

**EU PROJECT  
“MAKE TWIN TRANSITION”**

**HOW TO ENHANCE SOCIAL DIALOGUE  
ON THE TWIN TRANSITION  
IN THE COMMERCE SECTOR**

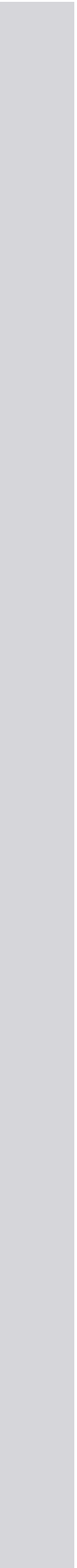
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**Toolkit**

**April 2024**



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# 1. INTRODUCTION

The EU funded project “Make twin transition”, with UNI Europa Commerce as sole applicant, aims to enhance social dialogue on the twin transition – green and digital – in the commerce sector. The main objectives of the project, which was launched in August 2022 and will run for two years, are to:

- ensure that the twin transition brings clear benefits for employers and workers in terms of new job opportunities, increased productivity, improvements in working conditions and new ways of organising work;
- raise awareness and improve understanding of employers, workers and their representatives of the risks, opportunities and challenges in the world of work resulting from the green and digital transition;
- provide support materials in the form of a toolkit to encourage, guide and assist employers, workers and their representatives;
- make social dialogue an integral part of the future policy-making process;
- facilitate the exchange of good practices.

The project focuses on **four target Countries** – Italy, Hungary, the Netherlands and Sweden – and benefits from the involvement and support of six UNI Europa Commerce affiliates: Filcams (IT), Uiltucs (IT), KASZ (HU), FNV (NL), Handels (SE) and Unionen (SE). The project Steering Group is composed of UNI Europa and representatives of these Unions.

During the initial phase of the project (work package 2), the project coordinator, with the support of the Steering Group, drafted an “**Overview Report**”. The document, available in English, Swedish, Italian, Hungarian and Dutch, was used as a base for four one-day national workshops planned in spring 2023 in the abovementioned target countries. The Overview Report includes:

- the results of in-house desk research covering:
  - an overview of national social partners in the project’s target countries (Hungary, Italy,

the Netherlands and Sweden), as well as the state of play of collective bargaining and social dialogue, in the commerce sector;

- the results of desk research of available publications and best practices referring to the green and/or digital transition and the (potential) role of trade unions;
- the presentation of the main results of an online survey addressed to UNI Europa commerce affiliates to:
  - Track existing practices of social dialogue collective agreements relating to the green and digital transition;
  - Identify and collect challenges and obstacles for the development of social dialogue collective agreements relating to the green and digital transition;
  - Identify and collect existing strategies to counter these challenges and obstacles;
  - Identify and collect potential opportunities for further development.
- a summary of experts’ input, “Facts and recommendations on the twin transition (climate and digitalisation)”, written by Syndex, the external expert identified by UNI Europa. The document produced by the experts consists of three-page papers for each of the five following topics:
  - the state of play: how commerce jobs and the industry are changing due to the green and digital transition;
  - the drivers of change: factors which bring change in the commerce sector;
  - risks and opportunities: for companies and workers;
  - anticipating/mitigating change: evaluating and anticipating future needs linked to the transition;
  - the role of the social partners and social dialogue.

■ final reflections: paving the way for the preparation of the four national workshops.

In the following phase of the project (work package 3), four on-site **national workshops** were organized and held. In coordination, and with the key contribution of the respective UNI Europa commerce national affiliates, the project coordinator designed and chaired the meetings in the period May–June 2023. While achieving the same general aims, each workshop had a customized program based on the specific characteristics of the hosting country (collective bargaining coverage, industrial relations system, union density) and the participants' profile (trade union leaders, shop stewards, decision-makers). In total, over 70 participants attended the workshops.

The workshops drew on the outcomes and reflections presented in the Overview Report and, in turn, they generated plenty of ideas and information, summed up in their respective follow-up reports. Both the outcomes of the Overview Report and the national workshops are the starting point for the drafting process of the “Toolkit”.

After summer 2023, the European Commission accepted a request for project amendment sub-

mitted by UNI Europa. Thanks to this, in the period January – May 2024, experts carried out a **desk research** on the regulatory framework – at EU and national level across Europe – to identify tools that Unions in the commerce sector can use as leverage in their efforts to have a greater impact on digital and green transition in social dialogue and collective bargaining. The research – published digitally in English, Italian, Dutch, Swedish and Hungarian – complements the “Toolkit”.

The **Toolkit** includes guidelines and recommendations for UNI Europa commerce affiliates. The overall aim is to help them develop a joint understanding of the sector's risks, opportunities, challenges, needs, specific changes in employment, skills need, the drivers of change, and how to promote inclusive ways of addressing the specific changes linked to the twin transition in the commerce sector.

The final version of the Toolkit, finalized after the project roundtable organized in April 2024, was launched, together with the desk research on the regulatory framework, at the project **final conference** in June 2024.

## 2. LESSONS LEARNED SO FAR

This toolkit builds upon the outcomes of the “Overview Report” and the results of the four national workshops.

The Overview Report made two key aspects clear:

- the two transitions – green and digital – are different in terms of impact, pace, responsibilities;
- the industrial relations systems and the power held by unions in the commerce sector vary from country to country.

These conclusions were confirmed during the national workshops. The discussions and results proved that Unions behave differently on the two transitions and in different national contexts.

But there are also some commonalities, which are essential to consider when drafting this toolkit:

- the awareness of the impact of the twin transition on the world of work and on the economical distribution in society;

- the understanding of the need for unions to have a say;
- the recognition that more has to be done in order to shape the transitions to make them “just”;
- the importance of having a human-centred approach;
- the necessity to develop a strategic approach and a long-term vision.

Based on the differences and commonalities identified, this Toolkit is not a “one size fits all” list of proposed solutions. It’s rather a set of tools aimed at supporting unions as they mitigate, manage and anticipate change. This should help unions achieve their long-term goal, which is to re-balance the power asymmetry we observe in the world of work, transforming the “twin transition” into a “just twin transition”.



# 3. HOW TO USE THE TOOLKIT

The key message beyond this Toolkit is that there's a lot of room for unions in the commerce sector to do more, better and faster on the twin transition. It won't be easy, but not doing enough would put unions – and the workers they represent – in an even tougher position. The tendency, in particular for unions who are already struggling with business-as-usual activities, is to invest all their energy into dealing with urgent issues (which are many), which risks focusing on the short-term outlook. In some cases, unions might even prefer to stay in their comfort zone, doing only those things they're good at.

With this Toolkit we intend to support unions in their **strategic decision-making as regards the twin transition**, as well as with implementing, assessing and revising strategies. We don't offer readymade or cookie-cutter solutions. Instead we want to empower unions and give them the autonomy and ownership of their decision-making.

This Toolkit is primarily aimed at trade unionists who are responsible for coordinating processes within their organizations. They might be decision-makers or being mandated by decision makers after a successful buy-in process. For the sake of simplicity, throughout the Toolkit we'll call this person (or group of people) the "Process Coordinator". The Toolkit is also meant to be a

user-friendly document accessible to all people who will be involved in the process by the Coordinator: he/she will refer to the Toolkit when explaining the working methodology to other internal stakeholders – workers, members, workers' representatives, EWC members, leaders – as well as external stakeholders, such as employers' organizations, company management, or any other relevant societal actor (public authorities, NGOs, etc.).

The Toolkit is divided into **five "steps"**:

- 1. Observe reality**
- 2. Map actions**
- 3. Assess actions**
- 4. Imagine scenarios**
- 5. Define a roadmap**

Each of them includes: a description, some examples and recommendations.

This Toolkit is neither a to-do-list for Unions, nor a collection of best practices, a glossary or a set of references to better understand the twin transition. Things change rapidly and there's a wealth of much more specific publications which can help unions.



# 4. STEP 1 – OBSERVE REALITY

## 4.1 DESCRIPTION

There's a wealth of publications on the impact of the green and digital transition on the world of work and on working conditions.

Some of them make an analysis of the existing situation, others describe possible developments.

In general, they have the point of view of academics, who eventually – through interviews or surveys – gather the opinions of workers.

While these publications represent a valid source of knowledge, they often fail to provide a granular understanding of working conditions and concrete issues related to a given sector or sub sector, or even specific to a company.

In order to zoom in, unions can make good use of workers' representatives and union members who are in the field. They are the frontline and represent the main observation point at company level.

The Process Coordinator will make sure that, by activating the right people, the following questions can be answered (the wording of the first question depends on the chosen transition):

1. What is your company doing to introduce more digitalization / to reduce its carbon footprint?
2. What are the consequences/impact on working conditions? Which are positive? And which are negative?
3. Who decides what in the company?
4. What is the role of unions at company level?
5. What can unions do to have an impact?

## 4.2 EXAMPLES

During the national workshop in Hungary, participants were asked what they observed in terms of new digital tools adopted by their companies. Their replies included some of the following observations:

- new procedures and changed expectations;
- workers' performances are tracked by management: many devices, which are part of the working tools and are structural element of the work organization, produce, de facto, precise data on the time and duration of specific tasks performed. This is perceived by employees not only as a tool to organize work, but also as a way for management to keep employees under constant surveillance;
- the data collected through the devices employees are asked to use help populate the company algorithmic management system, which is increasingly replacing human decision-making.

It's worth noting that the workshop participants who contributed to this exercise report that trade union power is pretty low. In Hungary, there's no sectoral collective agreement in the commerce sector. A company-level agreement existed only in a few cases, while in others there's no agreement at all (and working conditions are determined exclusively by the Labour Code), or agreements were finalized on salaries only.

Thanks to this exercise, participants learned about the impact of digitalization on working conditions. The discussion was an eye-opener and motivated shop stewards to strengthen unions at company level by including the above-mentioned aspects in collective agreements. They also saw the possibility of using the potentially negative impact of the digital transition on their working conditions as leverage to organize new union members and gain more weight when dealing with management.



## 4.3 RECOMMENDATIONS

- Shop stewards and workers, who are at the workplace on a daily basis, are the best witnesses of ongoing changes. Workers best know how work is organized and whether or not a new process is effective. They can assess things from their own perspective, which is usually not taken into account by the company when introducing changes.
- Workers' representatives also have the opportunity, as part of their role, to collect workers' points of view and opinions. They can do this in many ways: through informal one-on-one or group talks, during workers' assemblies, with surveys (on paper or online), with polls and voting (on paper or online), etc.
- Keen observation of reality can help anticipate the secondary, unexpected and long-term effects of the changes introduced.
- Observing reality should be a proactive and ongoing activity.
- In this phase it is probably better to keep the two transitions separate: this will allow the respondents to give more specific and detailed replies. Some questions will yield similar replies, paving the way for shared and collaborative work on the two transitions.



# 5. STEP 2 – MAP ACTIONS

## 5.1 DESCRIPTION

Thanks to the Overview report and the workshops, we observe that there are mainly two reasons why unions are not as proactive as they might want to be as regards the twin transition:

1. The complexity of the twin transitions requires a strategic vision, an holistic approach and a long-term perspective.
2. The nature of the decision-making process within unions, together with the complexity of their relations with key stakeholders in the respective national contexts.

Some explanations about the complexity of the twin transition:

1. It's quite obvious that both the digital and green transitions impact every aspect of a person's life, including workers;
2. Understanding all aspect of the transitions – economic, legal, societal, etc. – requires multi-disciplinary expertise;
3. Change might happen fast and it's easier to “be late”, rather than “on time” or even “forward-looking”;
4. At the same time, changes might be small and gradual, which risks underestimating the real size of the transitions (weather VS climate)
5. The two transitions will not last just a few years;
6. The causes and consequences of the transitions are not limited to a single workplace and can be only understood and tackled by considering the system which the workplace is a part of in its entirety (for instance: the supply chain, usually international, of a retail company, as well as the growing omnichannel approach of the sector).

Some explanations on the nature of the decision-making process:

1. Unions are democratic organizations and strategic decisions are usually the result of a complex internal process. Congresses represent key moments when visions, priorities and roadmaps are issued for the next four to five years;

2. Another key moment where unions, in this case together with employers, define common aims and rules for the next future, is when collective agreements, at sectoral and/or company level, are signed;
3. This means that, where a Congress or a collective agreement doesn't include a reference to – in our case – the digital and green transitions, the risk is that in subsequent years human and financial resources will not be allocated in these areas of work.

Users of this Toolkit will not be starting from scratch: things are certainly happening, at all levels, within unions on the digital and green transitions. However modest the union work in this area could be, there's at least a basic awareness of the existence of the two transitions and their impact on working conditions in the retail sector.

The Process Coordinator, once he/she has a mandate from union decision-makers, will have to run a mapping exercise to identify the actions – concluded, ongoing or planned – on the green and the digital transitions.

Due to the success of this approach during the workshops, we suggest using a basic grid which includes (see annex):

1. A comprehensive – although not exhaustive – list of trade union actions in different areas
2. A column for the digital transition
3. A column for the green transition

The Process Coordinator could run a meeting or a workshop with a group of people with different levels of responsibilities within the union and with different areas of expertise: green and digitalization related issues should be covered, and areas such as health and safety, as well as gender equality, could feed the discussion.

Participants should collectively contribute by filling out the “mapping grid” (see Annex).

## 5.2 EXAMPLES

The national workshop run in Sweden had participants from two unions – Handels and Unionen. They were divided into groups, each with members of the same organization. Using the “mapping grid”, they were asked to identify all actions that, as far they knew, their respective organizations were running (concluded, ongoing and planned) to support the digital and the green transitions. Groups then reported back in plenary and the project coordinator took notes of all the main actions identified on a flipchart (see picture). As a wrap up, what could be deduced from the flipchart was that:

- overall, there is a variety of actions that unions have been running, stretching from raising awareness on digital transition to capacity-building on greening, and from sketching scenarios on digitalization to running projects on greening in the commerce sector;
- the work done on digital transition covers almost all the list of possible trade union actions used in the grid.



## 5.3 RECOMMENDATIONS

- The Process Coordinator, once the initial buy-in with union leaders is successfully concluded, can organize such workshops within the organization.
- Depending on the union structure, it would be good to involve people from different departments, with different levels of responsibility, from top-level decision makers to shop stewards, working at national, regional and local level: this diversity would help in making the mapping exercise as comprehensive as possible.
- In addition, involving a variety of people would help to overcome any organizational barriers, raise awareness and create solid foundations for further multidisciplinary group work, showing the benefits deriving from working in teams and with an holistic approach to issues.
- When appropriate, as per the example above, the Process Coordinator could run such a workshop involving more than one union.
- When doing the mapping exercise, it is recommended to keep a distinction between actions on the two transitions, while ensuring that when reporting back, there’s room to highlight any possible case of action on the “twin transition”.

# 6. STEP 3 – ASSESS RESULTS

## 6.1 DESCRIPTION

While still working with the same group, once the grid is filled in and the mapping is complete, the next step in the discussion should focus on assessing the actions mapped, in particular those which are already – or about to be – finalized.

A first round in the discussion should focus on actions which are already – or about to be – finalized. The questions are:

### 1. Strengths:

- is there any action that we can consider as a “best practice”?
- what makes that action a “best practice”?
- are there already visible positive preliminary results?

### 2. Weaknesses:

- is there any action that we can consider as “to be improved”?
- what makes that action “to be improved”?
- are there already visible warning signs?

A second round in the discussion should elaborate on future actions. The questions are:

### 3. Opportunities:

- what should happen in order to ensure that they will be successful?

### 4. Threats:

- what could undermine their successful implementation?

As a result of the guided discussion, the Process Coordinator will wrap up and produce with participants a concise check-list of elements to be taken into account when planning future trade union actions on the green and digital transition.

This will include both “does” and “don’ts”.

In addition, the Process Coordinator will stress the importance of assessing previous actions when planning future ones.

## 6.2 EXAMPLES

During the workshop run in Sweden, following the report back as described at point 5.2, a guided discussion was run in plenary. Participants agreed that, in general, actions on the two transitions did follow two parallel tracks.

They recognised that if, on the one hand, a lot is going on (which is positive), on the other hand, this runs the risk of losing control and coordination of the many actions carried out (which is negative). Participants find it useful to run this exercise to increase their awareness on what their unions are already doing and to identify any differences in the progress made in the two areas, which is clearly visible from looking at the flipchart.

In addition, and this was an unexpected “plus” resulting from the discussion, the two unions attending the workshop expressed their willingness

and readiness to strengthen their cooperation by possibly creating a joint working group focusing on the twin transition, in an effort to be even more effective and efficient.

As another example, at the workshop run in Italy, there were participants from three different unions (Filcams, Uiltucs and Fisascat). During the plenary discussion following the mapping exercise, the results achieved were evaluated as a group after putting together the actions separately run by all organizations on the two transitions.

Participants agreed on some key reflections (see picture):

- Having a stronger coordination, both within each union and between the three organizations, is unanimously considered to be a pre-requisite for achieving better results in the future.

- The availability of more in-house experts would be extremely helpful in planning and running high-quality actions, ensuring responsiveness and addressing the unions' priorities.
- Setting up an ad hoc infrastructure to regularly and easily collect information and data on collective agreements signed by unions at company level (which, in Italy, represent a second level of collective bargaining in addition to the national sectoral agreements) would be needed in order to have a complete and updated quantitative and qualitative overview on trade union actions on the two transitions.
- Reinforcing the dialogue existing between unions and local authorities on the twin transition could pave the way to new and successful future actions.
- Last, but not least, there's awareness of the need to balance efforts and guarantee that both transitions are equally a priority, avoiding any imbalance.
- This assessment represented for participants their first ever occasion to consider their union work on twin transition, conduct a critical analysis and identify weaknesses and threats. In addition to being an eye-opening activity and raising awareness, the discussion helped pave the way to decision-making on structural changes needed within their organizations. In their specific case, the pre-requisites for future

#### **WRAP-UP**

- **+ DIGITAL / – GREEN**
- **LACK OF COORDINATION INSIDE & WITHIN UNIONS**
- **LACK OF IN-HOUSE EXPERTS**
- **STRUCTURAL COLLECTIONS OF INFO & DATA ON COLLECTIVE AGREEMENTS**
- **VERY WEAK DIALOGUE WITH LOCAL AUTHORITIES**

*WORKSHOP ITALY  
NOTES ON THE FLIPCHART*

successful actions were: reinforce coordination on twin transition; build in-house expertise; create monitoring tools.

## **6.3 RECOMMENDATIONS**

- The mapping exercise is most beneficial when it is followed by in-depth critical discussions and reflections.
- By identifying strengths and weaknesses, as well as threats and opportunities, participants can collectively build a solid foundation for further planning.
- During the guided discussion, the Process Coordinator can insist on some identified criti-

cal points if this is felt to be particularly relevant in view of Step 4 and Step 5: at this stage participants should be encouraged to elaborate as much as possible and to build a shared understanding of how things stand.

- The outcomes of the discussion, which should be wrapped up by the Process Coordinators, will be referred back to when implementing the subsequent steps.

# 7. STEP 4 – IMAGINE SCENARIOS

## 7.1 DESCRIPTION

Taking stock of the work done so far, the Process Coordinator invites participants to look to the future.

There are many ways to approach discussing scenarios, and the timeframes adopted might change.

If they feel that running a full strategic foresight exercise might be too challenging and resource-heavy, the Process Coordinators could run a discussion following a soft approach.

The aim here is to help participants to define a future situation, in a definite timeframe, where plausible and desirable aims are achieved.

The exercise should encourage participants to leave their comfort zone, if possible even thinking out-of-the box.

The end result should be describing a scenario where realistic and achievable, but also ambitious, aims are defined.

The Process Coordinator can assign groups to work on the following task:

1. Imagine it's 10 years from now and you have to report on the results achieved by your union on the twin transition.
2. Describe the actions you were able to implement, including successes and issues.

When groups report back in plenary, the Process Coordinator can identify commonalities and specificities of the scenarios described through the “reports”.

After wrapping up, a further stage in the discussion could focus on any obstacles or leverage participants identified during the implementation of their desired scenario.

## 7.2 EXAMPLES

During the workshop in Sweden, groups were asked to prepare “fake reports” on unions’ achievements on the green and digital transition as if they were written in 2033. One group, for instance, focusing on the green transition, made a comprehensive list of actions (see picture) which was much richer and more advanced compared to the results of the previous – still quite rich – mapping exercise. Since the task was also quite “creative”, the results presented by different groups were diverse and made the group follow-up discussion rich and fruitful.

The scenario described through the imagined “report” included a series of principles, for instance “no green washing!” and “human factor at the centre”.

In addition, examples of new concrete initiatives were identified, such as the introduction of ven-

tilation in the workplace, as well as the new role of the “green representative” within companies.

Another set of ideas included policy proposals: the proposal for reducing VAT for some products to support a more circular economy; public financial support for sustainable companies and “green” requirements included in public procurement.

All these ideas, produced in a relatively short amount of time by the working group, represent a sort of Manifesto showing where an organization would like to be in, in this case, 10 years’ time. From this point, as the next step, participants move forward with defining the master plan needed.

During the workshop organized in Hungary, a discussion was held on the possible obstacles to achieving the desired aims for the 10 years scenario.

Participants, well aware of the difficulties existing in the country for unions to be heard, provided a list of issues they know they could face. They range from lack of human and financial resources, as well as topic-specific knowledge, to the pessimistic and apathetic attitude observed within employees.

Openly identifying the obstacles is a necessary element in the preparation of the roadmap at Step 5. In particular unions who can't count on huge resources have to be careful in taking small but successful steps, rather than risking facing big failures.

## 7.3 RECOMMENDATIONS

- Choosing a 5 to 10 years scenario can help participants thinking outside-the-box, adopting a long-term vision and a forward-looking approach, avoiding the risk of getting stuck in the present.
- Remind participants that it's possible to be both realistic and ambitious: the tension between “what we want to do” and “what we are able to do” brings organizations out of their comfort zone and pushes them to tackle the unprecedented and systemic challenges brought by the digital and green transition.
- Examples and tools on how to conduct a more complete strategic foresight exercise can be found in ETUI publication “Anticipating change, staying relevant: why trade unions should do foresight”<sup>1</sup>, by Aida Ponce del Castillo.

1. <https://www.etui.org/publications/guides/anticipating-change-staying-relevant-why-trade-unions-should-do-foresight>

### 2033

- **WORKPLACE – ENVIRONMENTAL OFFICER**
- **NO GREEN WASHING!!!**
- **LOWER VAT, MORE CIRCULAR ECONOMY**
- **MORE SECOND HAND**
- **STOP COTTON PRODUCTION**
- **VALUE OF INTEGRITY**
- **RIGHT TO PRIVATE LIFE**
- **EVERYONE INVOLVED IN GREEN**
- **“GREEN” IS PART OF NEGOTIATIONS**
- **DEMANDS IN PUBLIC PROCUREMENT**
- **HUMAN FACTOR AT CENTRE**
- **VENTILATION**
- **MONEY FOR SUSTAINABLE COMPANIES**

WORKSHOP SWEDEN  
NOTES ON THE FLIPCHART

### OBSTACLES

- **LACK OF HUMAN & FINANCIAL RESOURCES**
- **LACK OF KNOWLEDGE & AWARENESS**
- **POLITICAL & ECONOMIC SITUATION**
- **PEOPLE'S PESSIMISTIC & CARELESS ATTITUDE**
- **UNDERESTIMATING ISSUES**
- **SHORT TERM INTERESTS**
- **PROFIT AS PRIORITY**
- **REACTIONS TOO LATE**
- **CLIMATE CHANGE**

WORKSHOP HUNGARY  
NOTES ON THE FLIPCHART

# 8. STEP 5 – DEFINE A ROADMAP

## 8.1 DESCRIPTION

Looking back to the previous steps, we can say that Steps 1 to 3 helped to define the state of play (“the starting point”), while Step 4 helps define where we want to go (“the arrival point”). Step 5 is about considering how to go from the starting point to the arrival point.

The Process Coordinator should further elaborate with participants, in an ambitious but still realistic way, bearing in mind all issues and challenges identified at Step 3: the goal of this exercise is, ultimately, to produce a feasible and forward-looking roadmap that the organization in question is able to implement.

This step should have as an outcome a draft proposal for a roadmap aimed at informing the decision-making process, usually under the responsibility of the organization leadership.

The Process Coordinator, when facilitating discussion, should go through different phases, alternating group work, report back and discussion in plenary:

1. Set the timeframe of the roadmap and then invite participants to brainstorm possible actions to be undertaken, completing for instance the sentence: “Within the next 12 months we will...”. Participants will be asked to be ready to explain

the reason for their choices. Note that the chosen timeframe can change depending on how used an organization is to doing mid- and long-term planning, as well on the decision-making process that is needed to validate the roadmap.

2. Ask participants to describe more into detail what are the deliverables/outcomes of each of the listed actions, trying to be as concrete and specific as possible.
3. Invite participants to consider the actions listed and identify priorities (“put first things first”), specify interdependencies (“action X can only start once action Y is completed”), order them on a timeline (with duration and start/end points) and highlight key moments (including relevant organizational decision-making moments, such as statutory meetings).
4. Finally, for each action participants should identify who is the responsible person and who should be involved in the team.

At the end of this step, participants should be able to present – as a document, a flipchart, or a grid – the main elements of what can be considered as “the roadmap” for their organization to shape the green and digital transition.

## 8.2 EXAMPLES

During the workshops held in Italy and the Netherlands, there was time to do a first brainstorming with participants. Divided into four groups – two focusing on the digital transition and two on the green transition – participants were asked to identify actions to be undertaken in the 12-month timeframe given by the facilitator (see picture).

After working in groups, spokespersons reported back in plenary and presented – using sticky notes – the actions they had in mind (one colour per group). During the debrief, the facilitator identified commonalities within the two groups working on the same transition and then also within

the groups working on the other transition.

The goal of such a debriefing was to create synergies between the groups working on the same transition and, if possible, identify actions that could serve the two transitions at the same time.

In the case of the workshop organized in Sweden, the timeframe chosen when brainstorming was not 12 months but 10 years. The reason for this was because the participants attending were from two organizations which are used to working with long-term plans, meaning that thinking 10 years ahead was not completely alien from their normal way of working. In addition, consid-



ering the solid work already done by both organization on the digital and green transition, the groups were asked to propose ideas for actions on the two transitions, instead of focusing on one only. In the plenary following the group work, ideas were shared and noted on the flipchart

by the facilitator (see picture). Where proposals were made by more than one group, they were highlighted on the flipchart with a dot, suggesting that they represented a meaningful area of consensus that was worth further exploring and consolidating.

**ROADMAP**      **NEXT 12 MONTHS...**

**DIGITAL**


**GREEN**


WORKSHOP ITALY  
NOTES ON THE FLIPCHART

**HOW TO GET TO 2033**

- UNIONEN/ HANDELS MORE DIALOGUE
- DEFINE JOINT GOALS
- PUSH ON EMPLOYER'S AGENDA
- JOINT STUDIES
- ANALYSIS & INITIATIVES AT LOCAL LEVEL
- SUPPORT FROM EPOC / UNI EUROPA
- ENLARGE PARTNERSHIPS
- DIALOGUE WITH EMPLOYERS
- INTERNAL COORDINATION & STRATEGY
- TRAINING FOR REPS
- BE PROACTIVE (US REACT)
- INTERNAL CAPACITY BUILDING
- COMPETENCE DEVELOPMENT AT WORKPLACE
- PRESSURE ON EU (ex STANDARDIZATION)

WORKSHOP SWEDEN  
NOTES ON THE FLIPCHART

## 8.3 RECOMMENDATIONS

- The Process Coordinator, when giving instructions for running the brainstorming, can ask participants to consider how to get from “A to B” (from now to the given timeframe), or from “B to A”, which means starting from the end and working backwards. This way of drafting a roadmap is called back casting.
- When drafting the roadmap, it’s wise not to be too ambitious: this is to avoid the risk of failing, or even worse of “failing big”. During the implementation of the roadmap it’s always possible to make adjustments, which could mean “doing less” than planned but also “doing more”.
- To further elaborate the roadmap produced by Step 5 and transform it into a solid project, some additional elements should be included:
  1. Identify specific indicators to be used to measure the success of each action: this will help with monitoring the project implementation and periodical assessment. This might appear, in the project design phase, as a burden, but it will prove to be essential to staying consistent and balanced.
  2. Foresee a risk assessment in the design phase of the project, identifying any issues the implementation of the roadmap might encounter, their probability and their impact. For risks with medium/high probability and medium/high impact, solutions to minimize them should be identified as early as possible and integrated in the project.
  3. As is usually the case, not surprisingly, there might be the need to invest not only human resources but also to allocate money to successfully implement the desired project. The budget is an essential element to be included the proposal: it shows its feasibility and helps leadership in taking informed decisions.
- While taking care to inform the decision-makers on the progress in producing the roadmap, under the responsibility of the Process Coordinator, the buy-in of the leadership will be completed when presenting the outcomes of the 5 Steps process presented in this Toolkit. It could be that, after a first check, the roadmap/project needs to be revised.

## 9. FINAL REMARKS

This Toolkit is meant to support those unions willing to pro-actively tackle challenges linked to the twin transition. It’s designed in a way that fits organizations of different sizes and operating in specific national contexts. Each organization, when following the method presented here, will provide specific input which will produce unique results.

The method suggested requires the key-role of the person(s) appointed by the organization to

act as a “Process Coordinator”: he/she/they will have to guarantee the consistency of the five steps described, with an approach that prioritizes collective intelligence, strategic thinking, project work approach and multidisciplinary input. By doing this, the resulting roadmaps will present forward-looking and holistic solutions, responding to unions’ priorities and vision for the future.

# 10. ANNEX – “MAPPING GRID”

AREA	KIND OF ACTION	DIGITAL TRANSITION	GREEN TRANSITION
<b>KNOW</b>	Raising awareness		
	Scenario sketching		
	Conduct Analysis		
	Knowledge gathering		
<b>PLAN</b>	Strategy		
	Roadmap		
	Principles		
<b>DEMAND</b>	Recommendations		
	Policy position		
	Regulatory Demands		
<b>INFORMATION CONSULTATION NEGOTIATION</b>	Sectoral national collective agreements		
	Sectoral local collective agreements		
	Company level collective agreements		
	European Works Councils		
	Global Framework Agreements		
<b>ACT</b>	Union organizing		
	Campaigning		
	Collective action		
	Call to action		
<b>LEARN</b>	Empowerment		
	Training		
	Capacity building		

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