



OCCASIONAL PAPER NO 17

Comrades, Entrepreneurs and Career Unionists:

**Organisational Modernisation
and New Cleavages Among
COSATU Union Officials**

Sakhela Buhlungu

August 2002

**FRIEDRICH
EBERT 
STIFTUNG
SOUTH AFRICA OFFICE**

C03-00531

Published by the
Friedrich Ebert Stiftung
South Africa Office
34 Bompas Road, Dunkeld West
Johannesburg, South Africa

P O Box 412664, Craighall 2024
South Africa

Tel 27 11 447-2232
Fax 27 11 788-5840
Fessa@fessa.co.za
www.fes.org.za

© Friedrich Ebert Stiftung. All rights reserved. The material in this publication may not be reproduced, stored or transmitted without the prior permission of the copyright holder. Short extracts may be quoted, provided the source is fully acknowledged.

First published in August 2002

ISBN 1-919706-23-2

The opinions expressed in this paper do not necessarily reflect the views of the Friedrich Ebert Stiftung, or the organisation which the author represents.

ABOUT THE AUTHOR

Sakhela Buhlungu works with the Department of Sociology and the Sociology of Work Unit (SWOP) at the University of the Witwatersrand, Johannesburg.

Comrades, Entrepreneurs and Career Unionists: Organisational Modernisation and New Cleavages Among COSATU Union Officials

Sakhela Buhlungu

August 2002



C03-00531

TABLE OF CONTENTS

ABSTRACT	3
INTRODUCTION	4
ORGANISATIONAL MODERNISATION AND NEW CLEAVAGES	5
WHAT ABOUT THE GENDER AGENDA?	10
THE NATIONAL AND GLOBAL CONTEXT	12
Union Recognition and the Advent of Liberal, Non-racial Democracy	12
Economic Liberalisation and South Africa's Integration into Global Capitalism	18
"LET'S AMEND OUR WAYS OF WORKING": ORGANISATIONAL MODERNISATION PROJECTS IN UNIONS	21
CONCLUSION	25
REFERENCES	29
LIST OF ABBREVIATIONS	31



ABSTRACT

There has been a proliferation of studies examining the social movement character of labour movements in developing countries and their notable contribution towards democratic transitions. Despite this, the ways in which transitions have impacted on unions and the specific forms that union reconstitution takes under these conditions have been neglected in the literature.

This paper explores the recomposition of the South African trade union movement at a time when society was undergoing a double transition - from apartheid to liberal democracy, and from economic isolation towards greater integration in the global capitalist economy.

Its aim is two-fold. Firstly, it explores the implications of changes within the post-1973 unions for full-time union officials employed by these unions. In particular, it discusses cleavages in union employment and how these are bound up with competing notions of organisational modernisation within the union movement. The transition from the era of liberation towards one of democratic consolidation has resulted in profound changes in the role of these officials. Secondly, the paper examines broader contextual processes - national and global - and how they contribute to, and accelerate, these changes within the post-1973 union movement.

INTRODUCTION

Most of the literature on transitions from authoritarianism to democracy acknowledges the contribution and political role of labour movements, particularly during the phase which some analysts refer to as the "resurrection of civil society" (O'Donnell & Schmitter, 1986). With reference to South Africa, scholars and political analysts have made a similar argument regarding the centrality of the labour movement in the transition from apartheid authoritarianism to a liberal democratic political dispensation (see, for example, Adler & Webster, 1995). However, in his discussion of labour's role in processes of "redemocratisation" in countries such as Spain, Portugal and Greece, J. Samuel 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 consequences of the changing political context on labour-management relations and on the labour movement itself, that is, 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" (Valenzuela, 1989:446).

It is this latter aspect of the trade unions' relationship to the current democratic transition in South Africa that is the central theme of our discussion in this paper. There has been a proliferation of studies examining the social movement character of labour movements in developing countries and their notable contributions towards democratic transitions. Despite this, the ways in which these transitions have impacted on unions and the specific forms that union reconstitution takes under these conditions have been neglected in the literature. This paper arises out of a larger research project which explores the recomposition of the South African trade union movement at a time when society was undergoing a double transition – from apartheid to liberal democracy, and from economic isolation towards greater integration in the global capitalist economy.¹

The aim of this paper is two-fold. Firstly, it explores the implications of changes within the post-1973 unions² for full-time union officials employed by these unions. In particular, it discusses cleavages within union employment and how these are bound up with competing notions of organisational modernisation within the union movement. The Congress of South African Trade Unions (COSATU) and its affiliates employ more than 1 600 full-time officials in various capacities such as administrators, organisers, researchers, legal officers and general secretaries. The transition from the era of liberation towards one of democratic consolidation has resulted in profound changes in the role performed by these

¹The concept of a "double transition" is discussed in Webster and Adler, 1999.

²The term "post-1973 unions" is used here to refer to the non-racial (but predominantly black) unions which 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 the Congress of South African Trade Unions (COSATU) and the National Council of Trade Unions (NACTU). The post-1973 unions that are examined in this study are those affiliated to COSATU.

officials within the union movement. Secondly, the paper examines broader contextual processes – national and global – and how they contribute to and accelerate these changes within the post-1973 union movement.

ORGANISATIONAL MODERNISATION AND NEW CLEAVAGES

The decade of the 1990s witnessed many profound changes within the South African union movement. In this discussion we focus on processes of organisational change, which we term organisational modernisation, and on a growing segmentation within the ranks of full-time union officials. Organisational modernisation cuts across all types of organisations, old and new. It refers to the enduring processes of change which result from the quest to achieve the goals of an organisation and to ensure its durability. One scholar argued that such efforts were intended to "convert temporary movement into permanent organisation" (Flanders, 1970:43).

Endeavours to make unions adaptable to changing internal and external circumstances include operational and strategic decisions and actions as well as changes in organisational structures and political orientation. They range from mundane and routine organisational adjustments to politically and strategically significant decisions, actions and changes.³ Although the Webbs did not use the term "modernisation", the 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" (Webb & Webb, 1920:xx). Later in this article we elaborate further on this theme.

Segmentation with the ranks of full-time union officials has resulted in a widening of the gap between some officials and the bulk of the unionised workforce, a divide that manifests itself in class terms. In the post-1973 unions, full-time employment has been characterised by various forms of cleavage such as race, gender, education and occupational position. In this paper we examine new cleavages within the ranks of union officials which induce, and are in turn induced by, processes of organisational modernisation 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 organiser and the emergence of a new type of union official. This change coincides with a process of generational change within the ranks of these officials.

The activist organiser embodied two roles – political activist and full-time un-

³ In COSATU and its affiliates, organisational modernisation is encompassed under the rubric of changes and adjustments known as "organisational renewal" or "organisational 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).

This paper examines how changes in union environment affect the style of union leadership.

Organisational modernisation looks at processes of change within organisations.

ion official. 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 organisations", unions were able to attract hundreds of highly politicised 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 organiser occurred because of the dissolution of the link between the roles of political activist and full-time union official. In the course of the dissolution of this link, the latter role has been emphasised by unions and officials themselves, with the result that for many officials working for the union has become, to all intents and purposes, a form of employment like any other conventional job in the labour market.

Understanding the changing role of the union official helps us identify the cleavages and distinctions which have emerged within the ranks of these officials. The first distinction among officials is a generational one. The old generation are those officials who were involved in unions during the era of the activist organiser and its prevailing organisational culture. They joined and were active in the unions in the 1970s and the 1980s, when altruistic activism and a democratic organisational culture were strong. At the centre of this democratic organisational culture was the notion of worker control. Worker control emphasised 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 worked hard to train 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 organiser were changing within the unions. In other words, 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 reprioritisation of the requirements for a union official accelerated the unravelling of the organisational culture associated with the old generation of 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 full-time officials together with the political and economic changes discussed below 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 organisational culture which had emerged during the time of the old generation.

The old-style unionist
was also a full-time
political activist.

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, Mojalefa Musi, 20 April 1999).

The generational change in union employment has had a profound impact on the traditions and practices of the union movement in general. It has resulted in a transformation in the organisational culture and approaches to organisational management and modernisation 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. Thus, the second distinction we make relates to union officials' political and ideological orientation towards the unions. Here we identify three types of officials – the ideological unionist, the "entrepreneur", and the career unionist.

These three ideal-typical categories intersect with the generational distinctions noted above. Table 1 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 organisational modernisation that they pursue within the union movement. Discussion of the first and last 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).

Ideological unionists remain ambivalent about organisational modernisation as they often find it necessary to achieve efficiency in the way unions are run.

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, paving the way for the emergence of a fully-fledged union oligarchy. Of course, the role of full-time officials in the unions under discussion is still too fluid to allow us to characterise these tendencies in definitive terms. The usefulness of this categorisation is that it suggests shifts within the unions which will have a considerable impact on power relations between union officials and rank-and-file members.

New-style unionists
place less emphasis on
the political and more
on the economic.

Table 1. Ideal-types of full-time officials in the post-1973 unions

	Ideological Unionist	Entrepreneur	Career Unionist
Features	Collectivist. Seeks to restore militant tradition and worker control. Wants to achieve socialism.	Individualistic and manipulative "empire builder". Union is a stepping stone to help mobility up the social ladder.	Wants to make unionism a life-time career. Focused on becoming expert on specific aspects of union work. Pragmatic.
Generation	Predominantly old-generation officials.	Predominantly new-generation.	Old and new generations.
Gender	Male.	Male.	Male and female.
Approach to Unionism	Political. Unions seen as part of class struggle against capitalist class.	Opportunistic and instrumental. Driven by personal career interests.	Apolitical, economistic and technocratic. Sees unions as mechanisms to improve wages and conditions, not to destroy but reform capitalism.
Organisational Modernisation Project	Minimalist. Ambivalent. They seek to strengthen worker control, but also want specialisation and some professionalism to achieve efficiency.	Maximalist. They seek to abolish worker control and see unions as business organisations. Create avenues for upward mobility and other entrepreneurial activities such as investment companies.	Moderate. Technocratic and bureaucratic. Seek specialisation 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.

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 deracialisation of South African society and related notions of black economic empowerment and economic liberalisation which have created vast opportunities for a few entrepreneurial individuals. The fact that some of these entrepreneurs find themselves in the unions is incidental as they are present in all other social institutions as the trailblazers of the predominantly black new middle class. Alfred Temba Qabula is a former Metal and Allied Workers' Union (MAWU)⁴ shop steward at Dunlop in Durban and a cultural activist who has since become unemployed and lives in a rural village in Pondoland. In his poem *It Has Been Such A Long Road*, he notes how workers are "movable ladders that take people up towards the skies" which are then "left out

⁴ 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 (NUMSA).

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" (Qabula, 1995:13-14). While it is not accurate to characterise all former unionists in this way – there are thousands who continue to work for the betterment of the subordinate classes – the characterisation that Qabula provides aptly describes the entrepreneurial official we identify in this discussion.

What distinguishes these union officials 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 stewards and union office-bearers, are at the centre of most leadership battles and are continually seeking opportunities for personal aggrandisement inside and outside the unions.

One of the manifestations of the activities of entrepreneurial officials is the formation of cliques that are then used as power bases to further the official's interests. The observations of a long-serving shop steward and former regional office-bearer of the Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union (CEPPWAWU) 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 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, Themba Mbokazi, 21 March 2000).

These officials remain in the unions for as long as their interests are served by the organisations. However, often they work to ensure that unions modernise 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 characterised by high-level engagement with other institutions, such as employer organisations and the state

The entrepreneurial unionist is driven by personal career interests.

The beneficiaries
of the erosion of
worker control are
the career unionists.

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 an official of the National Union of Metalworkers of South Africa (NUMSA), many have realised that "acting smart" can be rewarded handsomely in the form of lucrative positions in the civil service, Parliament, and provincial and local government structures (interview, Osborn Galeni, 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 organiser of NUMSA who is now the chief executive officer of NUMSA's investment company, and Paul Nkuna, a former national treasurer of NUM who is a senior executive in NUM's investment company.

Many of these officials support moves to modernise unions, but, as we argue below, the modernisation 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 are unequal power relations between men and women full-time officials in the union movement (Tshoaei, 1999; Buhlungu, 2001). This inequality translates into occupational differentiation, a phenomenon that relegates women officials to office-bound, clerical and other low-status positions. Women have been dislodged from positions of union employment such as organiser and general secretary, which have been redefined into politically powerful jobs. The purpose of this discussion is to link this marginality of women full-

time officials with the discussion of new cleavages among officials.

Women officials have participated in the post-1973 unions from the outset. They have served in virtually all areas of union work, from cleaners and "tea-girls" to legal officers, researchers and general secretaries. Women were part of the old generation of union officials, and they are also part of the new generation. 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. 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.⁵ 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.⁶ Within the union movement in South African, none of the unions, including those that are not the focus of this paper, has a female general secretary or national organiser 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 was discussed above. While male officials are represented in the ranks of all three types of officials – ideological unionists, entrepreneurs, and career unionists – female officials are predominantly present within the ranks of career 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 organisational culture with a male bias. 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 jobs which, when stripped of their activist dimensions, are purely clerical functions.

All the above has implications for the future of women officials regardless of which of the three types of union official emerges victorious. Women officials are, and it appears that they will remain, losers as a result of the changing role of full-time officials. The appearance and the essence of equality with their male counterparts that they enjoyed in the days of the activist union official have been eroded beyond recognition in the last decade. The irony of the changing role of the union official is that as the power of these officials *vis-a-vis* rank-and-file union members seems to be increasing, the power of female union officials *vis-a-vis* their male counterparts has been diminishing. If indeed the increasing power of full-time offi-

⁵ 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), also a chief director in the Department of Labour. Charnley is black while Bird and Seftel are white.

⁶ The two deputy ministers are Susan Shabangu (ex-TGWU) who is Deputy Minister of Mineral and Energy Affairs, and Rejoice Mabudafhasi (ex-NEHAWU) who is Deputy Minister of the Environment and Tourism.

Women union officials
have much more
limited access to
opportunities for
upward mobility
than their male
counterparts.

cials results in the emergence of a union oligarchy, such an oligarchy will be a pre-eminently male one. This means that in terms of full-time union employment, the gender equality agenda is best served by a democratic union environment rather than an oligarchic one.

THE NATIONAL AND GLOBAL CONTEXT

The second aim of this paper is to examine the broader national and global context and processes of change therein, how they contributed to and accelerated changes within the post-1973 unions, and how they exacerbated the cleavages discussed above. This discussion is of cardinal importance for this paper as a whole since changes within organisations can never be divorced from broader changes within the environment within which unions operate. In other words, movements, organisations and all other social institutions are not self-contained entities that are insulated from their social, economic and political milieu. Indeed, changes within organisations are often triggered by, or can be traced back to, changes within the broader environment. Below we highlight some economic and political changes in the national and global context that triggered, or are related to, the changes inside the union movement as discussed above.

Changes within organisations can never be separated from change within the broader environment.

Union Recognition and the Advent of Liberal, Non-racial Democracy

In the 27 years of existence of the post-1973 unions – that is, 1973 to 2000 – two changes occurred which had an unprecedented effect on the functioning of unions, including the role of full-time officials within these unions. The first one was the granting of official recognition to these unions in 1979. This recognition paved the way for spectacular growth and consolidation of the unions in the 1980s. More importantly, union recognition by the state and employers laid the foundation for growing institutionalisation of trade unionism for black workers. In this paper we have used the concept of organisational modernisation to refer to the internal union dimension of such processes. With recognition came some rights for unions, such as the right to stop-order facilities, 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 floor representatives or shop stewards.

All these rights had a tremendously positive impact on the unions' capacity to represent their members, and to win tangible gains for them. Two of these deserve specific mention. Firstly, the right to stop-order facilities resolved what was a perennial problem for black unions in South Africa – namely, their lack of a sustainable resource base. Stop-order facilities meant that unions could employ full-time

officials and be able to guarantee them a monthly salary and, in some cases, a few basic benefits. This meant that the hand-to-mouth existence of the early days was to become a thing of the past and union officials came to expect to be paid as a matter of right. Thus, some of the changes we have discussed – such as the change from activist organiser to different types of officials – have their roots in these early developments in the broader environment.

Secondly, the right of unions to negotiate on behalf of their members served to entrench the position of the official as a full-time functionary employed to service union members. The roots of what we have referred to as the dilemma of leadership are to be found in the granting of this right as the generally-held assumption among employers, state officials and, indeed, many workers, was that the full-time official was the representative of the workers and thus had the power to negotiate and conclude agreements on their behalf. Even during the heyday of the worker control tradition, the full-time official was expected by unions to be present at all important negotiations and to act as the chief signatory to agreements concluded.

However, the granting of union recognition by employers and the state failed to result in the bureaucratic tendencies about which sociological studies of trade unionism warn us. In other words, the labour relations reforms of the late 1970s and early 1980s failed to produce conventional trends and tendencies among South African unions because the struggle was not over for black workers until they had achieved political freedom from minority rule. Industrial citizenship was deemed as important as political citizenship, and the granting of the former merely acted to spur workers on to fight for political liberation. The militancy of unionised workers in the 1980s was an expression of their impatience with the old order and the way it continued to shape their lives, including workplace relations.

Thus, the fact that liberalisation of labour relations legislation was not accompanied by political liberalisation meant that the "normalisation" of labour relations was delayed. In the conventional literature it is assumed that union recognition necessarily results in the narrowing of the social distance and the blurring of class distinctions between management and union officials. In apartheid South Africa this remained unthinkable, however, not only because the class divide had been wide but also because under apartheid the chasm was also a black/white one, and black/white relations were extremely adversarial. The dominant view among activists, including unionists, was that of an "unfinished struggle". Those few officials who were suspected of fraternising with management and accepting bribes or who accepted junior managerial positions were ostracised by both workers and other officials.⁷

The other major change that impacted on the functioning of the union movement was the advent of liberal, non-racial democracy. Formally, this occurred fol-

Union members consider industrial citizenship and political citizenship to be equally important.

⁷ There were several cases of officials who asked for or were offered bribes by management in the 1980s and early 1990s. In one case an official was offered a lounge suite in return for discouraging workers from striking. Management later informed union leadership about this and the official was summarily dismissed. Several officials also accepted offers of positions as personnel officers or human resources officers. In the majority of cases, workers and union structures refused to work with these people, with the result that many of them lost their jobs because they were deemed ineffective.

lowing the first democratic elections in 1994, but effectively it started after the unbanning of liberation movements and the release of political prisoners in 1990. The end of apartheid represented the liberalisation of politics and the granting of political citizenship to black South Africans, a process which appeared to many as the logical conclusion of the struggle for liberation. It impacted on the unions' internal functioning in several ways.⁸ Firstly, the deracialisation of society that the demise of apartheid implied resulted in enormous opportunities for upward mobility for black people in general and union officials in particular. COSATU's decision in 1993 to send twenty senior officials and worker leaders to Parliament on an ANC ticket opened the floodgates for other union officials and leaders. Since then hundreds of experienced full-time officials have left the union movement for political office in local, provincial and national government, while many others have been the beneficiaries of affirmative action and black economic empowerment policies in various spheres. The availability of employment and political and business opportunities in broader society compelled unions to improve their employment practices in order to retain experienced officials, thus setting in motion many of the modernisation processes to which we have made reference.

Secondly, the opening up or deracialisation 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 such positions in the days of apartheid. These processes of class formation were part of the context within which unions operated, and they shaped developments within the union movement. The "race to riches" shaped the behaviour of full-time officials and forced unions to take note of market forces when determining the working and pay conditions of these officials.

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. A new value system emerged, 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 way to the three types of officials that we have discussed in this paper.

Fourthly, the democratic dispensation resulted in the creation of legitimate centralised 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. This centralisation engendered a

⁸ The September Commission (1997:168) 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 undermined the culture of solidarity in unions; and negative organisational trends such as lack of service to members, lack of skills, lack of discipline, and lack of commitment.

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. Although the new style was often unaccountable, elitist and secretive, 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 lucrative job and business opportunities. Of course we must point out that these trends are also a consequence of a growth in union membership, which makes it extremely difficult to practice worker control, particularly with regard to processes of mandating and reporting back.

Fifthly, during the years of apartheid, unions and other liberation movements were seen by many black people as legitimate institutions which represented their political aspirations. Since they had the resources to employ people, unions were among the few social institutions where activists could get employment that was directly related to the liberation struggle. Most jobs in society were under the auspices and control of the apartheid state and employers who practised apartheid in their own workplaces. The other legal or semi-legal liberation forces did not have the same resources as the unions to employ large numbers of people. However, with the unbanning of political movements, unions lost their monopoly of legitimacy as new "struggle job opportunities" appeared in the ANC, the SACP and other organisations. During this time some full-time officials left the unions to work for these organisations because the salaries 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. This resulted in large numbers of union officials joining the civil service as policy specialists or to work in other bureaucratic positions.

This change also occurred in relation to managerial jobs that were previously regarded with deep suspicion by unionists. A new discourse on 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 operate like other social institutions. Over time, unions began to adopt practices which were the norm in many other social institutions. These 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 differential remuneration based on market trends and the professionalisation of union activities in general. The changes also include changes in dress code, the cars officials drive, and the social circles in which they move. In all their engagements, unionists face unrelenting pressures to project a reasonable, moderate and professional image of themselves and some of this is beginning to show in the way unions conduct their internal affairs.

In short, the political democratisation of South Africa marked the deepening of the process of institutionalisation of the union movement that had begun with the granting of recognition at the end of the 1970s. Unions have now become part mainstream social institutions in terms of the way they conduct their affairs. Many

Unions as employers have had to increase their offerings in order to retain personnel.

The advent of liberal, non-racial democracy had a major impact on the union movement.

trade union education courses on "organisational development", which are standard fare on the internal education programmes of unions and of organisations supporting labour, borrow concepts and principles contained in 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 enrol for custom-made courses at local universities and technikons, 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 – increasingly finds 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 itself. Most importantly, however, other academic institutions and disciplines have succeeded in marketing themselves to the unions better than sociology. For example, technikons and management faculties at universities have developed courses and services which respond to the instrumental notions of knowledge in a movement which is under pressure to find quick solutions to complex problems.

Technikon Natal in Durban is an example of an institution that has seized the opportunity by providing tailor-made trade union courses to train union leadership and, in the process, reconcile them to the imperatives of business. The Labour Development Unit (LDU) which operates under the auspices of the Business Studies Unit of the Technikon specialises in trade union education. Incidentally, the Technikon has no historical ties with the progressive movement, but was enterprising enough to see the gap and create the unit in the mid-1990s. Their programme is co-ordinated and run by former officials from COSATU-affiliated unions, Mhlaba Mkhize (ex-PPWAWU regional secretary), Important Mkhize (ex-SACCAWU regional secretary) and Dudu Mohlomi (an ex-unionist and wife of former COSATU Southern Natal regional secretary, Thami Mohlomi). Its popularity has grown by leaps and bounds since its inception. The Technikon's programme is underpinned by a different ideology. The brochure of their Labour Leadership and Development Programme notes that the programme aims to create a foundation for a "far less volatile relationship". One of its objectives states:

The shop floor leader will be provided with an understanding of his/her role in the continued, participative growth of business. This in turn will foster the recognition of the joint responsibility of organised labour and management in ensuring the survival of the organisation to the benefit of all stakeholders (LDU, 2000:3).

Unions have become mainstream social organisations.

The Technikon's labour education programme is an example of current efforts to domesticate the post-1973 union movement by deepening its institutionalisation. Mhlaba Mkhize is a former regional secretary of the Paper, Printing, Wood and Allied Workers' Union (PPWAWU) in KwaZulu-Natal, who now lectures and is also the overall manager of the academic programme. He says the programme has provided training to hundreds of shop stewards from many COSATU, FEDUSA and NACTU affiliates. The Unit usually approaches management directly and asks them to sponsor the training of shop stewards at the Technikon. Mkhize says that management usually pays about R10 000 per person for a full, six-module programme. Alternatively, a union may approach the Unit to develop a special programme for its officials and office-bearers. In 2000, the Food and Allied Workers' Union (FAWU) and the NUM were two unions which had finalised details for leadership training involving all their full-time officials and national office-bearers (interview, Mhlaba Mkhize, 22 March 2000).

Some activists in labour-supporting organisations are critical of the Technikon and point out that its real motives are to reconcile the unions to the agenda of management. Kessie Moodley, the director of the Durban Workers' College, believes that the Technikon engaged in extensive "manoeuvring" such as getting well-known past and current unionists to support the programme before they could sell it to management. The attitude of the College was "to suss the whole of the thing out":

Firstly, the institution itself has been management oriented. Technikons have been that, that is the route. We are not denouncing it. Secondly, that you have got a few trade unionists there doesn't then automatically convert it. We need to know how they are doing it, what's their level, *et cetera*. And thirdly, that they are designing the course to suit management. Don't think that management is going to be paying for the course, you are going to be teaching them in the course things that are contrary to what management wants. It's going to be the management agenda, you know, whether you like it or not (interview, Kessie Moodley, 23 March 2000).

Changes such as the ones discussed here have had an immensely powerful impact on the unions and their traditions. This discussion now turns to an examination of the impact that economic liberalisation and globalisation have had on the post-1973 unions.

Union officials sometimes receive training that is very similar to that of members of management.

Economic Liberalisation and South Africa's Integration into Global Capitalism

Changes in the environment in which unions operate are not occasioned only by national political and labour relations factors and processes such as those discussed above. They are also influenced by economic processes such as the growing interdependence of national economies, economic liberalisation, and the internationalisation of capital which gives rise to intense competition between economies and firms. 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 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 liberalisation in the form of deregulation and privatisation, and workplace restructuring driven by "world class manufacturing" techniques. The deleterious effect of these strategies on trade unions was exacerbated by the collapse of state socialism in Eastern Europe and the emergence of a unipolar capitalist world.

Economic liberalisation undermined unions, particularly because it was premised on the notion that the state must withdraw from the economy and remove various forms of regulation, many of which could be used to promote the interests of workers. The result was privatisation of parastatal corporations; many workers lost their jobs, and an unregulated informal sector emerged that undercut workers in the formal sector. From the early 1990s these economic strategies formed part of a neo-liberal crusade which sought to counter the policy of nationalisation then espoused by the ANC and the union movement. The unions' lack of capacity became apparent in the course of their search for answers to this crusade and to changes at the workplace. Many of the organisational modernisation strategies which the unions adopted emerged as responses to this changing balance of power between management and labour.

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 of the size of the workforce, reorganisation of work, the introduction of new technology, and attempts to introduce co-operative relations between workers and management. The latter strategy often involved by-passing unions to deal directly with 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.⁹

The effect of all these strategies was to shift the balance of power decisively in favour of capital and to put the union movement on the defensive. In addition, these strategies had a profound impact on the internal functioning of the unions. Here we highlight only a few examples to illustrate the point. Firstly, they undermined the trusted union strategy of militant abstentionism and created cracks within the ranks of the union movement. While some diehard union officials, shop stewards and members continued to hold the view that management was a class enemy intent on self-preservation, a growing number argued for a more pragmatic approach. A former PG Bison shop steward who has since been promoted to industrial relations manager, felt that some people in the union did not understand that times were changing and that therefore there was 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, Joseph Mthembu, 11 March 1999).

Secondly, unions found it increasingly difficult to defend themselves from the negative effects of economic deregulation and liberalisation because they did not have the capacity to do so; furthermore, they were unable to develop alternatives to market capitalism. More importantly for our discussion here, these changes resulted in the emergence of cleavages within the ranks of full-time officials. Unions began to put emphasis on skills which came with formal education qualifications; officials who possessed these became indispensable while those with little or no formal education were increasingly viewed as "dead wood" which did not contribute to the capacity of the unions to deal with "complex issues". This differentiation also manifested itself in new grading systems which put a premium on formal education qualifications and technical skills and thus placed those who possessed them at the top end of the scale. In some unions there was a growth of this expert layer of officials as researchers, economists, legal specialists and others were employed to increase union capacity. Some of these professionals, as one official called them, brought a different style of doing things which was perceived to be about taking "short-cuts" as opposed to the traditional participatory style which

⁹ For a detailed discussion of these managerial strategies at workplace level, see the study of Nampak and PG Bison by Buhlungu (1996).

Unions have been negatively affected by deregulation, privatisation and workplace restructuring.

Unions' attempts to cope with economic liberalisation has resulted in internal differentiation.

often took a long time to secure results.

Some are coming with their experience as professionals and they respond to things professionally, by being proactive and running with things – “this is what I’m suggesting and this is what is being proposed”. 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. Instead of saying, “This is what I think should be done”, you want to take a long process. By the time the issue is supposed to be policy we are still discussing the paper. The people who are professionals want to see things done and they get responses from management. They get answers on issues. 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, Linda Mngadi, 11 March 2000).

Some unions
have become
obsessed with
professionalisation.

As the above extract notes, the short-cut approach of the professionals is a direct response to issues raised by management and to processes of restructuring in the workplace. It seems to work, as it elicits responses from management before the union is overtaken by events. Part of the explanation for the union’s obsession with professionalisation comes from the frustration they feel when they are unable to get responses from management and are thus unable to defend their members against workplace restructuring, deregulation of the economy and retrenchment of union members. As the pressure mounts, many officials adopt the professional approach to union work and avoid the traditional long process of calling workers’ general meetings to seek mandates or to report back on developments. Among full-time officials and other union leaders the traditional approach is increasingly being interpreted as a sign of being out of one’s depth.

We are now responding to the shop steward and go to management having just informed the shop stewards. Pressure does not only come from employers but shop stewards also come to you because they get pressure. You, as an organiser, respond because you don’t want to be seen as not being up to the issues (interview, Linda Mngadi, 11 March 2000).

Thirdly, the changed balance of power and the assertiveness of capital have resulted in the union movement losing the moral high ground it used to occupy. As we noted above, this has engendered a pragmatic style, which in turn gives rise to an eagerness to cultivate an image of “reasonable and professional” unionism. Many have come to believe that this can achieve the same results as the militant approach which characterised the union activist of the past. This new image of unionism can be observed among many union officials today, particularly the entrepreneurs and some career unionists. Examples include the adoption of a more

formal dress code, changing consumer tastes, changes in location and decoration of union offices, and enrolment for business and economics studies at local and international business schools to help officials master the language of business.

Finally, the insecurity that workers experience as a result of liberalisation of the economy and global competition has made it extremely difficult for unionised workers to resort to militant actions to block restructuring in its various guises. As a result, a large number of workers and shop stewards have come to put their faith in the expertise of the full-time official. This has resulted in a subtle shift in the balance of power from workers and shop stewards into the hands of full-time officials, particularly those with specialised expertise. Coupled with this are expectations, and even pressures, 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. One ex-unionist argues that worker control was a good thing, but that it needs to be transformed and modified in certain ways. One suggestion he offers is that union leaders should be allowed to make deals:

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, Jeremy Baskin, 24 February 2000).

This view finds greater support among full-time officials and some worker 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.

“LET’S AMEND OUR WAYS OF WORKING”: ORGANISATIONAL MODERNISATION PROJECTS IN UNIONS

Efforts to modernise union organisation have been a recurring theme in the post-1973 unions throughout the 1990s. In his introductory address to PPWAWU’s Seventh National Congress in June 1997, the union’s general secretary stated:

There has been a
subtle shift of power
from workers and
shop stewards to top
union officials.

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 "modernise" to refer to efforts to change the way it operated. Before the union's seventh congress, its national office-bearers had adopted a policy document entitled "Modernising PPWAWU". Organisational modernisation is a consequence of factors and processes internal to the union movement, such as membership growth, the need to achieve administrative efficiency, and changes in the role and character of full-time officials. In addition to those internal factors and processes, there are external factors which exert an equally powerful influence on the internal functioning of trade unions. In other words, organisational modernisation also occurs within, and is shaped by, a national and global context.

In reality, it is hard to separate the internal from the external processes which induce organisational modernisation. In the rough-and-tumble world of union organisation the discourse and practice of organisational modernisation which is often expressed in terms such as professionalism, efficiency, skilled officials and market-related employment conditions reveals itself as the logical next step and a universal panacea to the problems of a growing organisation facing internal and external pressures to undergo changes. Among some union officials and leaders organisational modernisation in all its different manifestations is presented as a virtue while its opposite, "primitive operation",¹⁰ is regarded as a problem. Union leaders also fail to examine the implications of modernisation efforts for modes of organisational governance and other traditions of the unions. The NUM is one of the unions which prides itself on having professionalised 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, Gwede Mantashe, 7 February 2000).

¹⁰ The term "primitive operations" is from an article by B. Skulu (1993). Skulu was then assistant general secretary of SACCAWU, and is now the general secretary of the union.

Although the discourse of modernisation presents itself as a neutral universal language shared by all in the union movement, our argument is that assertions such as the above conceal the real intentions and interests of different groups within the ranks of full-time union officials. We have argued that the activist organiser has been replaced by three types of union officials, all of them pursuing different interests. Thus, each of these groups has a different notion of what modernisation should be about. While the ideological organiser would like to professionalise 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 organiser sees modernisation as a substitute for worker control, which is seen as an obstacle to achieving his 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 modernisation 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 organisational modernisation reveals that there is not one, but three broad approaches to modernisation which correspond to the three types of union official we have discussed above. We refer to these ideal-typical approaches to organisational rejuvenation as organisational modernisation 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 that there is a need to modernise union operations. Implicit in each modernisation project are the interests and political ideology of the type of union officials who champion it. Thus each modernisation 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 modernisation project*, is espoused by the ideological unionist. 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; 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.¹¹

Although the objectives of this modernisation project are laudable, it has some obvious limitations. One of them is the fact that worker leaders who are part-time

¹¹ 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. They perform many functions which are normally performed by officials, such as organising, administration and negotiating with employers. The September Commission (1997) 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.

There are several types of modernisation projects, and their nature depends on the type of official who supports them.

shop stewards do not have sufficient time to attend 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 organisational stagnation and paralysis in the face of the internal and external challenges we have highlighted.

The second project, the *maximalist project of modernisation*, 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 to make deals on behalf of union members without being encumbered by mandates and other consultative processes. In terms of this extreme form of modernisation, 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 politicised and the discourse of worker control is too deep-seated for it 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 modernisation*, a position espoused by the career unionist. It acknowledges the limitations of the above projects and seeks to find a balance between democracy and organisational modernisation. According to this view, officials should assume a much greater role in the functioning of the union. This means that they should be granted 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, that 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 organisational modernisation, 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 modernisation 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 capacity to grapple with complexities resulting from membership growth and changes in the national and global context. It represents a progressive project of modernisation which leaves unionised 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 organisational modernisation is that it tends to favour the "professionals" rather the people it is intended to benefit – 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 rather than 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 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 organisation. Finally, modernisation implies a preparedness to benchmark one's organisation against what is considered the norm within the environment in which the organisation operates worldwide. Thus, salaries and employment conditions will be benchmarked against market rates. This results in the removal of the power to determine these and other matters from the hands of workers, and leaves it in the hands of the market.

The best way to overcome these problems is 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

Our discussion in this paper has dealt with cleavages among full-time union officials as well as the changing national and global environment within which the union movement operates. We also noted that these new cleavages manifest themselves as competing organisational modernisation projects. One of these projects, the moderate project, offers opportunities for resolving the contradiction of organisational imperatives (democracy versus efficiency), provided that the dilemma of leadership is maintained and sharpened.

A crucial question that arises from the foregoing discussion is whether this dilemma of leadership threatens to destabilise unions or is simply a creative tension that should be encouraged. Perhaps the way to begin addressing this question is to note that, under the conditions already discussed in this paper, worker control as practised 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 mod-

Organisational modernisation tends to favour the professional over the rank-and-file.

ernisation project is equally unfeasible for reasons 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 (1959).

However, we believe that it is possible to achieve a balance between democracy and administrative efficiency through the moderate modernisation 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 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).

Indeed, the moderate modernisation project that seeks to establish a balance between the imperatives of democracy and efficiency is not only possible, but desirable. This implies that rather than seeking to eliminate the dilemma of leadership, unions should learn to intensify and manage it in a creative way by ensuring that a representation gap does not arise. The creative tension results from having a rank-and-file which asserts worker control, as well as a skilled corps of full-time officials who are efficient at managing the union but who remain accountable and responsive to the needs of their members. If there are no members who assert worker control or no skilled officials who can run union affairs, the dilemma of leadership ceases to exist.

The notion of a dilemma of leadership has several theoretical implications for the way we understand trade union organisations. 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 organisational modernisation. Both organisational imperatives are equally important and should be nurtured in creative ways, some of which we suggest below. Too often, scholars and activists avoid confronting this question altogether, or they only offer clichéd answers about "finding a balance" without elaborating the nature and form of such a balance. The concept of a dilemma of leadership as discussed here helps us to break through this conceptual and theoretical barrier imposed by the democracy/efficiency dichotomy.

The notion of a leadership dilemma enables us to make use of conventional conceptual tools such as oligarchy and democracy but also helps us to learn from the contextual experience of unions in a developing society. Thus, while acknowl-

edging the presence of oligarchic tendencies in organisations, we are able to transcend the view that these tendencies are part of an immutable or natural "iron law". Identifying the dilemma of leadership means recognising a crucial aspect of an organisation such as a trade union – that its aspirations to democracy will always be contested. Oligarchy is the outcome of a successful contestation by certain forces in an organisation. 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.

This brings us to the crux of our argument, namely, that the dilemma of leadership enables us to recognise a process of change within organisations which we have termed organisational modernisation. In an organisation, different modernisation projects compete for hegemony. However, it is only when the moderate project succeeds that we get a dilemma of leadership, because this project seeks to reconcile the contradictory goals of democracy and efficiency. Eliminating the dilemma implies an attempt to return to primitive democracy, which is not feasible today, or a move towards oligarchy, which is not desirable. Thus we suggest that the way to resolve the contradiction of organisational imperatives (democracy versus efficiency) is to intensify the dilemma of leadership – that is, to intensify the tension between control of the union by a democratically-elected leadership on the one hand, and its administration by a skilled corps of full-time officials on the other.

Several implications for union organisational strategies flow from the above. The maintenance and intensification of the dilemma of leadership means that unions should ensure a continuity with their past traditions, struggles and achievements. Not only does this alleviate problems associated with generational change, it also preserves the legacy of struggle, sacrifice and a democratic organisational culture built over nearly three decades of the movement's existence. Ensuring this continuity could take several forms, all of which are about the preservation of the collective memory of those traditions, struggles and achievements. This can be done by recording or documenting the history of the movement and preserving internal union records which document various aspects of the unions' history. This would entail actions such as the preservation of union archives, the writing of union histories, the writing of accounts detailing key struggles of the movement, and the promotion of autobiographical writing by union members and leaders. The long-term objective of this would be to use individual accounts to build a collective memory of the movement's history, forms of organisation and struggles.

This collective memory and reservoir of organisational knowledge is crucial for the preservation of a repertoire of collective action, which in turn is essential for contestation and the maintenance of the dilemma of leadership. As Sidney Tarrow (1998:21) has argued, different social groups have "a particular history and memory" of forms of collective action. He notes that, "Workers know how to strike because generations of workers struck before them". Similarly, future generations of union members need to know how their parents and grandparents ran their trade unions and how the tradition of worker control enabled workers to assume leadership roles in these unions.

It is possible and desirable to achieve a balance between democracy and administrative efficiency.

A union's aspirations to democracy will always be contested.

A related area which needs attention to maintain and sharpen the dilemma of leadership is union education and training. The end of the era of mass mobilisation associated with the struggle for union rights and political citizenship has deprived unions of a vital form of membership politicisation and informal education. Today unions have to take responsibility for the education and training of their members, particularly with regard to how the union operates and how to run it. Thus, union efforts to ensure technical competency among their full-time officials need to be balanced by programmes to empower union members and shop stewards to run these unions and to oversee the work of officials.

REFERENCES

- Adler, G. and Webster, E. 1995. Challenging Transition Theory: The Labor Movement, Radical Reform, and Transition to Democracy in South Africa. *Politics and Society*, 23(1).
- Buhlungu, S. 1996. Trade Union Responses to Participatory Management: A Case Study. M.A. Thesis, University of the Witwatersrand, Johannesburg.
- Buhlungu, S. 2000. Trade Union Organisation and Capacity in the 1990s: Continuities, Changes and Challenges for PPWAWU. In *Trade Unions and Democratization in South Africa, 1985-1997*, eds. G. Adler and E. Webster. London: Macmillan.
- Buhlungu, S. 2001. Democracy and Modernisation in the Making of the South African Trade Union Movement: The Dilemma of Leadership, 1973 - 2000. Unpublished PhD thesis, University of the Witwatersrand, Johannesburg.
- Dicks, C. and Thobejane, C. 2000. OD in Unions: A Case Study of NEHAWU. *South African Labour Bulletin*, 24(3).
- Flanders, A. 1970. *Management and Unions*. London: Faber.
- Labour Development Unit (LDU). 2000. Labour Leadership and Development Programme. A brochure of the Labour Development Unit, Business Studies Unit, Technikon Natal, Durban.
- Michels, R. 1959. Political Parties: A Sociological Study of the Emergence of Leadership, the Psychology of Power, and Oligarchic Tendencies of Organizations. New York: Dover.
- O'Donnell, G. and Schmitter, P. 1986. Tentative Conclusions About Uncertain Democracies. In *Transitions from Authoritarian Rule: Prospects for Democracy*, eds. G. O'Donnell, P. Schmitter and L. Whitehead. Baltimore: Johns Hopkins University Press.
- Paper, Printing, Wood and Allied Workers' Union (PPWAWU). 1997. Report to the Bi-Annual National Conference, 26-29 June.
- Qabula, Alfred Temba. 1995. It Has Been Such a Long Time. *South African Labour Bulletin*, 19(6):13-14.
- Rees, R. 1992. More Workers' Control Needed. *South African Labour Bulletin*, 16(7).
- September Commission. 1997. *September Commission Report*. Johannesburg: COSATU.
- Skulu, B. 1993. How Many Officials does our Union Need? *SACCAWU News*, 4(2).
- Tarrow, S. 1998. *Power in Movement: Social Movements and Contentious Politics*. Second edition. Cambridge: Cambridge University Press.



Tshoaedi, C.M. 1999. Functional Differentiation in Trade Union Employment: A Study of Gender Inequality with Specific Reference to Women Union Officials. M.A. research report, University of the Witwatersrand, Johannesburg.

Valenzuela, J. S. 1989. Labor Movements in Transitions to Democracy: A Framework for Analysis. *Comparative Politics*, 21(4).

Voss, K. and Sherman, R. 2000. Breaking the Iron Law of Oligarchy: Union Revitalization in the American Labor Movement. *American Sociological Journal*, 106(2).

Webb, S. and Webb, B. 1920 (first published 1897). *Industrial Democracy*. London: Longmans, Green.

Webster, E. and Adler, G. 1999. Towards a Class Compromise in South Africa's Double Transition: Bargained Liberalisation and the Consolidation of Democracy. *Politics and Society*, 27(2).

Interviews

Baskin, Jeremy. Former general secretary, PPWAWU. Johannesburg, 24 February 2000.

Dicks, C. and Thobejane, C. 2000. OD in Unions: A Case Study of NEHAWU. *South African Labour Bulletin*, 24(3).

Galen, Osborn. National organiser for Engineering, NUMSA. Johannesburg, 10 August 1999.

Mantashe, Gwede. General secretary, NUM. Johannesburg, 7 February 2000.

Mbokazi, Themba. Shop steward at Interpak, CEPPWAWU. Pietermaritzburg, 21 March 2000.

Mkhize, Mhlaba. Lecture and programme manager, Labour Studies Unit, Business Studies Unit, Technikon Natal. Durban, 22 March 2000.

Mngadi, Linda. National education officer, CEPPWAWU. Johannesburg, 11 March 2000.

Moodley, Kessie. Director, Workers' College. Durban, 23 March 2000.

Mthembu, Joseph. Shop steward at PG Bison, CEPPWAWU; former national vice-president, PPWAWU. Germiston, 11 March 1999.

Musi, Mojalefa. National educator, SATAWU. Johannesburg, 30 April 1999.

LIST OF ABBREVIATIONS

ANC	African National Congress
CEPPWAWU	Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union
COSATU	Congress of South African Trade Unions
FAWU	Food and Allied Workers' Union
FEDUSA	Federation of Unions of South Africa
LDU	Labour Development Unit [at Technikon Natal]
MAWU	Metal and Allied Workers' Union
NACTU	National Council of Trade Unions
NEC	National Executive Committee
NEDLAC	National Economic Development and Labour Council
NEHAWU	National Education, Health and Allied Workers Union
NUM	National Union of Mineworkers
NUMSA	National Union of Metalworkers of South Africa
OD	Organisational Development
PPWAWU	Paper, Printing, Wood and Allied Workers' Union
SACCAWU	South African Commercial, Catering and Allied Workers' Union
SACP	South African Communist Party
SATAWU	South African Transport and Allied Workers' Union
SACTWU	South African Clothing and Textile Workers' Union
TGWU	Transport and General Workers Union