

## **RÉSUMÉ**

### **Modernisation organisationnelle et nouveaux clivages parmi les syndicalistes d'Afrique du Sud**

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*Cet article aborde la recomposition du mouvement syndical sud-africain, lequel a eu lieu en parallèle au développement d'un double processus transitionnel dans cette société : de l'apartheid à la démocratie libérale, et d'une économie isolationniste vers un plus grand degré d'intégration à économie capitaliste globale. Deux buts principaux sont poursuivis ici. D'abord, cet article examine l'évolution des principales dynamiques politiques et socioéconomiques nationales et globales, ainsi que la façon dont elles ont contribué aux changements survenus dans le mouvement syndical de l'après 1973. Deuxièmement, cet article explore l'impact qu'ont eu ces changements sur le rôle des syndicalistes travaillant principalement dans les organisations de travailleurs noirs après 1973. En particulier, cette étude aborde le thème de la disparition des « organisateurs activistes » et l'émergence de clivages au sein des syndicats, attribuables à une compétition accrue pour l'obtention de postes dans ces organisations. De plus, cet article démontre que ces clivages sont reliés à des perspectives divergentes concernant la modernisation organisationnelle du mouvement syndical.*

## **Organizational Modernization and New Cleavages Among Full-Time Union Officials in South Africa**

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### **Introduction**

It is only recently that South African unionists started realizing the contradictory effects of the democratic transition and the deleterious impact of global change for trade unions. In a 1997 submission to the September Commission on the Future of Trade Unions, a Congress of South African Trade Unions (COSATU) regional office-bearer made a cogent observation regarding the implications of social transformation for trade unions:

We always talk about transformation of society, transformation of government, transformation of the workplace – we never talk about transforming ourselves. We need to transform ourselves and our organisation before we can transform society. We need to make ourselves effective. (September Commission, 1997: 167)

The transformation of the South African trade union movement is best illustrated by examining the changes that have taken place among full-time officials of these organizations. In the formative years of the movement, full-time officials played a pivotal role by contributing organizational skills and nurturing the democratic traditions of the unions. All this occurred in the context of attempts by leading organizations in the anti-apartheid struggle to build “organs of people’s power”. However, the end of apartheid has seen a tendency among organizations to discourage participatory forms of governance with the result that a few powerful leaders have been

assuming too much power. But the discussion that follows shows that this transformation is characterized by contestation.

Most of the literature on transitions from authoritarianism to democracy acknowledges the political role of labour movements during such transitions, particularly during the phase that Guillermo O'Donnell and Philippe Schmitter (1986) refer to as the "resurrection of civil society". With reference to South Africa, scholars and observers have made a similar argument regarding the centrality of the labour movement in the transition from apartheid to democracy (for example, Adler and Webster, 1995). However, Valenzuela (1989) has argued that the task is not simply to examine the role of labour movements in shaping political change. Equally important is the task of examining the impact of political change on unions and "the possible recreation or reorganization of unions, the likely re-emergence of previously suppressed leaderships, and the reconstitution of links to political parties and state officials" (1989: 446).

The ways in which the transitions have impacted on unions and the specific forms that union reconstitution takes under these conditions remain largely neglected in the literature. It is this aspect of the trade unions' relationship to the current democratic transition in South Africa that is the central theme of this article. This article is part of a larger research project on the recomposition of the South African trade union movement at a time when the society was undergoing a 'double transition' – from apartheid to democracy and from economic isolation towards greater integration in the global capitalist economy (Webster and Adler, 1999). Its aim is twofold. Firstly, it examines broader contextual processes – national and global – and how they contribute to, and accelerate, changes within the post-1973 union movement. Secondly, it explores the implications of the changes within the post-1973 unions<sup>1</sup> for the role of full-time union officials employed by these unions. In particular, it

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<sup>1</sup> Following the banning of anti-apartheid organizations in the early 1960s black unions virtually ceased to exist as the apartheid state intensified repression. But in January 1973 things changed following the strikes in Durban and other centres. Today 1973 represents a watershed in South African labour history as it marks the birth of the militant union movement whose transformation is discussed in this article. 'Post-1973 unions' is used here to refer to the non-racial (but predominantly black) unions that emerged in the wake of the 1973 strikes in Durban and other major industrial centres of South Africa. Today most of these unions are affiliated to COSATU and the National Council of Trade Unions (NACTU). The post 1973 unions discussed here are those affiliated to COSATU.

discusses cleavages within union employment and how these are bound up with competing notions of ‘organizational modernization’ within the union movement. COSATU and its affiliates employ more than 1,600 full-time officials in various capacities such as administrators, organizers, researchers, legal officers and general secretaries.

Much of the literature on full-time union officials has been preoccupied with debating whether or not Michels’ (1959) notion of an ‘iron law of oligarchy’ is a plausible one. Others argue that there are ‘countervailing tendencies’ and contestation that discourages oligarchic tendencies include Lipset, Trow and Coleman (1956), Hyman (1971) and Voss and Sherman (2000). This article notes the immense contribution of this latter body of literature but also acknowledges its limitations, particularly its inability to recognize the context within which the various tendencies emerge.

The context within which oligarchic and democratic tendencies contest for hegemony is one characterized by pressures on the union to increase its resources and modernize its operations in the face of growing membership and diminishing power resources to effectively engage capital and the state. Thus in this article we argue that these tendencies emerge in a contest among different organizational modernization projects. As we argue below, different groups of union officials pursue different organizational modernization projects. These modernization projects correspond roughly with the five ‘trade union identities’ or patterns of choice regarding the representation of members’ interests identified by Hyman (1996).

This article arises out of a doctoral research project on the changing role of full-time union officials in COSATU, which has since been completed (see Buhlungu, 2001). That larger research was based on a survey of a random sample of 600 full-time union officials in 19 COSATU-affiliated trade unions as well as 52 in-depth interviews with a purposively selected sample of full-time officials, worker leaders and labour-supporting activists.

### **The National and Global Context**

This section examines how the broader national and global context and processes of change therein, contributed to and

accelerated changes within the post-1973 unions. Movements, organizations and all other social institutions are not self-contained entities that are insulated from their social, economic and political milieu. Indeed, changes within organizations are often triggered by, or can be traced back to, changes within the broader environment within which they organize.

### ***Union recognition and the advent of liberal, non-racial democracy***

In the 32 years of the post-1973 unions' existence two changes occurred which had an unprecedented effect on their functioning, including the role of full-time officials. The first one was the granting of official or legal recognition to these unions in 1979 following the recommendations of the Wiehahn Commission of Enquiry. This recognition paved the way for spectacular growth and consolidation of the unions in the decade of the 1980s. More importantly, union recognition by the state and employers laid the foundation for increased institutionalization of black unions. With recognition came some rights for unions, such as the right to check-off facilities for membership subscriptions, the right to negotiate on behalf of workers and sign binding agreements with employers, the right for union officials to gain access to the employer's premises and the right to elect shop stewards.

The right to check-off facilities resolved what was then a perennial problem for black unions in South Africa, namely the lack of a sustainable resource base. These unions could now employ full-time officials and guarantee them a monthly salary and, in some cases, a few basic benefits. The right of unions to negotiate on behalf of their members served to entrench the position of full-time officials. Even during the heyday of 'the worker control tradition' (democratic unionism), the full-time official was expected to be present at all important negotiations and be the chief signatory to agreements concluded.

However, the labour relations reforms of the late 1970s failed to result in the bureaucratic tendencies sociological studies of trade unionism warn us about. The granting of industrial citizenship to a workforce that did not enjoy political citizenship delayed the 'normalization' of labour relations. The other major change that impacted on the functioning of the union movement was the advent

of liberal, non-racial democracy. Formally, this occurred following the first democratic elections in 1994, but effectively it started after the unbanning of liberation movements and the release of political prisoners in 1990. Political liberalization impacted on unions in several ways.<sup>2</sup> Firstly, the decasualization of society, which the demise of apartheid implied, resulted in enormous opportunities for upward mobility for black people in general and union officials in particular. Since 1994 hundreds of experienced full-time officials have left the unions for political office in local, provincial and national government, while many others have been the beneficiaries of affirmative action and 'black economic empowerment' policies of the new government in various spheres

Secondly, the decasualization of society triggered class formation on a scale that has no precedent in black South African history. Activists of the struggle period were catapulted into new positions of power and high remuneration without the stigma that was associated with those positions in the days of apartheid. The 'race to riches' in the society shaped the behaviour of full-time officials and forced unions to take note of market forces when determining their conditions of employment.

Thirdly, the advent of liberal and non-racial democracy was also accompanied by the erosion of notions of altruism and collective solidarity that had been the hallmark of the struggle era, and the emergence of a new value system based on individualism. Comradely relations among activists were replaced by competition for positions and power. Inside the unions this meant that top positions such as regional secretary and general secretary into which officials were previously elected unopposed became arenas for fierce competition. The new value system was accompanied by the emergence of new cleavages among union officials with the consequence that the activist official of the struggle period gave

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<sup>2</sup> The September Commission (1997) also identified similar changes which had occurred since the end of apartheid. These were: a weakening vision and shared ideology within the unions; engagement with many complex issues; a shift from mass militancy to national negotiations; loss of experienced staff and worker leaders; massive growth of unions; growth of a black middle class and a culture of self-enrichment which undermines the culture of solidarity in unions; and negative organizational trends such as lack of service to members, lack of skills, lack of discipline and lack of commitment (1997: 168).

way to the three types of officials that we discuss later in this article.

Fourthly, legitimate centralized institutions for negotiation and consultation between labour, the state and employers, such as the National Economic Development and Labour Council (NEDLAC) and industry Bargaining Councils were established. This centralization engendered a new style of conducting consultation and bargaining which was at variance with the painstaking processes of mandating and reporting back which had become established practice within the union movement. The new style was often unaccountable, elitist and secretive, but many unionists and political leaders found it attractive because it enabled them to express themselves as individual leaders and, in the process, to raise their profile and prospects for getting lucrative job and business opportunities. Baccaro, Hamman and Turner (2003) have argued that the incorporation of unions in the socio-political system, particularly through access to policy-making institutions, impacts negatively on those unions' ability to "mobilise the membership, organise the unorganised, build coalitions with other groups, or give support to grassroots initiatives" (2003: 121). In South Africa, COSATU's alliance with the ruling ANC makes the federation's entrenchment in the socio-political system even stronger. The changing role of union officials discussed in this article is directly related to these process of incorporation.

Fifthly, with the unbanning of political movements, unions lost their monopoly of legitimacy as 'struggle employers' as new 'struggle job opportunities' appeared in the ANC, the South African Communist Party (SACP) and other organizations. Some full-time officials left the unions to work for these organizations because the salaries they paid were often higher than those paid by the unions. State institutions also acquired legitimacy after the ANC came to power in 1994. These institutions paid much higher salaries and benefits than the unions, something which attracted large numbers of union officials to join the civil service as policy specialists and bureaucrats. This change also occurred in relation to managerial jobs, which were previously regarded with suspicion by unionists. A new discourse of going into management to 'influence a culture change from within' encouraged many union officials and shop stewards to take up positions in management.

Finally, the dawn of democracy introduced new pressures on unions to abandon their social movement character and to operate like conventional social institutions. New practices ranged from abandoning township church venues for meetings in favour of up-market hotels and international convention centres in city centres and entertainment resorts, to the introduction of grades and differential remuneration based on market trends and the professionalization of union activities in general. There were also changes in dress code, the cars officials drive and the social circles they move in.

In short, the political democratization of South Africa led to the deepening of the process of institutionalization of the union movement that began with the granting of recognition at the end of the 1970s. Many trade union education courses on ‘organizational development’, which are standard menu on labour supporting organizations’ and internal union education programs, borrow concepts and principles from standard business management textbooks. In addition, mainstream economics and industrial relations theories find their way into the unions via union officials and shop stewards who enroll for custom-made courses at local universities and technikons<sup>3</sup> many of which run courses jointly with foreign, principally British and Australian, universities.

Meanwhile, sociology, the academic discipline that was most intimately associated with the birth and development of the post-1973 unions, is increasingly finding itself without a role in the rapidly changing union movement. During the formative years of the new unions, the discipline’s Marxist orientation and focus on collective action provided a generation of activists with intellectual skills to support the labour movement. It also created the space for intellectuals and activists to engage critically with the goals and practices of this movement. However, in recent years both the theoretical framework and the substantive issues have shifted away from social movements towards human resource management. In addition, some of the intellectual capacity that sociologists provided is now available within the union movement. But most importantly, other academic institutions and

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<sup>3</sup> A technikon is a tertiary educational institution that is equivalent to the British polytechnic. Following a recent (2003) restructuring of the higher education sector, these institutions are now known as universities of technology.



disciplines have succeeded in repositioning and marketing themselves to the unions better than sociology. For example, some technikon and management faculties at universities have been developing courses and services that respond to the instrumental notions of knowledge in a movement that is under pressure to find quick solutions to complex problems.

### ***Economic liberalization and South Africa's integration into global capitalism***

Historically the South African economy benefited from protectionism and the import substitution strategy of successive national governments and thus seemed to be coping despite the negative effects of recession and unfavourable changes in prices of international commodities such as oil. However, the vulnerability of the South African economy was exposed by the isolation of the country because of its apartheid policies. It lagged behind in a number of respects, particularly technology and human development. Thus, from the mid-1980s many individual corporations and some state institutions started searching for new strategies to adjust in anticipation of South Africa's reinsertion into the global economy. Out of these processes of adjustment two economic strategies emerged which had a profound impact on the trade union movement, namely, economic liberalization in the form of deregulation and privatization and workplace restructuring driven by 'world class manufacturing' techniques.

From the early 1990s these economic strategies formed part of a neo-liberal crusade that sought to counter the ANC's and the union movement's then policy of nationalization. Emerging at the same time as these macro-economic changes in state and corporate policies were attempts to restructure production along the lines of so-called "world class manufacturing techniques" to enable firms to adjust to pressures of international competition. This restructuring entailed, among others, a reduction in the size of the workforce, reorganization of work, the introduction of new technology and the attempts to introduce co-operative relations between workers and management. The latter strategy often involved bypassing the union to deal directly with the workers and using union shop stewards to win support for managerial plans. PG Bison and Nampak were among the first companies to introduce

these strategies, to which the union found it extremely difficult to respond coherently. The two companies went further and recruited shop stewards and union officials into supervisory and junior managerial positions.<sup>4</sup>

The effect of all these strategies was to undermine the trusted union strategy of militant abstentionism and create cracks within the ranks of the movement. While some die-hard union officials, shop stewards and members continued to hold the view that management was a class enemy intent on self-preservation, a growing number of members, shop stewards and officials argued for a more pragmatic approach. A former PG Bison shop steward who has since been promoted to an industrial relations manager, was one of those who felt a need for accommodation between workers and management.

The attitude of this company [PG Bison] towards the union is different from other companies. Like me, I can tell you, since 1991 I have never worked. I am getting paid to be a shop steward and talking, sitting in meetings and solving problems. There was a time when comrades used to say we are co-opted. The perception in the past was that if management fights for your good then you are sleeping in the same bed with them. In 1988 when PG Bison came back from Harare to meet with the [banned] ANC, they came back and gave in to the demands of the union without us going to them. They said, 'you say you want a living wage now? We are giving you a living wage' (interview with Joseph Mthembu, Germiston, 11 March 1999).

These changes also resulted in the emergence of cleavages within the ranks of full-time officials. As unions began to put emphasis on formal education skills, officials who possessed these became indispensable while those with little or no formal education qualifications were increasingly viewed as 'dead wood' that did not contribute to the capacity of the unions to deal with 'complex issues'. Table 1 below shows that today about 34 percent of COSATU officials have post-school education, a dramatic improvement on the situation in the 1970s and 1980s when only a handful of mainly white officials had such qualifications.

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<sup>4</sup> For a detailed discussion of these managerial strategies at workplace level, see a study of Nampak and PG Bison by Buhlungu (1996).

Formal Education Level	No. of Officials	Percent (%)
None	1	0.2
Up to Standard 2	2	0.3
Standards 3 - 5	9	1.5
Standards 6 - 7	18	3.1
Standards 8 - 9	113	19.3
<b>Matric (Standard 10)</b>	<b>235</b>	<b>40</b>
Technikon Certificate	84	14.3
University Certificate	34	5.8
University Degree	44	7.5
Post-graduate Qualification	35	6
Other	9	1.5
<b>TOTAL</b>	<b>584</b>	<b>100</b>
<i>Source: Buhlungu, 2001.</i>		

There was thus a growth of this expert layer of officials as researchers, economists, legal specialists and others were employed to increase union capacity (see also Table 4 below). These professionals brought a different style of doing things, namely taking ‘short-cuts’ as opposed to the traditional participatory style of the union that often took a long time.

They respond to things professionally, by being proactive and running with things...which is good for trade unions. There are other people who like to take things through the processes and brainstorm the issues with a number of people, develop a paper, circulate it...By the time the issue is supposed to be policy we are still discussing the paper. The professionals want to see things done and they get responses from management...Ja, you call them short-cuts because tradition has been that you develop things from your local, you discuss and go back to your factory and discuss and take that to your branch then make a position from there to your NEC. Then it becomes your national or union position (interview with Linda Mngadi, Johannesburg, 11 March 2000).

As the pressure mounts, many officials adopt the ‘professional’ approach to union work and avoid the long process of calling workers’ general meetings to seek mandates or to report back on developments.

The changed balance of power in favour of capital has resulted in the union movement losing the moral high ground it used to occupy. Among officials this has engendered a pragmatic style which gives rise to an eagerness to cultivate an image of ‘reasonable and professional’ unionism that many believe achieves the same results as the militant approach. Examples include the adoption by officials of a more formal or professional dress code, changes in location and furnishing and decoration of union offices, and enrolment for business and economics degrees and diplomas at local and international business schools to help officials master the language of business.

Finally, the insecurity of workers in a globalized economy has made it extremely difficult for unionized workers to resort to militant actions to block restructuring in its various guises. Many workers and shop stewards have come to put their faith in the expertise of full-time officials, thus resulting in a subtle shift of power from workers and shop stewards into the hands of full-time officials, particularly those with specialized expertise. Coupled with this are expectations in the broader society that full-time officials and other top union leaders should engage in deal-making which benefits union members in the long run.

I think that a good union leader in today’s environment should be making deals. In a society where you have a role in influencing and making decisions then you have to switch from direct democracy to indirect democracy. Deal-making depends on the long view, and you can only have the long view if you have stability of leadership. In my view the [public sector] unions [in 1999 and a few years before that] should not have focused on labour issues; they should have accepted greater labour market flexibility, greater fiscal discipline, in exchange for a national health system and proper housing policy and social security. They should have focused on things that would give them support in society and make them part of a bigger movement (interview with Jeremy Baskin, Johannesburg, 24 February 2000).

This view finds greater support among full-time officials and some workers' leaders today than at any other time in the history of the post-1973 unions. In a movement that is on the defensive as a result of national and global economic and political developments, the notion that full-time officials should play the role of deal-makers is likely to have far-reaching negative consequences for the tradition of worker control and exacerbate the dilemma of leadership.

### **Organizational Modernization and New Cleavages among Officials**

The processes of organizational change, which we term organizational modernization, cut across all types of organizations, old and new, and refer to the enduring processes of change which result from the quest to achieve the goals of an organization and to ensure its durability, efforts which one scholar argued are intended to “convert temporary movement into permanent organisation” (Flanders, 1970: 43), and endeavour to make unions adaptable to changing internal and external circumstances. These include operational and strategic decisions and actions as well as changes in organizational structures and political orientation. They range from mundane and routine organizational adjustments to politically and strategically significant decisions, actions and changes.<sup>5</sup> Although the Webbs did not use the term ‘modernization’, their Preface to the 1920 edition of *Industrial Democracy* alluded to the same process when it referred to trade unions as “working class democracies” which were “perpetually recasting their constitutions to meet new and varying conditions” (1920: xx).

Segmentation within the ranks of full-time union officials has resulted in the widening of the gap between some officials and the bulk of the unionized workforce, a divide that manifests itself in class terms. In the post-1973 unions full-time employment has always been characterized by different forms of cleavage such as race, gender, education and occupational position. In this discussion

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<sup>5</sup> In COSATU and its affiliates organizational modernization is encompassed under the rubric of changes and adjustments known as ‘organizational renewal’ or ‘organizational development’. For examples of current debates and thinking within the federation see September Commission (1997) (especially Chapter 9 entitled “Transforming Ourselves to Transform Society: Building Effective Organisation”), and Dicks and Thobejane (2000).

we examine new cleavages within the ranks of union officials which induce, and are in turn induced by, processes of organizational modernization in a context of political transition and integration of South Africa into the global economy. Thus, we elaborate on a central theme of our argument, namely, that the changing role of the union official is manifested by the disappearance of the activist organizer and the emergence of new types of union officials. This change coincides with a process of generational change within the ranks of these officials.

The 'activist organizer' embodied two roles, that of a political activist as well as that of a full-time official of the union. The liberation struggle created a context within which it was possible to fuse these roles. As a consequence, working for the union was regarded by many as being part of a commitment to the goals of national liberation and economic emancipation. Thus, in spite of their severely limited material resources and the risks involved in working for 'struggle organizations', unions were able to attract hundreds of highly politicized and energetic young people, many of whom were prepared to work for little or no financial reward. Union employment was thus non-hierarchical, collectivist and driven by altruism. In addition, it relied on self-supervision and political co-ordination rather than management in the corporate sense of the word. The disappearance of the activist organizer occurred because of the dissolution of the link between the role of political activist on the one hand, and full-time union official on the other. In the course of the dissolution of this link, the latter role has been emphasized by unions and officials themselves with the result that for many officials today, working for the union has become, to all intents and purposes, a form of employment like any other conventional job in the labour market.

Kelly and Heery (1994) use the notion of generational change to explore the changing role of full-time union officials. They argue that generations of full-time union officials emerge and their attitudes are formed by the political and economic climate which prevails at a particular time in history. Building on Kelly and Heery's distinction, this article examines the notion of generational change among COSATU officials and discusses union officials' different political and ideological orientation towards the unions. The article locates the emerging distinctions among full-time union

officials in the changing political economy of South Africa. The typology in Table 3 below is a conceptual representation of the emerging distinctions in COSATU and its affiliates.

The first distinction among officials is generational, one between the old generation and the new generation. The old generation are those officials who were involved in unions during the era of the activist organizer and the prevailing organizational culture. They joined and were active in the unions in the 1970s and the 1980s when altruistic activism and a democratic organizational culture were strong. At the centre of the democratic organizational culture they were socialized into was the notion of worker control. Worker control emphasized the creation of democratic union structures through which elected worker leaders, as opposed to full-time officials, could exercise leadership. The old generation of officials respected this approach and trained worker leadership at all levels of the union movement. Few of these officials remain in the unions today and, as we will show below, many of those that remain have changed in outlook and orientation towards trade unionism.

The new generation, on the other hand, are those officials who joined unions when both the assumptions and practices associated with the activist organizer were changing within the unions. Although it is hard to pinpoint the year in which these changes in assumptions and practices began, the release of Nelson Mandela and others in 1990, the unbanning of liberation movements and the creation of spaces for free political activity do represent an important watershed for our purposes in this discussion. The liberalization of the political system meant that people who would not normally join resistance movements were now able to do so without fear of victimization. Indeed, activism soon acquired a new meaning, namely, as an avenue for upward social mobility. Table 2 shows that the majority of officials (57 per cent) joined COSATU and its unions after 1992. By then the assumption that an official had to be a political activist was being replaced by the view that political activism was not an essential requirement and that the priority was to have skilled officials who could provide quality service to workers. This new emphasis and reprioritization of the requirements for a union official accelerated the unravelling of the organizational culture associated with the old generation of

Year Employed by Union	No.	Percent (%)
1973 - 77	2	0.4
1978 - 82	8	1.4
1983 - 87	59	10.8
1988 - 92	166	30.3
1993 - 96	313	57.1
<b>TOTAL</b>	<b>584</b>	<b>100</b>
<i>Source: Buhlungu, 2001.</i>		

full-time officials. For example, the emphasis on skills implied that educational qualifications would become an important consideration when appointing officials, which in turn implied the introduction of differential systems of remuneration.

The diminishing emphasis on the political activist dimension of the role of full-time officials together with political and economic changes discussed above brought about a change in the orientation of the new generation towards trade unions and trade unionism. Many officials began to show a disregard for the traditions and organizational culture that had emerged during the time of the old generation. Even those who were in agreement with the basic tenets of the culture of militant unionism, which is part of a broad working class offensive against capitalism, often rebelled against the specific aspects of the worker control tradition. Thus, as one official who is part of the new generation observes, this is a generation which “comes into the labour movement at a particular time when there is a decline in social movements, in activism, and so on”. (Interview with Mojalefa Musi, Johannesburg, 30 April 1999).

The generational change in union employment has had a profound impact on the traditions and practices of the union movement in general. In other words, the change has resulted in a transformation in the organizational culture and approaches to organizational management and modernization in the union movement. However, this generational change should be understood as a process which is unfolding simultaneously with other changes and forms of segmentation in unions. Below we



**Table 3 *Ideal-types of Full-time Officials in the Post-1973 Unions***

	<b>Features</b>	<b>Generation</b>	<b>Gender</b>	<b>Approach to Unionism</b>	<b>Organizational Modernization Project</b>
<b>The ideological unionist</b>	Collectivist. Seeks to restore militant tradition and worker control. Wants to achieve socialism.	Predominantly old generation officials.	Mainly male	Political. Unions part of class struggle against capitalist class.	Minimalist. Ambivalent. They seek to strengthen worker control. But they also want specialization and some professionalism to achieve efficiency.
<b>The career trade unionist</b>	Wants to make unionism a life-time career. Focused on becoming expert on specific aspects of union work. Pragmatic.	Old and new generations.	Male and female	Apolitical, economic and technocratic. Unions to improve wages and conditions, not to destroy but reform capitalism.	Moderate. Technocratic and bureaucratic. Seek specialization and professionalism. Decisions by experts and top leaders. Unions are not exactly the same as other institutions. Seek to curtail, but not necessarily to abolish, worker control.
<b>The entrepreneur</b>	Individualistic and manipulative 'empire builder'. Union is a stepping stone to help mobility up the social scale.	Predominantly new generation.	Mainly male	Opportunistic and instrumental. Driven by personal career interests.	Maximalist. They seek to abolish worker control and see unions as business organizations. Create avenues for upward mobility and other entrepreneurial activities such as investment companies.

*Source:* Buhlungu, 2001.

identify and discuss three types of officials, namely, the ideological unionist, the career unionist and the 'entrepreneur'.

These three ideal-typical categories intersect with the generational distinctions noted above. Table 3 provides a schematic summary of the key features of each of these categories, the generation and gender they are drawn from, their orientation to trade unionism and the project of organizational modernization that they pursue within the union movement. Discussion of the first two categories is implicit in debates on the sociology of trade unionism, particularly in relation to notions of union democracy on the one hand, and bureaucracy and oligarchy on the other hand. In this regard, ideological unionists would represent a diminishing layer of strong defenders of worker control. An example of this is a passionate plea made by one unionist for maintaining worker control.

If we give more decision-making power to our leadership now, we will be accepting what the bosses desperately need – a close relationship with union leadership. They need to use the authority of union leaders to reduce rank and file militancy and sabotage working class power (Rees, 1992: 57).

However, ideological unionists remain ambivalent about organizational modernization as they often find it necessary to achieve efficiency in the way unions are run. Although there are a few women in this category, the overwhelming majority of these unionists are male. These males are active in debates about the current state of the union movement and some are regular contributors to public platforms and labour journals such as the *South African Labour Bulletin*.

Career unionists, on the other hand, are technocrats who are committed to building an efficient union movement. Some of them could even be union bureaucrats in the making, breaking the path for the emergence of a fully-fledged union bureaucracy. This category includes a fair representation of women officials, particularly those in middle level administrative/clerical and expert positions. Of course, the role of full-time officials in the unions under discussion is still too fluid to allow us to characterize these tendencies in definitive terms. The usefulness of these categories is that it suggests important changes within the unions and shifts

which are going to have a considerable impact on power relations between union officials and rank-and-file members.

The third type of union official, the entrepreneur, deserves some examination here as it does not feature in conventional debates on full-time officials. Indeed, it would seem that the emergence of this category may be a function of the accelerated processes of class formation spawned by the decasualization of South African society and related notions of black economic empowerment as well as economic liberalization which has created vast opportunities for a few entrepreneurial individuals. The fact that some of these entrepreneurs find themselves in the unions is simply incidental as they are present in all other social institutions as the trailblazers of the predominantly black new middle class. In his poem *It Has Been Such A Long Road*, Alfred Temba Qabula, a former Metal and Allied Workers' Union (MAWU)<sup>6</sup> shop steward at Dunlop in Durban and a cultural activist who later became unemployed and died poor in a rural village in Pondoland, has noted how workers are "movable ladders that take people up towards the skies" which are then "left out in the open for the rain". In the meantime, former activists "show us their backs, and they avoid eye-contact, pretending they never saw us" (1995: 13 – 14). While it is not accurate to characterize all former unionists in this way because there are thousands who continue to work for the betterment of the subordinate classes, the characterization which Qabula provides aptly describes the entrepreneurial official we identify in this discussion.

What distinguishes this type of union official from the others is their instrumental and opportunistic approach to trade unionism. Unions, like other social institutions, are viewed as stepping stones to facilitate the individual's upward mobility. Similarly, the collective culture of the unions is seen as useful only insofar as it assists the individual to achieve his or her personal ambitions. In a nutshell, this type of official exhibits an extreme form of individualism which is capable of operating under the guise of the collective culture of union politics. In reality, entrepreneurial officials, who have their counterparts within the ranks of shop

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<sup>6</sup>MAWU was formed in 1974 and was part of the democratic tradition of unionism. In 1987 it merged with other unions to form the National Union of Metalworkers of South Africa.

stewards and office-bearers of the unions, are at the centre of most leadership battles and are continually seeking opportunities for personal aggrandizement inside and outside the unions. Although there are some women officials in their ranks, the majority of entrepreneurial unionists are male.

One of the manifestations of the activities of entrepreneurial officials is the formation of cliques which are then used as power bases to further the interests of an official. The observations of a long-serving CEPPWAWU shop steward and former regional office-bearer in Pietermaritzburg suggest that these officials are everywhere.

Ja, it is not something that was there before and it is now everywhere. It is also appearing even among old officials and it will end up splitting the unions. Yes, [at the centre of every clique] there is an official. You see, the interest behind an empire [clique] is that they can undermine worker control, undermine it completely. Ja, because you hardly ever get an official like that working with those people who are serious about worker control, you see. Just for instance, there is no more FAWU here in Maritzburg. It's just the name because of the thing of cliques. They were trying to control and manage the situation in the union, and they disciplined a comrade, an official, and eventually he was fired. But he came back and went into many of the workplaces campaigning. He opened an office and started as some kind of consultant and from there he opened a union (interview with Themba Mbokazi, Pietermaritzburg, 21 March 2000).

These officials remain in the unions for as long as their interests are served by these organizations. However, often they work to ensure that unions modernize in a way which favours their personal ambitions and interests. Thus they work hard to ensure that worker control is weakened and that full-time officials have more power in decision-making. They also thrive in an environment characterized by high-level engagement with other institutions such as employer organizations and the state and in meetings of the ANC-COSATU-SACP alliance, as it is in these interactions that they get exposure and access to avenues for mobility. Indeed, the entrepreneurial union official feels more at home in these meetings and forms of engagement than in general meetings with workers. According to a National Union of Metalworkers of South Africa (NUMSA)

official, many have realized that ‘acting smart’ can be rewarded handsomely in the form of lucrative positions in the civil service, Parliament, provincial and local government structures (interview with Osborn Galeni, Johannesburg, 10 August 1999).

There is a convergence between the interests of these officials and the emerging trend of ‘business unionism’ in the form of union investment companies. Business unionism creates entrepreneurial opportunities and avenues for upward mobility for some union officials. Well-known examples are those of Marcel Golding, former assistant general secretary of the National Union of Mineworkers (NUM), and Johnny Copelyn, former general secretary of the Southern African Clothing and Textile Workers’ Union (SACTWU), both of whom have become wealthy businessmen through their leading roles in the investment companies of their former unions. More recent examples include Tony Kgobe, a former national organizer of NUMSA who is now the chief executive officer of NUMSA’s investment company, and Paul Nkuna, a former national treasurer of the NUM who is a senior executive in NUM’s investment company.

Many of these officials support moves to modernize unions, but, as we argue below, the modernization project that they favour is one that exacerbates the erosion of the democratic character of the post-1973 unions and engenders a culture of individualism. In this way, they are in the forefront of moves to erode the tradition of worker control as it constitutes an obstacle to their personal ambitions and entrepreneurial designs. However, they do not necessarily have a long-term interest in trade unionism nor do they have the stamina to remain in the unions until the conditions are conducive for officials to take full control. In the absence of countervailing struggles by union members, the real beneficiaries of the erosion of worker control will be the career unionists, a layer of full-time officials who have a long-term interest in the unions and are currently investing in their own intellectual and technical development.

### **What About the Gender Agenda?**

Recent research shows that there is an inequality of power relations between men and women full-time officials in the union movement (see for example, Tshoedi, 1999 and Buhlungu, 2001).

This inequality translates into occupational differentiation, a phenomenon that relegates women officials to office-bound, clerical and other low-status positions. The situation seems to have worsened since the beginning of the democratic transition. For example, between 1973 and 1989 there were at least six women who served different unions, at different times as general secretaries. However, since 1990 women have been dislodged from those positions of union employment which have been redefined into politically powerful jobs such as organizer, regional secretary, national organizer and general secretary. In this period not a single COSATU union has elected a woman as general secretary. In addition, as Table 4 below shows, in 1997, 66 percent of women

<b>Current Position</b>	<b>Gender</b>		<b>Total</b>
	<b>Male</b>	<b>Female</b>	
Local Administrator	2	32	34
Branch Administrator	1	24	25
Regional Administrator	3	48	51
Head Office Administrator	5	53	58
Local Organizer	79	7	86
Branch Organizer	33	8	41
Regional Organizer	46	6	52
National Organizer	24	3	27
Branch Secretary	17	4	21
Regional Secretary	23	1	24
General Secretary	10	0	10
Research Officer	6	3	9
Legal Officer (Regional)	14	3	17
Legal Officer (National)	2	3	5
Education Officer (Branch)	4	0	4
Education officer (Regional)	12	0	12
Education Officer (National)	11	3	14
Media Officer	5	0	5
Other	43	40	83
<b>TOTAL</b>	<b>340</b>	<b>238</b>	<b>578</b>

*Source:* Buhlungu, 2001.

employees in COSATU unions were in administrative/clerical positions compared to only 3 percent of male employees (Buhlungu, 2001).

Women officials have participated in the post-1973 unions from the outset, and they have served in virtually all areas of union work, from cleaners and ‘tea-girls’ to legal officers, researchers and general secretaries. Thus women were part of the old generation of union officials and they are also part of the new generation as discussed in above. However, apart from occupational segmentation there are other respects in which the role and position of women officials differ from those of male officials. Compared to their male counterparts, both old and new generation female officials have extremely limited access to opportunities and avenues for upward mobility within and outside the unions. Whereas male officials have been moving up inside the unions and in politics, business, the civil service, NGOs, management, union investment companies and consultancy work, the only area wherein female officials are represented is politics.<sup>7</sup> Their presence in the political arena is partly an outcome of quota systems which operate within the different political parties, principally the ANC. As a result, it is now possible to identify several former women unionists in local, provincial and national politics – as municipal councillors, members of provincial legislatures, members of Parliament and even two deputy ministers.<sup>8</sup> Within the union movement, none of the unions in South African, including those which are not the focus of this article, has a female general secretary or national organizer at present.

The role and position of women officials and their male counterparts differ with regard to the typology of union officials in contemporary unions that we discussed above. While male officials are represented in the ranks of all three types of officials, namely, ideological unionists, entrepreneurs and career unionists, female officials are predominantly present within the ranks of career

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<sup>7</sup> The few high-profile exceptions are Irene Charnley (ex-NUM), now a senior Johnnic executive; Adrienne Bird (ex-NUMSA), now a chief director in the Department of Labour, and Lisa Seftel (ex-COSATU), a former chief director in the Department of Labour. The first one is black while the other two are white.

<sup>8</sup> The two deputy ministers are Susan Shabangu (ex-TGWU), Deputy Minister of Safety and Security and Rejoice Mabudafhasi (ex-NEHAWU), Deputy Minister of the Environment and Tourism.

unionists. For many, this is not out of choice but is imposed by the structural conditions of power configurations in a patriarchal society and an organizational culture which has a male bias. The democratic organizational culture of these unions was invented by a predominantly male activist layer and the majority of those who defend it (ideological unionists) are also male. The majority of women have always served as mere functionaries, rather than decision-makers. Thus, it stands to reason that it is only within the ranks of career unionists that women officials can have a guarantee of long-term survival in their union jobs. Even here, they remain in subordinate low-status jobs which, when stripped of their activist dimensions, are purely clerical functions.

### **“Let’s Amend Our Ways of Working”: Organizational Modernization Projects in Unions**

Modernizing union organization has been a recurring theme in the post-1973 unions throughout the 1990s. Addressing the 7<sup>th</sup> national congress of PPWAWU in June 1997, the union’s general secretary devoted some of his introductory remarks to this theme:

All of us gathered here are called upon to outline practical programmes to improve and to modernise our Union.... The challenge of modernising Unions remains the key one. We should avoid becoming prisoners of Past traditions, regardless of the New Conditions. We need to amend our way of working (PPWAWU, 1997: 1).

Although other unions had been debating the same issues for a number of years, PPWAWU was the first union to use the term ‘modernize’ to refer to efforts to change the way it operated. Before the union’s 7<sup>th</sup> congress, its national office-bearers had adopted a policy document entitled ‘Modernising PPWAWU’.

It is hard to separate the internal from the external processes which induce organizational modernization. In the world of union organization, the discourse and practice of organizational modernization is understood to mean ‘professionalism’, ‘efficiency’, ‘skilled officials’ and ‘market related employment conditions’ and is seen as a universal panacea to the problems of a growing organization facing internal and external pressures to undergo changes. Among some union officials and leaders, organizational modernization is presented as a virtue while



'primitive operation',<sup>9</sup> its opposite, is regarded as a problem. The NUM is one the unions which prides itself for having professionalized its approach to staffing:

One of the changes in the union is that staffing matters are now being run professionally. The union accepts that the activist culture of the 1980s is gone and officials need to be paid competitive packages and managed professionally. The role of union officials is not static. There is nothing wrong with change in dress and lifestyle among officials. You can't expect officials to act as if they are still in the situation of apartheid in the 1980s. I do not believe in the approach of white officials of the past that union activists should show their commitment by dressing shabbily. The union has to create conditions to retain officials, otherwise people will leave. The union must pay them competitive salaries, and when this happens lifestyles change (interview with Gwede Mantashe, Johannesburg, 7 February 2000).

However, assertions such as the above conceal the real intentions and interests of different groups within the ranks of full-time union officials. Each of the three types of union officials identified above has a different notion of what modernization should be about. While the ideological organizer would like to professionalize the role of the full-time union official, he would also like to maintain worker control and union democracy. On the other extreme, the entrepreneurial organizer sees modernization as a substitute for worker control which is seen as an obstacle to achieving his or her ends. In a national and global context where professionalism is associated with notions of global competitiveness and world-class standards of corporate performance, for some the language of modernization also serves to reconcile the union movement to a corporate style of conducting its internal affairs.

Thus, a closer examination of the discourse and practice of organizational modernization reveals that there is not one, but three, broad approaches to modernization which correspond to the three types of union official we have discussed above. We refer to these ideal-typical approaches to organizational renewal as organizational

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<sup>9</sup> The term 'primitive operations' is from an article by Skulu (1993). Skulu was then assistant general secretary of SACCAWU and is now the general secretary of the union.

modernization projects. They compete with one another in a context where the union movement is facing internal and external pressures to amend the way it operates. All of them acknowledge that membership growth and changes in the national and global political economy impose new challenges on unions and thus there is a need to modernize union operations. Implicit in each modernization project are the interests and political ideology of the type of union officials who champion it. Thus each modernization project embodies a set of propositions about the way power relations between rank-and-file members and full-time officials and among the various strata of union leadership should be reconfigured.

The first project, which we call the *minimalist modernization project*, is espoused by the ideological unionist and it maintains that changes in the way unions operate should not necessarily result in conceding power to full-time officials. Rather, worker leaders such as shop stewards and worker office-bearers, working through constitutional structures of the union, should undertake such functions and, where it is not possible for them to do so, they should oversee the work of full-time officials. Unionists who hold this view argue that the capacity of worker leadership to run unions can be augmented by means of education and training and other measures such as an arrangement to have full-time shop stewards.<sup>10</sup>

Although the objectives of this modernization project are laudable, it has some obvious limitations. One of them is the fact that worker leaders who are part-time shop stewards do not have sufficient time for attending to union business. Those who become full-time shop stewards often become distanced from the rank-and-file and begin to function just like full-time officials. Another problem is that the turnover of full-time shop stewards is high because of the contestation and competition for such positions. In a nutshell, the danger of this approach is that it could result in

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<sup>10</sup> Many unions agree with this approach in principle. Almost all COSATU unions have agreements with many employers giving unions the right to have full-time shop stewards. Full-time shop stewards perform many functions that are normally performed by officials, such as organizing, administration and negotiating with employers. The September Commission also suggested that all of COSATU's national office-bearers should become full-time shop stewards so that they could have time to perform their duties.

organizational stagnation and paralysis in the face of the internal and external challenges we have highlighted.

The second project, the *maximalist project of modernization*, is a conservative approach which holds that union officials should take all decisions and should not be required to account to the membership at all. The entrepreneur official who champions this position believes that a critical aspect of leadership is the freedom of a leader to make deals on behalf of union members without being encumbered by mandates and other consultative processes. In terms of this extreme form of modernization the union official is the 'boss'. In a nutshell, the maximalist project is the harbinger of business unionism, a model of unionism where full-time officials are powerful business agents providing services to passive union members in return for monthly membership subscriptions.

A key limitation of this project is that the membership of the post-1973 unions is still relatively politicized and the discourse of worker control is too deep-seated for this membership to countenance such an extreme erosion of worker control. Thus the discontinuity which this project implies would result in instability and fragmentation of the union movement. In addition, in South Africa there is still a widely shared expectation that unions should operate democratically.

The third approach is the *moderate project of modernization*, a position espoused by the career unionist, which acknowledges the limitations of the above projects and seeks to find a balance between democracy and organizational modernization. According to this view officials should assume a much greater role in the functioning of the union. This means that they should be granted more powers to take some decisions and make some 'deals' without the stringent consultative processes associated with worker control, but that in the final analysis they should still be required to account to union structures. The underlying assumption behind this view is that full-time officials have specialist knowledge which workers and their leaders cannot be expected to have and thus, the practice of worker control should take this into account. Over the last decade this view has gained popularity within the post-1973 unions.

The moderate project of organizational modernization which seeks to reconcile the imperatives of democracy and administrative efficiency represents the best possible solution to the democracy-

efficiency conundrum. However, this solution does not eliminate the contradiction implicit in this conundrum. Thus, a built-in aspect of this resolution is the dilemma of leadership, a tension which is a necessary condition for maintaining the balance. The dilemma arises because of the need to have a democratically elected and accountable leadership on the one hand, and the desire to have a skilled and efficient leadership on the other. The moderate modernization project succeeds in maintaining continuity with the worker control tradition while at the same time making the necessary adjustments to ensure that unions have the necessary capacity to grapple with complexities resulting from membership growth and changes in the national and global contexts. It represents a progressive project of modernization which leaves unionized workers with power to act as the final arbiters in decision-making on all issues. This is particularly important in a union movement with a majority of members who still subscribe to the notion that a union ought to operate democratically.

One of the ironies of organizational modernization is that it tends to favour the 'professionals' rather the people whom it is intended to benefit, namely, the rank-and-file union membership. Firstly, it concentrates power in the hands of these experts and specialists and makes it possible for them to hide information so that their indispensability within the union is reinforced. Secondly, it engenders an individualistic style of work and removes the incentive for officials to work in a collective way since it is the individual, not the group, that takes credit for work done. Thirdly, it makes it more difficult for worker leadership and union structures to control professionals because of the way they are accustomed to do their work. Besides, the power of these professionals lies in their ability to generate ideas as individuals and to see these through without reference to another person or group within the organization. Finally, modernization implies a preparedness to benchmark one's organization against what is considered the norm within the environment in which the organization operates worldwide. Thus, salaries will be benchmarked against market rates in the same way that employment conditions and other benefits are. This results in the removal from the hands of workers of the power to determine these and other matters and leaves it in the hands of the market.

The best way to overcome these problems is to seek to maintain and sharpen the dilemma by building a strong and combative rank-and-file and worker leadership who are able to act as a countervailing force to such tendencies.

## **Conclusion**

A crucial question which arises from the foregoing discussion is whether this dilemma of leadership threatens to destabilize unions or whether it is simply a creative tension which should be encouraged. Perhaps the way to begin addressing this question is to note that, under the conditions already discussed in this article, worker control as practiced by the post-1973 unions in the past is no longer practicable. At the same time, the bureaucratic model which arises as a result of the maximalist modernization project is equally unfeasible for reasons we have advanced earlier in this discussion. It is a recipe for crisis in the union movement and instability in the industrial relations system which is a harbinger of oligarchy as propounded by Robert Michels.

However, it is possible to achieve a balance between democracy and administrative efficiency through the moderate modernization project. This observation has been made elsewhere.

Membership training and leadership development, strategic planning, administrative efficiency and professionalism, sound financial planning and appropriate staffing policies, are all key capacity issues which are integral to any strategy for organisational renewal. However, a strategy of organisational renewal has to ensure continuity in the trade union movement by strengthening those aspects of trade union organisation which still have relevance now and in the future. In particular, unions must ensure that principles of democratic decision making and worker control, leadership accountability, proper servicing of union members and strong structures are maintained (Buhlungu, 2000: 97).

The notion of a dilemma of leadership has several theoretical implications for the way we understand trade union organizations. It helps us overcome the either/or and zero-sum approach to attempts to resolve the democracy/efficiency conundrum by seeking to reconcile these contradictions. Unions need democracy or worker control in the same way that they need efficiency and organizational

modernization and both organizational imperatives are equally important and should be nurtured in creative ways. The concept as discussed in this article helps us break through this conceptual and theoretical barrier imposed by the democracy/efficiency dichotomy. Oligarchy is the outcome of a successful contestation by certain forces in an organization. Similarly, and as the work of Voss and Sherman (2000) demonstrates, democracy is the outcome of a successful contestation by other forces within a trade union.

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