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# Covid-19 and the work of trade unions: Adaptation, transition and renewal

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## Abstract

Trade unions face long-term challenges including declining memberships that threaten their influence. COVID-19 created new challenges and possibilities for renewal. This article presents findings from a study conducted during the pandemic, comprising a large survey and interviews that investigated how unions adapted to the changes to working life they and their members faced. Evidence from UK unions shows unions rapidly changing how they worked, particularly in adopting and investing in new technologies. COVID-19 became a trigger for adaptation for unions which helped to meet the challenges created by the pandemic and demonstrated unions' creative ability to adapt and maintain relevance. The article contributes new insights about union renewal and argues that renewal should be understood as a continuous and evolving process of adaptation and transition, shaped as much by internal strategy as external shocks. It argues that confidence within unions about their ability to reform is important for understanding renewal.

## 1 | INTRODUCTION

Trade unions around the world face long-term challenges to their relevance, influence and legitimacy. Against a backdrop of declining memberships and collective bargaining coverage over the last 40 years, unions seek to represent workers in a world of work being rapidly shaped

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by digitalisation, demographic shifts and climate change (Ibsen & Tapia, 2017; International Labour Organisation ILO, 2019). Calls for unions to modernise if they are to reverse long-term decline and meet the new challenges workers face come from within the union movement (Arnold, 2018); the stark warning of 'change or die' is prominent (Topping, 2018). The COVID-19 pandemic created new challenges, but also possibilities for renewal. This article explores the extent to which the pandemic encouraged reforms that contribute to 'union renewal', understood here as the processes of change that seek to put 'new life and vigour' into the labour movement to rebuild its strength (Kumar & Schenk, 2006, p. 30).

The article presents findings from a study conducted in late 2020 that explored the impact that COVID-19 was having on trade unions. With a predominant focus on the United Kingdom, the study, which comprised a large survey of and interviews with union officials, is one of the first investigations of union activity during the pandemic.<sup>1</sup> The study began just 7 months into the pandemic when the UK and many other countries were experiencing their 'second wave'. The report published on the results found unions making rapid changes to how they operate to respond and adapt to the new circumstances their members and officials (both paid staff and lay workplace representatives) were facing. The findings indicated that member engagement and activism had deepened and increased online and that the majority of unions have adopted new forms and methods of campaigning, communications, recruitment, negotiating, training and representation. The report demonstrated how unions were upgrading, adapting and investing in their communications infrastructure (Hunt, 2021).

Using the data from this study this article draws on the literature about the role of unions during the pandemic (Hodder & Martínez Lucio, 2021; Mwamadzingo et al., 2021) and contributes new insights to the debates on union renewal and revitalisation strategies. It shows how short-term and creative adaptations to unions' work, often made through necessity and not arising from strategic decision-making processes, are encouraging further adaptation and stimulating debate within unions about longer-term strategic reforms. While it remains unclear to what extent reforms by unions to respond to COVID-19 will endure, they raise new questions and insights about union renewal. They make a fresh case for why union renewal should be investigated and understood as a process of transition (Fairbrother, 2015) that is highly contingent and does not always follow predetermined plans, and one that can be shaped by external shocks as much as by strategy.

The UK experienced in 2020 its worst economic performance for over 300 years (Romei & Giles, 2021), a decrease in the employment rate and an increase in rates of economic inactivity and unemployment (ONS, 2021). Yet, amid a highly challenging social and economic context the study found a strong sense of confidence among union officials. This was attributed to optimism about the changes their union was making during the pandemic, to the role of unions in shaping government policy and to rising membership growth. The article considers what this tells us about union renewal and in so doing makes a fresh intervention by arguing that confidence within unions should be seen as an important factor for understanding processes of, and possibilities for, renewal.

The article begins with a review of debates on union renewal. The study's methodology and findings are then presented, first with a discussion of the pandemic's impact upon the locations from where union activity is organised, focusing on remote working, before considering changes to six interconnected elements of union activity: member engagement; recruitment and retention; training members and supporting workplace representatives; advocacy and

<sup>1</sup>A summary of the data was published in Hunt, T. (2021).

influencing; representing members, and governance and democracy. The discussion and conclusion sections explore the findings' contribution to our understanding of union renewal.

## 2 | UNION RENEWAL

A rich literature on the role and activities of trade unions provides insights into, and explanations for, union decline (Ackers, 2015; Visser, 2013) and into strategies for union renewal (Ibsen & Tapia, 2017; Murray, 2017). While some take a more pessimistic view and have questioned the ability of unions to reform (Hyman, 2007; Taylor, 2005), others have shown where and how processes of renewal, or 'revitalisation', can occur. In a review of research on union renewal conducted during the last 30 years, Murray (2017, p. 23) concludes that renewal comes through 'rigorous democratic experimentalism' but that there are no easy answers and argues renewal should be understood in those terms. The evidence presented in this article illustrates how the pandemic presented unions with new opportunities for experimentation, some of which, like the use of new technologies as a tool for communicating both internally and externally are likely to have a more permanent impact on the organising tactics and ways of working for unions (see Geelan, 2021).

Murray also highlights the crucial role of 'strategic capabilities' and the need for unions to develop such capabilities to have sufficient capacity to enable experimentation. In an earlier contribution, Lévesque and Murray (2010) outline a framework for assessing the power resources and strategic capabilities needed to build union capacity. Their contribution highlights the importance for scholars investigating union renewal to consider questions such as, which challenges are unions seeking to meet, what opportunities for renewal have been identified and how are resources deployed accordingly? This article's analysis is informed by such questions yet the evidence it presents problematises the notion of union renewal being informed through strategic decision-making as it indicates how renewal may arise from reactive actions taken through necessity and not as a result of pro-active and deliberate choices.

Heery's study (2005) of sources of change in unions assesses the internal and external pressures that paid union officials face when determining which groups of workers to focus upon in their organising activities. The findings presented in this article are similarly drawn by surveying union staff who are, as Heery notes, 'a key group of representatives within unions, with a prime responsibility for organizing and bargaining' (2005: 94). By examining the role of internal actors within unions and the specific actions they take and have the ability to take, debates about union strategy and capacity are translated from theory to practice. In a contribution that interrogates 'the meaning of strategy in the trade union context' (2007: 195), Hyman concludes that strategic capacity is a product of both leadership and internal democracy (2007: 203). Identifying processes of internal dialogue, discussion and debate as important for enhancing strategic capacity, his analysis encourages inquiry to gain insights about such processes; a call that this article seeks to meet by providing new evidence about how unions' democratic and governance processes functioned during the pandemic.

While studies of union renewal demonstrate how different industrial relations frameworks and institutional arrangements mean that 'renewal' as well as 'decline' can have different meanings in different countries (Frege & Kelly, 2003), membership (both total membership and density) is widely recognised as a key metric of both. This is particularly true in liberal market economies such as the UK where, in contrast to other European countries, unions have had hostile legislative curbs placed on their activity and operate in a context of limited or no

institutional support meaning that unions' strength is 'largely dependent on their ability to organise new members' (Murray, 2017, p. 10).

Investigation into the relationship between unionisation and the business cycle has found union growth to be procyclical: in many countries employment growth leads to union membership growth and rising unemployment reduces growth and density (Schnabel, 2013, p. 258). However, others argue that membership growth is more dependent on the institutional context in which unions operate than on the business cycle (Western, 1997). Analysis of declining membership in the United States since the 1980s finds 'no apparent relationship to the business cycle' (Ruth Milkman & Stephanie Luce, 2017, p. 149). In the United Kingdom, since the introduction of antiunion legislation in the 1980s, a trend of long-term membership decline through both periods of economic growth and recession can also be observed. Despite the steep contraction in economic activity in the United Kingdom in 2020, total union membership rose by 118,000, the fourth consecutive annual increase (Department for Business Energy and Industrial Strategy BEIS, 2021). Although overall union density remained static, this growth, albeit modest by historic standards, provides evidence that one indicator of union decline may have begun to halt its long-run trajectory. The membership rise corroborates evidence from the study that found union officials reporting buoyant membership growth during the pandemic with some forecasting large annual increases. Moreover, it suggests that, contrary to previous studies, membership growth, an important indicator of renewal, is possible in the challenging context of both an economic downturn and where unions operate with unfavourable institutional arrangements.

Scholars have outlined quantitative and qualitative indicators by which to understand and assess outcomes of union renewal. Behrens et al. (2004) present the case that revitalisation can occur on four dimensions: membership, economic power relative to employers, political influence and better internal governance. Ibsen and Tapia (2017) add a fifth dimension of better, or stronger, member participation. The article's final section considers the findings of the study against these five dimensions and makes a new contribution by arguing that the level of confidence and optimism within unions about their ability to reform should also be considered an important new qualitative dimension for understanding union renewal. Confidence, as the study shows, can be gained from various factors including membership growth, but also from the very process of making reforms. Confidence is also contingent upon events and so in that regard, it connects to the framework proposed by Hodder and Edwards (2015) to understand the essence of trade unions. Their dynamic framework offers a new perspective on understanding how union identity, purpose and ideology interact and shape each other. Just as unions' activities constantly evolve, their framework is similarly 'not static and can be subject to change as a result of different actions by the state, capital and unions themselves' (2015: 849).

The dynamic essence of trade unionism underpinning Hodder and Edwards' framework is similarly found in Fairbrother's contribution (2015) which argues that union renewal should be examined as a process of transition. A sense of transition runs through the findings in this article and also shaped the context of the study that provides them. While processes of change within unions may follow well-established plans developed deliberately and made possible through long-term cultivation of union capacity, new events and shocks can emerge unexpectedly to derail such plans and demand immediate and new responses. To revitalise unions need to engage in fundamental organisation change. Yet, as Hyman argues, 'within trade unions, particularly those long established, the widespread respect for precedent and protocol means that traditions of all the dead generations frequently inhibit learning' (2007:

202). Hyman (2007) draws on the concept of organisational learning to understand how a crisis for an organisation can generate ‘creative chaos’ which in turn encourages social learning. The nature and extent of the impact of the COVID-19 pandemic on union work necessitated a fast and fundamental set of adaptations, which centred on the shift to online ways of working and communicating internally and externally.

Arguably, trade unions have been ‘behind the digital curve’ in adapting to new technologies and have not seized the full potential of information and communication technologies (ICTs) (Geelan, 2021; Geelan & Hodder, 2017). Since the early 2000s waves of research and debates in the literature have shown how unions have used ICTs to develop new forms of communication, renew organising, participation, union democracy and the conduct of industrial disputes (Diamond & Freeman, 2002; Greene et al., 2003; Kerr & Waddington, 2014; Martínez Lucio & Walker, 2005).

The shift to working online is problematic for institutions like trade unions where reaching and representing workers can rely completely on physically going to workplaces, where not all workers have access to computers or online platforms. Finding innovative ways to reach workers, using both online platforms and social media, has been a tactic for trade unions and has the potential for revitalising the influence of trade unions (Geelan, 2021). The ‘creative chaos’ of COVID-19 accelerated the need for unions to adapt and transition to more fully embracing and investing in new technologies and this shift underlies much of the way in which union working has changed in the findings presented below.

### 3 | METHODOLOGY

In January 2020, a virus emerged and within 10 weeks, a global pandemic was declared. This was the starting point for the study undertaken in late 2020, which set out to investigate the question: when large parts of economies shut down, when going to work often became a matter of life and death, and when work for millions of people was suspended, ended, or moved into their homes, how did unions operate and how did their work change? The findings contribute new evidence to answer that question and new insights about union renewal.

Data collection comprised a survey of union officials and in-depth interviews with officials. An online survey for union officials investigated the impact of COVID-19 on their job and the work of their union, changes to union membership, and changes to engagement with members and representatives. The appendix presents the survey questions and results. A total of 146 responses that provide information about the work of 32 unions were collected between October and December 2020. The survey was sent by email to trusted contacts in unions who shared it internally within their own unions. Respondents were also recruited by sharing the survey on social media and interviewees were sent the survey to circulate to colleagues.

The study is also informed by in-depth interviews with 27 union officials including senior leaders (General Secretaries, Chiefs of Staff), mid-level officials (Training Managers, Digital Coordinators) and regional organisers. Interviewee details are presented in the appendix. Semistructured interviews, lasting 40–80 min, were conducted between October–December 2020 using an online video platform. Interviewees were recruited in two ways: (1) direct requests by email and (2) where survey respondents indicated they were willing to be interviewed.

To ensure a representative sample of unions, effort was made to recruit interview and survey participants from UK unions operating in a wide range of sectors, large and smaller unions, and general and single-profession unions. Respondents representing workers in the

creative industries, education, energy, financial services, health and social care, manufacturing, public administration and transportation contributed.

Ibsen and Tapia highlight that the literature on union renewal ‘shows a predominance of case studies that...build contextualised single-case or low-to-medium *N* case comparisons’ with analyses focusing on particular unions, industries and labour movements in particular countries (2017: 117). By presenting evidence drawn from a wide range of unions, the article makes a fresh contribution. Further, rather than analysing completed or well-established activities, the article makes a distinct intervention by presenting data gathered contemporaneously amid the pandemic about adaptations that were being made in real-time or had only very recently been made.

## 4 | ADAPTATION AND LEARNING

This section presents findings about the key adaptations made by unions to respond to the challenges created by the pandemic and about the learning and reflection that took place within unions in response to those adaptations.

### 4.1 | Remote working

As lockdowns began, unions quickly closed offices and staff began working remotely. In the survey 56% of respondents reported solely working from home since March 2020 with a further 40% of respondents having worked at home for some of that period. With most paid officials having previously worked from union offices all or most of the time this represented a significant change to how unions operate. Nearly all of the evidence presented in this article about union activity during the pandemic was either planned or implemented by officials working at home, often for the first time. This shift to homeworking required rapid adaptation for union activities to be able to continue and bred confidence among officials, as discussed later, about the ability of their union to adapt quickly to new circumstances.

Remote working required officials to learn how to use online platforms, such as Zoom and Microsoft Teams, which were infrequently used pre-pandemic but quickly became essential for communicating with colleagues and members. When asked if the pandemic had changed how they do their job, 71% of survey respondents said there had been significant changes with just 1% reporting no change. When asked to explain those changes, most respondents referenced the replacement of face-to-face meetings and activities with video calls and higher email volumes. Remote working also involved establishing new formal interactions between colleagues such as online team meetings and new informal communication methods such as staff WhatsApp groups. The latter was seen as particularly important to counter some of remote working’s disadvantages. These include the erosion of ‘bonds’ between colleagues, greater difficulties to resolve interpersonal conflicts and a sense that outside of an office environment officials were less aware of what was happening in the wider organisation beyond their immediate work group.

In keeping with many office-based organisations, officials reported that in response to the shift to homeworking their union had begun to evaluate the size of their physical estate and to explore whether more flexible forms of working should be permanently implemented. One national official with responsibility for strategy (interviewee 12) described how:

[we are] using the crisis if you like to accelerate some of the things that we might well have ended up doing in two or three years time but we're doing it now. We will be quite a different kind of organization in 12 months time I suspect.

Cost savings from reduced travel and rent are influential factors in such evaluations, as is a newly gained awareness that some officials may work more effectively when not wholly office-based. However, senior leaders also acknowledged the downsides of remote working particularly for staff with caring responsibilities and junior colleagues who miss out on the informal learning gained in offices. They also acknowledged the increased risk of reduced staff wellbeing due to isolation and overwork; the latter is reflected in survey evidence. Fifty-five percentage of respondents reported working more hours than usual since March 2020.

Examining how unions adapted to remote working is instructive because it revealed multiple processes of adaptation and learning simultaneously taking place. The immediate adaptation to new circumstances, often through necessity was combined with the iterative and quick evaluation of those adaptations, often leading to further changes to encourage better outcomes and more effective processes and recognition that adaptations being made would require more considered and structured evaluation if they are to lead to longer-term change. These processes and feedback loops were observed across all areas of union activity during the pandemic, although unevenly within unions.

## 4.2 | Member engagement

A consistent finding throughout the study was that unions had higher levels of engagement with members during the pandemic and that this has taken place in new ways. With face-to-face interactions limited, unions experimented with new online forms of engagement. As the pandemic began, unions quickly increased their use of 'all-member' emails; an action taken for two reasons. First, from February 2020 onwards, large numbers of members turned to unions for advice and guidance. An official (interviewee 5) described how their 'key worker' members 'can't watch the nightly news... so our role increased to pass on what the government messages were and refining them down to what they actually meant'. All-member emails were therefore used to provide members with clear information and advice about COVID-19. Second, all-member emails were used to gather information about the new circumstances members were experiencing at work. Online surveys sent via email were widely used and officials reported high response rates. This enabled unions to use survey data to effectively inform campaign planning and negotiations with employers and policymakers.

Officials also reported that their union was investing in digital technologies and systems to increase and improve engagement with members. This included procuring webinar infrastructures, upgrading email systems and commissioning new websites. Branch meetings moved online using video conferencing platforms and were widely reported to have higher attendances than equivalent prepandemic 'in-person' meetings. A widespread view among officials was that online meetings are easier for the 'usually silent majority' to attend which meant a broader range of members was being heard from. Similarly, officials described being able to 'visit' more workplaces by using video calls which enabled engagement with more members compared to via traditional workplace visits.

The study found widespread recognition among officials that greater member engagement was enabling deeper understanding of the conditions and challenges being experienced by members



and was increasing internal capacity. Recognition of the value of this was also prompting reflection about further longer-term adaptations. One senior leader (interviewee 23) outlined how greater online engagement was leading the union to rethink its organising strategy:

We're not just meeting 20 people once a quarter in a room. We can consult with a hundred interested people or a thousand interested people just before we start doing something, as we're doing something and then afterwards...we might still use the 20 people who we were getting together...but they'll be the people who are coordinating that.

The official described plans to use new methods deployed during the pandemic, such as online meetings, to embed throughout the union 'the principle of engaging as many members as possible as often as possible'. A pattern of adaptations inspiring further adaptation was observed across different unions and informs the article's argument that renewal should be understood and investigated as a process of transition.

### 4.3 | Recruitment and retention

As noted earlier, union membership in the United Kingdom increased by 118,000 in 2020 (Department for Business Energy and Industrial Strategy BEIS, 2021). Official statistics had not been published while the study was being conducted but participants reported that their union was experiencing growth. Sixty-two percentage of survey respondents said they were aware that membership had increased since March 2020. With many members experiencing financial hardship and with in-person recruitment activities in workplaces and education settings unable to take place, participants described initially fearing and expecting that the pandemic would lead to membership decline. Many expressed satisfaction, and some relief, that the opposite appeared to be occurring. The study found evidence of organic membership growth but also that new initiatives had led to recruitment and member retention.

Interviewees and survey participants attributed organic growth to two separate but related sources: people who joined because they sought protection, support and advice about threats to their employment and health related to the pandemic, and people who joined having seen unions supporting their members during the pandemic. While unions would argue that defending members' jobs and interests is the essence of trade unionism and thus continuing to do so during the pandemic does not represent change, this does suggest that the cumulative effect of unions' work during the pandemic to support members contributed to membership growth.

Alongside organic growth, unions adapted their recruitment activities in ways that contributed to membership growth. This included investing in new online membership systems and upgrading existing systems (a response to a large majority of new members joining online during the pandemic) and by organising 'virtual' recruitment sessions in workplaces. When over 25,000 trainee health professionals enrolled to work in the United Kingdom's National Health Service, one health union introduced a new category of membership that was initially free for temporary entrants to the workforce. The same union also used the pandemic as an opportunity to remove up-front joining fees for new members and to move their subscription model to monthly payments. Unions also acted to retain members by introducing 'subscription holidays', providing hardship funds for members experiencing reduced incomes and

proactively contacting members who had left or fallen into arrears to encourage them to retain their membership or re-join.

Despite participants in the research widely expressing satisfaction and optimism about expected membership growth, concerns were also raised about membership-related challenges that their union may soon face. They included concern that the ending of temporary job support schemes may lead to the decline predicted at the start of the pandemic if members in hard-hit industries (such as airlines and the creative arts) then faced redundancy. Some also expressed concern that their union's subscription model and 'offer' to members may require change, particularly if members who joined during the pandemic find they aren't covered by a collective bargaining agreement and subsequently question the value of their membership. Such concerns indicate how despite adaptations to recruitment and retention activities there was awareness within unions that further adaptation was likely to be required both during and after the pandemic.

#### 4.4 | Training members and supporting representatives

Alongside membership growth officials also reported that large numbers of members were volunteering to become lay workplace representatives, and that in particular a far higher number of members than usual had volunteered to become health and safety representatives. As one official (interviewee 7) noted, the pandemic meant workplace safety took on a new urgency and had become about 'keeping your colleagues safe, keeping yourself safe' from COVID. New representatives required training and the changed circumstances of the pandemic meant new training courses and delivery methods were needed. With in-person training typically not possible, unions embraced online training using platforms such as Zoom, often for the first time. Recognising that existing courses, often delivered in-person in all-day residential settings, could not be delivered online, officials restructured existing courses and prepared wholly new COVID-specific courses that through necessity were delivered immediately without being piloted or having gone through extensive consultation. One official (interviewee 20) stated:

I think it would have taken over two years to build confidence and pilot that through our structures had it not been for COVID. The fact we had to shut everything down meant we just had to do it. An electric shock to the system is actually a benefit.

Having adapted to online provision, officials widely shared the view that future training would combine online and in-person courses. There was also broad recognition that internal resistance to online training had been removed due to the overwhelming evidence that it could work and that there was high demand for it from members. One union provided online training to 3500 members between March and July 2020. In a normal year they would expect to provide in-person training to 2200 members.

Social distancing and closed workplaces led officials to develop new methods to support existing representatives, many of whom faced higher caseloads yet were often physically isolated from the members they were supporting. Officials prioritised contacting representatives through individual video or telephone calls to provide advice and pastoral support and established WhatsApp groups so representatives could receive peer-to-peer support. Officials reported that the pandemic was prompting broader reflection about how long-term support to

representatives is provided. One union leader explained that historically their representatives receive basic introductory training but little subsequent training. The experiences of their representatives during the pandemic had encouraged them to introduce a new performance management system to provide representatives with skills development opportunities tailored to their needs and expertise.

## 4.5 | Member representation

Evidence of rapid learning and of moving in-person activities online can also be observed by considering how unions represented members during the pandemic, both in collective representation through negotiations with employers, and when representing individual members, for example, in disciplinary and grievance processes. Face-to-face negotiations with employers moved online and the issues being negotiated quickly changed. Organisers reported that negotiations already in progress, including for example, annual remuneration processes, were paused and talks quickly refocused on preventing redundancies but also on new issues such as securing furlough status for employees, agreeing homeworking arrangements and ensuring members had adequate personal protective equipment (PPE). Officials reported that their ability to negotiate effectively and often in a highly time-critical fashion on these new issues was a direct result of having engaged with members in the new ways described earlier to learn about the new situations they were experiencing.

Online negotiations were described as being more formal and taking longer than in-person negotiations, due to the loss of informal conversations that can take place at the sides of negotiations and due to participants finding it harder to 'read the room' and the body language of interlocutors when online. However, negotiators learnt how to adapt such as by agreeing new online 'ground rules' with employers which included ensuring regular breaks are scheduled and secure break-out rooms provided. They also learnt that convening members to consult with them during negotiations can be much quicker when online video calls rather than in-person meetings are used and that often this led to higher member participation. Similarly, senior leaders such as general secretaries learnt that online negotiations make it easier and more time-efficient for them to join talks at critical stages from wherever they are rather than needing to travel to the location of in-person talks as would have been expected pre-pandemic.

Interviewees reported concern that once social distancing rules were relaxed to enable in-person talks to resume some employers might seek to maintain online negotiations. Concerns were also raised that online talks made it easier for employers to avoid meetings, ignore communications and that unions had lost the ability to 'turn up' unannounced at workplaces. Despite their concerns, officials also noted that the advantages of online talks in some circumstances might encourage them to experiment with continuing online negotiations if that led to better outcomes for members.

## 4.6 | Advocacy and influencing

Advocating for and with members is central to a union's work but when efforts to lobby and influence employers and policymakers are traditionally centred around face-to-face lobbying and mass gatherings, the pandemic required adaptations to this work. The study found

evidence of unions experimenting with new forms of campaign activities and reprioritising how lobbying work is organised. While some unions adapted mass participation activities such as rallies and demonstrations to fit the new circumstances of the pandemic, for example, by organising socially distanced rallies, most unions experimented by adopting new online campaign methods. These included virtual lobbies of politicians and rallies using video conferencing platforms which saw high member participation. Unions bought targeted adverts to promote campaigns on social media platforms and used online campaign tools such as e-petitions and websites that enabled members to send emails to politicians and employers. Many of these tools were used by unions pre-pandemic but became more widely used when online campaigning took on greater importance. One official (interviewee 17) explained how their union was investing to upgrade their online campaign tools to better mobilise its 'reserve lobbying army'. Decisions about which campaigns to organise were, in part, determined by the results of all-member surveys which, as described earlier, gave unions new and immediate insights about members' experiences.

#### 4.7 | Governance and democracy

Much of the evidence presented so far reflects actions taken by unelected officials with delegated responsibility for specific industries, regions and workplaces. This section looks at changes to unions' national governance arrangements during the pandemic, focusing on elected executives and conferences. While some internal meetings could be postponed, National Executive Committee (NEC) meetings, a key decision-making body within unions, generally could not. A shift from in-person to online NEC meetings took place which had implications for how they functioned and for the decisions taken. One senior official (interviewee 11) described positively how online meetings led to NEC business being completed more quickly, in part because shorter meetings were scheduled but also due to a new expectation that papers relating to the meeting's agenda would be read in advance. The official expected their union to adopt a schedule of online and in-person NEC meetings post-pandemic. Less positively, a senior official in another union (interviewee 27) described how meeting online had led their NEC to become 'increasingly risk averse' in its decision-making with implications for the 'direction of travel of the trade union'. Several reasons were identified, namely that NEC members wanted to avoid confrontation when online; were less able to gain unconscious cues from other members and were unable to informally discuss business outside of the 'formal' online meeting. Officials adapted to this by encouraging offline one-to-one conversations between NEC members and with officials to take place to 'bring back the informal chit-chat' and to provide members with greater information in the hope this would encourage more questions and scrutiny of the business being considered.

Decision-making authority within unions also often rests with democratic conferences. As the pandemic began, many conferences were postponed until 2021 but by autumn 2020, some unions were experimenting with online conferences. The study found evidence that holding online conferences was prompting reflection within unions about the purpose of conferences. Interviewees questioned whether traditional in-person conferences are an effective use of time and whether some functions such as procedural reports and debates could, or should, stay online post-pandemic.

## 5 | RENEWAL AND TRANSITION

The findings presented contribute new understanding to the academic literature on union renewal. The evidence presented makes a fresh case for why renewal should be understood and investigated as a process of transition: rapid changes by unions to adapt to the new circumstances of the pandemic have led and are leading to further adaptations. Not all changes will be permanent, for example, the relaxation of social distancing rules has enabled some in-person activities and office-based working to resume, but not all have or will return. The research found a strong sense among officials that their union would not go back to its prepandemic ways of working and that its future model was to be determined. Illustrating that sense of transition, one senior official (interviewee 8) stated that it was important unions now outline a positive vision for the future to show ‘where we’re going after this.’ Moreover, interviewees described the need to evaluate recent changes to inform how they should proactively meet future challenges. The view below, of one national official (interviewee 23), is indicative of this widely shared perception:

we’re not going back to what we were, but nobody quite knows what the future will be. It’s really difficult to—and I think it’d be pointless trying to—offer all of the answers, but if you don’t ask the questions at this point then you will lose the opportunity because someone else will impose a solution on unions.

As noted earlier, scholars argue that outcomes of union renewal can occur along different dimensions. Assessing the findings presented in this article against the outcomes proposed by Ibsen and Tapia (2017) and Behrens et al. (2004) highlights the difficulty of delineating processes of renewal into distinct dimensions. Moreover, it calls into question the utility of using ‘outcomes’ as a frame through which to view renewal and reinforces this article’s argument for why renewal should be understood as a process of transition.

The study shows strong evidence of greater levels of member engagement, which supports Ibsen and Tapia’s view, that ‘(better/stronger) member participation’ (2017: 180) is a dimension along which outcomes of union renewal can occur. New forms of online communication utilised during the pandemic enabled unions to engage with more members and led to higher participation in union meetings and with member surveys. This gave unions a rich picture of the situations members were experiencing, which led many officials to express the view that as a result they could more effectively plan campaigns and better represent members in negotiations with employers than they could prepandemic.

Turning to the four dimensions outlined by Behrens and colleagues (economic power relative to employers, better internal governance, membership and political influence), first, it must be noted that the scope of the study means a meaningful assessment of unions’ economic power relative to employers cannot be made. Secondly, on governance, the study found evidence that unions had successfully adapted their internal governance with processes shifting to online platforms. However, as described above, while some officials considered this to have improved decision-making processes, others raised significant concerns that communications between participants in governance processes and their scrutiny of key decisions had been weakened. Third, the study provides evidence of unions reporting membership growth. Officials across a wide range of unions reported increases since the start of the pandemic and in part attributed this to their unions’ adapted recruitment and retention activities during the pandemic; anecdotal evidence supported by the subsequent publication of annual membership

statistics (Department for Business Energy and Industrial Strategy BEIS, 2021). Another major factor cited by officials for why membership had grown directly relates to an outcome of unions' enhanced political influence during the pandemic, the fourth dimension cited by Behrens and colleagues that is the introduction of the UK government's Job Retention or 'furlough' scheme.

The establishment of the furlough scheme in March 2020 was the outcome of lobbying and direct negotiation by the Trades Union Congress and industry bodies with the UK Treasury. Its introduction showed an ability on the part of the union movement to rapidly innovate to develop new policy solutions and to work with government to design and implement them. It thus demonstrated the political influence unions could have, which is notable in the United Kingdom where institutional arrangements offer limited support to unions and deny them any significant role in policymaking (Coulter, 2020). The furlough scheme, at its height, supported 8.9 million jobs and was widely credited with preventing the steep rise in unemployment experienced in other countries when lockdowns set in, notably in the United States (Tomlinson, 2021). The introduction of the scheme, together with demands by unions made early in the pandemic for greater provision of PPE and higher sick-pay for workers, were widely cited by officials as major contributing factors for why new members had joined, having seen unions defending and supporting their members. The introduction of furlough was therefore both an indication of unions' political influence and a contributing factor to recent membership growth, which in turn, if sustained, could further bolster unions' political influence if they are able to demonstrate they speak for a growing share of the workforce. Furthermore, an enhanced level of engagement with members meant that in early 2020 unions had become quickly aware of the acute threats to millions of jobs as COVID-19 began to spread and business and consumer confidence collapsed. This added urgency to unions' lobbying efforts about the need for a job protection scheme and informed negotiations with government. As such, what can be observed is how multiple actions taken by unions during the pandemic to adapt to the fast-changing new circumstances being created by COVID-19 were mutually reinforcing. This highlights the difficulty of separating out such actions into different dimensions of renewal with discrete outcomes.

Considering the development and effects of the furlough scheme is instructive because it also draws attention to the highly contingent conditions within which unions have operated since the emergence of COVID-19. For example, an assessment of the strength of the UK labour movement in January 2020 would not have provided clues that within 2 months unions would have demonstrated their political influence with a period of 'Covid-corporatism' (Coulter, 2020), where unions and employers worked constructively with a Conservative government to shape public policy significantly.

In March 2021, 1 year after the declaration of the pandemic and the introduction of the furlough scheme, the movement was indeed showing healthy signs of 'new life and vigour', evidenced by rising membership and greater member engagement. However, there has been a retreat from 'Covid corporatism' in the postpandemic period and few signs of any re-regulation of labour markets on governments' agendas (Coulter, 2020). One might then draw a different conclusion about the health of the movement and question the extent to which renewal may be occurring. It is for this reason that this article argues renewal is best understood as a process of transition rather than a discrete set of reforms with clearly identifiable beginnings, endings and outcomes. Moreover, it shows the importance of analysing unions holistically rather than solely focusing on different aspects of their work, for example campaigns or recruitment, because union functions do not exist in siloes, but are deeply integrated.

An important feature of the role of unions in establishing the furlough scheme and their wider efforts to improve workplace safety was how they helped to form a strong narrative about the critical early actions they took early on in the pandemic to save jobs and protect lives, counter posed against perceived inaction and delay by the government and employers. Officials who contributed to the study drew on this narrative to frame much of their union's activities during the pandemic. The research also highlighted how the narrative was a key factor underpinning the confidence and optimism that union officials expressed about the ability of the collective union movement to effect change and the ability of their union to support its members. When asked to consider the strength of their union, 70% of survey respondents stated a belief that the union was stronger in autumn 2020 than before the pandemic. Respondents particularly attributed this to the breadth and speed of changes made by their union and the impact those changes had had to protect jobs, as well as to rising membership and greater member engagement.

In their assessment of how to evaluate the strategic capabilities and power resources of unions, Lévesque and Murray (2010) identify 'narrative resources' as a key resource to consider. Defining this as the 'existing stock of stories that frame understandings and union actions and inform a sense of efficacy and legitimacy' (2010: 336), they highlight Voss' contribution (1996) which described the importance of 'fortifying myths' that allow 'activists to frame defeats so that they are understandable and so that belief in the efficacy of the movement can be sustained until new political opportunities emerge' (1996: 253). The narrative observed in this study, one grounded in the success of unions' actions to effect changes that protected jobs and improved workplace safety rather than on reframing defeat, suggests that 'fortifying truths' can also be a critical element of narrative resources that unions can draw upon to frame, inform and motivate their work. The study found that the confidence among officials that reforms had inspired was emboldening and motivating some to push for further reforms. As such this article argues that confidence, and the motivational effect it can have, should be considered as an important factor in understanding processes of renewal and a focus for further academic inquiry. A hypothesis that merits further academic inquiry is thus: if union officials are pessimistic about the ability of unions to reform then they are less likely to make or propose changes if they perceive they are likely to fail. This study found evidence of the opposite: confidence about the perceived success of reforms that had been, inspired by a newfound recognition that reforms could, when required, be quickly made, was encouraging officials to learn from the changes made during the pandemic to inform further short and long-term adaptation and experimentation. This too, warrants further inquiry, but would appear to support Murray's conclusion from his wide review of union renewal that it is through 'democratic experimentalism' that new organisational forms, new types of collective action and 'renewed union vigour' will emerge (2017: 23).

Whether the changes outlined in the article will prove successful or long lasting is uncertain but they aid understanding of union renewal. They show unions making adaptations, that were reactive and made through necessity, and that are leading to further adaptations, both already realised and being planned. The changes made also highlight a sense of discovery within unions of their ability to implement new changes at pace and a newfound awareness of the prospects they raise for longer-term renewal. The desire expressed by some officials for their union to strategically plan further reforms, informed by knowledge about the impact of recently made changes and inspired by the confidence those changes had bred, demonstrates the complex and iterative interactions between short and longer-term decision-making. It thus illustrates the usefulness of understanding and investigating renewal as a dynamic process of

transition that is shaped by both reactive actions taken through necessity and proactive decisions arising from deliberation and evaluation. Renewal can be shaped by external shocks and strategy and by the interactions between them.

## 6 | CONCLUSION

This article has shown how unions responded to the pandemic by making significant and rapid changes to how they operate. As one official (interviewee 20) put it, 'we have in effect turned our organization inside out'. New forms of engagement, training, recruitment, representation and campaigning were developed with widespread adaptation to remote working and adoption of digital tools. This led to greater levels of member engagement. The findings demonstrate the potential of ICTs for building and renewing internal communication practices, but also how it can build 'discursive power' through external networking, campaigning and influencing public debate (Geelan, 2022). The research also makes a case for why union renewal should be understood and investigated as a process of transition. The extent to which the changes described will be permanent is uncertain, but the study found an awareness among officials that unions were unlikely to revert to their prepandemic model and that further change is likely to be needed to adapt to a world of work which is still being shaped by the pandemic.

An area that needs further exploration, and not covered in any depth in this article, is the way in which union work has been made more visible and relevant with the focus on 'health and safety', where unions already play a (albeit, limited) role in workplaces through union health and safety representatives (see James, 2021). Unions viewed many of the COVID-19 risks as preventable and framed many of their responses to workplace hazards in terms of the need for employees to have decent and fair work. Union work during COVID-19 was to ensure employment rights, job security, and access to sick pay and support were protected (Watterson, 2020). The extent to which union narratives around health and safety has made workers more drawn towards unions as defenders of their working conditions, deserves further exploration.

Trade unions have had to respond to continuous external shocks since 2020 including the impacts of the war in Ukraine and political and economic uncertainty. As we write this in December 2022, during a wave of strikes in the United Kingdom, unions are potentially more adept at responding as a result of the sweeping adaptations made during the COVID-19 pandemic. The article has shown an ability by unions to learn and to innovate rapidly to change how they work and to shape public policy, thus challenging their critics and a narrative of long-term, even terminal, decline. This generated confidence among unions and motivated officials to push for further change and experimentation. A challenge for unions now will be to learn from periods of change made through necessity and to strategically embed and develop further changes and a narrative about their role. Achieving this may help to facilitate long-term renewal and would contribute further insights for understanding the processes through which unions can adapt and seek to renew.

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## SUPPORTING INFORMATION

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