefits that already exist or that are implemented during the period of the pandemic ... This includes special subsidies, extension of social security and social protection (distributive and non-contributory policies), reduction and/ or freezing of [fees] for basic services and access to hygiene and food products” (CSA 2020).

Thus the orientation and commitment of the international trade union movement, and its resulting accomplishments in various countries, may be appreciated.

## Proposals reflecting women’s perspectives

In formulating any policy or action strategy that addresses inequalities and gender-based double standards in the commitments made to men and women within the current pandemic context, it is crucial to consider the proposals advanced by women themselves. Women have defined the following priorities and needs, informed by a concern for the preservation of human life:

### *On employment*

- ▶ Adoption of decent work policies
- ▶ Fair pay and clear minimum-wage policies
- ▶ Special guaranteed income and humanitarian aid programmes for women workers who are unemployed or have been laid off
- ▶ Living wages and minimum-wage protection policies

### ***On workers' rights***

- ▶ Resources for COVID-19 prevention, including appropriate and equitable vaccination programmes; treatment; and mitigation
- ▶ Equipment for hospitals and health centres, and vaccines for everybody
- ▶ Adherence to work schedules
- ▶ Respect for workers' rights in their entirety

### ***On social protection***

- ▶ Greater public and private investment in health and social security
- ▶ Effective workplace biosafety protocols and systems
- ▶ Public and institutional policies that protect the health of all women workers in occupational settings and communities
- ▶ Innovative social protection policies that address psychosocial risks and care work

### ***On social dialogue***

- ▶ Social dialogue to promote socio-economic policies that guarantee the health and quality of life of the population

### ***On care work***

- ▶ Focus on care work in the COVID-19 crisis response
- ▶ (For governments:) Promotion of a plan of social and economic development to foster conditions for living in dignity, with decent work
- ▶ (For employers:) More humane working conditions, greater investment in technology, decent work, training, and respect for workers' rights
- ▶ Strengthening of trade union capacities and structures to protect rights and promote decent work

## **Direct demands and requests addressed to tripartite actors**

The female trade unionists interviewed in preparation for this article adamantly asserted the need to:

- (a) respect biosafety protocols, in light of the obligation to work, and reinforce institutional measures addressing employment, health, education and housing, and combat corruption;
- (b) communicate broadly and transparently on the pandemic to build people's trust; and
- (c) provide workers in the informal economy with more financial and medical assistance, and offer effective vaccines.



With these aims in view, they present the following recommendations and concrete demands to each of the tripartite actors:

### ***For governments***

- ▶ Put people's health before economic interests, and allocate resources to COVID treatment and vaccination. (Mexico, Peru, Brazil)
- ▶ Ensure better, more effective distribution of vaccines. (Peru)
- ▶ Communicate openly, on a daily basis, about the impact of COVID-19 on the population, and dispel all doubts about vaccines. (Venezuela, Dominican Republic)
- ▶ Implement public policies that protect workers' health, provide for universal social protection, and strengthen health centres. (Peru)
- ▶ Jump-start economics with a human face. (Bolivia)
- ▶ Launch an effective plan for social and economic development to foster dignified living conditions. (Panama)
- ▶ Do not allow emergency legislation aimed at containing the crisis to harm the working class. (Peru)
- ▶ Audit the government and public policies for economic recovery to ensure respect for human rights. (Peru)
- ▶ In transitioning out of the crisis, embrace fairness and equity, without compromising economic and social ideals. (Dominican Republic)
- ▶ Uphold social dialogue and a commitment to tripartism. (Costa Rica, Venezuela)
- ▶ Widen access to social security. (Paraguay)
- ▶ Ratify and enforce the ILO Workers with Family Responsibilities Convention, 1981 (No. 156); Maternity Protection Convention, 2000 (No. 183); Domestic Workers Convention, 2011 (No. 189); and the Violence and Harassment Convention, 2019 (No. 190). (Costa Rica, Venezuela)
- ▶ Elaborate programmes and policies to eradicate workplace discrimination and gender-based violence. (Costa Rica)
- ▶ Provide greater support for the transition from the informal to the formal economy. (Honduras, Mexico, Peru)
- ▶ Recognize that female domestic workers have the same rights as others. (Panama, Colombia)

### ***For employers***

- ▶ Promote more humane working conditions and labour relations, as people need sound health as well as work. (Paraguay, Peru)
- ▶ Invest in decent work, technology and training to close digital divides and offer equal opportunities. (Brazil)

- ▶ Guarantee better vaccine distribution in institutions run by public or private partners. (Peru)
- ▶ Prioritize workers' health, safety and income sources, because work is not a commodity. (Peru)
- ▶ Collaborate with governments to support small and large initiatives and get out of this situation. (Bolivia)
- ▶ Do not take advantage of people's vital needs, but through tripartite and bipartite dialogue and collective bargaining, agree on measures to preserve businesses and employment, with policies that allow a balance to be struck, for mutual benefit. (Ecuador)
- ▶ Provide more opportunities for work, employability and entrepreneurship for women. (Peru)
- ▶ Enhance socially responsible programmes – not as philanthropy, but from the angle of the ILO, focused on promoting responsible company behaviour respectful of human rights – to meet the crisis head on and contribute to workplace stability. (Paraguay)
- ▶ Transform business as usual, fearlessly launching and investing in initiatives to reap economic and social profits. (Peru)
- ▶ Adopt gender-responsive mechanisms to stem violence and harassment targeting women in the workplace. (Venezuela)
- ▶ Comply with labour law and respect rights, including initiatives to eradicate gender-based violence and discrimination. (Ecuador, Panama)

### ***For trade unions***

In spite of the severe restrictions affecting women workers and trade unionists in the region, they have demonstrated the ability to conduct an array of activities from within their organizations. Perseverance in pursuing the following lines of action is critical if they are to provide adequate responses to the effects of the pandemic crisis:

- ▶ Propose comprehensive reform of the social security system, including domestic, informal and migrant workers in social programmes; and regulate teleworking, taking care work into account. (Dominican Republic)
- ▶ Support sick trade union members. (Dominican Republic)
- ▶ Ensure that workers have both biosafety equipment and access to isolation areas, and can alternate periods of rest through staggered work schedules; and assist those who have contracted the illness and the families of those who pass away. (Paraguay)
- ▶ Continue to inform constituencies about social and labour developments in the country, and train them in standards of biosafety with technological support. (Panama)
- ▶ Continually advise and defend workers' rights in labour courts. (Panama)
- ▶ Take action against gender violence and discrimination. (Venezuela)

- ▶ Campaign for the ratification of the ILO Violence and Harassment Convention, 2019 (No. 190). (Costa Rica)
- ▶ Ensure capacity building and empowerment for other labour issues (new initiatives that springboard from training for trade union members equipping them to deal with new labour market strategies). (Honduras)
- ▶ Offer guidance for employees of online businesses; form alliances with governmental and non-governmental entities to obtain more support for trade union members; and secure technical support through international cooperation. (Honduras)
- ▶ Support women by sharing expertise and advice on personal and professional matters. (Costa Rica)
- ▶ Offer capacity-building courses on COVID-19, and foster growth and personal empowerment. (Peru)
- ▶ Ensure that legal support and health advice are available to network service professionals who are working outside or responsible for maintenance, customer service, or technical support for landlines and cell phones. (Brazil)
- ▶ Draft and adopt agreements to: (a) maintain workers at home until pandemic conditions are safe enough for a return to the workplace; and (b) establish procedures for that return. (Mexico)
- ▶ Identify discrimination against migrant workers, and keep going after companies that exploit them and leave them to die of hunger. (Costa Rica)
- ▶ Address current situations in which, nothing having come of documents that have been drafted, statements of protest, and proposals for social dialogue, the State has only favoured business recovery, putting it before health. (Peru)
- ▶ Come to the aid, and acknowledge the expertise, of domestic workers' organizations, which have acted in solidarity to provide support, notably by:
  - attending to the mental health of women members, ensuring they are eating well, attempting to minimize the damage done by the pandemic, pursuing the dialogue with authorities and employers, and persevering in the struggle; (Ecuador)
  - offering food baskets and community meals for trade unionists; (Paraguay)
  - training women workers in the use of the Zoom videoconferencing platform and building their capacities; and pursuing the project with the Pan American Health Organization for the benefit of all women trade unionists, to guarantee workplace health and safety; (Panama)
  - taking to the streets to protest government orders that harm the whole working class; and distributing food baskets, face masks and money vouchers donated by a non-governmental organization. (Ecuador)

## Conclusions

COVID-19 knows no borders: everyone is at risk and many have been affected. However, in all countries, it is women who have suffered most. Therefore, the war against this pandemic must acknowledge gender inequalities and divides, which have made women into essential instruments for containment, mitigation, care, recovery and resilience. Policies and strategies that are proposed and implemented must take these considerations into account in order to tackle the health crisis, promote recovery and resilience in the short term, and make societies sustainable in the future.

Gender responsiveness must be integral to the recovery of the economy, businesses and employment. This crisis offers a clear reminder that the world needs more international solidarity and active roles for government and the public sector, which cannot be minimized or revoked. A clear, comprehensive, tripartite commitment must be encouraged in constructing the new normal, one that answers the calls of women workers by adopting policies that seek to lessen and eradicate the inequalities of which they are victim, in order to contain the spread of the virus and its consequences.

Immediate priorities to consider during this crisis impacting countries and the world include:

- ▶ recognition of unpaid care work, tapping into its potential to create decent work opportunities, improving working conditions, and recognizing that domestic workers are entitled to the same rights as others;
- ▶ reduction and fair distribution of unpaid care work between the men and women of households, the government, businesses, and the community;
- ▶ greater coverage and effectiveness of social security for women, especially domestic and informal workers;
- ▶ granting of maternity, paternity, and other parental leave; and
- ▶ promotion of fairer legislation furthering the economic empowerment of women.

Care work must be recognized as a radically political act in times of harsh living and lockdowns. By encouraging sustained debate and discussion on these themes within trade union institutions, we offer a crucial alternative. This is especially clear when we acknowledge that the exercise of transformative leadership by women trade unionists is greatly dependent on their sound physical and emotional health, and on their autonomy in meeting care work demands and contributing to the fulfilment of the 2030 Agenda for Sustainable Development, especially Sustainable Development Goals 5 and 8.

To these ends, we consider it appropriate to spotlight best practices among trade unions. In concluding this article, we would therefore like to draw attention to an initiative of the Costa Rican Rerum Novarum Workers' Confederation (CTRN), which launched an online training course on female leadership and self-care in times of crisis, aimed at women members of CTRN women's affairs offices and associated women directors. In their preliminary evaluations, participants expressed their satisfaction with the structure and delivery of the course.

There were also online conferences on the relevance and application of the ILO's Violence and Harassment Convention (No. 190), 2019, and Recommendation (No. 206), within the scope of the pandemic response and recovery. The second conference presented the findings of the online survey on workplace violence and harassment, in which male and female members of the confederation were invited to participate. They will be used to support the CTRN action plan pushing for ratification of the aforementioned Convention (No. 190). Both events were held under the auspices of the ILO Office in Costa Rica, with the support of the ILO Bureau for Workers' Activities (ACTRAV) in Geneva. Together with other similar practices, this is an approach that merits further development, to be repeated in other countries after adaptation to national contexts.

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# Digitalize, adapt and innovate: Challenges and opportunities for trade unions amidst the COVID-19 pandemic and the recovery period

***Mohammed Mwamadzingo***

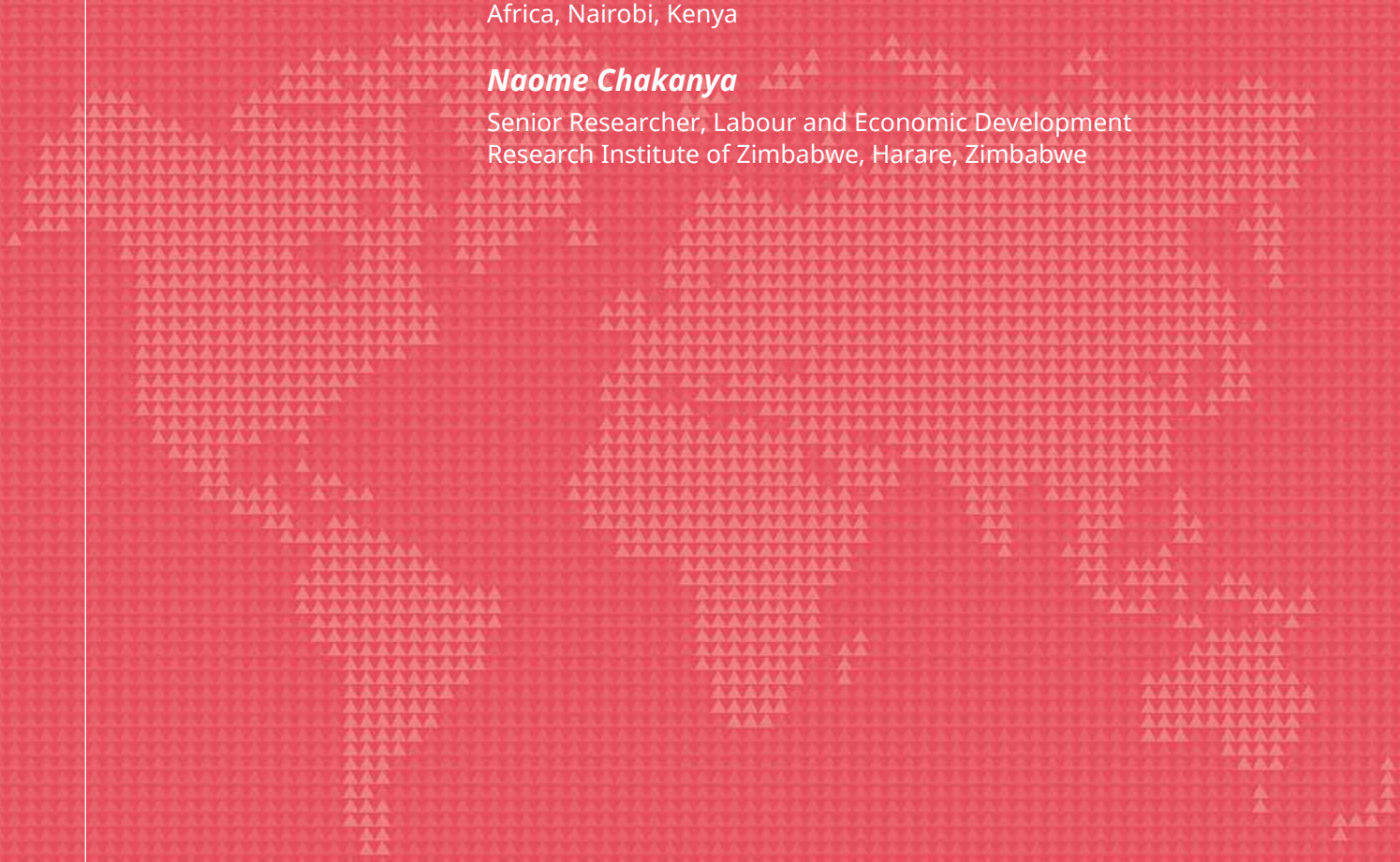
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## Introduction

The adoption of digital technologies in the workplace, the economy and social spheres took centre space following the outbreak of COVID-19 and the associated changes in the world of work characterized by teleworking, social distancing and COVID-19 health protocols. New ways of doing business were necessary to control the spread and impact of COVID-19. This situation was also particularly applicable to workers and their organizations: the internet and systems that were accessible online became pivotal to the daily functions of trade unions.

The new forms of working did not start with COVID-19. Terminologies such as “telecommuting” or “teleworking” were coined in the early 1970s by Jack Nilles, popularly known within technology circles as the father of telecommuting, to respectively mean using technology in place of commuting to work and using technology in place of travel (Nilles 1975). The two terms are gradually being replaced by similar-meaning terms such as “remote work”, “distributed work”, “work shifting”, “smart working”, “mobile working”, “work-from-home”, and “work-away-from-office”.

A recent survey established that 56 per cent of employees had jobs that could partly be done remotely, while workers’ desks were repeatedly reported to be empty between 50 and 60 per cent of the time (Global Workplace Analytics 2020). However, there is less literature available on how workers’ organizations harness digital technologies in their daily operations of recruitment, organizing, research, collective bargaining and social dialogue, education and training, mobilization of workers, advocacy and engagement, given that before COVID-19 most activities were predominantly face-to-face.

Moreover, digitalization is challenging trade unions to rethink how they do business, how they can adapt, and also whether “digital or online trade unionism” should be the new normal. The increased access to social media both in and out of the workplace means that employers and trade unions can no longer afford to ignore this growing phenomenon or treat it as a side issue (ACAS 2011). More important is how to maintain the culture of incremental changes in the form of making improvements or additions to trade union processes while at the same time maintaining the organizations’ core principles and values of promoting and defending workers’ rights.

It is in this context that this article discusses digitalization from a worker organization and core trade union perspective. The article also explores the emerging challenges: complexities that intersect with digital technology deficits at national level and growing informalization, gaps and opportunities for workers’ organizations as they embrace use of digital technologies at various levels of their operations. It makes recommendations on how to leverage digital technologies to mobilize workers as well as fight for, protect and promote their needs and interests. Overall, the article argues that whilst various challenges exist (both external and internal), the adoption of digital technologies by trade unions still provides huge opportunities and benefits that unions can leverage which might not have otherwise been realized through physical meetings, conferences and interactions.



## Conceptual framework of digitalization and trade union operations

According to the ILO's recent report *World Employment and Social Outlook 2021* (ILO 2021) there has been a five-fold increase in the last ten years of digital labour platforms transforming the world of work (the report defines digital platforms as online entities providing digital services and products). According to the report, digital labour platforms are providing new work opportunities, including for women, persons with disabilities, young people and those marginalized in traditional labour markets. This growth has underlined the need for international policy dialogue and regulatory cooperation in order to provide decent work opportunities and foster the growth of sustainable businesses more consistently.

The report's findings are based on surveys and interviews with some 12,000 workers and representatives of 85 businesses around the world in multiple sectors. It focuses on two main types of digital labour platform: online web-based platforms, where tasks are performed online and remotely by workers, and location-based platforms, where tasks are performed at a specified physical location by individuals, such as taxi drivers and delivery workers.

The challenges for platform workers relate to working conditions, the regularity of work and income, and the lack of access to social protection, freedom of association and collective bargaining rights. Working hours can often be long and unpredictable. Half of online platform workers earn less than US\$2 per hour. In addition, some platforms have significant gender pay gaps. The COVID-19 pandemic has further exposed many of these issues.

The new opportunities created by digital labour platforms are further blurring the previously clear distinction between employees and the self-employed. Working conditions are largely regulated by the platforms' terms of service agreements, which are often unilaterally determined. Algorithms are increasingly replacing humans in allocating and evaluating work, and administering and monitoring workers.

Digitalization is characterized by rapid technological and digital advancement through increased use of mobile communication and interconnectivity (Internet of Things – IoT), big data, artificial intelligence, robotics, autonomous vehicles, 3D printing, nano and biotechnology, and quantum computing, among others (ILO 2021). Whilst the subject of digital technologies is broad, this article explores three dimensions of digital technologies that intersect with the role of workers' organizations (figure 1).

▶ **Figure 1. Digital technologies intersecting with the role of trade unions**

Hard devices	Networking softwares	Informational softwares
<ul style="list-style-type: none"> <li>▶ Smart phones</li> <li>▶ Internet-connected gadgets (computers, laptops, tablets)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Social media (WhatsApp, Facebook, Twitter, Instagram, etc)</li> <li>▶ Web-based / virtual platforms for meetings, training, conferences, etc</li> <li>▶ Streaming technology</li> </ul>	<ul style="list-style-type: none"> <li>▶ Interactive websites</li> <li>▶ e-publications (e.g. e-books, e-learning packages)</li> </ul>

The Global Commission on the Future of Work (ILO 2019a) recognized the importance of harnessing and managing technology for decent work. It called for workers and managers to negotiate the design of work by adopting a “human-in-command” approach to artificial intelligence that ensures that the final decisions affecting work are taken by human beings. The report also recommended the establishment of an international governance system for digital labour platforms to require platforms to respect certain minimum rights and protections. To that effect, the Global Commission called for a “Universal Labour Guarantee” for all workers including fundamental workers’ rights, an “adequate living wage”, “limits on hours of work” and “ensuring safe and healthy workplaces”.

For its part, the ILO Centenary Declaration for the Future of Work (ILO 2019b) also reaffirmed the continued relevance of the employment relationship as a means of providing labour protection to workers. In a way, the Declaration recognized that new ways must be found to afford adequate protection to all workers, whether they are in full-time employment, executing micro-tasks online, engaged in home-based production for global supply chains or working on a temporary contract.

These transformations in the world of work can result in situations of employment misclassification that lead to the erosion of the employment relationship, and new forms of work that do not always afford adequate labour protection. This affects above all workers in diverse forms of work arrangement such as temporary labour or dependent self-employment, and workers in new forms of work associated with digital transformation. These developments threaten the traditional model of industrial relations and will be a particular challenge for trade unions.

Workers’ organizations are demanding concrete steps on how to cope more effectively with the negative externalities of technological change while harnessing its potentials. Some trade unions are already advancing on these issues, for example around data protection and surveillance at the workplace as well as organizing in the platform economy, creating many good practices which could be exemplary for the labour movement as a whole. However, in many cases, these efforts are insular and do not lead to a more comprehensive response by the national and international labour movement.

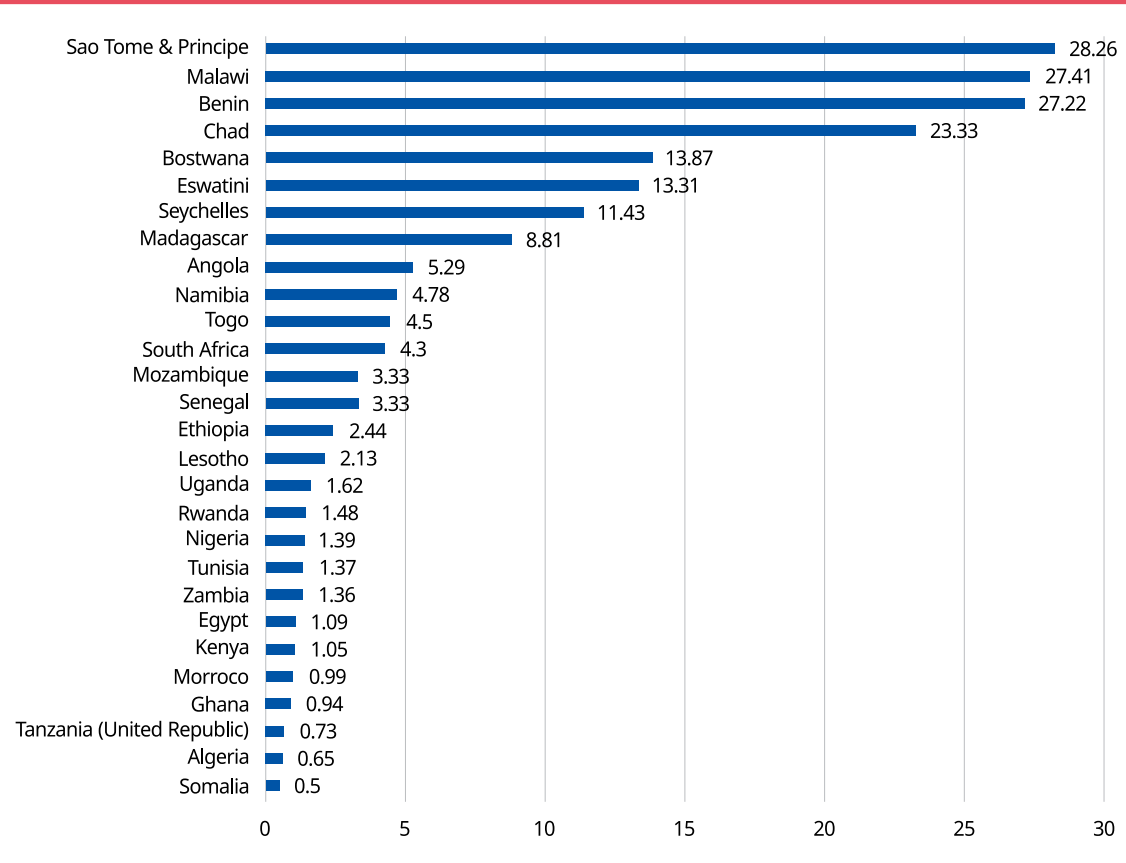
## Factors affecting the adoption of digital technologies by trade unions

Before COVID-19, most trade unions (particularly those from the 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 the outbreak of COVID-19, digitalization has increased significantly in scale, speed and complexity and is fast-changing, putting pressure on trade unions to use digital technologies to shape their way of operating, advance membership servicing and strengthen advocacy and engagement with other national stakeholders.

However, the digital economy faces a number of challenges, which tend to limit optimum harnessing of digital technologies and internet for trade union advantage, even though they may recognize and appreciate the necessity of leveraging these technologies.

**High internet data cost and the unaffordability challenge:** High costs for mobile data in developing countries are driven by the lack of infrastructure, the high level of taxation in the mobile sector and low competition in the sector. Figure 2 shows the cost of a gigabyte in selected African countries.

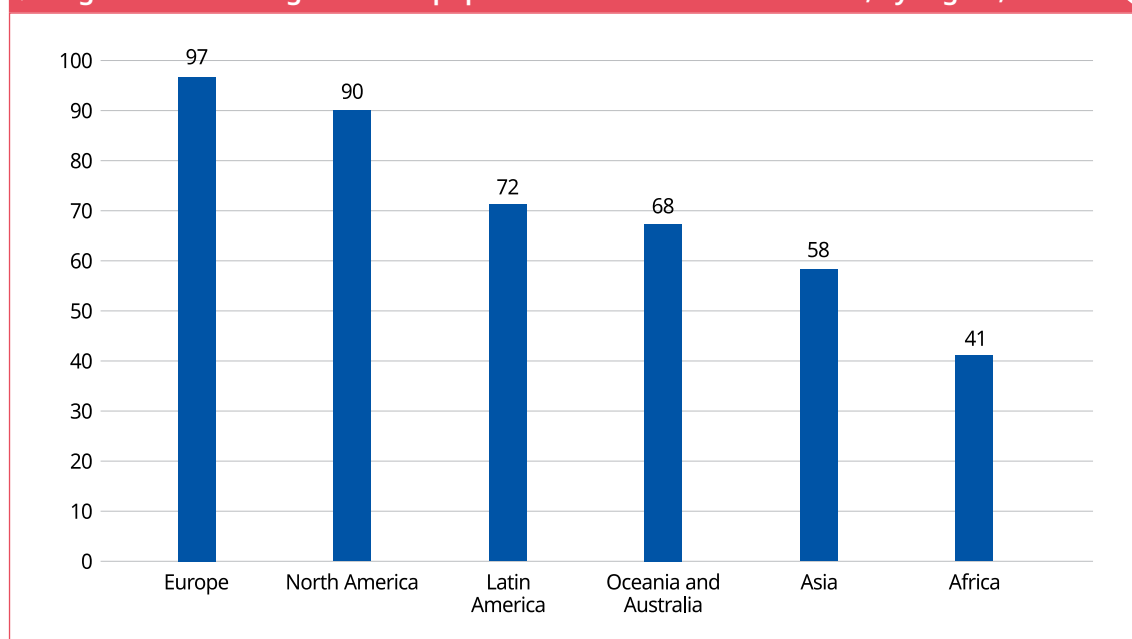
► Figure 2. Average price for 1GB of mobile data in selected African countries, 2020 (in US\$)



Source: Faria 2021.

Figure 2 illustrates that in the majority of African countries the cost of a gigabyte is more than US\$1, which is expensive for the majority of workers, especially those operating in the informal economy where incomes are low and unstable. Even for workers in the formal economy, the low wages make internet data and smart gadgets expensive, leaving some workers having to decide between internet and other equally important family welfare issues (food, rent and school fees). The situation has been made worse by the COVID-19 pandemic and disruptions of jobs and incomes at a time when workers needed to be engaged more online than ever. Figure 3 depicts the share of internet users in Africa as the lowest (41 per cent) compared to other regions.

► Figure 3. Percentage share of population who are internet users, by region, 2020



Source: Statista 2020; Worldometer 2021.

**Connectivity challenge:** In June 2020, around 56 per cent of the population in sub-Saharan Africa lived within a range of 25 kilometres from fibre (Faria 2021). Limited internet infrastructure and perennial power cuts in some of the African countries also causes poor connectivity. Furthermore, the national lockdowns exposed the fact that trade union officials rely more on internet connection at offices than for their personal data. Thus, the closure of offices in the lockdown periods limited trade union officials from effectively connecting with membership online.

Below is a synopsis of some of the challenges of working from home, from a technology viewpoint:

- **Limited space:** following the closure of global functional systems, work, schooling, and vacation were all taken from homes. Unfortunately, not all workers have expansive enough residences to conveniently accommodate all the competing activities requiring concurrency. Limited space may contribute to sub-optimal delivery and performance.

- ▶ **Availability of internet facilities:** Not every home has business quality internet access. Even where there is internet access, it may not always be reliably available or always stable enough for non-disrupted connectivity.
- ▶ **Internet affordability:** The cost of internet bandwidth remains high in most parts of Africa; this makes effective remote collaboration challenging. Organizations that cannot afford good office space for their office-based staff may find it difficult to afford the internet capacity for desirable levels of work-from-home performance.
- ▶ **Privacy and data protection:** Since the primary method of communicating is purely through e-mail and online tools, the chances of succeeding in enforcing organizational data protection policies significantly diminish. In addition, being a potential avenue for data and privacy breaches may lead to legal suits and huge associated costs.
- ▶ **Exposure to hackers:** The use of mobile devices to connect to organizational information and work resources opens avenues of vulnerability that may be exploited for data breaches and hacks. While technology solutions to adequately protect online workers exist, the levels of investment required for effective protection of such remote workers may be beyond the reach of the less funded workers' organizations.
- ▶ **Regular communication:** Maintaining consistent and timely communication between workers' organizations and employers' and workers' representatives is an imperative for successful delivery of the mandate of workers' organizations. Working from home poses a challenge of coordination of teams while at the same time taking away the benefit of being able to read body language and tone – things that are important when communicating, more so when negotiating the rights of workers.
- ▶ **Employee performance:** Monitoring and tracking of performance of employees working remotely is a challenge. Employers may exploit this challenge to unfairly target certain individual employees. Neither workers' representatives nor workers' organizations have the data and/or evidence required to mount a solid challenge against any such unfair employers and unfair treatment of workers.
- ▶ **Team building:** Workers' organizations are grounded on togetherness, resounding team spirit and a sense of oneness. In an environment where individuals work away from the office, achieving the team spirit required of organized workforce could be a challenge. Workers' organizations are required to be innovative and adopt technologies and strategies to build the right culture and team spirit for successful delivery of services to their members.
- ▶ **Gender-based violence and inequalities:** Lockdowns have meant that family members who had previously hardly spent any significant part of the day together were suddenly compelled to live behind the same doors for months. Besides little-known incompatibilities emerging, locking people in homes was stressful for some couples to bear, especially with the rampant reductions in income that families experienced. And the fact that children had to adapt to online schooling meant that parents had to play teachers' roles – which to a great extent reduced the number of hours some

parents spent performing their office work. Reduced employee performance meant loss of promotion opportunities for the affected individuals – who tended to be primarily women or men with lesser incomes within family setups. ICT-enabled and empowered workers faced fewer challenges.

## **COVID-19 and digitalization: Challenges and gaps in trade union operations**

### ***Collective bargaining***

Collective bargaining is one of the core mandates of trade unions. Whilst it was already under threat before the outbreak of COVID-19 due to emerging forms of employment (precarious work) and declining trade union density, the outbreak of the pandemic worsened the situation.

A survey by the Southern Africa Coordination Council (SATUCC) in 2020 on the impact of COVID-19 on workers in Southern Africa reveals that many collective bargaining negotiations stalled. Fifty-eight per cent of the respondents indicated that collective bargaining rights were suspended. In other cases, the employers and the trade unions resorted to virtual collective bargaining through various platforms such as Zoom, Google Meet and Skype. For trade unions, their internal technological deficits, including limited smart gadgets and financial resources for long connections, had a detrimental effect on their effective participation in virtual collective bargaining processes.

Additionally, virtual collective bargaining presents its own challenges compared to physical collective bargaining meetings. The art of collective bargaining incorporates factors such as reading and gauging of emotions, facial expressions and body language by both parties. For trade unions, who are usually in the weaker position, these factors assist them in communicating, motivating themselves and strategically overcoming conflicts, and reaching an agreement, all of which is taken away by virtual collective bargaining.

Furthermore, access mechanisms for organizing and setting up of a virtual collective bargaining meeting largely remains in the hands of employers, meaning there is a risk of manipulation of the settings they use. Bad employers, for example, can decide to mute or unmute speakers as a way of undermining the trade union representatives, especially those who are outspoken. Thus, it is critical for trade unions to take ownership of organizing and setting up these virtual meetings.

### ***Workers' education and training***

Workers' education and training programmes are key to keeping trade unions connected with their membership and for strengthening the capacities and capabilities of workers to articulate issues that affect them. The outbreak of COVID-19 challenged the traditional forms of trade union education and training programmes, which were predominantly physical. For example, in 2019 ILO/ACTRAV coordinated a course titled "The Evolving World of Work: New Learning

Methodologies and Technologies for Enhanced Trade Union Education in Africa". This was a blended course (with online and face-to-face components); participants were education officials drawn from national (federation) centres, trade union research institutes, global union federations (GUFs), and regional and subregional trade union organizations in 15 countries. The course was an opportunity for trade unions to rethink how to reconstruct trade union education and training programmes in the era of digital technology.

## Opportunities arising from digital technologies for trade unions

### *Closing the youth participation gap*

The integration, inclusion and participation of young workers in trade unions had been gaining momentum, though on a slower scale. Global statistics underscore that the youthful population engages more on internet. Statista (2020) reveals that 18 per cent of internet users are 18 to 24 years old, 32 per cent between 25 and 34 years, 19 per cent between 35 and 44 years, 14 per cent between 45 and 54 years, 10 per cent between 55 and 64 years and 7 per cent over 65 years. This means that half of the global active population of internet users are under 35 years old.

COVID-19 has made it more apparent that trade unions need to adopt digital programmes that catch the attention of young workers, as the majority of them are now more active on social media. Advancements in digital technology would provide unions already struggling to connect with younger workers with a means to communicate with this group via a medium with which the younger generation is comfortable. It has become more apparent during COVID-19 that trade unions need to rethink, develop and experiment different virtual ways of communicating and reaching out to new and younger potential members.

### *Capturing wider audiences beyond the trade union membership*

In the context of declining trade union density and in the absence of physical meetings and mobility restrictions due to COVID-19, it has proven critical for trade unions to escalate e-campaigning and e-mobilization of membership and non-members (workers and general citizens) including workers in the informal economy through various social media and other online platforms. Since social media platforms have become popular in the political sphere, the same must also apply to trade unionism so as to ensure that their visibility and relevance is consistently maintained and escalated.

Global experiences have proven that campaigns through virtual platforms (especially Facebook, Twitter and WhatsApp groups) and trade union websites have assisted unions to connect and to build alliances, networks and solidarity not only among workers but also with other civil society organizations.

Shifting more towards e-campaigning and e-mobilization has become imperative to complement unions' traditional forms of exerting pressure on governments, employers,

parliamentarians and opinion leaders to uphold workers' rights and decent work in general. Examples of effective and successful trade union e-campaigns include the "Prices Must Fall" and "Wage Theft" campaigns by the Zimbabwe Congress of Trade Unions (ZCTU) and National Organisation of Trade Unions (NOTU).

### *Closing the gender participation gap*

Historically, increasing women's participation in trade unions, leadership and decision-making structures remains a fundamental challenge for the labour movement. Leveraging on digital technologies provides an opportunity for women trade unionists to overcome the physical and financial barriers that historically limited their effective participation in trade union activities. However, trade unions need to continue supporting and encouraging women's participation in online programmes and various social media platforms through funding women-only webinars and other related programmes.

### **Innovative strategies and technology solutions for trade union digitalization processes**

What would it really take for a workers' organization to be well prepared for working from anywhere from an ICT-preparedness perspective? Table 1 provides useful insights from a typical African country context.

► **Table 1. Indicative ICT costs for an office with ten users, typical African country (in US\$)**

ICT service/Product type	Cost/month (US\$)	Annual cost (US\$)	One-time/Recurring
LAN Setup ,10 users		50 000.00	One-time
Office productivity tools, 10 users	400.00	4 800.00	Recurring
Laptops, 10 users	1 500.00	15 000.00	One-time
Security software		4 000.00	One-time
Home office setup, 10 users	400.00	4 000.00	One-time
Office internet	1 000.00	12 000.00	Recurring
Website setup		1 000.00	One-time
Website maintenance	1 000.00	12 000.00	Recurring
Collaboration tool (e.g. Zoom)		10 000.00	Recurring
Mobile phone	500.00	5 000.00	One-time/2 years
Mobile phone units	500.00	60 000.00	Recurring
Home staff internet	250.00	30 000.00	Recurring
Insurance		2 000.00	Recurring
ICT support	10 000.00	120 000.00	Recurring
Supplies		5 000.00	Recurring
<b>Total</b>		<b>334 800.00</b>	
Paper document conversion to e-version	1.00/page		Dependent on numbers

Source: ICT and internet providers in Nairobi, Kenya.



This indicative budget is not small by any means, even for commercial organizations. The implication is that the less financially endowed workers' organizations may face a challenge with work-from-home arrangements. In fact, costs for data communications in West Africa and landlocked nations in Africa are even higher than those presented above, aggravating the challenge of being able to tap into ICT for business continuity during pandemics.

Some of the options for workers' organizations include:

- ▶ **Non-profit pricing:** There are technology providers who have non-profit offerings, some with pro-bono options, e.g. Microsoft offers Office 365 for free to small non-profits. Qualifying workers' organizations may seek availability clarifications from applicable vendors.
- ▶ **Open-source solutions:** This is another option that workers' organizations may resort to, at least for some of their business requirements such as content or database management systems like MySQL. While some effort towards customizations and configurations may be required, where sources of funding are not forthcoming, open-source software would be an option, although it should be noted that there are limitations and disadvantages to free software. This option would need to be approached with consideration of relevant laws and legislations (such as General Data Protection Regulation, GDPR) in mind.
- ▶ **High net worth individuals:** Workers' organizations may reach out to and seek financial support from such individuals with excess disposable incomes who are willing to contribute towards improving workers' organizations delivery. Information on such funding opportunities is available on the internet.
- ▶ **Solidarity support funding:** There are organizations and/or governments offering relief/stimulus packages that workers' organizations may tap into. These include international funding institutions, foundations, governments and multilateral organizations, which may have funding opportunities for well-supported funding proposals which workers' organizations may explore. Solidarity support from well-endowed trade unions organizations also remains a viable option.
- ▶ **Create a hybrid work culture:** There is a high likelihood that for most organizations, having run their businesses mainly "away-from-the-office" for about a year, there will be an increased shift towards work-from-home practices. The recent study by Global Workplace Analytics mentioned above found that remote working has grown by 173 per cent since 2005, and that over the past ten years the number of people working primarily from home had increased by 115 per cent (Global Workplace Analytics 2020). Available data show that employees who spent 60–80 per cent of their working time away from the office had the highest rates of employee engagement. Trade unions may wish to push for policies that entrench a flexible work culture where workers are encouraged to freely choose where to work from.
- ▶ **Invest in cloud-based collaboration solutions:** Organizations that employ remote collaboration tools and systems are more prepared to facilitate business continuity in times of emergency. Cloud-based collaboration tools (such as Zoom, GoToWebinar,

and MS Teams) have advanced significantly to accommodate business quality virtual collaboration sessions, and at a lower cost. In fact, some collaboration tool providers today do not charge for one-to-one collaboration sessions. Why cloud-based? – they are accessible from anywhere, are resilient with globally distributed data centres that are suitably constructed and located to withstand most disruptions.

- ▶ **Empower the trade union workforce:** To ensure the workforce is well prepared for any unforeseen eventuality, workers need to be provided with ICT equipment and software solutions, especially cloud-based, that have the appropriate specifications to meet business requirements. The tools provided should have capabilities to connect securely to corporate systems, with the workforce adequately trained in the ICT system use and handling.

It is essential to ensure that workers' partner organizations representing the interests of workers, and by extension workers themselves, are adequately facilitated for seamless delivery of services in times of difficult situations that may limit physical access to an office setup.

- ▶ **Digitization of documents and business processes:** To complete the resilience journey, workers' organizations and affiliate organizations or groups need to ensure that each of their paper documents is converted to an electronic file format. There are a dozen suitable electronic document management systems (eDMS) to choose from, as there are as many companies that specialize in document archiving that organizations may use to fully scan and file all organizational documents.

The COVID-19 experience has shown that dealing with paper-based documents will soon be a practice of the past. Organizations therefore need to invest in and adopt digital signature systems that, as much as possible, tightly integrate with their chosen eDMS.

Automation of all organizational business systems and approval workflows will not only contribute towards better organizational performance and offer required transparency and accountability but also make it possible to carry on the business of workers' organizations with or without emergencies, from anywhere. Adopting and deploying blockchain or other technologies that ease interoperability between and among partner organizations' systems will place the organization in a suitable place to deal with future crisis. A workers' organization cannot afford to leave behind its partner member organizations – the marriage has to persist, regardless of the cost and/or circumstances.

## Recommendations, way forward and conclusions

This section provides recommendations that workers' organizations may adopt or employ to ensure organizational readiness to continue business during the pandemic. The section also makes innovative suggestions that affect the operations of specific trade union functions.

So, what are the technology enablers for working from home for a trade union organization? They include:

1. A **laptop** with a high-resolution (possibly adjustable) camera and latest office productivity software installed. It is desirable that staff are provided tools such as sit/stand desks, ergonomic chairs, and appropriate wide monitors or where possible dual screens.
2. A **smart phone** or a tablet is no luxury with "work from anywhere" practice, hence it is an important provision, especially in some parts of the world where internet stability is not guaranteed, therefore making a smart phone an appropriate backup for hotspotting for internet access when a regular broadband or WiFi link is down.
3. Sufficient **internet connectivity** that allows easy and reliable access to work resources, whether located on-premise (at the office) or in a public or public cloud. Internet provision should preferably have a cable internet backbone, with adequate signal distribution within residences.
4. Easy-to-use suitable **collaboration and meeting tools**. Virtual meeting rooms are fast replacing physical meeting spaces with the advent of the full-blown working-from-home experience. It is essential that teams continue to be able to collaborate and work together effectively and efficiently, much as they would in a traditional office setting. Each worker should therefore be able to call colleagues, invite them to meetings, book meeting rooms, appraise teams, join meetings, and host seminars (now webinars) with the same or better ease as when in a physical office setup.
5. Workers should be empowered with the **knowledge and skills** required for successful utilization of the technology tools and systems necessary for high performance as they work from home or anywhere else. This should include proficiency in web or mobile tele- and video-conferencing tools.
6. **Information security and data protection**. Working from home must not compromise privacy and compliance requirements. The practice has increased the pool of potential cyberattack victims due to increased internet presence in the new workspace. Tools to ensure requisite protection of remote workers are therefore a requirement; these range from stringent account/password management policies, up-to-date antivirus solutions; remote monitoring, updating and patching systems; virtual private networks; desktop and residential internet firewalls; disk encryption; mobile device management tools; multi-factor authentication; and technology tools for ICT staff that enable remote monitoring and management of device security, be they laptops, mobile devices, IP cameras or other home internet-connected devices that make up the Internet of Things (IoT).

7. Fully **automated business process workflows**, incorporating document management capabilities and secure integrations with partner systems with support for secure digital signatures.
8. All the above should be backed up with a solid **ICT support system**. A well-staffed call centre available to support workers on a 24/7 basis would be most suitable to support the flexible work habits of working from home.

Some of the innovative suggestions that affect the operations of specific trade union functions include:

### ***Strategic planning for ICT within trade union structures***

Information technology must be seen to be important for all trade union operations, ranging from membership recruitment and organizing, delivery of services, collective bargaining, research, training and education, to political campaigns and maintenance of democratic principles. Trade unions must also recognize information technology as a critical force in shaping their relevance in the future.

In this context therefore, in a bid to enhance processes and functions, it is recommended that ICT should be established and supported as a core component within trade union organizations, and therefore represented at higher levels of decision-making. This will enable the ICT leadership to be able to budget, plan, organize, direct, control and coordinate the acquisition, development, maintenance and use of computer and telecommunication systems within the organization to fulfil its mandate to the workers.

Additionally, there is a need to establish an ICT Department headed by an ICT Manager (or Director) at senior decision-making level. This strategic functionality will enable the greater collaboration with other decision-makers in other departments to identify, recommend, develop, implement, and support cost-effective technology solutions and therefore define and implement ICT policies, procedures and best practices. It is within the ICT Directorate or Department that a more accurate assessment and diagnosis can take place regarding the absence of, or inadequate, ICT infrastructure and capacity. To implement these recommendations, it may be important to redesign organigrams.

### ***Revising and reshaping collective bargaining negotiations and agreements***

There is need for trade unions to ensure that provisions for digitalization and technology diffusion are integrated into collective bargaining agreements and in workplace social dialogue structures such as workers' committees and works councils. It is critical to ensure that trade unions and workers are engaged at an early stage of the introduction of new technologies.

Given the peculiar challenges of virtual collective bargaining, trade unions have the privileged position of having members at the shop floor level who are well versed in the performance and financial position of the company. Many companies are using virtual

platforms to communicate their performance to existing and potential customers and clients. The ease of availability of information in the era of open data creates a platform in which unions and representatives have freer access to the kind of information that is often the subject of conflict (ACAS 2011). Thus, trade unions should use this privileged position combined with use of various digital technologies for data collection and conducting trend analyses of company or sectoral performances that will enable them to be more effective in collective bargaining at all levels.

The increasing global capital of interconnectedness includes the fast internet speeds greatly enhances access to information. In the same manner, the global labour movement needs to escalate its interconnectedness and solidarity, and mobilize and unite workers around workers' demands that challenge negativities arising from global capital operations. The Global Union Federations (GUF) exposure to digital technologies can assist various trade unions to win in this area.

### ***Reconstructing worker education and training***

Not all traditional face-to-face learning courses can easily be used for or are compatible with online learning. Therefore, trade unions and their service organizations (research and education institutes) need to:

- (i) Collaborate, reconstruct and convert their traditional face-to-face learning courses and modules into online-compatible learning modules, courses and e-materials, and deliver them through webinars.
- (ii) Invest in upgrading office ICTs.
- (iii) Develop internal expertise in online teaching and learning methodologies. These can be in the form of purely online courses or blended courses (a combination of face-to-face and online education).
- (iv) Seek the support of ILO/ACTRAV in developing tailor-made online courses or modules suitable for national and sectoral education and training (such as Learning Modules On-Line – LEMON) as coined by the Council of Europe (CoE).
- (v) Ensure that such online courses are accredited, licensed and monitored for quality assurance and compliance purposes.
- (vi) Cooperate with labour-friendly experts and/or CSOs and academia so as to build alliances and partnerships critical in a globalized world.
- (vii) Develop specialized ICT courses for trade union members/grassroots, trade union structures and workplace-based committees such as workers committees, OSH committees and gender committees on how to interface with online and virtual platforms.

### ***Development of online/web based trade union applications (apps) and databases***

Digital technologies allow trade unions to develop their own trade union and worker applications and union databases that are accessible to their membership. This can act as a leverage point for e-recruitment with online stop-order forms, as well as capture the interest of young workers to join trade unions. Web applications can have services of e-recruitment or e-payment, given the varying financial situations of workers and payment schedules which vary among individuals. The applications can also contain critical information such as online collective agreement guidelines, labour law and regulations, SDGs, socio-economic rights, apprenticeship and training opportunities, women- and youth-related issues, among others. These applications will keep membership engaged and boost opportunities for articulation of their issues.

### ***Enhancing women's participation in trade unions through digital technologies***

Women members should self-motivate themselves to capitalize and strengthen networking and solidarity among them, using the numerous channels brought about by digital technologies and online platforms. They should create their own content and disseminate as much as possible digitally. Already the various WhatsApp platforms have been a stepping stone for more engagement among women workers, but discussions need to escalate from mere sharing of challenges and networking to sparking constructive debates that challenge patriarchal norms and systems in trade unionism; challenging themselves to take up leadership and decision-making spaces; escalating online mentoring/confidence-building programmes which would otherwise not have been possible in face-to-face engagement; strengthening intersectoral, subregional and international exchange programmes; e-mobilizing and e-campaigning on ratification of the ILO Violence and Harassment in the World of Work Convention, 2019 (No. 190); and enhancing solidarity among women workers under the motto "an injury to one is an injury to all".

### ***Engage governments to address the connectivity challenge***

All countries depend on the quality of their infrastructure to improve their productivity, international competitiveness, economic growth and improvements in living standards of their citizens. Trade unions need to demand that their national governments pay special attention to resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation. In this context, the term "infrastructure" would need to take a broader perspective to incorporate a broad range of factors including physical infrastructure such as roads, bridges, ports and communications infrastructure as well as socio-economic institutions such as the legal system, government regulatory systems and even considerations as intangible as social norms of behaviour. Trade unions must join other partners in advocating for the development of guidelines and best practice in the promotion and development communications industries and improve services for enterprises and citizens.

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## Annex

Resolution concerning  
a global call to action  
for a human-centred  
recovery from the  
COVID-19 crisis that is  
inclusive, sustainable  
and resilient



2 [Adopted at the International Labour Conference](#)

The General Conference of the International Labour Organization,  
Having received the proposal made by the Conference Committee on the  
Response to COVID-19,

Considering the urgent need for action to ensure a human-centred recovery  
from the COVID-19 crisis that is inclusive, sustainable and resilient,

Adopts, this seventeenth day of June of the year two thousand and twenty-one, the following resolution

**A global call to action for a human-centred recovery from the  
COVID-19 crisis that is inclusive, sustainable and resilient**

1. The coronavirus disease (COVID-19) pandemic is having a profound impact on humanity, underscoring the interdependence of all members of society and all countries.
2. In addition to the tragic loss of life and damage to human health and communities, the pandemic has had devastating impacts on the world of work. It has led to increased unemployment, underemployment and inactivity; losses in labour and business income, especially in the most impacted sectors; enterprise closures and bankruptcies, particularly for micro, small and medium-sized enterprises; supply chain disruptions; informality and insecurity of work and income; new challenges to health, safety and rights at work; and exacerbated poverty and economic and social inequality.
3. The crisis has affected the most disadvantaged and vulnerable disproportionately, particularly individuals in the informal economy and in insecure forms of work; those working in low-skilled jobs; migrants and those belonging to ethnic and racial minorities; older persons; and those with disabilities or living with HIV/AIDS. The impact of the crisis has exacerbated pre-existing decent work deficits, increased poverty, widened inequalities and exposed digital gaps within and among countries.
4. Women have suffered disproportionate job and income losses, including because of their over-representation in the hardest-hit sectors, and many continue to work on the front line, sustaining care systems, economies and societies, while often also doing the majority of unpaid care work, which underscores the need for a gender-responsive recovery.

5. The crisis has profoundly disrupted the education, training and employment of young people, making it even harder for them to find a job, successfully transition from education and training to work, continue education or start a business and posing the risk of a reduced trajectory of earnings and advancement over the course of their working lives.
  6. Without concerted action by governments, employers' and workers' organizations, and the international community, these differential effects will endure well beyond the pandemic itself, with profound implications for the achievement of social justice and decent work for all, including full, productive and freely chosen employment, and will further reverse gains and undermine progress towards achieving the goals of the United Nations 2030 Agenda for Sustainable Development.
  7. Urgent and coordinated action, including in the multilateral context, is also needed to ensure that all people have timely, equitable, affordable and global access to quality, safe and effective COVID-19 vaccines, treatments and preventive measures, such as health technologies, diagnostics, therapeutics and other COVID-19 health products, with fair distribution across all levels of society, which is critical to safety and health, to curbing the growing inequality within and between countries, and to restarting economies and building forward better.
  8. The ILO Centenary Declaration for the Future of Work, 2019, with its human-centred approach, based on the unique tripartite structure and normative mandate of the International Labour Organization (ILO), provides the foundation for a recovery from the crisis that is fully inclusive, sustainable and resilient and supports a just transition. The Declaration offers a positive vision and a road map for how countries can build forward better. Accelerating its implementation through increased emphasis and investment must become a top priority of public policy, enterprise actions and international cooperation.
- ▶ **I. Urgent action to advance a human-centred recovery that is inclusive, sustainable and resilient**
9. We, governments and employers' and workers' organizations, commit to working individually and collectively and with the support of the ILO for a human-centred recovery from the COVID-19 crisis through the fo-

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cused and accelerated implementation of the ILO Centenary Declaration, thereby advancing progress towards an inclusive, sustainable and resilient development with decent work for all.

10. We commit to addressing the global dimensions of the crisis through enhanced international and regional cooperation, global solidarity and policy coherence across the economic, social, environmental, humanitarian and health domains, thereby enabling all countries to overcome the crisis and expedite progress towards the achievement of the 2030 Agenda, the Paris Agreement of the United Nations Framework Convention on Climate Change and the Addis Ababa Action Agenda of the Third International Conference on Financing for Development.
11. We commit to placing the aim of full, productive and freely chosen employment and decent work, the needs of the most vulnerable and hardest hit by the pandemic, and support for sustainable enterprises, jobs and incomes at the heart of strategies that are gender-responsive, to build forward better from the crisis, tailored to specific situations and taking into full account national circumstances and priorities, including by working to:

**A. Inclusive economic growth and employment**

- a. provide for a broad-based, job-rich recovery with decent work opportunities for all through integrated national employment policy responses, recognizing the important role of the private and the public sector and the social and solidarity economy, including:
  - i. supportive macroeconomic, fiscal and industrial policies that also foster equity and stability; and
  - ii. appropriate public and private investment in sectors hit hardest by the crisis, such as hospitality, tourism, transport, arts and recreation and some parts of retail, and those with strong potential to expand decent work opportunities, such as the care economy, education and infrastructure development;
- b. facilitate a speedy recovery towards a sustainable travel and tourism sector, bearing in mind its labour-intensive nature and its key role in countries highly dependent on tourism, including Small Island Developing States;

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- c. promote global solidarity through support for developing countries experiencing crisis-related reductions in fiscal and monetary policy space or unsustainable external debt obligations;
- d. support business continuity and an enabling environment for innovation, productivity growth and sustainable enterprises, including micro, small and medium-sized enterprises, recognizing the important role of sustainable enterprises as generators of employment and promoters of innovation and decent work;
- e. provide incentives to employers to retain workers despite crisis-related reduction of business activity, such as through work-sharing and shorter working weeks, targeted wage subsidies, temporary measures relating to tax and social security contributions, and access to business support measures in order to maintain employment and income continuity;
- f. strengthen national systems of employment services and national policies to provide quality employment services for workers and employers to mitigate crisis-induced economic and labour market disruption, recognizing, where appropriate, the complementary role of private employment services when properly regulated in line with international labour standards, including the prohibitions therein on charging fees and costs to workers;
- g. support quality education, training and decent work for young people, to maximize their potential as a source of dynamism, talent, creativity and innovation in the world of work and as a driving force for shaping a better future of work;
- h. strengthen public and private investment in skills development and lifelong learning, including through universal access to quality education and more equitable and effective access to training, including apprenticeships, career guidance, upskilling and reskilling, and through other active labour market policies and partnerships that facilitate successful labour market transitions and reduceskills mismatches, gaps and shortages, including for the low-skilled and the long-term unemployed;
- i. foster more resilient supply chains that contribute to:
  - i. decent work;

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- ii. sustainability of enterprises along the supply chain, including micro, small and medium-sized enterprises;
- iii. environmental sustainability; and
- iv. protection of and respect for human rights in line with the three pillars of the UN Guiding Principles on Business and Human Rights and the ILO Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy; supported by sustainable international trade and investment;
- j. leverage the opportunities of just digital and environmental transitions to advance decent work, inter alia through social dialogue, including collective bargaining and tripartite cooperation;
- k. develop and implement comprehensive, innovative and integrated approaches to curb the spread of informality and accelerate the transition to the formal economy, particularly for the creation, preservation and formalization of enterprises and decent jobs, paying due attention to the rural economy;

#### **B. Protection of all workers**

- a. provide all workers with adequate protection, reinforcing respect for international labour standards, and promoting their ratification, implementation and supervision, with particular attention to areas where serious gaps have been revealed by the crisis. This includes respect for fundamental principles and rights at work; an adequate minimum wage, either statutory or negotiated; maximum limits on working time; and safety and health at work with particular attention to the ongoing challenges presented by the COVID-19 pandemic;
- b. redouble efforts to address the increasing fundamental rights violations resulting from the pandemic, with special emphasis on the elimination of child and forced labour;
- c. provide that workers at higher risk of exposure to COVID-19 and those at greater risk of negative health impacts, such as health-care workers and all other frontline workers, including those working transnationally, have access to vaccines, personal protective equipment, training, testing and psychosocial support, and that they are adequately remunerated and protected at work, including against excessive workloads;

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- d. strengthen occupational safety and health measures by cooperating with public institutions, private enterprises, employers, workers and their representatives on:
  - i. the provision of tailored practical guidance;
  - ii. support for risk management;
  - iii. the introduction of appropriate control and emergency preparedness measures;
  - iv. measures to prevent new outbreaks or other occupational risks; and
  - v. compliance with health measures and other COVID-19-based rules and regulation;recognizing that safe and healthy working conditions are fundamental to decent work;
- e. introduce, utilize and adapt teleworking and other new work arrangements so as to retain jobs and expand decent work opportunities through, among other means, regulation, social dialogue, collective bargaining, workplace cooperation and efforts to reduce disparities in digital access, respecting international labour standards and privacy and promoting data protection and work-life balance;
- f. uphold the continued relevance of the employment relationship as a means to provide certainty and legal protection to workers, while recognizing the extent of informality and the urgent need to ensure effective action to achieve the transition to formality and decent work;
- g. implement, through public policy and enterprise practice, a transformative agenda for gender equality by:
  - i. ensuring equal pay for work of equal value, supported inter alia by pay transparency;
  - ii. expanding policies providing adequate paid care leave and promoting a more balanced sharing of work and family responsibilities;

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- iii. promoting employment creation and lifelong learning policies that close gender skills gaps;
  - iv. investing in education, healthcare, social work, the care economy and other sectors, addressing understaffing and improving working conditions;
  - v. removing legal and other types of barriers to entry to and advancement in education, training, employment and careers, including by combating gender stereotypes; and
  - vi. preventing and protecting against gender-based violence and harassment in the world of work;
- h. execute across the public and private sectors a transformative agenda for equality, diversity and inclusion aimed at eliminating violence and harassment in the world of work and discrimination on all grounds, including race, colour, sex, religion, political opinion, national extraction and social origin, and taking into account the specific circumstances and vulnerabilities of migrants, indigenous and tribal peoples, people of African descent, ethnic minorities, older persons, persons with disabilities and persons living with HIV/AIDS;

### C. Universal social protection

- a. achieve universal access to comprehensive, adequate and sustainable social protection, including nationally defined social protection floors, ensuring that, at a minimum, over the life cycle, all in need have access to basic income security and to essential healthcare, recognizing the right to the enjoyment of the highest attainable standard of physical and mental health as more important than ever;
- b. enhance access to unemployment protection to ensure support for workers who have lost their jobs and livelihoods due to the pandemic and to facilitate transitions;
- c. provide access to adequate paid sick leave, and sickness benefits and health and care services, family leave and other family-friendly policies for all workers, ensuring coverage in cases



of quarantine and self-isolation and developing faster delivery mechanisms for benefits;

- d. provide for equitable and sustainable financing for social protection systems through effective resource mobilization as well as reinforced global solidarity and coordination to ensure that no one is left behind;
- e. reinforce the essential role of the public sector in supporting well-functioning economies and societies, recognizing in particular the important role of public health and care systems in times of a health crisis and in the prevention of future shocks and pandemics;

#### **D. Social dialogue**

- a. build upon the role that social dialogue, both bipartite and tripartite, has played in the immediate response to the COVID-19 pandemic in many countries and sectors, based on respect for and the promotion and realization of the enabling rights of freedom of association and the effective recognition of the right to collective bargaining;
- b. promote social dialogue in particular to support delivery of the outcomes set out in this global call to action, including through governments consulting with social partners on designing and implementing national recovery plans and policies addressing the need for retention and creation of decent jobs, business continuity, and investment in priority sectors and areas, both public and private, to ensure a job-rich recovery;
- c. strengthen the capacity of public administrations and employers' and workers' organizations to participate in such dialogue as the means to develop and implement regional, national, sectoral and local recovery strategies, policies and programmes.

### **▶ II. ILO leadership and support of a human-centred recovery that is inclusive, sustainable and resilient**

12. The ILO, with its mandate for social justice and decent work, must play a leadership role with its constituents and in the international system

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in advancing a human-centred recovery from the COVID-19 crisis that is inclusive, sustainable and resilient. Through focused and accelerated implementation of the ILO Centenary Declaration, it will strengthen its support of Member States' recovery efforts and leverage the support of other multilateral organizations and international institutions while contributing actively to the efforts of the United Nations system to expedite delivery of the 2030 Agenda.

13. In order to help governments and employers' and workers' organizations build forward better from the crisis, the ILO will use all its means of action to support the design and implementation of recovery strategies that leave no one behind. To this end, the ILO will strengthen its support of Member States' efforts to:
  - a. create inclusive and sustainable economic growth, employment and social development, increasing support for the development of policies and approaches that:
    - i. generate employment-intensive investment;
    - ii. strengthen active labour market policies;
    - iii. promote an enabling environment for entrepreneurship and sustainable enterprises;
    - iv. boost productivity through diversification and innovation;
    - v. harness the fullest potential of technological progress and digitalization, including platform work, to create decent jobs and sustainable enterprises, enable broad social participation in its benefits and address its risks and challenges, including by reducing the digital divide between people and countries;
    - vi. promote skills development opportunities that are responsive to labour market needs and support effective transitions for young people from education and training to work; and
    - vii. promote guidance, training and employment services that provide older workers with the facilities, advice and assistance they may need to expand their choices, optimize their opportunities to work in good-quality, productive and healthy conditions until their retirement, and to enable active ageing;

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- b. protect all workers, including by strengthening policy advice, capacity-building and technical assistance in support of:
    - i. sound labour relations and the promotion of legal and institutional frameworks based on international labour standards, including fundamental principles and rights at work, and a particular emphasis on occupational safety and health in the light of the experience of the COVID-19 pandemic;
    - ii. prioritizing and mainstreaming strategies to address the informal economy and insecure forms of work, which have been particularly affected by the crisis, including through research, development cooperation and policy interventions and guidance; and
    - iii. preserving jobs and increasing the resilience of labour markets to crises and pandemics;
  - c. achieve universal access to comprehensive, adequate and sustainable social protection, including floors, that ensures income security and health protection and enables people, including the self-employed and workers in the informal economy, to cope with challenges in life and work such as those precipitated by the COVID-19 crisis;
  - d. strengthen the capacity of labour administrations, labour inspectorates and other relevant authorities to ensure implementation of rules and regulations, especially regarding social protection and occupational safety and health;
  - e. use social dialogue to design and implement recovery strategies, strengthening the capacity of employers' and workers' organizations to engage in national recovery strategies and to support their members in the recovery, including through the International Training Centre of the ILO and its training partners.
14. Underlining the importance of multilateralism, particularly in addressing the COVID-19 crisis' impacts on the world of work, the ILO will strengthen cooperation with relevant multilateral and regional organizations and processes to achieve a strong and coherent global response in support of national recovery strategies, including in order to:

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- a. coordinate the provision of technical and financial support to maximize its beneficial impact on employment and decent work, with a special focus on the most vulnerable and affected people and the hardest-hit sectors;
- b. prioritize in national policy and development cooperation: respect for fundamental principles and rights at work; ratification and implementation in law and practice of international labour standards; skills development and lifelong learning and other active labour market policies; gender equality; occupational safety and health; and financing of the business continuity of enterprises disproportionately affected by the crisis, including micro, small and medium-sized enterprises;
- c. assist Member States in developing and implementing financing strategies with global support for comprehensive and sustainable social protection systems with the objective of comprehensive, adequate and sustainable universal social protection, including floors, on the basis of international labour standards;
- d. coordinate decent work objectives and capacity-building assistance more closely with international trade and investment policies to widen the benefits of international trade and investment and promote decent work, environmental sustainability and sustainable enterprises in supply chains, taking into account the strong, complex and crucial links between social, trade, financial, economic and environmental policies;
- e. promote fiscal, monetary and trade and investment policies that aim at achieving inclusive, sustainable and resilient economic growth as well as full, productive and freely chosen employment and decent work, including by improving understanding of the potential beneficial macroeconomic effects of the human-centred approach set out in the ILO Centenary Declaration;
- f. reduce inequalities, formalize the informal economy, address insecure forms of work and promote an enabling environment for entrepreneurship and sustainable enterprises;







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