Class, Contradictions and Intersections: The Emergence of Organic Workerism in South African Public Sector Unions?

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DECLARATION

I, the undersigned, hereby declare that the work contained in this thesis is my own work and has not previously, in its entirety or in part, been submitted at any university for a degree. The copyright of this output rests with the author.

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July 2020

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SYNOPSIS OF THE RESEARCH

The national project of the African National Congress (ANC), the National Democratic Revolution (NDR), guides the post-apartheid state's work to develop a new African middle class through policies such as Affirmative Action and Black Economic Empowerment (BEE). A substantial portion of the Congress of South African Trade Unions (COSATU) public sector trade union members have been the beneficiaries of this project. COSATU is considered as a working-class organisation with a commitment to socialist politics, whereas the ANC is seen as a party that has emerged out of multi-class interests, dominated by the politics of nationalism. The underlying assumption is that much of the conflict between COSATU and the ANC is connected only to class politics. In the post-apartheid era, the ANC's nationalism has been re-conceptualised and a shift to Africanism as the ANC's hegemonic non-racialism nationalism has occurred. This has acquired momentum both inside and outside the ranks of the ANC and its allies, including COSATU. As a result, questions about COSATU's political traditions and its membership composition have emerged. To address this, this study's contribution is that there are signs of a new worker identity, *organic workerism,* emerging among the membership of the Democratic Nursing Association of South Africa (DENOSA) and, to a lesser extent, among the membership of the South African Democratic Teachers Union (SADTU); both being public sector affiliates of COSATU in the province of Gauteng. The ANC's ideology was hegemonic through the NDR in COSATU, but as it endeavoured to manage too many contradictions, it has now run its course in post-apartheid South Africa. What is striking about organic workerism is that it is challenging the hegemonic ANC's NDR within COSATU. The identification of organic workerism emerged through an interrogation of a selection of COSATU's public sector trade union members' class location, guided by the notion of contradictory class location, their racial identities and subjectivities, and intersections with their gendered identities and subjectivities. This study concludes that COSATU and its public sector trade unions are far more complex and contested in terms of their political traditions and in terms of their membership in post-apartheid South Africa.

Key terms: National Democratic Revolution, Africanism, nationalism, socialism, middle class, organic workerism, public sector, trade unions, contradictory class location, intersections, post-apartheid South Africa.

ACKNOWLEDGEMENTS

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LIST OF ACRONYMS

ANC	African National Congress
ANCYL	African National Congress Youth League
BC	Black Consciousness
BEE	Black Economic Empowerment
COSATU	Congress of South African Trade Unions
CST	Colonialism of a Special Type
DENOSA	Democratic Nursing Organisation of South Africa
FEDUSA	Federation of Unions of South Africa
FOSATU	Federation of South African Trade Unions
GEAR	Growth, Employment and Redistribution
GWU	Garment Workers Union
MWU	Mineworkers Union
NACTU	National Council of Trade Unions
NDR	National Democratic Revolution
PAC	Pan African Congress
RDP	Reconstruction and Development Plan
SACP	South African Communist Party
SACTU	South African Congress of Trade Unions
SAFTU	South African Federation of Trade Unions
SADTU	South African Democratic Teachers Union
T&LC	Trades and Labour Council
UDF	United Democratic Front

Chapter 1: Introducing the research and thesis

1.1   Background

Trade unions are complicated in terms of their ideology, identity, purpose, political traditions (Hodder & Edwards, 2015) and in composition of their membership. The underlying assumption, specifically the view that the labour movement by definition represents working-class interests, has worker-centred politics (or socialist ideology) and focuses on shop-floor issues are what is at stake in this study.

The Congress of South African Trade Unions (COSATU) was allied to the national liberation movement, held militant and socialist political traditions, and has grown in strength by organising both private sector and public sector employees. In post-apartheid South Africa, COSATU is part of the ruling Alliance with the African National Congress (ANC) and the South African Communist Party (SACP), but worker control is still a firmly held belief within COSATU. This implies that employed workers are central in the trade union (that is, workers in full-time employment hold all the elected leadership positions in the union) and that full-time officials serve them (Baskin, 2019).

On the left side of the political spectrum, there are two main schools of thought that offer explanations for the nature of the relationship between trade unions and the ANC as a liberation movement (and later as the ruling party in South Africa). The debate originates from the revival of the trade union movement in South Africa following the strikes in Durban in 1973. These competing narratives are connected to various political traditions, known as charterism and workerism. This debate came to the fore in the mid-1980s with the formation of COSATU. In this period, some of the trade unions moved away from a sole focus on their membership and the shopfloor in order to become the leading force for the condemnation of apartheid (Marx, 1989). The combination of different political traditions fed the ideological dissonance within the nascent COSATU, but also formed the basis for an appeal for some ideological unity within the union movement.

The charterist tradition asserts that it is the 'national democratic tradition' that prevailed in the struggle to create the democratic trade union movement in the 1970s. The claim for this stems from the argument that the movement was guided by the South African Congress of Trade Unions (SACTU) activists, who had aligned with the ANC in the 1950s before they were banned. SACTU identified with the nationalist movement and worked to strengthen the Congress Alliance (Southall & Webster, 2010). The charterists in the trade union movement in the 1970s argued that trade unions had to be aligned to the ANC and the SACP, and that the National Democratic Revolution (NDR) joined the working class to the nationalist project. The idea was that the unions would combine forces with the liberation movement to overthrow apartheid as a system, and then work towards socialism as a second phase of the NDR (Van Niekerk & Fine, 2019).

The competing perspective, the workerist tradition, asserted that the 'tradition of democratic organisation' build robust shop-floor structures and internal trade union democracy, and that this would be the best way to sustain union responsiveness to the needs of its members. The workerists were hesitant about aligning politically and they were critical of the national liberation movement. The rationale was that if the trade unions focused on shop-floor issues and not political issues, that the trade union movement would grow strong enough to make political demands (Baskin, 2019).

The divisions between the charterists and the workerists were real, but the lines of division in practice were not as clear-cut (Baskin, 2019). There were strong tensions between the two at times (Buhlungu, 2006), with the term 'populist' used insultingly for unionists associated with the charterist tradition. Charterists saw workerists as white socialists (and their proxies) who did not appreciate the oppression of black people by the apartheid state. Workerists described the charterists as nationalists who would sell out the labour movement to capitalism after liberation. To the charterists, workerists were far too negative in their views about trade unions and the African nationalists, and in some cases the two camps even formed rival unions. Hickel (2012) asserts that workerist historiography assumes that workers joined workerist unions because they recognised that the NDR would not be able to launch a significant challenge to capitalism. Data from the sugar industry trade unions shows that workers rejected the NDR for entirely different reasons. The dominant narrative – that all worker struggle in South Africa was deliberately in

service of the ANC's project of national democratic revolution – is the ANC's nationalist meta-narrative (Hickel, 2012).

The charterists and the workerists both worked from the assumption that trade unions are working-class organisations, their members have a working-class identity and that the political essence of the working class is their affinity for socialist politics.

Workerists raised questions about the fate of COSATU affiliates after national liberation, and whether the trade unions would be allowed to continue to be independent of the ANC or if they would be brought under its direction (Plaut, 1986). The first general secretary of COSATU, Jay Naidoo, believed that it was possible for COSATU to occupy a position between workerism and charterism and still preserve COSATU's political independence. COSATU's resolution of the concern about its autonomy was through the adoption of the ANC's Freedom Charter in 1987, which was seen as a 'stepping-stone to socialism' (Pillay, 2011). It was taken forward by the National Union of Mineworkers (NUM), but opposed by workerists from the National Union of Metalworkers of South Africa (NUMSA). The adoption of the Freedom Charter represented both an entrenchment of a 'strategic compromise' for COSATU, as it acknowledged that the popular ANC-SACP Alliance was important but, so too, was an independent labour movement. As Baskin (2019) points out, the thinking in COSATU at this time was that – in the interests of its unity as a labour federation – there had to be a combination of concentrated workplace organisation, with a recognition that the union movement had to remain attached to the Congress orientation and adopt an anti-apartheid programme, with socialism being the objective. Certain shop-floor practices, such as local shop steward councils, were retained along with popular and 'traditional' culture such as church hymns and revolutionary songs, to name a few, which helped trade unions to organise, mobilise and increase its membership, most dramatically in the public sector.

By 1990, COSATU was openly allied to the ANC and entered into an alliance with the ANC and the SACP to contest the first democratic elections in South Africa in 1994. The NDR narrative became a potent political tradition within the South African labour movement and predominated in many of the COSATU affiliates. COSATU trade unions were seen as representing the working class and they carried out trade-union duties such as recruiting, being accountable to

membership, engaging in negotiations with employers about wages and working conditions, attending to matters such as unfair dismissals and retrenchments, bargaining and training, and educating shop stewards.

South Africa's political freedom was secured at the peak of the era of neoliberal triumphalism (Scully, 2015). As the oppressed were politically liberated, many went on to work for the state in post-apartheid South Africa as its state managers, professionals, semi-professionals and white-collar workers; and they became COSATU trade union members. Some took up positions in private sector companies or became incredibly wealthy due to BEE deals. In post-colonial societies, this heterogeneous group is collectively referred to as the new African middle class (Melber, 2017) and are usually in government or corporate employment. They are the civil servants, doctors, nurses, teachers and middle-class professionals in the public sector who all form a major section of those in formal employment in many African countries, apart from those in the private sector (Southall, 2004).

Many lives have been improved in post-apartheid South Africa as the ANC has worked to retain its political capital to sustain its presence among historically oppressed South Africans, including COSATU's trade union members. This has cut across class lines. The discourse of the NDR, the 'two-stage' theory of revolution, is that part of the ANC's nationalist project in the post-apartheid era is that the project of racial redress must be carried out.

COSATU's public sector trade unions have become the largest affiliates in COSATU in terms of their membership. They wield influence within the federation and within the Alliance. Waterman (1975) argues that the traditional employment of the 'labour aristocracy' concept is connected to the highly skilled, manual and unionised parts of the working class which were to be found in the upper stratum and affiliated with the middle class socially, politically and economically in the mid- to late-19th century Britain. The term was mostly used in European and American settings to describe the more conservative parts of the working class. For Marxist scholars, the concept of the labour aristocracy was used an explanation of working-class activity in Victorian and Edwardian Britain (Moorhouse, 1978). According to Hobsbawn (1968:208, cited in Moorhouse, 1978), the labour aristocracy appears when 'the economic circumstances of capitalism make it possible to grant significant concessions to its proletariat, within which certain strata of workers

manage by means of their special scarcity, skill, strategic position, organisational strength, etc., to establish notably better conditions for themselves than the rest'. Importantly, the labour aristocracy is a single group, even if they are in different occupations, as they share six distinct features, the most important being the 'level and regularity of earnings', according to Hobsbawn (1968, cited in Moorhouse, 1978). In addition to this, the upper stratum of the working class, the labour aristocracy, are supposed to have been 'bribed', 'bought off' or 'favoured' (Moorhouse, 1978) because of the privileges that they enjoy.

In the African context, the concept has been applied to the conservative sections of the working class, especially those in regular employment and who are unionised wage earners in the private sector (Bischoff & Tame, 2017). In the apartheid era, the 'insiders' were white; yet in the post-apartheid state, the composition of the insiders has changed, where black formal sector employees have replaced white workers. COSATU members are referred to as the 'labour aristocracy', which is a proposition related to how divisions among the permanent and temporary workers have grown, the differences between high-income earners and low-income workers have increased, and COSATU has become inhibited by its reliance on state dependence (Forslund & Reddy, 2015). COSATU members are now part of the group of insiders and their federation, COSATU, is neither concerned with the unemployed, nor with those who are in poor-paying informal jobs or with the poor – in other words, the outsiders (Pillay, 2008).

A view from the right side of the political spectrum focuses on the tensions between the Alliance partners, which have also entered COSATU and its affiliates. Sharpe (2013) contends that the Alliance could collapse, as the ANC focuses increasingly on expanding the black middle-class while simultaneously turning its attention away from the working class (not to mention those in precarious employment or those who are unemployed). Sharpe (2014) predicts that COSATU will split into two – with the private sector trade unions on the one side (whose membership have been at the mercy of job cuts, outsourcing and subcontracting) and public sector trade unions (whose membership have benefitted from continuity in employment) on the other side.

Sharpe (2014) saw the NUMSA-COSATU split in 2014, a historical fracturing in post-apartheid South Africa in the labour federation, as a battle for the heart of the ANC and about the working class being set in opposition to the middle class. NUMSA and other former COSATU affiliates

subsequently formed a rival federation, the South African Federation of Trade Unions (SAFTU); elements in NUMSA even sponsored a rival political party to contest the 2019 national elections. Sharpe (2014) argues that due to this, COSATU is now predominantly middle class, as it has big public sector affiliates. This is considered as the 'embourgeoisement thesis', which accounts for COSATU's changed class composition in the direction of the middle class; with factors like the bulk of COSATU members being in permanent employment and possessing higher levels of skill and education used to support this claim. This understanding is supported by some in the ANC, as the imaginative national project of the post-apartheid era is that of secure formal sector employment, an essential requirement of social citizenship (Forslund & Reddy, 2015). This is ahistorical as far as the class location of some of the civil servant or public sector trade union members of COSATU is concerned. It is part of the 'embourgeoisement thesis' and assumes that trade unions are composed of members who were part of the working class, but have simply become the middle class now.

In post-apartheid South Africa, the ANC has become beleaguered by internal conflicts; and COSATU and the SACP, which jointly function to curb ANC power, are both weaker, too (Fogel & Jacobs, 2019). The emergence of a pro-capitalist ANC-led state with developmental state aspirations in post-apartheid South Africa also led to an increased insecurity for many workers – including public sector workers – and trade unions, especially those aligned to COSATU that are forced to 'balance political loyalties and newfound democratic possibilities with their opposition to marketisation during the transition' (Jordhus-Lier, 2012:434). South African neoliberalism is associated with the Growth, Employment and Redistribution (GEAR) programme, which is viewed as an exceptionally conservative programme of neoliberal macro-economic policies that was implemented by the ANC in 1996, pushing aside the neo-Keynesian Reconstruction and Development Plan (RDP) (Marais, 2011). Buhlungu (2010a) refers to the 'paradox of victory', which means that even though COSATU is part of the ruling Alliance and has political influence, its affiliates have lost their power to employers under globalisation and labour market restructuring, and their organisational power is weakening.

The expulsion of NUMSA signified the 'NUMSA moment' (Satgar & Southall, 2015) which meant that there was hope for the renewal of a progressive economic project for the working class. This represented the peak of a long-term process within COSATU where the vanguard of

the NDR, represented by the Tripartite Alliance, was contesting the dissidents in organised labour and their ambitions, which they felt had been used to mislead the labour movement. NUMSA felt that within the Alliance there was no common conception of the purpose of the NDR, that it had not operated as the model for progress and that the Alliance had been overwhelmed by right-wing forces which marginalised those who supported working-class policies. The Alliance was dominated by the ANC, it subordinated organised labour; and, as the SACP had become embedded in the state, it had discarded its revolutionary role of serving as the vanguard of the working class, struggling for socialism (Satgar & Southall, 2015).

There have been many issues that COSATU has not been able to overcome, such as the neoliberal policies of the state, COSATU's own institutional deterioration (Scully, 2015) and, significantly, that some COSATU affiliates have become 'isolated from other working-class organisations and are retreating into the narrow coalition politics of the Triple Alliance' (Bonnin, 2012). Some analysts (Satgar & Southall, 2015) questioned whether the expulsion of NUMSA from COSATU in 2014 would further fragment organised labour, or lead to its renewal, with Bezuidenhout and Thsoaedi (2017) arguing that it was the case of the former.

As COSATU itself became increasingly concerned about losing its influence within the ruling Alliance, yet continued with the governing Alliance, notwithstanding the threat that it presented to its members, contradictions within COSATU in relation to the ANC's policies and its influence on COSATU as the representative of the working class developed. The shift to GEAR implied for those on the left, within and beyond the ANC Alliance, a move from racial to class apartheid and came to be known as the 'ANC's 1996 class project' (Hart, 2013). This served as a source of great tension among the Alliance partners. COSATU's former General Secretary, Zwelinzima Vavi, declared GEAR 'unworkable and unwinnable' (Marais, 2011:111). COSATU had a powerful anti-privatisation outlook and insisted that government stop privatisation until it had shared a well-defined strategy to steer the restructuring of state assets. Former COSATU union members set up private companies, using funds from trade union investment companies. COSATU's own union investment companies presented the opportunity for radical social change and worker dominance, but this led to 'labour capitalism' – labour's ownership of capital which was its employer and its assumed exploiter (Iheduru, 2001). Trade union investment companies have adversely influenced the character of COSATU, as only the most influential groups and

those linked to the politically powerful have gained from labour's compromise with capital. The thinking in COSATU trade unions was that trade union investment companies would position labour to change the economy, enable the shift of skills to the underprivileged and create jobs; or that their assets would serve as a channel for broad-based BEE that could be used to transform South Africa's economy. Instead, trade union investment companies have further weakened labour's political influence, as all black business have become dependent on state-determined wealth accumulation in post-apartheid South Africa.

Within COSATU, there were different views of the economic agenda of the ANC government. The one view, called the NUMSA perspective (Satgar & Southall, 2015), viewed the pursual of the neoliberal economic agenda as having taken place at the expense of the working class. The alternative view is that the NUMSA perspective is too stringent a criticism, and that a more nuanced view is needed.

The connections between the changes in employment in the public sector through policies of racial redress, guided by the ANC's NDR, the increase in the public sector trade union membership in COSATU and the political traditions (or ideological orientation) of COSATU, in post-apartheid South Africa, warrant a deeper investigation. The next section considers the two key contributions made by the study to address this.

1.2   Key contributions made

There are two key contributions made by this study.

There is merit to understanding the connections between the post-apartheid state policies, the expansion of employment in the public sector for Africans, the rise of the public sector trade unions in the state and within COSATU, and the implications of this for COSATU's membership composition. The ANC is a political collective with the broadest political base in South Africa and was founded by the educated African elite who used the notion of the NDR to bond all the oppressed classes to the nation and unite them against a mutual oppressor. At times, the ANC received support from black African workers. The political culture of some, but not all, of the unionised black and African workers were fashioned in the 'Congress' tradition, but there was another political tradition present in other black African trade unions which was worker-centred.

Some black African trade unions adopted the Freedom Charter as the programmatic centre and its national liberation politics so that a non-racial democracy could be established (Satgar, 2019b). The prevalent thinking was that there was a contest between national liberation politics and worker-centred politics (or socialism) that articulated with, at a particular historical time, the struggle against apartheid and capitalism; and, therefore, this served as the source of ideological tensions within COSATU, when it was founded in 1985 onwards, its affiliates and among the Alliance members. This study presents evidence of how the discourse, the political traditions, politics and policies of the NDR, the ANC's nationalist project, had been hegemonic in COSATU and markedly shaped trade unionism in post-apartheid South Africa; and in COSATU in particular, at both the top level – that is, among its leadership (this is most visible among the leadership of some of the public sector trade unions) – but also among its membership. In 1994, the weight and influence of the public sector unions in COSATU was small as there were just three unions: the National Education, Health and Allied Workers Union (NEHAWU), the South African Municipal Workers' Union (SAMWU) and the South African Democratic Teachers Union (SADTU), a mix of blue-collar and white-collar workers. By 2012, there were seven public sector affiliates in COSATU.

COSATU's membership was initially composed of unskilled blue-collar workers; even in the public sector and among certain public sector affiliates, their membership is drawn predominantly from the lower-skilled occupations. Africans employed in the public sector were mainly classified as manual workers in 1994, as they were government employees prohibited from the provisions of the Wiehahn reforms that were carried out in the 1980s, when trade union rights were extended to African workers. Associated with this was an assumption of a working-class identity of COSATU, with (some) affiliates adhering to socialist ideologies (which contrasts to the composition of the ANC as a middle-class, nationalist orientation).

Yet the increase in public sector employment for Africans in the post-apartheid era was guided by the ANC's NDR. Many of those employed in the public sector have been recruited into public sector trade unions affiliated to COSATU. There are some public sector trade unions whose members are skilled; white-collar workers and semi-professionals who possess qualifications such as university degrees and diplomas. This study focuses on some of these public sector affiliates and their members, namely the African teachers and nurses (that is, the semi-

professionals) who were members of SADTU (formed in 1990) and the Democratic Nursing Organisation of South Africa (DENOSA) (formed in 1993), respectively, at the time of this study. SADTU and DENOSA make up approximately 35 percent of COSATU's public sector membership (Bischoff & Maree, 2017).

As indicated above, there exists a view that there is a class divide within COSATU; this is embodied in the labour aristocracy notion and the embourgeoisement thesis. Yet this is received critically by COSATU, as it suggests that worker unity is threatened. The class divide – that is, the labour aristocracy thesis (that these COSATU members are part of the upper stratum of the working class) and the embourgeoisement thesis (that COSATU members have moved from the working class to the middle-class) – is critically examined through employing the class analysis of Wright's (1983) notion of contradictory class location. This allows for the detection of the gradations within trade union membership when examining the semi-professional occupations, work and working conditions as well as income, family backgrounds and the number of wage dependents. This notion of contradictory class location also helps to support the claim that the divisions and changes within COSATU cannot be reduced to either that of a privileged working class or that members are middle-class now. In addition to this, consideration has to be given to how matters of social justice and social inequalities, such as the marginalisation of minority groups within working class struggles such as race, gender, sexual orientation, disability and migrancy are issues of growing importance among trade union members. It appears that some of the SADTU and DENOSA members have turned to labour politics in the context of this growing inequality to address issues of marginalistion.

This study also advances the idea that a micro analysis of the connections between the contradictory class location of these COSATU members and their gendered and racial identities and subjectivities reveal their political tradition, or their labour politics. There are signs of a new 'organic workerism' that is beginning to emerge among certain sections of COSATU's membership in the Gauteng province. Organic workerism is not imposed by union officials either (as it had been done previously by officials in unions under the umbrella of the Federation of South African Trade Unions, or FOSATU). Organic workerism is an interesting phenomenon, as nurses and teachers who formed and belonged to trade unions and professional associations were generally excluded from the FOSATU/COSATU debates of the early 1980s, where workerism

emerged in the industrial unions. Satgar and Southall (2015) assert that although there are strong grounds for arguing that the ideological differences between workerism and populism had been stifled or limited since 1994, they are reappearing.

Organic workerism is both political tradition and critical response by the DENOSA and SADTU members, at the local level, to the perceived deficits in leadership in the affiliates, the federation and in the ANC, as well as their concerns over trade union independence from the ANC and the need to strengthen shop-floor democracy within their trade unions. The teachers and nurses of SADTU and DENOSA are conscious of the gap between union leadership and membership whch has opened up; some are dissatisfied with the service received and they want their interest to be taken more seriously by their leadership. This can also be situated in the broader contestation at the level of the federation with regard to remaining in the Tripartite Alliance and the less obvious but quite profound ideological battles over the fight for power and resources, e.g. BEE, trade union investment companies and public sector expenditure. The organic workerism of the teachers and nurses of SADTU and DENOSA also reference histories of race, class and gender oppression in society and in employment. Some of the SADTU and DENOSA members drew on their struggles regarding access to racial equality and the politics of liberation. Kenny (2020) argues that as long as relations within jobs reproduce forms of racial and gender subservience, workers as a collective political subject will regard their trade union membership as a way and a tool to articulate and contest these forms of oppression and fight for their welfare in their labour politics. Organic workerism is present among the ordinary members of COSATU, such as some DENOSA members in Gauteng in particular. The political tradition of organic workerism is a response by membership to the need to check internal democracy and to be more critical of the ANC in ways that do not compromise the trade unions. This suggests that the ANC's NDR is not as hegemonic in COSATU as it had been in the past. This study argues that COSATU, its trade unions and its membership are more complex and contested in terms of their composition and in terms of their political traditions (ideologies).

1.3   Research questions

The primary research question that this study addresses is: 'Given the increased dominance of public sector unions in COSATU, how do the changing intersections between their class, race

and gender connect with the political traditions as members of DENOSA and SADTU?' Three sub-questions were developed in order to direct not only the data collection process, but to aid the analysis of the data. These sub-questions are as follows:

- With the phenomenal increase in public sector trade union membership in COSATU, what changes took place in COSATU's configuration as a result of the occupational, educational and income levels of its public sector members since 1994?
- Does Wright's notion of contradictory class location assist in understanding the class location of the semi-professional trade union members in South Africa's post-apartheid society?
- What are the connections between the teachers and nurses of the public sector affiliates in COSATU, their political traditions and the nationalist politics of the ANC in the post-apartheid era?

1.4   Rationale

This section discusses how each of the three sub-questions relate to the existing literature as rationale for the research.

The first research theme involves a closer examination of the relationship between COSATU trade unions and the ANC's nationalism in post-apartheid South Africa. There is a rich history and a multitude of case studies on the national liberation movements in African states and particularly the trade unions, which were allies of the anti-colonial movements, and their fate in post-colonial states. When African states gained their independence, Buhlungu (2010b) reminds that it was against the backdrop of national liberation that union mobilisation was conducted. Trade unions could not confine their dealings to employers and the state; they also had to engage with the brand of politics embodied by the national liberation movements and their leaders. In most post-colonial societies, nationalist regimes either incorporated or made trade unions subservient to the ruling party. As African trade unions were preoccupied with the politics of national liberation, there was the potential for unions to become captured by nationalists. In post-colonial societies, there was always friction between nationalism and class-based discourses. Trade unions were also significantly influenced by the politics of national liberation and as they had both economic and political sides to them, they could not exclusively be class-based or nationalist organisations (Buhlungu, 2010b). The South African labour movement pursued the

same strategy that other African labour movements had and formed an alliance with the ruling nationalist ANC party and with the SACP (Scully, 2015). From 1994, COSATU was part of the governing Tripartite Alliance with the ANC and the SACP. Glaser (1988) observes that COSATU was less critical of nationalism, as it cooperated with the liberation movement in the liberation struggle and did not avoid alliances with political and nationalist organisations, although there was a lack of clarity on how the relationship between the trade unions and the Alliance should be defined. Plaut (1986) wonders whether COSATU would accept the political direction of the ANC and what the ANC expected from the union movement in the post-apartheid era.

Many COSATU trade unionists view themselves and were viewed as socialist, and their policies are deemed to be worker-centred (including the public sector affiliates such as SADTU), with the debate among the 'left' about the road to a socialist society and how the trade unions through the ANC can achieve this. Under apartheid, South African independent unions defended worker control which set the standards for union participation and democracy via frequent meetings, decision-making structures and mandates. These traditions have weakened in many ways, as unions and officials in the post-apartheid era became engrossed in the technical restructuring decisions at higher levels as trade unions were used as launching pads for government or business opportunities and career advancement (Kenny, 2020).

There have been major tensions within and among COSATU's affiliates and the source of this was due to support for the ruling Alliance (in particular, support for the ANC) given the persistent challenges of national oppression and, in post-apartheid South Africa, growing inequality. The project that unfolded – racial redress – came in the form of the NDR, which was an official discourse endorsed by all of the Alliance partners. Thus, the ANC's NDR is a process of struggle that seeks the transfer of power to the people. When we talk of power, we mean political, social and economic control. The NDR has been understood in terms of phases at which certain objectives should be achieved. The objectives of NDR include the transformation of South Africa into a non-racial, non-sexist, democratic and united South Africa where all organs of the state are controlled by the people' (Netshitenzhe, 1996:3). COSATU abides by this as the federation and its members benefit from the drive by the state to racially transform the economy and society, including the public sector. The limitations of the NDR were reworked at

various times, e.g. by the SACP, after 1994, to de-emphasise discrete stages. Satgar and Southall (2015) maintain that because it is vague, the notion of the NDR has been preserved and it functions as the glue that keeps together the various coalition of classes comprising the liberation movement. At times, the NDR presents a militant 'quasi-Marxist' rhetoric that endorses the revolutionary nature of the liberation movement and the move to socialism at the same time as it supports the continued development of capitalism. These are the opposing perspectives of the NDR. Nevertheless, the ANC and the SACP are of the view that the Alliance is directing the NDR in a progressive direction in a globalised and neoliberal world and that the SACP is the vanguard of the working class, tactically influencing government policies in favour of the workers and the poor.

This leads to the second research theme, which includes a closer examination of the significance of how, within COSATU, many members of the semi-professionals in the public sector – that is, teachers and nurses – have become increasingly unionised (Southall & Webster, 2010; Bezuidenhout, Bischoff & Nthejane, 2017) and how this has impacted COSATU's membership composition. There are some pertinent studies of COSATU's membership in post-apartheid South Africa to refer to (Buhlungu, 2010b; Buhlungu & Tshoaedi, 2012), with not as many dedicated studies of COSATU's public sector trade union membership in post-apartheid South Africa (Maree, 2017b; Bischoff & Maree, 2017). However, there are also very few studies of public sector trade unions and civil service staff associations in the apartheid era as well as just before and after the transition to democracy in 1994 (Macun & Psoulis, 2000). African teachers and nurses did form and belong to trade unions and professional associations to take up issues such as racial discrimination in employment and the system of Bantu Education, to name a few, before the formation of SADTU and DENOSA (covered in chapters 6 and 7 of this study). Draper (2000) argues that the significance of the shift in union membership from the private to the public sector was understudied in labour studies. In the post-apartheid era, COSATU's membership grew and the increase stemmed from the public sector trade unions affiliated to the federation, namely NEHAWU, the Police and Prisons Civil Rights Union (POPCRU), SADTU, DENOSA and SAMWU – some of which now also represent the white-collar and semi-professional categories of workers along with those in blue-collar occupations. Sidumo Dlamini was the past president of COSATU and had trained as a pupil nurse in KwaZulu-Natal. The nurses and teachers who became DENOSA and SADTU members, respectively, joined trade

unions that were dedicated to improving the working conditions of their members and ensuring their members' professional development. SADTU's membership grew substantially and was at the time of writing just over a quarter (28 percent) of all COSATU public sector membership (COSATU Organisational Report, 2015a).

The provision of high-quality training, education, research and innovation are key to the achievement of the objectives set out in the National Development Plan (Vision 2030) (NDP). The teachers and nurses of the public sector are a significant part of the state's national development project (Scully, 2015). Employees of the state are very much a part of the state's project to contribute to a more fair and humane society, to provide the conditions for economic growth and development and to unify a divided society (Chisholm, 2004). The occupations of teachers and nurses in South Africa served as a core of employment for the African middle class historically in South Africa as argued by Hyslop (1986) and Marks (1990), and as the subject for the analysis of the African middle class (Crankshaw, 1993; Seekings & Nattrass, 2005). Some scholars assert that the growing African middle class is a product of the post-apartheid state (Southall, 2016). In post-apartheid South Africa, high-skill jobs feature in the public sector job growth and thus are an aspect of the growing African middle class (Bhorat, Naidoo and Pillay, 2016). Mattes (2015) argues that class and occupation are becoming firm identity indicators within the African middle class, and that education and economic development are important policy issues for the African middle class (Ngoma, 2017). However, Khunou (2015) points out that being middle class and black was experienced differently in South Africa, historically and even in the post-apartheid era. This needs to be understood more deeply by those who use class analysis, such as labour scholars, as class intersects with other social identities, especially in societies that were marked by racial divisions. Citing Rita Mae Brown, Hooks (2000:25) argues that "class is much more than Marx's definition of relationship to the means of production".

The third research theme comprises an analysis of the class location of the African teachers and nurses of COSATU in post-apartheid South Africa. Gentle (2015) argues that COSATU has changed from a blue-collar working-class organisation to a public sector white-collar federation, as almost a third of COSATU members have university degrees. Focusing on the teachers and nurses in the public sector to interrogate this assertion about the change in COSATU's composition is necessary. It is this category of workers that also experience terrible working

conditions while their salaries are still low. In combination, these are the factors behind the declining status of nurses and teachers (Southall, 2016). There is literature on the African middle class (Southall, 2016; Melber, 2017), but no dedicated study about the class location of ordinary public sector employees like teachers and nurses in post-apartheid South Africa. This is astounding, as the public sector in post-apartheid South Africa has become more skills-intensive and also more union-intensive (Maree, 2017b). National statistics of the labour force revealed that there was a growth in the employment of African teachers and nurses in post-apartheid South Africa and that these workers have acquired specialised knowledge and skills. Although teachers and nurses are not as highly paid as professionals such as engineers, they are numerous (Bezuidenhout et al., 2017). African teachers and nurses are also trade union members and are positioned in hierarchies of control and management within their occupations. Research conducted on teachers' class has been tackled in terms of analysis of the labour market and teaching as a category of work (Hoadley & Ensor, 2009). Connell (1985) looks at the ambiguous or contradictory class location of teachers' work; Ginsburg (1987), Ozga and Lawn (1988) and Robertson (2000) ethnographically study the proletarianisation of teachers and the labour process of teaching. These studies involve examining the class location of teachers and asking questions such as, are they members of the working class or are they part of the bourgeoisie? Metz (1994) looks at teachers' class background (this is was part of teachers' subjective class positioning) that shape their work as teachers. These studies indicate that for scholars, the question is what class location teachers occupy when their occupation, skills set and their educational levels are taken into consideration (the same can be asked of nurses). The university-educated nurses and teachers have jobs which provide relatively high status in their community and some of the teachers' salaries put them in the top decile in the country.

In sociological class analysis studies, a process of the operational merging between Marxist and Weberian viewpoints on class has taken place in order to facilitate the examination of the increase of non-manual occupations, such as that performed by teachers and nurses. Wright (1997) is attentive to the differentiated occupations according to skills and authority. In doing so, he developed a typology of class that splits up skilled supervisors, non-skilled supervisors, experts and skilled workers from other workers. Wright and Singelmann (1982) argue that nearly half of all class locations within the class structure has a 'contradictory character' in that their class content is influenced by more than one basic class. Modisha (2007) finds in his study of

African managers, or the African middle class, that they occupy a contradictory class location in post-apartheid South African society due to the intersections of their race and class identities.

This study extended the notion of the contradictory class location to African nurses and teachers working in the public sector, and focused on its intersections with their other social identities, such as race and gender, the connections to their political traditions as trade union members of two of COSATU's public sector affiliates, SADTU and DENOSA, and connections to the nationalist discourse of the post-apartheid state.

1.5 Outline of remaining chapters

Chapter 2 is the literature review chapter. Relevant literature was sourced and reviewed continuously for the construction of this chapter and to inform the study. When the proposal was written, a preliminary literature review was conducted and it shaped the outline of this chapter. There was consideration made of empirical, critical conceptual and theoretical issues as well. This study seeks to understand the public sector trade union membership in COSATU and the changes that have taken place within COSATU's configuration as a result of the occupational, educational and income levels of its public sector members since 1994. This study also seeks to understand the COSATU public sector teachers and nurses, who are members of SADTU and DENOSA, their class location and its intersections with race and gender, political traditions of trade unions members and the nationalist discourse of the post-apartheid state. The following key areas are taken into consideration in this chapter: the African middle class and the various traditions of the analysis of the African middle class in South Africa; occupations, skills, professions; Wright's (1978a, 1985, 1983, 1997) theory of classes, the middle class and contradictory class location; the application of the contradictory class location in South Africa and to trade union members; the concepts of identity, race and class and relevant literature on intersectionality as a concept, as a methodology and as a tool for analysis as the race-class debates that accounted for the relationship between race and class in South Africa, neglected gender and the intersections between these identities. The conceptual framework guiding this thesis is also included in Chapter 2.

Chapter 3 is the historical literature chapter and the looks at literature on liberation movements, nationalism, political parties and trade unions. As such, the following key areas are covered:

trade unions, anti-colonial mobilisation and national liberation in Africa; nationalism, nation, the nation state and the history of Afrikaner nationalism and trade unions in South Africa and the history of African nationalism and trade unions in South Africa. In addition to this, the relevant literature on race, class and oppression in apartheid South Africa and the debates about the connections between apartheid and race are considered, as well as debates about Colonialism of a Special Type (CST) and the NDR. Lastly there is a review of nationalism and trade unions in post-apartheid South Africa, including Black Economic Empowerment (BEE) and trade union investment companies.

Chapter 4 is the methodology chapter and it outlines the research design and the methodological approach used in the study. The chapter provides a justification for a mixed-methods approach by reviewing the quantitative and qualitative features of the research design, which encompasses drawing on key documents, policy analysis, secondary data analysis on labour force data for nurses and teachers of the public sector in post-apartheid South Africa, qualitative data from interviews with teachers and nurses as well as interviews with SADTU and DENOSA officials. The chapter outlines the research philosophy of critical realism, an approach by Bhaskar (1978) and the categorical approach (McCall, 2005) which are appropriate for the intersectional analysis of the contradictory class location of a selection of COSATU public sector union members. The chapter concludes by reflecting on both the methodologies used and ethical considerations.

Chapter 5 starts with an overview of the pertinent literature on the public sector, employment and trade unionism historically in South Africa. The chapter draws on quantitative evidence for the growth in employment (as well as income and increased public sector expenditure), trade unionisation of Africans in the public sector and the state of bargaining in the public sector in post-apartheid South Africa. The chapter outlines and reflects on the changes that have taken place among COSATU's membership by drawing on membership figures and educational skill level of COSATU membership provided by other studies.

Chapter 6 looks at the African teachers of the public sector. The chapter starts with an overview of literature on the history of teaching in South Africa and attention is paid to the labour legislation for teachers, the teachers' associations and teacher trade unions. The chapter moves on to an assessment of the employment levels, educational levels and the unionisation of African

teachers in the public sector in post-apartheid South Africa. The chapter pays attention to SADTU, an affiliate of COSATU. The chapter considers post-apartheid labour market information on the African teacher labour force, including employment, educational levels and trade union trends by drawing on the national statistics. To supplement the quantitative data, the chapter provides an analysis of the qualitative findings of the self-administered questionnaires completed by a selection of African teachers who are SADTU members and work in public sector schools in Gauteng. The qualitative data on African teachers' educational levels, skill levels, occupational levels, household information, employment conditions in the public sector education sector, views and experiences of trade unionism, views and experiences of SADTU, COSATU, the Alliance and the ANC aid in the analysis of their class location, its intersections with their other social identities and the connections to their political traditions.

Chapter 7 looks at the nurses of the public sector. The chapter provides a brief overview of the history of nurses, legislation, discrimination and their associations in South Africa by drawing on the relevant literature. The chapter moves onto an examination of the employment levels, educational levels and unionisation of African nurses in the public sector post-apartheid. The chapter uses existing literature on nurses in the public sector, where appropriate, to assist in the analysis of the national trends in employment, educational levels and trade unions for African nurses. To supplement the quantitative data, the chapter provides an analysis of the qualitative findings of the structured interviews with a selection of African nurses who work in the public sector in Gauteng. The qualitative data on African nurses' educational levels, skill levels, occupational levels, household information, employment conditions in the public sector healthcare system, views and experiences of trade unionism, views and experiences of DENOSA, COSATU, the Alliance and the ANC aids in the analysis of their class location, its intersections with their other social identities and the connections to their political traditions.

Chapter 8 looks in detail at the connections between the ANC's nationalism and COSATU. Specifically, the chapter examines key ANC, COSATU, SADTU and SACP documents; and the qualitative data from the interviews with key COSATU, DENOSA and SADTU officials is used to flesh out the connections. The clearest indicator of the rise of the prioritising of the ANC's nationalism in COSATU is the deepened tensions among the Alliance partners and within COSATU itself. The content of key COSATU, SADTU and SACP documents is provided as

evidence of the crisis which revolves around the issues of the defence of neoliberalism, the desire to fulfil the objectives of the NDR and the ANC's nationalism. Where relevant, existing literature that focuses on COSATU is used to aid the analysis.

Chapter 9 discusses the results of chapters 5, 6, 7 and 8; and concludes the thesis by answering the research question which is, given the increased dominance of public sector union in COSATU, how do the changing intersections between class, race and gender connect to their political traditions as members of DENOSA and SADTU, which are affiliates of COSATU? This chapter concludes that the study of COSATU public sector trade union members reveals that the DENOSA and SADTU members in Gauteng have a contradictory class location and this intersects with their race and gender identities, which has an impact on their political traditions as trade union members. Due to this, a more nuanced understanding of the relationship between COSATU trade unions and the ANC's nationalism in post-apartheid South Africa is provided.

Chapter 2: Class and class location, race, gender and intersections

As Chapter 1 outlines, this study is about the African teachers and nurses in the public sector trade unions (SADTU and DENOSA) and their employment in the public sector schools and hospitals in Gauteng. Subsequently, this section reviews the relevant literature on the sociological theories of class, the various studies of the African middle class in South Africa before and after apartheid. Some argued that teachers and nurses in South Africa served as a core of employment for the African middle class historically in South Africa (Hyslop, 1986; Marks, 1990).

Understandably, the focus tended to be on the black professionals' battles for status and racial fairness and not on the different work conditions, their trade unions or their class location. This study also pays attention to the changing intersections between class, race and gender and the connections to their political traditions as DENOSA and SADTU members in post-apartheid South Africa. This chapter covers the following key areas:

- Sociological theories of class, the race and class connections, the African middle class, before 1994 and after 1994.
- Skills, professions and Wright's theory of classes, the middle class and contradictory class location and the application of the contradictory class location to the middle class in South Africa and elsewhere.
- Intersectionality as a concept and as a tool for analysis.
- The conceptual framework that guides this study.

2.1 Sociological theories of class theories, the neo-Weberian and neo-Marxist traditions of the middle class and the African middle class(es) before and after 1994

In this section, the sociological theories of class and the neo-Weberian and neo-Marxist traditions of the middle class is covered.

2.1.1 The sociological theories of class

There are many ways in which class is examined academically. One approach is to examine the categories people themselves employ and then the class structure is plotted in correspondence with the categories in which people place themselves. This is known as 'class imagery' studies. Another way is to see class in gradational terms such as income. Class could be outlined along the lines of productive assets, e.g. using indicators such as education, land, human capital or entitlements such as social welfare; this could be done for individuals or households. The last method is to understand class in terms of the relations between classes (Seekings & Nattrass, 2005). The main theories of class arose because they were useful for social scientists who wanted to make sense of the patterns and dynamics of social and political life – such as intergenerational mobility, lifestyles and health, outlooks and consciousness, and political views – and how this differed between the classes.

When we study class, we have to make a choice methodologically between the household or the individual as the suitable unit of analysis. Seekings and Nattrass (2005), for example, look at the entire social structure of South African society, pre- and post-apartheid, and their unit of analysis is the household[1] for class analysis. The class position of individuals and households, just like their incomes, could vary at any given time, and there is immense reliance of South African households on wages as a source of income. Accordingly, the analysis of class has to focus on occupations (Seekings & Nattrass, 2005).

Southall (2018) usefully points out that class may well take on diverse manifestations and forms in the global South, but if they are not connected to the two traditions – that is, neo-Weberian or neo-Marxist – they will not be accurately understood as class. The primary issue is that middle classes must not be analysed in isolation from other classes in society either (Southall, 2004). In the more conventional approach to the sociological analysis of the middle class, the neo-Marxist tradition is pitted against the neo-Weberian tradition and this is examined next.

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[1]Seekings and Nattrass (2005) mapped the class position of South African households in three phases. The first step was to categorise the occupations of individual people. The second step was to label the households according to the occupations of working members. The final step involved amending their chart to incorporate income from assets and entrepreneurial activity. A nine-class schema was produced. Once the individual in employment was given an occupational classification, the sorting of the households of which they are members of was carried out. Seekings and Nattrass (2005) discovered that the upper-class and semi-professional households were the most advantaged classes in society when taking into consideration income.

2.1.2 The neo-Weberian tradition of the middle class

One approach to the analysis of the middle class stems from the work of Max Weber, but also draws on the work of Pierre Bourdieu (cited in Seekings, 2015), applying the term 'middle class' to denote those people who are employed in occupations such as managers, professionals, scientists and technicians. This group possesses extraordinarily high levels of skills and education, benefit from middle to high incomes; and related to this, experience matching lifestyles and cultural activities which make them different to those beneath them in the social hierarchy. In the Weberian tradition, the approach to class is broad and includes additional criteria to identify class such as 'human capital' (like skills and educational qualifications), 'social capital' (such as connections) and 'cultural capital' (scarce resources used to improve life-chances) (Seekings, 2015). The neo-Weberian theorists of class assign individuals to a flexible number of classes corresponding to their occupation, income, education and other life chances. There is general consensus that education is imperative to any middle class, both for the hopeful and for the established middle class. To be clear: education, the attainment of qualifications and the subsequent access it allows to higher-level occupations comprise the main argument of the neo-Weberian approach to the middle class, where the close connection between education and social mobility is comprehensively covered.

2.1.3 The neo-Marxist tradition of middle class

In the Marxist tradition of class, the concept of class is tied to the ownership of productive property. The middle class, theorised Marx, own less or various kinds of productive property than the bourgeoisie do, but more than the proletariat, and are between the property-less proletariat and the propertied bourgeoisie (Seekings, 2015). The Marxist or neo-Marxist scholars regard the middle class as those people who fill a place in a class structure which is difficult to classify as either capitalist or working class. Neo-Marxists are concerned with describing the borders between the working class and the new middle class. If we adopt a Marxist understanding of class for teachers, they are in the same class as the unemployed as they do not have productive property (meaning economic or financial capital) and they share the possibility of exploitation (Seekings, 2015).

Seekings and Nattrass (2005) contend that over time, the disparities between Marxist and Weberian scholars of class fade. Weberians became as interested in people's occupations as well as their market situations as much as Marxists evaluated current capitalist society with reference to authority and skills or expertise in addition to the means of production did. Marxists view capitalism as a system of distribution and not just as that of exploitation. Both Marxists and Weberians ask related questions of the class structure, such as how flexible the class margins are and if there is mobility between classes, either within someone's lifetime or between generations.

The next section looks at the African middle class before 1994 and the various class analyses offered by the two traditions, neo-Weberianism and neo-Marxism, in South Africa that accounted for the links between apartheid and capitalism.

2.1.4 African middle class(es) in South Africa before 1994, class analysis and the historic tradition of the neo-Marxist and neo-Weberian approaches

In the scholarship of the African middle class in South Africa, both neo-Marxist and neo-Weberian traditions are applied and at times it is clear that they battle with each other in providing the most convincing account of the African middle class and the connections between race and class. Seekings and Nattrass (2005) argue that historically there was a small African middle class and that there were very few opportunities for others to take up membership of this class. It was clear who was part of this middle class, and the African urban working class was in reality the middle class.

The neo-Marxist approach to the middle class is largely concerned with resolving the political alignment of the black middle class. The work of the revisionists (or neo-Marxists) hypothesise that the black petty bourgeoisie is the product of contradictory processes that elicit various changes. The African population has become increasingly heterogeneous and, accordingly, people shift into the growing middle class.

The neo-Weberian approach to the middle class (or the liberal approach) regards the black middle class as result of the processes of modernisation and of the development of the economy. In the Weberian tradition, investigations of the African middle class are included under studies of 'African elites', who in colonial or early post-colonial days were considered as the main

agents in producing modernisation and development. Working-class employment for Africans changed as semi-skilled jobs increased and unskilled jobs decreased. From the 1960s, liberal scholars embarked on explaining the attempts by employers to counter the lack of white artisans by employing African workers as an indication that the so-called colour bar was dissolving (Southall, 2004). The racial configuration of the classes also changed as Africans progressed into divisions of the middle class. Urban African workers progressed up the occupational ladder and the urban African population as a whole increased and settled in towns. The African middle class continued to expand as many African people took up more professional, semi-professional and white-collar jobs. The emerging African middle class settled in new housing built on the edges of or separate from the townships.

There is some disagreement between the two approaches, one area being that of exploitation. The revisionists claim that the 'white' work carried out by Africans was at a low-cost rate, while the liberals counter that the wage disparity between white and African workers was decreasing. Towards the end of the late-1970s, both traditions concurred that the increasing occurrence of the African middle strata was a result of the progression and social promotion of black people into clerical, technical and non-manual jobs and Africans into skilled employment.

Crankshaw's[2] (1996) study concentrates on what he sees as the varying relation between racial and class partitions during the apartheid phase. He quantifies and explores the pattern of 'African advancement' into occupations that were previously dominated by white workers, such as semi-skilled and skilled employment, white-collar work, the semi-professional occupations such as teaching and nursing and, to a certain extent, managerial and professional work.

Crankshaw[3] (1993, 1996, cited in Southall, 2004) reflects on the data collected and uses both neo-Weberian class schemes (especially occupation) and neo-Marxist labour process theory (which offers explanations about why changes in the racial division of labour occur) in his analysis of this section of the African middle class. Crankshaw (1996) observes that changes in the nature of production processes appeared as the racial and occupational division of labour was restructured. As a result of the introduction of machinery and semi-skilled labour, more African

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[2] Crankshaw's study (1996) looked at occupational class in South Africa and used a comparable approach to that of Wright (1997).

[3] Before this, Crankshaw (1993) had studied the upward mobility of African workers in the metal industry over a 25-year period.

workers were employed in jobs that paid higher wages. Regardless of the apartheid policies and practices in the labour market, Crankshaw finds that there was upward occupational mobility of black labour into jobs that used to be performed by white people (Crankshaw, 1993). This was a clear process of upward social mobility and is why a neo-Weberian analysis of class is more usefully employed in analysing the 'fracturing' of the African workforce due to the fact that occupational and income differences were developing. The outcome was the emergence of a more skilled and higher paid supervisory class of African workers.

To summarise at this point, the work of the neo-Marxists and neo-Weberians signal that both are important in the understanding of the growth of the African middle class, the connections between race and class in apartheid South Africa and the changes in the connections between race and class at different historical junctures. The review of literature is also useful for this study in that if one is interested in analysing class, income is an important variable, but one needs to assess whether it comes straight from production or not. There also has to be a consideration of the mixture of occupation and ownership or non-ownership forms of wealth and who the employer is. The review of literature also demonstrates that class and the middle class can also be understood as a historical category which is subject to change (Ozga & Lawn, 1988). Crankshaw (1996) uses data from the Manpower Surveys, which were carried out by the Department of Manpower from 1965 to 1985, and from 1987 by the Central Statistical Services. These surveys documented employment by race and gender for 600 occupations. Crankshaw (1996) observes that there were discrepancies in size of the middle class due to the variance in the meanings of the middle class. There were also complications in the census and other data when used for separating occupational groups into class categories. This is a significant point for this study, as it cautions that while drawing on the national statistics on employment and education are useful to quantify patterns of social mobility among the occupations, on its own it is insufficient for an analysis of the class location of subjects.

The next section looks at sociological research on the African middle class(es) in post-apartheid South Africa.

2.1.5 The African middle class(es) in post-apartheid South Africa

The African middle class is currently a subject of substantial importance for many sociological studies, as contemporary accounts attempt to theorise the African middle class(es) and many comparative studies across different African countries have been undertaken (e.g. see Melber, 2017). In post-colonial African societies, the new African middle class was usually in government or corporate employment. Civil servants, doctors, nurses and teachers, and other middle-class professionals in the public sector and who had access to the state also formed a major section of those in formal employment. If they did undertake business projects on their own behalf, they usually did so with the assent of the state, on which they were reliant for capital and patronage. These individuals were labeled as belonging to either an 'old' petty bourgeoisie which was usually the self-employed, or a 'new' petty bourgeoisie such as managers and professionals, who carried out vital work for capitalists but experienced relative autonomy in the workplace, while facing social pressures which pulled them in the direction of the working class (Southall, 2004).

Southall (2004) recommends that a description of the current African middle class in South Africa in the post-apartheid era should start with the reality of the national liberation movement having taken control of the state machinery and subsequently how the extensive transformations in the political and economic realms have occurred.

One of the most visible processes of upward mobility by African men and women into higher-income occupations has been in the public sector. Africans also entered these occupations due to the changes that took place in institutions of higher education as the proportions of African students rose. The ANC-led government's emphasis on deracialisation encompassed labour-market policies, public education and social welfare policies that benefitted Africans. This process aided in altering the racial configuration of upper-income deciles and a deracialisation of opportunities at the apex of the income distribution occurred. Therefore, the new African middle class in post-apartheid South Africa comprises people in salaried jobs (Seekings & Nattrass, 2005) and in occupations such as the semi-professionals, professionals and white-collar workers. This suggests, too, that the African middle class has many components to it (Southall, 2016).

Some studies stress that evaluations of how, why and whether Africans in South Africa view themselves as middle class should take place (see Phadi & Ceruti 2011, cited in Southall, 2018) in post-apartheid South Africa. Others argue that the African middle class is extremely heterogeneous and there may be some doubt that it is essentially a class at all (see Neubert 2015, cited in Southall, 2018). Khunou (2015) concludes that being middle class and black is heterogeneously felt in post-apartheid South Africa. There have been studies of the urban-based African middle class and their spatial practices (where they live, what they spend money on and how they are influenced by and determined the urban environment) (see Crankshaw 2008 and Kracker Selzer & Heller, 2010, cited in Southall, 2018). Kunene (2015, cited in Southall, 2018) examines how the spectacular growth in general school and higher educational registrations strengthen the development of the African middle classes.

Yet, a review of the literature suggests that what actually constitutes the middle class is not close to being settled and that it is challenging to quantify the African middle class. The reason why there are inconsistencies among the studies of the size of the African middle class (e.g. by the Human Sciences Research Council and the Unilever Institute for Strategic Marketing at the University of Cape Town) is because of the variations in the way it is conceptualised.

Southall's (2018) understanding of the middle class is one which merges the Marxist approach – that is, the understanding that the middle class is neither capitalist nor working class – with the Weberian view, which is that the middle class is situated in 'middling' vocations, such as the professions and management, but encompasses the 'lower middle class' of white-collar workers (Southall, 2016). This study argues that there is room for a more comprehensive deliberation of the neo-Marxist and neo-Weberian traditions, or even a combination of key elements of both traditions in order to develop a distinct appreciation of the class location of the African nurses and teacher trade union members working in the public sector in post-apartheid South Africa. The significant commonality that occurs between the empirical categories are used by leading Marxist and Weberian scholars on class such as Erik Olin Wright and John Goldthorpe. Wright (1978a, 1985) attempts to make sense within a Marxist framework of the large numbers of non-manual workers in contemporary capitalist society by developing the theory of contradictory class location. This is outlined in the next section, along with his theory of classes and the middle class.

2.2   Skills, professions and Wright's theory of classes, the middle class and contradictory class location and the application of the contradictory class location to the middle class in South Africa and elsewhere

This section is tackled in six ways. The literature of skill and the profession, using teachers as the representative of the semi-professionals, is reviewed. If teachers' work is deskilled, then this raises questions about possible proletarianisation, or the proletarianisation thesis (Ozga & Lawn, 1988). This is common to those in these professions, even though they possess significant professional status. As teachers and nurses are the focus of this study and are considered to be semi-professionals, the notions of occupation, skill and the differences between professional and semi-professional is reviewed briefly.

This section then moves to a discussion of Wright's (1997) analysis of classes, Wright's (1978a) analysis of the middle class and Wright's (1978b, 1985) concept of contradictory class location. A brief analysis of the critiques of Wright's (1978b) notion of contradictory class location is provided. Wright's (1978b, 1985, 1997) notion of contradictory class location are applied to the semi-professionals – that is, teachers – and to other occupations. There is a deliberation of Wright's (1978a, 1985) notion of contradictory class location in the South African context which are briefly covered, too.

2.2.1 Occupation, skill, the professions and proletarianisation

Many studies of teachers and their social class concentrate on the difficulties of how to ascertain their class location (Harris, 1982; Ozga, 1988) and thus notions of skill and the profession are raised. Silver (2003) argues that teachers are proletarians in that they do not own the means of production and so, to subsist, they have to sell their labour power (and in the main they sell it to the state). In relation to the proletarianisation thesis, Carter (1997) argues that teachers' skills and their autonomy counter the proletarianisation of teachers; and that the introduction of new hierarchies due to managerialism is what causes differentiation (Maguire, 2005).

Lawn and Ozga (1988) study how teachers' work is subject to the same forces of deskilling, as has happened in other occupations. This is termed the proletarianisation of teaching, which was shaped by Braverman's (1974, cited in Lawn & Ozga, 1988) work on the labour process and

proletarianisation. Proletarianisation is the process of the outcome of the worker's ability to initiate and execute work that is being taken away from the worker. Furthermore, conception is detached from execution and execution is fragmented into separate, controllable simple parts. This process deskills the worker. The result of this is the loss of workplace autonomy and the increase of management controls, among other things. Lawn and Ozga (1988) found evidence of the proletarianisation of teachers' work through studying the labour process in schools and where the teacher's capacity to control the pace, content and number of tasks had changed. These are all features of proletarianisation. To be more precise, evidence of proletarianisation includes an erosion of teaching time by administrative tasks, redeployment, redundancy and the expansion of management, and monitoring the performance of teachers in schools. Proletarianisation, simply put, refers to the process of teachers losing control over the definition of their work.

Nevertheless, Lawn and Ozga (1988) note that one has to be cautious when applying the proletarianisation thesis to the work of teachers, as very little is known about teachers' work even when information about working conditions for teachers objectively exists. Lawn and Ozga (1988) recommend that ethnographic research be carried out to determine if this process has taken place in the form of changes in the work process, and that this be studied at the micro level; that is, at the level of individual teachers. Lawn and Ozga (1988) also warn that focusing on increasing deskilling and management control over teachers as synonymous with proletarianisation is incorrect, as deskilling does not always result in a loss of skill overall, nor is deskilling inevitable. Deskilling is resisted by teachers, too, and skill is socially constructed. As teachers are active in the labour process and they are unionised, they socially construct their skills through professionalism, and they have the space (or autonomy) to do so. Teachers were subjected early on in the 20th century to housekeeping and maintenance work and had to take responsibility for health and welfare work, such as serving school dinners or teaching during the holiday period. These were ways in which teachers were deskilled, but also what led teachers to thinking of themselves as being exploited, as they were trying to "educate in impossible conditions (this was, however, due to the feminisation of the teaching force)" (Lawn & Ozga, 1988:331). However, the contradiction at the centre of the expanded role of teachers is that some parts of teachers' work have been deskilled, while other parts have not. The extension of teaching tasks into welfare work is defined as public service and this undermines teachers in their claims to professional status at most. Thus, when there is a transformation of teaching into a

process of technical delivery which can be measured, this indicates a process of proletarianisation.

Southall (2016) refers to South African teachers and nurses as semi-professionals, but it is important to note that there is an 'arbitrary' difference between professional and semi-professional categories. The main difference between professionals and the semi-professionals is connected to exclusivity and status. Both professionals and semi-professionals have specialised knowledge and skills, but it takes professionals a longer time to qualify. Professionals are paid more than semi-professionals and there are many more semi-professionals than there are professionals (Southall, 2016). Professionals enjoy a higher status than semi-professionals do. Importantly, semi-professionals link their ambitious striving for professional status with trade unionism; this signifies that semi-professionals also have to guard against their work being deskilled. Semi-professional unions consist of teachers and nurses, globally, and they are usually in the employ of the state. Professionals possess knowledge and expertise, and these are verified by qualifications which are backed by professional bodies or by institutions of higher learning. The professionals rely on the state to control entry and standards, but the professionals strive to maintain their independence (Southall, 2016). Professionals are interest groups, too, so they attempt to uphold their market positions as sources of scarce skills. They are committed to a system of professional ethics and the provision of high levels of service. Historically, in South Africa, the professional bodies were controlled by white professionals.

In allocating workers to classes, boundaries have to be taken into consideration. Sometimes, only production workers are part of the proletariat, but all wage earners are part of the working class. The boundary between the working class and the new petty bourgeoisie can be studied, too. It is more urgent to, when one studies white-collar workers and semi-professionals, to pay attention to the problems of boundary definitions between classes, as this becomes more apparent when focusing on these occupations (Southall, 2016). Teachers are assumed to be part of the middle class and, as such, they produce the practices connected with this social location. Yet some emphasise the ambiguous or contradictory class location of teachers, such as Connell (1985). Wright (1978b:26) was of the opinion that an 'alternative way of dealing with the ambiguities in the class structure is to regard some positions as occupying objectively contradictory locations within class relations'. The next section briefly covers Wright's (1997) analysis of class, before

moving onto Wright's (1997 and 2002) analysis of the middle class and Wright's (1978b and 1985) notion of contradictory class location.

2.2.2 Wright's analysis of classes

Wright (1997) contends that both Marxist and Weberian analyses of class define class position in relation to other classes; that is, a given class location is defined by virtue of the social relations which link it to other class locations. Secondly, Wright (1997) asserts that both traditions define the concept of class in terms of the relationship between people and economically relevant materials or resources. Marx applies the ownership of the means of production to class and Weber employs market capacities to class. Thirdly, both traditions see the significance of class as somewhat functioning through the ways in which these relations influence the material interests of actors; that is, one's materials and/or resources expedite one's chances and inflict limitations on what one can do to get what one wants in life (Wright, 1997). A composite concept of class in which productive property is key is used by Wright (1997); but other criteria are included, such as power and income.

2.2.3 Wright's analysis of the middle class

Wright (1997) studies those individuals who have very little productive property yet sell their labour power; who exercise great power over other employees where they work and receive large incomes, e.g. managers in United States corporations. These managers do not own productive property and thus have to sell their labour power to the bourgeoisie. Wright (1997) found it preposterous to classify these individuals as proletariat, as they are not exploited due to the fact that they possess power in the form of *authority* in the capitalist corporate scenario, providing them with a privileged position. Wright (1978a) tends to use Weber's understanding of the middle class as a distinct category, to which managers belong, which becomes obvious as one studies their power and status in the labour market. For Wright (1997:19) the middle class consists of 'people who sell their labour power on a labour market, and yet do not seem part of the working class'.

Modisha (2007) asserts that Wright's (1997) analysis of the middle class in a capitalist class structure blends the Weberian and Marxist views of class stratification to arrive at an

understanding of what the middle class is. To be clear, Wright (1997) asserts that one can identify who is in the middle class when two measures is used to separate employees. The first measure is the relationship to authority and the second is the ownership of certain skills and expertise. The middle class can be distinguished from the working class as their possession of skills and expertise affords them a higher place in the labour market and thus gives them an advantage in their relationship to authority within production. Although these two dimensions are related, they do not depend on each other as it is plausible to have authority yet lack skills or vice versa.

2.2.4 Wright's theory of contradictory class locations

Wright (1978a, 1983, 1985) and Wright and Singelmann (1982) use and wrestle with the concept of contradictory class location in trying to make sense of the middle classes in capitalist society; and this is also where his theory has received a lot of critical attention.

Wright (1978a) examines class relations in the social division of labour of capitalist societies and contends that the class structure of these societies is distinguished by the presence of ambiguous positions. Wright (1978a) claims that managers and supervisors inhabit a contradictory position between the bourgeoisie and the proletariat. Even if managers and supervisors are the representatives of the bourgeoisie who are assigned to supervise the means of production, they are still employees. This kind of relationship indicates that the manager's attachment to the bourgeoisie is partial, but they are not part of the proletariat. As they are tasked with management of workers in the capitalist production system, it denotes that their location is contradictory (Buhlungu, 2006).

Wright (1997) states that when the class location is assigned, the lived experiences and material interests held by the individual has to be assessed. Being in a class location entails that the individuals does particular things and that certain things happen to them. What people do in the workplace – that is, their job – is one way to connect people to experiences and interests, but it is not the only way. Families also provide a set of social relations which tie people to the class structure.

However, what is central to class is that in order to obtain more surplus labour and surplus value from the worker and as the division between mental and manual labour in many sectors of the economy grow, the division of labour increases to simultaneously produce jobs connected with high levels of skill or technology and more manual jobs. Wright (1983) asserts that this is the way in which a new class location is generated, namely that of semi-autonomous experts. Occupations such as coders, home-care workers, engineers, teachers and nurses are examples of this new class location. Therefore, as the division of labour develops and relative surplus value grows, this results in new splits within the working class. There are new classes, according to Wright (1978a); more specifically, a new class location, which is similar to Weber's class situation. According to Wright (1983), these workers are in a privileged position. In terms of class interests and political organisation, workers in privileged positions in the division of labour relate to those above them in the social hierarchy, that being the owners and top level of management. When this occurs, this operates to separate the more privileged worker from the less privileged or 'uncredentialed' worker. Simultaneously, Wright (1978a) regards these privileged workers to be in a contradictory class location; that is, this group is not part of the bourgeoisie (nor even the petty bourgeoisie); indeed, they inhabit a contradictory class location between the working class and the petty bourgeoisie. The privileged class do not own productive property.

Those in the privileged class are highly educated and at times they identify politically with the less privileged working class. Wright and Singelmann (1982:182) assert that "managers/supervisors have one foot in the bourgeoisie and one in the working class, and this means that their class interests are objectively torn between these two classes". Due to their contradictory class location attribute, the role of this class in the class struggle is not defined, as at times they will tend to support the working class and at other times they will clash with this class. Wright (1983) presumes that these more privileged workers also have contradictory political, ideological and economic interests.

To summarise at this point, Wright (1978a, 1985) examined class relations in the social division of labour of capitalist societies and contends that the class structure of these societies is distinguished by the presence of ambiguous positions. Wright's offering of contradictory class locations (1978a, 1985) is useful as he asserts that the two-class model of capitalist society

explanation is deficient when it comes to understanding those in ambiguous positions or who are the semi-experts.

As the division of labour develops and relative surplus value grows, this results in new splits within the working class. In Wright's (1987a, 1985) conceptualisation of it, a new class location is produced among the workers in privileges positions. The 'contradictory locations' are not actually 'between' classes, but rather represent locations which are concurrently or *simultaneously within the classes*. Wright and Singelmann (1982:182) usefully argue that the contradictory classes are described as contradictory because people are located concurrently in two classes. This means that they share basic class interests with both the petty bourgeoisie and the working class. Thus, the class location of privileged workers in the labour process is contradictory. Wright (1983) as well as Wright and Singelmann (1982:182) argue that the contradictory classes are "contradictory in the precise sense that they are located simultaneously in two classes". This means that they share basic class interests with both the petty bourgeoisie and the working class.

There are discrete levels of a contradictory class location in capitalist class relations (Wright, 1978a). Wright and Singelmann (1982) identify three contradictory locations in advanced capitalist societies. Firstly, there are managers and supervisors who occupy a contradictory location between the working class and the capitalist class (they are like capitalists as they command the labour of workers and at least some of the physical means of production; and they are like workers as they are prohibited from control over the accumulation process and led by capital within production). The other two contradictory locations are small employers and semi-autonomous employees. The semi-autonomous employees retain relatively high levels of control over their immediate labour process and occupy a contradictory location between the working class and the petty bourgeoisie. All are privileged workers and are in contradictory class locations.

To summarise at this point, those in contradictory class locations concurrently inhabit a superordinate position on one dimension of the capital-labour relation and a subordinate position in another such dimension. Salaried employees who do not own the means of production but have considerable power and authority in the labour process (as managers or semi-autonomous

experts) are categorised by Wright (1985) as occupants of 'contradictory class locations'. Such positions belong neither to the proletariat nor the bourgeoisie, but are torn between divergent class positions (Burris, 1988).

Wright (1985) developed his thoughts on the characteristics of the petty bourgeoisie who occupy a contradictory class location in his work *Classes*. Wright (1985) broadens the three contradictory class locations to six contradictory locations[4] as they are seen as contradictory locations within *exploitation* relations. The contradictory class locations are internally separated according to the amount of 'organisational assets and skill/credential assets' they enjoy, although they also share the mutual characteristic of the non-ownership of the means of production (it must be stressed that Wright (1985) mainly worked in the neo-Marxist tradition).

It is important at this stage to outline how Wright (1985) changed his mind about whether exploitation or domination is central for understanding contradictory class locations as this laid the basis for the critique of Wright's (1985) theory of contradictory class locations by others, which is covered subsequently. In *Class, Crisis and the State*, Wright (1978a) argues that contradictory class locations overlap with major classes in capitalist society; and for this, the theory of domination, rather than the theory of exploitation, is useful. Then, in *Classes*, Wright (1985) argues that contradictory locations can be understood through a theory of exploitation rather than a theory of domination (which he had argued was the case in *Class, Crisis and the State*, Wright, 1978a). Wright (1985) thus presents a critique of his own preliminary conceptualisation, that his initial concept of contradictory locations was supported by a theory of domination[5] (a Weberian concept) rather than one of exploitation (a Marxist concept). Wright (1985) centres exploitation in his conceptualisation of contradictory class locations in *Classes* (1985) and rejects the theoretical framework on which his argument was based on in *Class, Crisis and the State* (Wright, 1978a).

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[4] These positions were expert managers, expert supervisors, expert non-managers, semi-credentialed managers, semi-credentialed supervisors and uncredentialed managers.

[5] In employment relations, there are workers who are rigidly supervised and paid a wage, and there are workers whose work requires greater autonomy – such as teachers and nurses – and so their income and working conditions are different. This is an important aspect of the work relation; and so the concept of class is understood as economic life chances and the various employment relations available in the labour market and in the organisation of work. This is associated with the work of Goldthorpe (2000), who had a neo-Weberian understanding of class, according to Alexander (2010).

The next section looks at critiques of Wright's concept of contradictory class location and more detail on his conceptualisation is provided along with the critiques.

2.2.5 *The critiques of Wright's theory of contradictory class locations*

Weil (1995) commends Wright (1985) for analysing the new class locations of modern society that Marx passed over in his analysis of capitalist classes (Weil, 1995:2). Weil (1995) asserts that in Wright's *Classes* (1985), there is convincing theoretical coverage of those "class locations that are neither exploiters nor exploited … these are traditional or old middle class of a particular kind of class system" (Wright, 1985:86). Yet others take Wright (1985) to task for his theoretical shift from domination to exploitation in relation to the contradictory class location notion.

First, Wright (1985) is criticised for not acknowledging Weber's contribution to social stratification systems, even though he indirectly draws on Weber when he uses domination to understand contradictory class locations. Rose and Marshall (1986) critique Wright's (1985) attempts in *Classes* for forming a theory that obscures the differences between neo-Weberian and neo-Marxist analyses of class structure. Another valid criticism of Wright (1985) in *Classes* is that he expresses how significant credentials and organisational position are in any understanding of modern stratification systems, yet it was Weber who first explored the correspondence of these two elements in his writings on bureaucracy. This is something that Wright (1985) overlooks.

Second, Wright (1978a) is criticised for trying to explain the conundrum of the intermediate classes by including Weberian relations of domination into the Marxist definition of class, thereby downplaying relations of productive property and exploitation (Burris, 1988). Wright (1985) subsequently recognised that he made an error by concentrating on relations of domination in his own theory of contradictory class locations. If one includes relations of authority (domination) and subordination into the definition of class, then this conceals the distinctiveness of class oppression by placing it on the same level as the many other types of domination such as sexual, racial or national. If one does this, then one is presented with problems when trying to adhere to the basic Marxist claim that class relations are key in the analysis of social conflict and change. Thus Wright (1985) proceeds to focus closely on the immediate production process and overlooks other key components of class relations, such as

market relations and distributive conflicts, which are treated as secondary. Neo-Weberians are critical of neo-Marxist theorists (like Wright, 1985) who do this. Giddens (1973), Parkin (1979) and Collins (1979) (cited in Burris, 1988) all convincingly argue that class positions of salaried managers and professionals are best comprehended from the standpoint of distributive relations. They develop models in which skills and credentials are seen as the central features of intermediate classes (Burris, 1988). Wright argues that Weberians regard skills and credentials from a culturalist standpoint (in other words, in terms of meaning systems that influence social action), but he conceptualises them from a materialist stance (in other words, in terms of objective patterns of exploitation that are autonomous of the subjective positions of actors). Burris (1988) points out that Marxists state that what is recognised as skill in a society or what is approved of as credentials is a social construction, which Wright (1985) overlooks.

Third, Wright (1985) is criticised for not basing his theory of contradictory class locations in a clear analysis of exploitation. Meiskins (1988) criticises Wright's (1985) redefinition of exploitation on which he builds his argument that class locations are contradictory. The theory of exploitation on which Wright bases this new theory of 'contradictory class locations' signifies an essential difference from the conventional Marxist analysis of exploitation. Wright (1985) snubbed the traditional Marxist view that exploitation should be defined as the appropriation of surplus labour. Instead, Wright (1985) offers a definition of exploitation in terms of per capita shares of the total social pie. If an individual or group is the recipient of less than their per capita share of the available social assets, they are economically subjugated. Using his definition of exploitation, Wright (1985) implies that there are numerous kinds of exploitation that are crucial to contradictory class locations; one can be an exploiter along one dimension and exploited along another. Meiskins (1988) disapproves of this, as he argues that Wright (1985) does not offer any proof that these multiple exploitations exist. Wright (1985) claimed that there is 'skill exploitation' and 'organisation asset exploitation' and connects distinctions of skill with the capitalist exploitation of wage labour. Wright (1985) contends that there are diverse types of rank and skill, and these inequalities may become the reason for the many kinds of social conflict. Meiskins (1988) does not accept this and contends that Wright (1985) fails to supply a vital theoretical defence for viewing the divisions and conflicts as more than forms of diversity and disunity within the polar classes of capitalist society.

Fourth, Wright (1985) is criticised by Meiskins (1988) for overlooking the notion of 'occupational solidarity' in his theory of contradictory class locations, which are the 'effort to protect skills'. Meiskins (1985) argues that that this is proof of the origins of class consciousness, even if the employee does not relate to the broader working-class movement. If one takes this view into consideration, then the middle-strata employees are not structurally different to the working-class employees, as Wright (1985) argues they are.

Fifth, Wright (1985) is criticised for failing to provide empirical evidence for his claim that credentialed workers gain at the expense of those who do not possess credentials. Wright (1985) claims that those who hold credentials have artificially limited the availability of particular skills, thus compelling employers to pay them wages that surpass the value of their 'marginal product'. Thus, they are themselves seizing someone else's labour. Meiskins (1988) questions this and criticises Wright (1985) for not supplying the evidence that those who possess credentials are earning wages in excess of their value. Furthermore, Wright (1985) does not consider that it is conceivable that the skills possessed by those who have credentials make them more productive in ways that justify their higher wages. Wright (1985) fails to show how credentials always control the supply of labour in ways that push wages up. Wright (1985) does not provide evidence of how credentialed workers are the exploiters of the uncredentialed and how this made their class locations different. Wright is also criticised for being unable to put into practice the notion that there is no simple correspondence between what he calls 'class location' and 'class formation'.

Sixth, Wright (1985) is criticised for abandoning his original conceptualisation of capitalist relations of exploitation as a complicated articulation of ownership and domination (control) relations. This has implications for the intermediate strata and the contradictory class location theory. In his original model, Wright (1978a) classified the intermediate strata by their contradictory place on diverse sides of the mode of production. In *Classes*, Wright (1985) downplays the importance of domination relations, equates exploitation with productive property relations, and asserts that intermediate strata are notable by their contradictory positions of different modes of production (that is, the overriding form of exploitation in capitalist society is one based on the private ownership of the material means of production; hence other types of exploitation, especially those that stem from the uneven distribution of other assets, are

secondary). Yet it is only on the basis of these now subsidiary assets (skills and organisation assets) that the intermediaries can be classified as separate from the proletariat because they own one of these subsidiary assets and are able to exploit the labour of other workers (Burris, 1988).

Lastly, it is asserted that Wright (1978a, 1985) does not provide an estimate of the number of workers located in the contradictory locations (he was speculative but not exact) and what the class-based action of those organised segments could be (Harp and Betcherman, 1980).

Wright's notion of the contradictory class locations inspired one of the research questions of this study and was operationalised to investigate the class location of the African nurses and teachers of the public sector trade unions in COSATU. The post-apartheid racial transformation of society was driven by Affirmative Action to achieve an equitable representation of the 'historically disadvantaged individuals', especially in white-collar and management positions, in the labour market. In the public sector, the 1997 *White Paper on the Transformation of the Public Service* and subsequently the 1996 *White Paper on Affirmative Action in the Public Service* (which is the focus of Chapter 5 of this study on the public sector) clearly reflected that the goal of the ANC state, among others, was to construct a more demographically representative public service administration. These policies also assisted in the social mobility for Africans in particular, as Chapter 4 on the public sector demonstrates. African teachers and nurses in the post-apartheid have educational qualifications such as degrees, as outlined in chapters 6 and 7, which has assisted in their social mobility. South Africa was historically divided along racial lines, but in the post-apartheid South Africa there is social mobility along race lines, too, with class outcomes. An advantage of using Wright's (1978a, 1985) conception of the contradictory class location is that he, too, places emphasis on disaggregating what is in the middle by exploring the contradictory aspects of class location. This inspires the theoretical coverage of the study and its methodological framework, which is covered in Chapter 4 of the study.

2.2.6 The application of Wright's (1978, 1985) theory of contradictory class locations by others to teachers and nurses and to other middle strata

Harp and Betcherman (1980) apply Wright's (1978a) theory of contradictory class locations to teachers in Canada, identifying teaching as one of a group of occupations defined as 'semi-autonomous wage earners'. The argument is that for the occupation of teaching, the labour

process is not totally proletarianised and there is some amount of control over the immediate work process. On the one side teachers are non-productive wage-earning workers, yet a "strong union movement among white-collar employees could constitute a political factor which could push them to the working class" (Wright, 1977, cited in Harp and Betcherman, 1980:146). Teachers in Quebec affiliated with the working class by joining the 'La Centrale de l'Enseignement du Quebec (CET)' – a labour movement – as the teachers in Quebec viewed themselves as workers; labour unionism for them was the most suitable channel for agitating for change. In Ontario, teachers formed the Ontario Secondary School Teachers' Federation to advance their salaries but this did not affiliate to the labour movement in the region.

Hyslop (1986) applies Wright's (1978a) theory of contradictory class locations to African teachers in South Africa. Hyslop (1986) argues that teachers have more authority over their work than industrial or ordinary clerical workers do; they benefit from higher wages and circumstances and they are professionals with some social status. Hyslop (1986) acknowledges that there is an argument over whether teachers should be considered as the middle class or as the petty bourgeoisie. Hyslop (1986) points out that teachers are dependent on their wages for their existence and so are members of the working class. To Hyslop (1986) it is advisable to understand teachers as being positioned somewhere in the middle section of the social stratification system – that is, between the working class and the petty bourgeoisie – but they occupy a contradictory class position, being exposed to the political forces of both groups. Furthermore, Hyslop (1986) theorises that the kind of organisation teachers create is contingent on whether the interests they share with workers prevail or their desires to be part of the middle class are predominant. If teachers are of the view that popular and workers' movements are an effective way to enhance their economic position and attend to their national oppression grievances, it leads to a militant teachers' trade unionism. If the pull of middle-class objectives is more convincing, then the outcome is the strategy of professional organisation (Hyslop, 1986). It must be remembered that African teachers' status was downgraded by Bantu Education (and black nurses were similarly subordinated within a racially structured health system) (Southall, 2016).

Nzimande (1991) specifically studies the position and role of African managers as the African middle class in the struggle against the apartheid regime. Some view African managers as part of

the working class, while others locate them as part of the bourgeoisie, since people belonging to this class are not exploited like the working class is. Indeed, they were in a contradictory location between white capital and black labour during the apartheid era, and this represents the essential lived experiences of the African managers. Called 'the corporate guerillas', they were wedged not just in a class struggle, argues Nzimande (1991) – that is, between the working class and the capitalist class – but in the context of apartheid South Africa, they were trapped between a vast black working class and a dominant white capitalist class. Nzimande (1991) strongly contends that the post-apartheid African middle class is not massive and is itself composed of numerous strata, to be found in both the public and private sectors; and within each sector where it is situated, they are undertaking widely diverse functions. Nzimande (1991) found that the dilemma that faced the African managers during the apartheid era was how to safeguard their class reproduction via upward social mobility without becoming estranged from their oppressed African working-class communities – and that this was the source of their contradictory class location.

Buhlungu (2006) applies the notion of 'contradictory location' in relation to the partial inclusion of white officials in the black unions that emerged after 1973. Buhlungu (2006) reasons that in the context of a racially split South African society in the 1970s and 1980s, the kind of relationship between white union officials and black trade unions represented a contradiction – but not as that identified by Wright (1997). Buhlungu (2006) uses the notion of 'contradictory location' and modifies it to portray the white officials' association with black workers at the social and cultural levels to explain links between their class and their race relations. Inside the black working-class trade union movement, the separation between black and white officials tallied with class, as white officials came from non-working-class backgrounds while nearly all black officials were from working-class circumstances; there was thus an unevenness in power relations between these two racial and class groups.

Buhlungu (2006) contends that white officials as intellectuals were outsiders, participating in the working-class struggle, but they were not oppressed; they had assumed an ideological position against capitalism. The white officials defended 'worker control' in the shape of democratic decision-making and emphasised responsive worker leadership, and this emerged from their ideological alignment with Marxism. There was a division of labour between white officials,

who were all university educated and carried out planned and intellectual operations (all of which had more political authority) and black officials, who carried out more ordinary tasks such as organising and clerical work. The white officials' contradictory location was in the social structure of a racialised society, which was the reason for their power on the one hand but also the site of their powerlessness, as they could not break through into the world of black workers. The white intellectuals set about training a worker leadership that would not contest their own politics. In the early 1980s, a tier of worker leaders and organic intellectuals emerged who were autonomous of white officials. The presence of this substantial sector of black organic intellectuals led to a rupture in the position of white officials. Therefore, the rise of a confident black union leadership only served to emphasise the contradictory location of white officials in black unions and ultimately weakened their extraordinary reputation as authorities in these unions (Buhlungu, 2006).

Although she did not use the term contradictory class location, Hooks (2000) told her own story of growing up in a poor, working-class African American family. In the USA, black people did not emphasise the matter of class and class exploitation, even though there were always distinct caste and class groups among African Americans. Hooks' (2000) political loyalty was to the working people, although she interspersed facets of her working-class upbringing with new thoughts and habits such as the way she dressed, what and how she ate, and how she talked. Certain that nothing could detach her from the world in which she grew up, she found that she traversed class margins effortlessly. In the space of race and gender, Hooks (2000) located herself with those who were oppressed along race and gender lines; class was the one place where she had a choice about where she stood. Hooks (2000) found that the amount of money she earned categorised her as upper class, but that she did not relate to this class positionality, even though she relished the class power it afforded her. In the 1960s in the USA, class-based racial unification disturbed the racial cohesion that often bind black people at the same time in the face of class divergence. In other words, although black people objected to the ways racism functioned to prevent them from doing well in their careers or how racism impacted them daily, their criticism was not connected to an appreciation of how their class power acted as a go-between regarding racial prejudice in a way that it did not do so for the poor and underprivileged black people (Hooks, 2000).

Furthermore, the studies on the application of Wright's contradictory class locations provide rich material that this study can draw on. Hyslop (1986) demonstrates how Wright's contradictory class location is useful in understanding the class location of teachers, Nzimande (1991) uses the notion for African managers in white-dominated firms, and Buhlungu (2006) uses the concept for the white activists in the black trade union movement. These studies also took place in apartheid South Africa.

As noted above, the traditional African middle class was composed of teachers and managers in apartheid South Africa. As race was the basis for the national oppression, this had the effect of downgrading the status for Africans in these occupations and explained why the contradictory class location notion made sense. Modisha (2007) contends that South African scholars investigate the contradictory character of class locations so that an understanding of not only the links between class, but also power and social status as shaped by racial stereotypes that were fixed in apartheid society, can be better understood.

As this study looks at the class location of African nurses and teachers who work in the public sector and are members of COSATU trade unions, it is argued that it is important to pay attention to the way that their class, race and gender intersect. The study of social transformation has to pay attention to the correspondence between the categories of class race, class and gender; but an appropriate theoretical and analytical framework for this has to be found – and it is intersectionality. It is to a review of the literature on identity and intersectionality that this chapter turns.

2.3   Identity, race, class and intersectionality

For the section, a review of a selection of the literature on the theme of identity is covered. Literature on the connections between race, class and oppression in South Africa and the relevant literature is briefly drawn on, too. The theme of intersectionality and consideration of how it is used in the approach to African middle-class women in post-apartheid South Africa is also given consideration. Lastly, an overview of the methodological approaches to intersectional analysis is deliberated on and the researcher contemplates on the implications for this study.

2.3.1 Identity

The notions of nation and nationalism, which are covered in Chapter 3, bring into focus the issue of identity (as what was created by Afrikaner or African nationalists, for example, was an Afrikaner identity or an African identity). The social science disciplines accord much attention to the 'construction' of racial, gender and ethnic identities, or what is known as subjectivities, in discourse and types of cultural representation. Identities are individual and collective, multiple and fluid. Identity is continuously relational and contextual; people express themselves in relation to others and they stress one or other combinations of the numerous building blocks of their identity, subject to the prevailing context (O'Meara, 1997). Identity is understood as a collective phenomenon and signifies an essential sameness among participants of a group or category. The members comprehend this objectively (as a regularity) or subjectively (as an experienced, sensed or recognised sameness). The sameness expresses itself in solidarity, in mutual outlooks or consciousness, or in collective action (Brubaker & Cooper, 2000). Identity is also understood as the consequence of social or political action.

Identities are politically critical as they entrench subjects in meaning systems and collective agency (Bloom 1990, cited in Petersen, 1991), and they activate purposive and politically meaningful actions. The identities of 'race', 'nation', 'gender' and 'class' are all types of social and political practices as well as sets of social and political analyses. In political identities, gender, race, ethnicity and nationalism are fundamental variables. Indeed, national identity is also a socially defined imaginary of belonging and it is co-terminous with, but does not assimilate, other identities. National identity is sometimes confused, combined or constructed in terms of other identities, e.g. gender, race and class (Einhorn, 1996) when the process of defining political limits between 'us' and 'them' occurs. These social identities are moulded by issues such as language, culture, history, locality, gender and ethnicity. All identities, whether they are individual or collective, are socio-historical constructs; they are not absolute nor are they fixed (Baines, 1998).

Thus, identity is both a category of practice and analysis. Identity as a category of practice is used by social actors in their daily circumstances to understand themselves, their activities and what they have in common with others but also how they are distinct from others (Brubaker &

Cooper, 2000). Social divisions exist and people are subjected to them in their daily lives along the lines of inclusion and exclusion, inequity and advantage. These social divisions are present in representations as they are articulated in images and symbols, texts and ideologies (Yuval-Davis, 2006).

Skeggs (1997) asserts that there is a relationship between the concept of class and the concept of self (or identity), and that class is at the centre of how we conceive of a self. Skeggs' (1997) study of the working class found that it had gradually become multi-ethnic. Importantly, Skeggs (1997) argues that it was vital to not think that the importance of class as an analytical focus had to be replaced with ethnicity or race, or that a changed make-up of the changes in the working class signified that class was not appropriate for studying the changes. Instead, studying the intersecting identities is vital to understanding the changes that were taking place among the working class. A rich tradition to understand the social divisions in apartheid society was the debate about the connections between race and class for the black and African working class (there is more extensive coverage of this debate in Chapter 3 of this study). Consideration was given to the nature of the relationship between apartheid and capitalism, and how the black population was disadvantaged – not just politically, but also economically. Weldon (2008, cited in Rabe, 2017) maintains that relying on the discourse of the 'triple oppression' to explain black women's race, gender and class under apartheid is an inadequate account of how race and gender intersect. In other words, there are no women without race and the racial group of any woman impact her gender experiences. The triple oppression approach is critiqued on the basis that there is no such thing as suffering from oppression as 'black', as a 'woman' or as a 'working-class person', as each social layer has a distinct existence and is in a complicated relation to other social divisions.

Importantly, the race-class debate and the triple oppression theoretical tradition do not pay attention to the intersections of identities in relation to the various oppressions and types of social inequality. These intersections produce specific social problems and discrimination, and these are not as noticeable as long as one concentrates solely on race or class or gender (Weldon, 2006).

Buechler and Cylke (1997) contend that there has also been a tendency towards class-based analysis in industrial relations. Proponents of Orthodox Marxism argue that the most important social actions are best portrayed by class relationships embedded in the process of production, with the result that all other social identities are minor in the composition of collective actors.

In trade unions, it is usually the case that economic issues – that is, wages and benefits – are given more attention than broader social justice issues such as the right not to be discriminated against on the basis of race, gender, sexuality, disability, age, belief or religion. Tshoaedi (2017) maintains that COSATU unions fail to address societal gender issues, even in their own affiliates, and evidence of this is the under-representation of women in unions. COSATU's membership among women has grown steadily and is at just under half (48 percent) of total memberships. Women are under-represented at the leadership level and in the key decision-making structures of the federation. Thsoaedi (2017) argues that, in addition to these demographic matters, violence against women and gender discrimination in the workplace and within the trade unions are not considered important by COSATU. COSATU has also failed to understand how the political climate has changed and that issues of social justice and inequalities are of growing importance among its own members in post-apartheid South Africa.

Issues of sexual harassment and racial discrimination are broader societal issues. In the workplace and in trade unions, the gendered hierarchical leadership and occupational structures continue to position men in strategic locations where they have decision-making powers in the hiring, promotion, salaries and benefits of employees. Within the COSATU unions, there has been a long struggle over sexual harassment in unions. When COSATU was formed in 1985, women called for the federation to resolve to attend to sexual harassment in the workplace. At a COSATU national congress in 1989, women trade unionists criticised the men for missing the point that sexual harassment is violence against women and an acute political issue which needed a serious resolution. A code on sexual harassment was only implemented in 1994. Up until then, COSATU trade unions viewed sexual harassment as a personal issue that was not key to the essential business of the union. At times, sexual harassment (the case against the general secretary of COSATU, Vavi, refers) has been used as a potent weapon in COSATU leadership battles when factions needed to strengthen their political positions. Thsoaedi (2017) argues that black men in trade union organisations have failed to support the rights of women, champion

gender equality and fight against the violation of women's' sexual rights. This exposes the lack of transformation in COSATU unions. Tshoaedi (2017) links this lack of transformation to how COSATU has regularly used dominant masculine identities within the unions to deem which politics are relevant for the labour movement, and also to the fact that the male-dominated structures do not encourage public debates on gender inequality. COSATU has considerable power and influence in the South African political landscape, but has failed women – and black women specifically – and advancing democratisation and transformation within the unions, within the workplaces and within society more broadly. Trade unions affiliated to COSATU have a narrower view of the relations between capital and labour and the oppression of workers.

Of minor importance are the intra-class divides or intersections, yet these are crucial to the ways in which particular workers were and are divided, excluded and oppressed. McBride, Hebson and Holgate (2009) found that in trade unions, class oppression explanations are used to highlight the daily struggles that workers face, rather than the composition of the exact intersections of 'race', class, gender or other forms of discrimination in their oppression.

This does not suggest that class analysis of trade union members is impossible, nor that it should be avoided. Instead, there has been a revival of class analysis, rather than an end to it, with a recommencement of interest in the social and cultural customs of class (Skeggs, 2004). The idea of intersectionality requires that one does not avoid thinking about how to theorise the interaction of different axes of structural inequalities such as race and class (Wright, 1997, cited in Weldon, 2006) as well as gender and sexuality. As the historical writings about the connections between race and class predate that of intersectionality, many social scientific studies of organisations such as trade unions traditionally did not take into consideration issues of social location and intersectionality. It is to a closer examination of intersectionality that this section turns to next.

2.3.2 Intersectionality

Intersectionality is a perspective, a concept or a lens, theory, and a paradigm; and the debate about which one it is remains unresolved (Collins, 2015). It is also unclear whether intersectionality is a general theory of identity or a theory mostly about marginalisation (Belkhir & Barnett, 2001).

Intersectionality refers to social processes, social divisions and identities. Intersectionality is best explained as the connections among the many dimensions and processes of social relations and subject constructions. The term intersectionality was created by Kimberlé Crenshaw in 1989, in order to explain how distinctive social identities can be interrelated and was used to clarify the typical experiences of women of colour. It was argued that gender as an analytic category could not be understood separately from race and class.[6] Furthermore, there were numerous and complex levels of oppression experienced by black women, compared to white women or black men. The theorists of intersectionality maintained that one could not comprehend the ways in which women were hindered as women, nor the ways that 'people of colour' were subjugated unless one examined the ways these structures interacted. Importantly, feminist scholars had incorporated 'gender' as a variable into the analyses of class or ethnicity or race, or of women's subordination; or they combined all three – that is, gender, ethnicity or race, and class – simultaneously (Belkhir & Barnett, 2001).

Intersectionality represents a theoretical shift from examining social locations such as race and gender as distinct categories to a more inclusive framework that explores the interconnecting social relations of domination and oppression, and how they function along different axes. The approach of intersectionality offered that, in actual cases of discrimination, being oppressed as a 'black person' was structured and intertwined in other social divisions such as gender, class and nationality (Yuval-Davis, 2006). Intersectionality merges various constructed identities such as sexuality, ethnicity, culture and socioeconomic status; and is "concerned with the ways in which constructed identities interact to shape multiple selves or dimensions of persons" (Cramer & Plummer 2009:163, cited in Van Herk, Smith & Andrew, 2011). Intersectionality is useful for understanding that there was a systematic way that social norms, laws, practices and institutions benefitted some groups and hindered other groups. Related to this, in certain social contexts, intersectional narratives were fundamental to contesting the dominant discourses of the advantaged.

As there were prominent aspects of social complexity, the collaboration between social structures such as race, class and gender (among others) produced discriminatory effects. As the

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[6] Other theorists (such as Yuval-Davis, 2006) applied intersectionality in more general terms to any grouping of people, the advantaged and the disadvantaged.

ways that social structures influenced each other themselves changed over space and time, it was likely that some axes were more prominent or politicised in some environments than in others (Weldon, 2006). Intersectionality accorded importance to the interconnecting and disparate qualities of identities. The ways in which individuals and groups generated a sense of themselves linked to their previous experiences and to their current structural locations (Pearson, Anitha & McDowell, 2010). Social divisions had common features and were materially constructed by or intertwined with each other, but they were not reducible to each other in any historical era, as individuals were not dispersed arbitrarily along the different axes of power of the various social divisions. Not everybody had a race, gender or class identity; but they were situated at the intersection of class, gender, and racial structures.

There remained uncertainty as to the inclusion of class in the analysis of the intersection of gender with other inequalities. However, some studies on gender inequality focused on the intersection of gender and class relations (e.g. Acker, 2006) and others looked at the intersection of gender, ethnicity and class (e.g. Collins, 1998; Davis, 1981). The interest in class had diminished but had not entirely disappeared from analysis (e.g. McCall, 2005).

Class is a significant facet in the shaping of inequalities, and it intersects in complex ways with the inequalities (Collins, 1998). Walby, Armstrong and Strid (2012) argue that class has to be methodically integrated into the analyses of the intersections of gender and other inequalities. At the same time, it is crucial not to exaggerate its significance and to include it so that the differences between the various kinds of inequality can be uncovered.

As far as class is concerned, at the workplace level, McBride et al. (2009:134) contend that "a sole focus on class, to the exclusion of ethnicity or gender, sometimes fails to uncover the myriad of social processes that positions workers in the labour market and the workplace". Scholars in the industrial relations disciplines now use intersectional analysis, particularly in relation to male and female trade union members (McBride et al., 2009). Labour studies is an appropriate area to apply intersectionality as there are many suitable topic areas, e.g. labour market precarity and difference, which has been studied along the axes of gender, racialised difference and citizenship. Most analyses of the multiple forms of discrimination that capture the interaction among several axes of oppression such as class, race, ethnicity and gender among trade union

member studies – that is, the interaction of multiple forms of oppression – is becoming a key area of research (see Briskin, 2008 in Kainer, 2015/2016), but there are not many studies that have been produced.

As noted, this study includes the teachers and nurses of the public sector, the semi-professionals who perform 'emotion work' for their learners or their patients. Mirchandani (2003) argues that very little is understood about the connections between the 'emotion work' that some people perform and their social locations within intersecting class, race and gender hierarchies. Mirchandani (2003) posits that emotion work is reliant on the gender and ethnicity of the worker and on the occupation within which they are employed, as well as their social location in relation to the stratification system of the society in which they live.

Using intersectionality permits a focus on the micro-level processes; that is, how each individual of the group inhabits a social position within an interlocking organisation of oppression that is organised along the axes of class, gender, race and national identity (Collins, 1998). The intersectional approach had been expanded to incorporate ethnicity, sexuality and nation (Alison & Banerjee, 2014) and intersectionality is applicable in national contexts that have a history of class, race and gender oppression, such as in South Africa (Weldon, 2006).

In addition, as race, class and gender include coinciding processes of identity and institutional and social practices that are key components of organisations, it is more than appropriate to extend the intersectional analysis to the study of members of trade unions and the trade union federation itself. Intersectionality is relevant to trade union members as it is assumed that workers have just one collective identity, commonly articulated in terms of class, that oblige individuals to 'set aside' their other identities. Some trade unions have formed committees to address the intersection of class with other inequalities and have developed a feminist trade union agenda (see Munro, 2001). Tshoaedi (2017) argues that COSATU's working-class agenda misses the mark in according priority to the gendered and racial inequalities in the labour market. Women and black women are still employed in the lowest-paying occupations and with restricted to non-existent rights to the basic conditions of employment. COSATU unions have not run campaigns to contest the gendered occupational structure to press for equal opportunities for men and women in the labour market, and to call for the protection of women from sexual

harassment and violence in the workplace. Simply put, women do not enjoy the full citizenship rights as per the ANC's nationalist image. Tshaoedi (2017) criticises COSATU for not developing a clear agenda for eradicating the sexist, patriarchal attitudes that discriminate against women as full human beings.

Inequality in South African society is linked to income, race and gender. In South African societies and in the workplaces in which COSATU affiliates have members, power continues to be a privilege for the few, which the trade unions do not necessarily take on, as Tshoaedi (2017) argues. Theron (2017) endorses this and argues that COSATU needs to organise the minority groups – the unorganised workers, migrants and women – as it did previously; and to do this, serious measures to ensure real worker control in the trade unions need to be put into place.

Sociologists used intersectionality in their research to give the subjugated a voice or to give an account of the experiences of marginalised and invisible groups. Khunou (2015) applies the intersectionality approach in her study of African middle-class women in post-apartheid South Africa. In Khunou's (2015) study, the African women were shaped by both the class and racial identity of their parents, which accordingly affected how they dealt with and regarded themselves as being members of a racialised and shifting class location. Khunou (2015) argues that there were complicated ways in which the African middle class handled their lives when they resided among diverse classes of black people and in middle-class spaces that were racialised. Various pieces of legislation such as the apartheid Group Areas Act of 1950 stipulated that the black middle class live next to the black working class. As a result, apartheid era public policies restricted processes of class formation among the African population on the whole due to racial discrimination. Race accordingly operated to mold the class structure and to assign positions within it. Black people were limited to townships and homelands; and even if they had enough money to live elsewhere they usually lived among members of their own race, irrespective of their class. Differences in class and gender were underemphasised in order to pay attention to and deal with racial oppression (Ramphele, 2000; Krige 2012, cited in Khunou, 2015).

Khunou (2015) focuses on African women who have a similar class position to most white people, but who cannot not self-identify with the middle-class location as filled and lived by

white people. As the women in Khunou's (2015) study hesitantly self-identify as middle class, a major argument to be made is that middle-class membership encompasses endless negotiation directed by inclusiveness in one's own community and the results of being racially othered in contact with white people and white spaces.

A significant part of the debate about intersectionality focuses on the implications of this perspective for research methodologies as well as for analysis (Belkhir & Barnett, 2001). McCall (2005) submits that there are three methodological approaches in intersectional analysis, namely the anti-categorical complexity approach, the intra-categorical complexity approach and the inter-categorical complexity approach. It is mostly the intra-categorical approach, as a form of intersectional analysis, that marks the study of intersectionality, as it takes into consideration the boundaries of social locations and pays closer attention to social groups – either the marginalised or the invisible – at 'neglected points of intersection' that are the initial point of analysis (McCall, 2005). The intra-categorical approach can be used in quantitative studies, case studies or in ethnographic studies. However, the users of the intra-categorical approach may easily become fixated with studying differences and the analysis may consequently neglect to tackle the question of power (McCall, 2005).

This study uses the 'intra-categorical' approach in the study of trade union members – the African teachers and nurses of the public sector affiliates in COSATU – in the interrogation of how their contradictory class location intersects with other identities and inequalities, such as gender, race and nationalism, to make sense of complex social phenomena such as race, class and gender at a theoretical level. Furthermore, the use of the 'intra-categorical' approach allows for a focus on a particular social group – the teachers and nurses of the public sector trade unions in Gauteng – so that the complexities of their experiences as COSATU members can be better understood. Attention was paid to the all the distinct experiences of this subgroup of COSATU members, such as their gender (male or female), the composition of their households, their professions, the nature of their work and their working conditions and their perceptions of their trade unions, their federation, the Alliance and the ANC; and this is reported on in the analytical sections of this study, namely chapters 6 and 7.

Fukuyama (2018) argues (albeit in the context of the United States of America), that the modern concept of identity is constructed around self-esteem. People have 'hidden selves' and they often feel undervalued by other people. Fukuyama (2018) links this to the civil rights movement for African Americans, the feminist movement, the movements on behalf of the disabled, the LGBT movement and social movements of the 1960s, as these were groups who had been gradually marginalised from mainstream American society through racial segregation and unequal access to the labour market, for example. Issues with regard to race, gender, gender orientation and similar issues, currently, are about people feeling offended more so than it is about material resources. Fukuyama (2018) points out that identity politics is when people take on political stances that are based on their race, ethnicity, religion or sexuality instead of taking on the wider issues. They perceive, based on their identities – whether national, religious, ethnic, sexual, gender or otherwise – that they are not being given adequate recognition and that they are marginalised and undermined by the elite. Identity politics is not a minor phenomenon and has become the leading concept that accounts for what is happening in global affairs. Fukuyama (2018) argues that economic anguish is often understood by individuals as more of a loss of identity than it is about a loss of resources. Identity politics flourish when the poor and the marginalised feel that they are invisible to their fellow citizens and this feeds into the construction of exclusionary nationalisms.

Fukuyama (2018) argues that the value of identity politics is that it has drawn our attention to the narrower experiences of injustice, and this has revealed how the changes needed in cultural norms can come about through public policies that actually help people. Yet identity politics focuses on cultural issues that Fukuyama (2018) argues has turned our energy and attention away from serious thinking on how to reverse the trend toward increasing socioeconomic inequality. In this way, identity politics as a political strategy has its clear disadvantages.

Satgar (2019a) critically argues that being African has become a taxonomic term. It is now impossible to tell it apart from the individualistic identity politics that is so widespread and which the current trend for intersectionality is a part of. Marxist feminists have connected with the notion of intersectionality from a variety of angles. Satgar (2019a) usefully identifies the Marxist engagements with intersectionality that overcome the analytical and political disadvantages of narrow identity and individual-centred methods of intersectional analysis.

However, not all Marxist feminist views support intersectionality. Indeed, some point out its failure to make the connection with the material foundation of capitalism. As a result, intersectionality operates at merely a conversational level, intentionally encouraging an array of social identities, as well as social divisions (Aguilar 2015). A historical materialist option is proposed as the way to think about race, class and gender. The historical materialist approach examines how intersecting relations create oppression and this is used as a way to work out collective oppression.

A Marxist feminist approach that is sensitive to intersectionality but accepts that its analytical desires may not be achieved, given the many social facts it seeks to include, is provided by Acker (2006). Satgar (2019) points out that Acker's (2006) historical materialist style is more mindful of racial and gender oppression, while acknowledging the salience of class. Bannerji (2005) is critical of an approach to intersectionality that condenses it to the formulaic addition of race, gender and class. Bannerji (2005) proclaims a more social synthesis of class that has central to it gender and race, but disapproves of a stratificatory and cumulative notion of intersectionality.

To summarise at this point, a brief overview of literature on the traditional and current African middle class as well as a consideration of both the neo-Weberian and neo-Marxist views of the middle class has been given. A review of the application of the neo-Weberian and neo-Marxist approaches to the study of the African middle class in South Africa has been discussed. The reasons for designating the teachers and nurses as semi-professionals has been outlined. The African middle class(es) in post-apartheid South Africa has been given consideration. A review of the literature on skills and the relevant professions, Wright's theory of contradictory class location, a critique of the concept of contradictory class location and where the notion of contradictory class location in relation to the African middle class in South Africa originates from, has been deliberated on. The race-class debate and the notion of triple oppression were briefly considered as well, and the relevant literature on intersectionality and the reasons for its application to this study has been given attention.

2.4   Conceptual framework

The main focus of this study is understanding the significance of the increased dominance of public sector unions on COSATU's composition, understanding the changing intersections between class, race and gender, and understanding the connections to their political traditions as DENOSA and SADTU members and the influence of the ANC's NDR within COSATU.

This study focuses on public sector trade unions' members who are members of DENOSA and SADTU, teachers and nurses, and part of the African population group. Participants were not asked to identify as African, but this study adopted the Statistics South Africa's definition of population groups which guided the researcher's identification of who was African and thus eligible for participation in this study as, "a group with common characteristics (in terms of descent and history), particularly in relation to how they were (or would have been) classified before the 1994 elections" (Statistics South Africa, 2014b:12). As Africans make up the bulk of SADTU and DENOSA's membership (even though they are non-racial trade unions) and are to be found in the public sector schools and hospitals, due to Affirmative Action policies, these trade unions and these sites are the focus for the selection of participants in the study.

The public sector is considered as the state employer of teachers and nurses. The teachers and nurses work in government schools and hospitals and thus they are employed in the public service or sector. These teachers and nurses are in semi-professional occupations due to their higher levels of education and qualifications; they earn salaries and are employed with benefits such as pensions and medical aids. Semi-professional occupations are differentiated from professional occupations, as Crankshaw (1996) suggests, due to the fact that the qualification obtained are lower and in some cases it can just be a diploma as opposed to a degree, there is limited likelihood of upward occupational mobility, and they do not have a lot of authority in the workplace. This understanding is adopted, and the semi-professional nurses and teachers can have a degree or a diploma, in addition to the other features. The post-apartheid state refers to the transformation of the former white colonial and apartheid state to an African democratic politically independent post-apartheid state, from 1994 to present. Trade unions are considered as bodies constituted to speak for the collective interests of workers, as workers in the workplace, and bargain with employers and governments to protect and upgrade the conditions in which

workers sell their labour to capital. Identity (be it race, gender, political or national) is understood as the product of social or political action in daily life that is shaped by the social actor's position in a particular social space that is denoted by categorical features like race, gender and class and in the collective social structure such as position in the labour market or in the occupational structure (Brubaker & Cooper, 2000). Subjectivity is defined as how people understand and interpret the world and themselves, and so it refers to the lived experiences but not in a way that individuals are detached from groups, collectives or society (McCabe, 2007, cited in Soni-Sina, 2012). Social location refers to the relative amount of privilege and oppression that individuals experience on the basis of precise identity constructs such as class, race or gender. As part of the research seeks to understand whether teachers and nurses hold contradictory class positions, Wright and Singelmann's (1982) and Wright's (1987a, 1985) notion of the contradictory class location is used. Contradictory classes are not 'between' other classes; rather they are located in more than one class – "they are contradictory in the precise sense that they are located simultaneously in two classes" (Wright, 1980b:182). This also means that those in the contradictory class location share basic class interests with both the middle class and the working class. The indicators of class used in the study include income and benefits, employment, educational level, professional activities, social status, consumption patterns, residence type, suburb, lifestyle and dependents. Proletarianisation refers to the process of teachers and nurses losing control over the definition of their work as well as to their deskilling and how they and their trade unions respond to this.

This study also focuses on the influence of the ANC's NDR and nationalism within COSATU in the post-apartheid era in South Africa. The NDR is understood as the ANC's national project and programme which is aimed at changing the state and society as a whole, with the ANC in control of the project. African nationalism is understood as inclusive nationalism where there is an emphasis on equality and equity as well as the eradication of discrimination and obstacles grounded in race or ethnicity, or other social divisions, in order to unify all the local groups and to counter discrimination. COSATU's ideological orientations were linked to various traditions within black African trade unions, specifically the charterist tradition, understood as the tradition of the 'national democratic tradition', and to the workerist tradition, which was understood as the safeguarding working-class independence.

The next chapter is a review of the literature on the relationship between trade unions and national liberation movements, the historical connections between trade unions and nationalism in South Africa, and the current connections between trade unions and nationalism in post-apartheid South Africa.

Chapter 3: Trade unions, nationalism and national liberation

As explained in Chapter 1, the main focus of this study is on understanding the significance of the increased dominance of public sector unions on COSATU's membership composition, through the changing intersections between class, race and gender identities and the examination of the impact of the ANC's nationalism with COSATU and members of its two affiliates, DENOSA and SADTU, in the Gauteng province in particular. This suggests that historical and contemporary connections between trade unions and nationalism in South Africa have to be reviewed to deepen the understanding of the relationship between trade unions, their membership and national liberation movements.

The following three key areas are covered in this chapter, namely:

- Trade unions, anti-colonial mobilisation and national liberation in Africa.
- Nationalism, nations, identity; Afrikaner nationalism and trade unions in South Africa before apartheid; African nationalism and trade unions in South Africa, before and after apartheid.
- Nationalism and trade unions in post-apartheid South Africa.

3.1   The historical relations between trade unions and national liberation in Africa

There is a rich history and a multitude of case studies on the relationship between national liberation movements in African states and trade unions, which were allies of the anti-colonial movements, and their fate in post-colonial states.

Webster (2007) argues that trade unions in Africa had a long tradition of political engagement that started with their commitment to the anti-colonial movements' involvement through to current struggles for democracy.

Great burdens were placed on African unions to connect with the objectives of national development in the post-colonial settings. After independence, the trade union movements' relation to the nationalist project of the new elites was a critical area of concern, as the political elite demanded that the trade unions act responsibly in the national development effort. Trade

unions in the post-colonial states were paradoxically, in spite of their weakness, more often feared by post-colonial governments. The post-colonial African governments demanded that unions perform a dualistic role: they had to not only give up their 'narrow' interests for the general requirements of national development, but they also had to sacrifice the representation needs of their members. To be specific, trade unions were required to be developmental rather than representational, as it was argued that they organised a minor and supposedly privileged section of the labour force in Africa (Pillay & Webster, 1991). In light of this pressure, most studies on the relationship between trade unions, political parties and politics focused on how trade unions fulfilled the objectives of national development without compromising their independence and their unity (Beckman & Sachikonye, 2010). Buhlungu (2010b) argues that trade unions played a profound political role in both colonial and independent Africa and that trade unions were deeply concerned with politics. Beckman and Sachikonye (2010) argue that there was a robust custom of close union-party relations in Africa. Political parties served as vehicles for the expression of trade unions, but trade unionism in turn influenced politics. This was the case in Tanzania, Kenya, Senegal, Ghana, Nigeria, Uganda, Zimbabwe, Namibia and South Africa. The first African leaders who led the struggle for independence in their countries were trade unionists – Leopold Senghor in Senegal, Houphet Boigny in Cote d'Ivoire, Sekou Toure in Guinea, Jomo Kenyatta in Kenya, Julius Nyerere in Tanzania and Patrice Lumumba in the Democratic Republic of Congo (DRC). More recently, the list included Frederick Chiluba, who was the president of Zambia (1991-2002) and Morgan Tsvangarai of Zimbabwe, who was the country's prime minister from 2009 to 2013 (Budeli, 2012). In South Africa, the current president, Cyril Ramaphosa, was a COSATU trade unionist.

Clearly, workers' well-being was guaranteed by some sort of affiliation of their union with the ruling political party, and ministerial posts and similar for trade unionists in exchange for pledging industrial peace took place. Many trade unions in post-colonial Africa counted on their alliances with ruling parties so that they could shape public policy. As trade unions remained important economic and political forces, they made use of their strategic location in the economy, such as key public services, to mobilise and to disrupt (Webster, 2007). This led to some elites in post-colonial African countries asserting that more direct political control over the unions to foster nation-building had to occur in order to subordinate trade unions to the national

development project. The outcome of this effort was varied, but many trade unions in Africa remain linked to nationalist political parties.

In Senegal, decolonisation resulted in reinforcing the independence (non-alignment) of the African trade union movement and the reaction of the political authority towards the trade unions was harsh, as leadership structures were banned since these trade unions constituted a threat to political regimes (Ndiaye, 2010). In Egypt, trade unions were incorporated into authoritarian ruling party structures without autonomy and influence. In Uganda, the trade union leadership retained an alliance with the governing regime, seats were reserved for trade unions in parliament and the trade unions lacked autonomy. The Ugandan trade unions considered themselves as so-called free or autonomous trade unionism (Barya, 2010) but due to its small working class, the lack of employment and the casualisation of labour, the government did not recognise nor bargain with trade unions in the public and private sector.

Clearly the nature of the relationship between unions and political parties varied from non-alignment to alignment with political subordination (Budeli, 2012). Some trade unions' rights were protected, but most trade unions became subordinated to political parties and so their ability to intervene politically was weakened.

Beckman and Sachikonye (2010) maintain that union-party relationships in post-colonial Africa were not only a case of ruling party authority and union subservience. Some trade unions formed their own political parties. In Zimbabwe, some trade unions (not the Zimbabwean Congress of Trade Unions, or ZCTU) were part of the formation of the Movement for Democratic Change (MDC) in 1999, which was an attempt to discredit the old national liberation movement (Buhlungu, 2010b). Despite having a small formal employment working class, the Nigerian Labour Congress (NLC) tried to establish a labour party in 2004 after a number of unsuccessful efforts earlier on to do so (Beckman & Lukman, 2010), but it failed to take off in the end. Despite its practice of long-term political engagement, the Ghana Trades Union Congress (TUC) in 1992 elected to implement a policy of non-affiliation with political parties, pull out of politics and not enter into alliances with political parties (Akwetey & Dorkeno, 2010). The TUC realised that the formal alliance had been beneficial in the short term, such as labour being on the

receiving end of labour-friendly legislation, but not in the long term. The TUC was connected to the government, but this served to destabilise the TUC's internal democracy.

In Namibia, trade unions remained one of the more resilient civil society organisations but represented only a minority of the population (Jauch, 2010). The largest trade union federation, the National Union of Namibian Workers (NUNW), is affiliated to the ruling South West Africa People's Organisation (SWAPO). In Zambia, Zimbabwe and Namibia, trade unions were divided along political party lines.

Previous studies focused on trade union leadership mobility in new political structures. Scott (1967) states that on the African continent, civil servant unionists rose to greater prominence than industrial unionists did after independence, and tended to be well organised and politically involved, particularly in East Africa where the most powerful unionists or ex-unionists took up positions in government. Other trade unionists took up managerial positions in the public and private sectors, which led to ambiguity regarding the working-class base of the labour movement (Jauch, 2010). Some studies focused on the link between trade unions and nationalism. Mothibe (1996:157) argues that in Zimbabwe, "organised labour and nationalism were intimately connected" both in its ascent and its decline. Initially organised labour was not subordinated to 'petty bourgeois nationalism', as workers and nationalist politicians worked closely to seek accommodation in the colonial political structures and then in the fight for independence. In 1963, the alliance collapsed when the nationalist movement split into the Zimbabwe African People's Union (ZAPU) and the Zimbabwe African National Union (ZANU).

A few studies look closely at the connections between public sector trade unions, their role in the development project and the rise of the middle class in post-colonial states, which suggests that there is merit to an examination of whether these trends are present in South Africa in the post-apartheid era. The emergence of the middle class in Ghana was due to the growth of the educational system and the correlated increase in state employment in the immediate post-independence era (Luckham, Gyimah-Boadi, Ahadzie & Boateng, 2005). The post-colonial state brought a new public elite among the unionised state employees into being, whose lifestyles mirrored that of the former colonialists in the form of their salaries, subsidised housing, cars and travel allowances. Clearly in some cases, the unions represented a very small portion of the

labour force – so much so that they were considered as privileged or part of the labour aristocracy, compared to the vast majority of the people who were unemployed and economically precarious (Pillay & Webster, 1991). In post-apartheid South Africa, factors such as the size of the labour movement and the degree of industrialisation found workers in a far more powerful position than their continental counterparts. The COSATU trade unions had been active in broader working-class politics before the fall of apartheid in 1994 and had aligned with the ANC and the SACP in post-apartheid South Africa. However, Satgar and Southall (2015) argue that a meaningful change in South African politics will only take place when the Tripartite Alliance split.

Some of the later challenges trade unions faced in post-colonial African countries included the decline of the interventionist state, the introduction of structural adjustment policies, the intensification of neoliberal policies and political authoritarianism. In more current times and in the era of neoliberal globalisation and market deregulation, trade unions have challenged some of the authoritarian governments in Africa. In the post-development phase in Africa, trade unions have become important political actors for democratic change (Budeli, 2012).

The coverage of trade union and political party relations in post-colonial or post-independence African countries exposed two main issues that guided this study.

The first key issue is that the relationship between trade unions and the national liberation movements in post-colonial Africa were not predetermined. In many post-colonial societies, the new nationalist regimes either sought to integrate or subordinate trade unions (in some cases they paid no attention to trade unions). As the connection between trade unions and nationalism was not fixed, some trade unions were subjected to the petty bourgeoisie's nationalism and lost their autonomy, some maintained their independence but were sidelined by the government, and some pulled out of political alliances after a very long time as the trade union's internal democracy was compromised. Leadership positions within the trade unions and the national liberation movements were also shared. As trade unions in Africa were greatly shaped by both the politics and the discourse of national liberation, African trade unions were not exclusively class-based nor were they exclusively nationalist organisations (Buhlungu, 2010b). The nationalist parties legitimated their right to rule by carefully structuring narratives of the struggle for liberation and

presented themselves as the primary part of the post-colonial national identity (Melber, 2016). Many national liberation movements that became the ruling governments in southern Africa also turned into the new ruling class that were conservative and at times became the post-colonial adversaries of democracy and freedom (Melber, 2016).

The second key issue was that in order to manage the national development project, the rise of the public sector was a significant factor; and as government services expanded and the educational system grew, state employment increased and subsequently the African middle class increased, too.

As the study also focuses on the impact of the ANC's nationalism on COSATU trade unions in the post-apartheid era, it is to nationalism that this chapter now turns to. There is a rich history of Afrikaner and African nationalism and trade unions in South Africa in pre-apartheid and apartheid South Africa. Marks and Trapido (1987) argue that the social and political landscape of 20th century South Africa was crafted in the immense battle between two nationalisms, namely Afrikaner and African.

3.2   The history of nationalism and trade unions in South Africa and nationalism and trade unions in post-apartheid South Africa

3.2.1 Nationalism, nation and national identity

The classic text on nationalism was by Anderson (1983, 1991), who argued that nationalism, nation-ness and nationality were cultural artefacts, aroused deep emotional legitimacy and entrenched profound attachments. Anderson (1983:24-25) pointed out that: "The imagined community of the nation can best be seen if we consider the basic structure of two forms of imagining which first flowered in Europe in the 18th century: the novel and the newspaper. These forms provided the technical means for 'representing' the *kind* of imagined community, that is the nation." Nations were understood as imagined communities and such "are to be distinguished not by their falsity/genuineness, but by the style in which they are imagined" (Anderson, 1991:7). Anderson's (1983, 1991) understanding of nations was that they were recent phenomena and were envisaged as arrangements of cultural representation in which people imagined or believed that they shared an experience of identification with a specific, culturally

defined broader community. Nations had to be invoked and like nationalisms, they were invented or constructed. Nations were complex social practices expressed through time, invented through the media and the printing press, in churches, in schools, in the numerous types of popular culture, in funerals, in protest marches, in liberation movements and in trade unions. Nationalisms epitomised connections to political power (McClintock, 1991). National identity was subjective and thus not primordial nor absolute. The reproductions of groups, whether they were biological or social, were key to nationalist customs, process and politics (Petersen, 1991).

Anderson (1983) identified four kinds of nationalisms. An early type of nationalism was founded in the Americas in the late 18th century and early 19th century. Within Europe there were popular 'linguistic' nationalisms in the 19th century and conservative 'official' nationalisms in the second half of the century. When de Gobineau, a French aristocrat infamous for the deployment of scientific race theory, organised racial groups according to their supposed genetic capabilities in the 19th century, the Teutonic or German race was positioned on the uppermost level of the racial hierarchy due to their being the supposed chosen people. Thus, a form of 'biological nationalism' or 'ethnic nationalism' was born and was premised on the 'purity of blood' (Vincent, 2000) or ancestry (Adam, 1994). Twentieth century nationalisms took place in the colonial territories of Asia and Africa and had their own particular features (Hart, 2013). On the whole, scholars of nationalism agree that it was an occurrence unique to the modern period and Cope (2007) asserts that nationalism is a modern phenomenon and is mainly political or ideological in nature.

Scholars emphasise the role of elites and the state in fostering national identity (Cope, 2007). At the time, nationalisms authenticated or constrained people's rights to privileges and resources of the nation state such as land, economic and political control, and housing, to name a few (McClintock, 1991). A typical understanding of nationalism was that it was a process in which a large number of men and women who came from various classes and regions integrated and behaved in terms of new identities. These new identities pervaded and overpowered all other parts of their individual identities, irrespective of the context (O'Meara, 1997).

However, in societies where white men governed, even if white women did not occupy the main social positions, they were frequently fetishised in the course of nation state-building (Frader,

1996). Given this, Frader (1996) asserts that in Anderson's (1983) work there was a marked absence of gender from examinations of the construction of nations and national identities. In the histories of nationalism, women were usually represented as secondary and theorists of nationalism overlooked how nationalisms were linked to gender power (this obvious oversight was curious, as there was no record of a nationalism that had given women and men equal access to the resources of the nation state). As much as they were invented, all nationalisms were gendered and women were key in the ideological articulations of nationalist movements (McClintock, 1991).

Vincent (2000) contends that the symbol of woman as mother persisted right the way through the history of nationalist political mobilisations. Nations were typically represented as a woman and women were usually seen as symbolic indicators of the cultural identity of the group. Women were the source of its traditions, the reproducers of its legitimacy, the provider of the labour force and its soldiers (Einhorn, 1996). Ethnic or national identity was typically represented along the lines of an extended family and the role of women was that of the biological and social reproduction of its members. As a result of this, gender relations were key and attention was paid to the correct role of women which functioned as a code for the political practices of state formation (Einhorn, 1996).

Yuval-Davis and Anthias (1989) submit that women's association with nationalism consisted of five key types. The first role was women as the biological creators of national groups or the biological mothers of the people; the second form was that of women as the image and signifiers of national dissimilarity in male discourse; the third form was women as the sources and producers of the cultural accounts themselves; the fourth form was women as the reproducers of the limitations of the nation – that is, they consented to or rejected sexual intercourse or marriage with specified groups of men – and the fifth and final form was women as effective members of national movements such as their congresses, armies, community organisations and, importantly, their trade union activism.

These ideas about women were part of non-Western nationalisms, too. For example, the nascent nationalism of colonial Bengal in the last quarter of the 19th century adhered to the figure of mother to symbolise the nationalist hopes, yet this was an ideology grounded in a philosophy of

deprivation for women materially that had its origins in popular religious practice (Bagchi, 1990). Sen (1993) argues that motherhood and mothercraft functioned as significant elements of nationalism in Bengal in the 1920s. The family and the home was the 'microcosm of the nation' and the nationalists maintained that good mothers were those who obeyed the doctors' guidance about childrearing and mothercraft; in this way, these women were viewed as the vanguard of advancement and modernity. Working-class women and poor women were subjected to the same ideas. Motherhood was idealised in the service of the nation, but in due course it was employed to warrant the withholding of political rights and social power to women. There were thus intersecting nationalist, natalist and maternalist discourses in the 1920s, as women were understood as the 'bearers of the nation' (McClintock, 1991).

To summarise at this point, the chief focus of this study is nationalism and trade unions; the review of literature on nationalism revealed that at the heart of any nationalism lies the issue of identity, and also revealed how big groups of people from various social and regional settings historically were drawn into thinking that they were part of a common community which had to be invented (Frader, 1996). The second issue that emerged was that even though women were central to nationalism, in the construction of national identity women were considered as secondary in some accounts of nationalism. The feminist analyses of nationalism by Vincent (2000), Einhorn (1996) and McClintock (1991) was covered as these studies paid attention to the ways in which gender was invoked in processes of state-building and how state-building generated gender. Their work show that discourses about gender and national identity or nationalism were conveyed in policies and national politics and that nationalist movements, nation-state formation, state-building and nationalist revolutionary struggles were supported by gendered discourses and gendered policies (Frader, 1996). In the next section, Afrikaner nationalism is covered first and then the history of Afrikaner nationalism and trade unions is discussed. The chapter then moves onto an outline of African nationalism and then African nationalism and trade unions in South Africa is covered.

3.2.2 Trade unions, white immigrants, socialism, Afrikaners and Afrikaner nationalism

3.2.2.1 Background

In South Africa, the discovery of diamonds in 1867 and gold in 1886 shaped the transition from agriculture to mining in South Africa's economy. As the deposits were firmly ensconced in deep level hard rock and in order to remove the minerals cost-effectively, production costs had to be maintained at low levels; this was accomplished through the establishment of a substantial allocation of cheap black labour. The requisite skill and technical expertise necessary for hard rock mining was unavailable and so white miners from the British Empire and America were engaged to perform these tasks. These immigrants were well remunerated and were accorded a further privileged status on the mines as white labourers.

Some miners were from the British armies and were demobilised soldiers, but they were responsible for presenting new ideas of labour and socialist organisations. The American miners introduced the American brand of industrial unionism and syndicalism into the white South African labour movement (Visser, 2016). The socialists of the early craft unions refused to recognise Africans as fellow workers and they combined their craft viewpoint with their colour prejudices. However, colour bars were not required for the earliest English miners, since they could negotiate with their skill and experience (Davies, 1973) and they established craft unions that excluded all, irrespective of colour, on the basis of skill (Lewis, 1984).

African workers were not paid the same wages as white workers and their cheap labour threatened white miners.[7] White miners were regarded as skilled, while all Africans were classified as unskilled labourers – with accompanying lower wages. Pressure for a segregated system of industrial relations first appeared in Transvaal in 1893, as black people were precluded from operating as blasters in the mines; this expanded into other occupations where white workers campaigned for a white labour policy in many areas such as railway services and factories where mostly unskilled white workers were located. Davies (1976) contends that the

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[7] When they became proletarians, unlike their African counterparts, most unskilled white people's access to the means of production outside of capitalist relations ended. The bulk of white people became fully proletarianised and very few maintained their connections with the 'white' rural areas. Thus the whole family unit was reliant for its subsistence on what could be gained from the capitalist mode of production. Furthermore, capital was unable to compress the value of the labour power of the unskilled white people to the level of the individual worker's subsistence, while simultaneously securing their reproduction as a work force over time (Wolpe, 1973, cited in Davies, 1976).

white labourers were the 'petty bourgeoisie' as they were the supporters of the 'white labour policy'. White workers supported the Labour Party on the Witwatersrand due to the prevalence of mining and many Labour councillors related to white supremacy. Racial solidarity was effective in backing and employing racial discrimination against black workers in order to protect white jobs from black competition (Davies, 1976), as Africans acquired more skill.

Socialists on the Rand were not irrelevant; they had many adherents, were somewhat well organised and were at times militant. Yet even to socialists, white working men would become the vanguard of revolution. Even though colour rather than class governed status and the dispersal of power, white workers were still insecure as they were not part of the established order, yet they were not against capitalism. White workers voted for the parties of white superiority with their white labour policy and they were not interested in international socialism. Furthermore, the socialists were rivalled by the right-wing trade union leadership. Evidently, the ideological differences present at the time were the choice between socialism or white supremacy. The right wing was devoted to racial prejudice and the socialists found that they, too, had to contest elections that were centred on an all-white franchise. Even though they condemned racism, they risked alienating potential supporters among the white community if they did not do so. The socialists in the white labour movement thought that white workers were the most revolutionary power in the country, and this played a part in the Rand Revolt of 1922. As white workers would not consent to equality under socialism since this would relegate their standards in order to elevate those of Africans, all workers remained divided along race lines. African workers were viewed as opponents to white workers, as they were perceived to be the allies or tools of capitalism against the white workers. Simons and Simons (1969) contend that white workers had the same interests as white mine owners in preserving the migrant labour system and most white workers, skilled and unskilled, therefore, connected with 'their top exploiters.'

To summarise at this point, the brief review highlighted the point that historically, trade unionism in what is modern South Africa was divided along national, racial and ideological lines. To protect themselves from exploitation, unskilled white workers initiated organised labour structures and adopted race protection strategies, within their trade unions, as a result of capital's perceived preference for the African workers who worked at cheaper wage levels and

thus were seen as unfair competition (Visser, 2016). White trade unionists sought a colour bar to elevate the status of their trade and provide employment for white people (Simons & Simons, 1969). Labour leaders also acted out of self-interest and racial conceit, as they did not call for equal rights for all workmen (Africans were not covered by industrial laws). Both British chauvinism and the ideology of Afrikaner nationalism – white supremacy – played a more critical role in the struggle against racial solidarity at the expense of the ideology of socialism, even inhibiting the growth of a strong socialist movement. It is only apt that nationalism and trade unions are focused on in more detail next. In the white trade unions, there were clear connections between class, race and nationalism. The literature review now turns to the history of Afrikaner nationalism and white trade unions in the period before the 1948 elections.

3.2.2.2 Afrikaner nationalism and trade unions

In this section, an account of Afrikaner nationalism and the white trade unions is outlined in some detail. This is due to the fact that there is a detailed historical scholarship available on the subject, which was referred to, and secondly there was rich detail on nationalism, feminism, class and trade unions, which was revealing and pertinent to the study, as this showed that issues of class, race, gender and national (political) identity were connected in white trade unions (but also in trade unions that were multi-racial) in this period before 1948. The literature review explores Afrikaner nationalism, the Afrikaner nation, the connections between Afrikaner nationalist ideology and trade unions, and the connections between Afrikaner nationalist ideology and working-class women who were trade union members. Where appropriate, attention was given to how the Afrikaner nationalists used nationalism to appeal to white workers and organise them, and where white workers responded to the Afrikaner nationalists from within their unions.

The period when the first trade unions for white people was founded – 1892 up to 1948, when the National Party (NP) came to power – is focused on only (and not events after 1948), as many historians considered this period as the time when the attempts by Afrikaner nationalists to lure white workers into Christian trade unions was most intense (Visser, 2016).

3.2.2.3 Afrikaner nationalism

To begin with, one of the seminal texts on Afrikaner nationalism was by O'Meara (1977) and his work on Afrikaner nationalism provided a very careful analysis of the class conflict that stimulated the rise of Afrikaner nationalism and at the same time disturbed the unity of the *volk* (Walshe, 1984). In the 1930s and 1940s[8], a consistent Christian national redrafting of Afrikaner nationalist ideology appeared (O'Meara, 1996; Moodie, 1975) that combined the history of the Afrikaners, the formalised language (Afrikaans) and Afrikaner Calvinism as central symbols (Moodie, 1975). Christian nationalism characterised the broad foundation of the Afrikaner's Protestant-Christian heritage of civilisation and 'Christian' and 'national' were linked in that 'Christian' did not only mean the Afrikaner's Christian religion, but it referred to the daily aspects of a Christian's life. Thus, Afrikaner nationalism was connected to its Calvinist past of the *Afrikanervolk* (Afrikaner nation or people), but it provided a comprehensive account of what the model Calvinist society had to look like. In other words, it gave the outline for the future which comprised racial segregation and Christian-National Education (Moodie, 1975) along separate racial lines. The themes of this redrafted Afrikaner nationalism included cultural brotherhood and racial differences, patriarchal power and a single, unifying language, among other things, which were all traditions that had been created.

At the centre of the new nationalist worldview (*weltanschauung*) was the idea of *volksgebondenheid*, which is the view that the bonds of blood and nation came first. The *volk* (people) were composed of the 'poor whites' (a term used in the Carnegie Commission of Investigation study into white poverty in 1932) who had very few options – small-scale farmers and poor teachers, humble clerks and shopkeepers, intellectuals and petty bourgeoisie. This mixed class group found themselves all precarious in the newborn state (in 1910, the South Africa Act was promulgated in Britain, which granted the white minority power over the other racial groups and merged the colonies and republics together as the Union of South Africa) and

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[8] Afrikaner nationalism was established as a result of British colonialism, its contradictions in South Africa (McClintock, 1991) and devised hastily after the South African war (briefly, this was a series of wars fought between the British Empire and the two Boer states from 1899 to 1902) and the conquest by the British as the widely dispersed Boer communities worked to build an alternative culture to that of the English colonialists.

they regarded themselves as the vanguard of a new Afrikanerdom, the selected representatives of the national *volk*.

South Africa was considered as the God-given domain of the (white Afrikaner) nation, whose divine task was the accomplishing of its own Calvinistic character in an Afrikaner republic not tied to British imperialism. The future Christian national republic would be based on Afrikaner religious and political philosophies and practices rather than on the secular Westminster model enforced by Britain. Dubow (1987) affirms that this Afrikaner nationalism was a classical nationalism (Chipkin, 2016) and that it demarcated the political community on the basis of race, language and religion, connecting full citizenship to whiteness and designed a hierarchy of political and economic belonging on the basis of illusive ethnic indicators. It was also a classical nationalism in that Afrikaner nationalism developed in relation to imperialism specifically in response to the object of imperialism, that being the 1910 Union of South Africa. Dubow (1987) refers to this as 'anti-imperialist republicanism'. Louis Botha, who was a Boer war hero in the South African war (Boers were descendants of the Afrikaans-speaking settlers), became the first Prime Minister in the Union of South Africa and was a member of the South African Party (SAP, the party was founded in 1911 and lasted until 1934; this was a political party made up of Afrikaner parties from the former colonies of the Cape Colony and the Orange River Colony and the *Het Volk* party in the Transvaal). Botha was succeeded by Jan Smuts, who was also a Boer commando (these were volunteer military units of guerilla militia) in the South African war; he was a member of the SAP and the United Party (UP, founded in 1934 and established out of a merger of the NP, which had been founded in 1914, which was an Afrikaner ethnic nationalist party led by Barry Hertzog, who had been a Boer general during the South African war) and the SAP and the Unionist Party.

Yet the *volk*, the white Afrikaners, did not possess a solid identity; they had no shared historic principle and they had no particular unifying language. The newly created community of the *volk* had to work to deliberately invent a single print language, a standard press and a well-educated public who could consume these cultural artefacts; and this necessitated a class of cultural agents and image architects who could perform the design. In the early 20th century, a 'language movement' ensued where poems, magazines, newspapers, novels and countless cultural events

were produced, and the many Boer dialects were molded into a single discernible language, namely Afrikaans (McClintock, 1991).

Furthermore, Afrikaner nationalist ideologies also wrought a precise set of roles for their female members, as Afrikaner nationalism was indistinguishable from white male security, ambitions and their politics (McClintock, 1991). White men were understood as representing the political and economic agency of the *volk*. Afrikaner nationalism, like all nationalisms, was from the beginning founded in gender power relations. It was already noted that gender as a category integral to nationalism itself was overlooked[9]. As feminism was in service of Afrikaner nationalism, it was appropriate to consider the work of Vincent (2000) and McClintock (1991) and their coverage of Afrikaner nationalism and Afrikaner women, as this was pertinent to the consideration of Afrikaner nationalism and the GWU, which will be subsequently covered.

To be clear, Afrikaner nationalism delineated the political community on the basis of race, language and religion, relating full citizenship to whiteness which entailed the setting up of a social order of political and economic association on the basis of ethnic markers. It was the responsibility of Afrikaner white women to keep the bloodline 'pure' and there were clearly distinct racial and sexual policies regarding behaviour in the ideological arsenal of the *volksmoeder* (mother of the nation). The role model fashioned for Afrikaner women was that of the *volksmoeder* and *Voortrekkervrou* (pioneer woman) who were soldiers, teachers, nurses and doctors during the Great Trek[10] and were revered as the archetype of the fundamental *volksmoeder* attributes. In *volksmoeder* ideology, the Afrikaner woman's ultimate mission and paramount achievement was to be found in her own home where she would physically and honorably reproduce the nation (Vincent, 2000). Subsequently, women had to play a humble role in the elevation of the nation's poor, even if they were trade union members and so employed. Afrikaans women were required to undertake charity work in welfare organisations, which meant that the woman's identity was that of unpaid service to the *volk* through her husband and family.

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[9]Equally, some feminisms, notably white and middle class, also disregarded race and class as categories fundamental to gender (McClintock, 1991). There were also other inconsistencies within the collectivity of nationalism such as conflicts of class, ethnicity, and regional and generational diversities, to name a few.

[10] The Great Trek started in 1836, when Dutch-speaking settlers began journeying by wagon trains moved from the Cape Colony into the interior of modern South Africa as they wanted to establish a life outside the control of the Cape's British colonial administration.

The cultural authority of Afrikaner motherhood was summoned to benefit white nation creation and women were vital to the building of a definitive Afrikaner culture and the development of Afrikaner identity.

Afrikaner nationalism was as reliant on authoritative interpretations of racial distinctions as it was on dominant productions of gender difference. Afrikaner men engaged the features of gender difference to regulate the borders of racial (and class) distinctions. In South Africa's race discourse in the first part of the 20th century, it was purported that certain undesirable behaviour by white people, such as racial mixing, was regarded as an indication of "racial degeneration among the civilised races; it was seen as a consequence of the uncontrolled development of a black and white proletariat thrown together in the cities" (Chisholm, 1990:300, cited in Vincent, 2000). The power of motherhood was used in the application and in the enactment of white supremacy. Women's traditionally marked role was that of biological mothers in that they plainly bred the citizens of the white nation, but they also generated the cultural and symbolic limitations of white 'nationhood.'

Afrikaner national ideology was inadequate in stirring up Afrikaners' electoral endorsement among all sections of the community, like those who were trade union members. The intricate expressions of Christian-nationalism had to be converted into tangible issues which could be visibly presented to influence the everyday lives of all Afrikaners, argue O'Meara (1977). Afrikaner nationalism was arduously created in a long and intensely challenged process which was deliberately carried out by a small group of middle-class intellectuals and politicians, who implemented a strategy of purposefully creating a new 'Christian-national' identity for all white Afrikaans-speakers. Yet most of this target group showed little interest in this classification of 'their' culture and identity (O'Meara, 1997) due to divisions that existed in the Afrikaner community, which are examined next.

3.2.2.4 Divisions among the Afrikaner community

Kruger (1991) argued that earlier on in South Africa's history, the most fundamental challenge that faced Afrikaner nationalist leaders was a growing class division among Afrikaners. As noted above, there were different classes among the Afrikaners, such as commercial farmers, the workers and the petty bourgeoisie. Their class differences were ideological, too, as they were

separated along the lines of who they supported politically. Afrikaners were divided between supporting the parties of Botha and Smuts, who held conciliatory views towards Britain and collaborated with the British Empire (Smuts was part of the British Imperial War Cabinet) and Hertzog's nationalism and the NP, which advocated for Afrikaner leadership assembling a self-governing and an integrated white nation. The NP appealed to each layer of Afrikaners on the premise that they were victimised and oppressed as Afrikaners and its Christian-nationalism was an explicitly exclusivist and ethnic ideology.

Further divisions took place among Afrikaners, after 'fusion' in 1933, that is when Hertzog's NP merged with Smuts' UP (which did not have a clear policy on race relations, was English-speaking, had pro-British sentiments and was more liberal than the NP) and the SAP (which was an Afrikaans-speaking party but more moderate than the NP). DF Malan, who was a minister of the Dutch Reformed Church and was active in the NP leadership, broke off to find the Purified Afrikaner National Party (or *Gesuiwerde Nasionale Party*, GNP) in 1935 (it was made up of a radical faction of Afrikaner nationalists). In the lead up to the Second World War, Nazi splinter groups appeared such as the South African Gentile National Socialist Movement (the Greyshirts) and the South African Fascists in 1932. Some became part of Malan's GNP and in 1949 the Greyshirts formed the white Workers Party and thereafter they became part of the *Herenigde Nasionale Party* (Reunited National Party, HNP) formed at the same time. To be clear, on the political landscape, 'fusion' and the establishment of the GNP in 1934 were responsible for the considerable modification in the class foundation of Afrikaner nationalism (Visser, 2016).

Christian nationalism was disseminated initially by the Afrikaner *Broederbond* (the Bond, formed in 1918 by a railway clerk and theologians as an organisation to nurture Afrikaner interests, but they were largely secretive and exclusive) after 1934, and then by the HNP after 1940; but it did not originate from the centre of a naturally united *volk* as the plethora of Afrikaner nationalist parties established in the period and covered above attest to.

In the promotion of Afrikaner nationalism, Kruger (1991) argues that the Afrikaner middle class fashioned and guided the way in which it unfolded and O'Meara (1977) points out that it was the Bond that was critical to this. The Bond recognised that it was in the interests of the Afrikaner that diverse and opposing interests of the several levels among them be merged. The Bond

pursued two groups, namely the bourgeoning Afrikaner businessmen but also, significantly, Afrikaner workers to advance their particular economic interests and so entice them to identify with the Afrikaner national project. In 1936, the National Board of Trustees was founded with the specific task of forming trade unions, to break class solidarity across the race groups and to build Afrikaner consciousness; the force behind this group was the Bond.[11] The Bond also promoted Afrikaner capital and *Spoorbond* was a trade union founded for railway workers. It formed a savings bank called *Spoorbondkas* which had a trading capital of £170 000 only three years after the trade union was established. The new Afrikaner identity in this period was employed by the cultural agents to motivate the *volk* to develop a *volkskapitalisme* (people's capitalism). This was a significant economic movement and it exploited powerful nationalist propaganda to marshal the savings of all Afrikaners of all classes into the reserves that helped establish independent Afrikaner financial activities. It was argued that this would not only defeat the class and economic differences within the *volk*, but also between the *volk* and the English-speaking white people. This project had the aim of overcoming the omission of Afrikaans-speakers from the economy and was a programme aimed at economically empowering all classes of Afrikaners, from the poor white people to the workers and farmers, as well as the intellectuals and entrepreneurs. The ideology of *volkskapitalisme* was to seize control of the foreign (British capitalist) system and modify it to suit the Afrikaner national character (McClinctock, 1991). The petty bourgeoisie leadership of the Afrikaner nationalists devoted themselves to a programme of Afrikaner capitalism to removing the control of the 'foreign' capitalists.

It was noted that the Bond had thus embarked on a mission to secure key trade unions for Afrikaner nationalism so much so that O'Meara (1977) famously stated that there an extreme struggle for the soul of white trade unionism during the 1930s and 1940s. At the same time, O'Meara (1977) explains that a robust and militant African trade union movement had risen to rigorously confront the structure of racial oppression. The white trade unions did not do much to support the African movement, and in some areas vigorously resisted it. Despite this indifference to black trade unions, white workers remained structured and rallied along class rather than along cultural lines, and this is what Afrikaner nationalists had to contend with.

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[11] The Broederbond goals included the protection of the Afrikaans language and the affirmation of a Christian spirit as well as improved working conditions and higher wages.

In the 1930s, the Afrikaner nationalist policy had to function at an economic level in order to subvert the authority and influence of white trade unions. This intervention by the Afrikaner nationalists succeeded in eventually depoliticising class interests among white workers and mobilising them along cultural lines. This was coupled with the appropriation of key unions in the trade union structure. Taken together, these transformation events and forces were indispensable to the nationalist victory in the 1948 elections. To achieve this, there had been a well-orchestrated and ruthless attack by a small faction of petty bourgeois politicians on a significant section of white workers and their white-only trade union during the late 1930s and 1940s.

To summarise at this point, the work of O'Meara (1977), McClintock (1991), Vincent (2001) and Kruger (1991) demonstrate that the attempt to create Afrikaner subjectivity or identity in the 1940s by the Afrikaner nationalist discourse of Christian nationalism faced serious competition from competing identities, particularly that of class identity among the Afrikaner workers. The presence of discourse and the nationalist agents alone were ineffective in reaching their target audience, which comprised the workers and white trade union members, in order to change their behaviour or their identity which was informed by class.

The next section looks at which trade unions the Afrikaner nationalists confronted in the period before apartheid, why these decisions were made and what the outcome of the Afrikaner nationalist strategy was in their attempt to undermine the solidarity of class among white Afrikaner workers and change their subjectivities to that of Afrikaner *volk* members.

3.2.2.5 Mine Workers Union

The first trade union organisation established in 1892 was the Witwatersrand Mine Employees' and Mechanics' Union. It was known as the Labour Union and it provided for miners and artisans who came from Britain. In 1897, the Rand Mine Workers' Union was founded and in 1902, the Transvaal Miners' Union (TMA) was launched in Johannesburg. In both cases, the membership was chiefly British immigrants, but immigrants from other countries enlisted along with English-speaking South Africans and some semi-skilled white Afrikaners. As only white underground miners with a blasting ticket could enlist, membership was racially exclusive. The TMA allied with the South African Labour Party (SALP, which was formed in 1910 for white

workers only, but was a democratic socialist party) in 1912 and the TMA was renamed the South African Mine Workers' Union or MWU in 1913 (Visser, 2016).

Visser (2016) maintains that the Afrikanerisation of the MWU occurred in two main phases; when young job seekers partook in the labour market after the Anglo-Boer[12] War (1904-1909) and after the Great Depression (1932-1933), and secondly as a result of the mounting poverty among Afrikaners. The mines were the sites of employment for these unskilled and semi-skilled work seekers who possessed considerably minor educational qualifications in comparison to the skilled immigrant white people. As noted above, the latter was worried that the mine owners would undermine their jobs with cheap black labour. Indeed, the flow of Afrikaners into mining was augmented by the Mines and Works Act of 1911, as this legislation had produced a job colour bar that earmarked particular skilled and semi-skilled jobs for white people[13]. White Afrikaners took part in strikes in 1913 and 1914 for better wages and working conditions, and took the place of British miners when they went off to fight in the First World War. By the end of the war in 1918, Afrikaner workers comprised the majority of white people employed in the gold mines and in the MWU membership (Visser, 2016). Thus, the majority of the workers at the subordinate levels of technical skills were Afrikaans-speaking and they constituted the bulk of MWU membership.

Nevertheless, unemployment persisted; and among white people, unemployment largely concerned young male Afrikaners who had entered the labour market in 1920 and 1921 (Visser, 2016) and had demanded jobs (unemployment among white people had been high for some years) (Davies, 1973). Tensions between capital and labour re-emerged due to the price of gold varying and as mining was the chief supply of wealth and the core employer of white labour in South Africa, they were dependent on it. The economic depression in 1920 spurred mining capital into lowering costs and thus they focused on high-paid white labour to cut labour costs. Black wages had stayed low as there were laws that prevented their political and trade union

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[12] These were also known as the First and Second South African War and were fought between Britain and the self-governing Afrikaner or Boer colonies of the South African Republic, namely the Orange Free State and the Transvaal.

[13] Evidence indicated that the colour bar did not save lives and had decreased norms of efficiency and safety. As soon as work became too dangerous, such as drilling which subjected the worker to silica dust, it was no longer seen as skilled (as it had been done by white people) and so was delegated to Africans. The separation between skilled and unskilled work on the mines was thus a case of skin colour and not the amount of skill involved (Simons & Simons, 1969).

organisation; the colour bar and the migratory labour system all were formal mechanisms of state policy. The white wage had been elevated as a result of their political privilege, but if this privilege vanished, the white wage would be cut. Pending retrenchments as a result of the shutting down of marginal mines and the desire to reduce white wages generated anxiety about the replacement of white workers by African labour. The Rand Revolt broke out in 1922 and strike commandos were established to protect the interests of white workers (the strike commandos were largely composed of Afrikaner miners). After the 1922 white mineworkers' strike was quashed by Smuts, who had become the prime minister of the Union of South Africa, the membership of the MWU split from the artisans, who established their own separate craft unions. By the 1930s there were eight white unions in the mining industry, but the MWU was the only non-craft union. This was a significant development, as the MWU had been the only trade union for white workers before the strike.

Subsequently, MWU members were unhappy about what they perceived to be the unethical leadership of their union[14] and the MWU's membership dropped. Miners had objections concerning their working conditions on the mines and in their view the MWU were not addressing their grievances, nor were they adequately acting in the workers' interests. Within the MWU, a bureaucracy of union leaders, composed of permanent and salaried trade union officials, had developed from whom the rank and file membership had become estranged (Visser, 2016).

However, the state was unwavering in both defeating and appeasing organised white labour by co-opting it into state structures. After the 1922 strike, the SALP moved into an electoral coalition with Hertzog's NP. Together they contested the SAP and Smuts, who was elected prime minister in the 1924 elections. The 'Pact' government of 1924 subsequently passed a protectionist policy for white workers, known as the 'civilised labour policy', accompanied by the Wage Act of 1925, which allowed unskilled white workers to procure a 'civilised' or white rate of pay. The Mines and Works Amendment Act of 1926 (popularly known as the colour bar) neutralised the militant skilled white miner as the law secured the position of skilled and semi-

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[14] The MWU leadership neglected to safeguard the interests of their members in the 1930s and 1940s and as a result their wages declined in comparison to other white workers. To exacerbate issues, in 1937 the Chamber of Mines granted a closed shop in exchange for an undertaking by the union to rein in militancy. The MWU was also structurally undemocratic and its leadership was taken out of office after two serious strikes by rank and file members in 1946 and 1947.

skilled white workers by earmarking certificates of competency in skilled trades for white (and coloured) workers. Davies (1976, cited in Visser, 2016) argues that following the 1922 white mineworkers strike, the state's intrusion in labour issues via labour legislation brought about the incorporation, institutionalisation and bureaucratisation of white unions within the state structures and this greatly reduced the potential militant, political threat that they had represented. Addressing white unemployment was a self-declared concern of the Pact government, yet the 'civilised labour' policy was insufficient on its own to achieve this. Although sponsored employment was a powerful tool and offered some relief to the problem, it could not get rid of the issue on its own. It was industrial development that would truly stimulate the demand for more labour, particularly white labour (Davies, 1973).

Even with the subjugation of the white unions to the State and Afrikaner miners dominating MWU membership, the Afrikaner nationalists did not control the trade union (Visser, 2016). When the authority of the MWU in the mining industry diminished, the union was left debilitated and divided and the Afrikaner nationalists seized the opportunity to exploit the miners' legitimate objections against their leadership. The Afrikaner nationalists harassed and took occupation of the MWU with the aim to end the cohesion and clout of the organised white working class. According to O'Meara (1977), the MWU was a strategic union within the Trades and Labour Council (T&LC) as it was the largest white union and provided a sizeable portion of the T&LC funds. The T&LC was an organisation established in the 1930s and counted white, coloured as well as some African unions among its affiliates (the condition being that none attacked the status quo) (Davies, 1973). The T&LC itself comprised many trade unions that were diverse in their racial make-up. These included craft unions, white industrial unions, racially mixed industrial unions that were dominated by white people, and non-racial industrial unions. In 1944, the T&LC implemented the Workers Charter for a socialist government so that the working classes could be freed from exploitation and domination. Therefore, the Afrikaner nationalists specifically focused their efforts on destabilising the dominant T&LC as well as the SALP. To be clear, the battle to control the MWU was conducted between the Afrikaner nationalists in the NP and their adversaries in the UP (Visser, 2016).

The SALP was key, as it was initiated to politically represent politically the class interests of white workers. The background to the formation of the SALP was that the new proletarianised

Afrikaners, who had been driven into the mining industry in their large numbers, as outlined above, came into an industry that was essential to the economy but where a racial division of labour existed. They were subsequently recruited into the MWU even though union management comprised only English-speaking supporters of the SALP, who were imperialists and held anti-Afrikaner views. Afrikaner workers often experienced vicious attacks by the craft unions which controlled the SALP and the T&LC. The SALP was an urban-based political party and the Afrikaner working class who had relocated to the urban centres were susceptible to their politics (Visser, 2016). Afrikaner workers clearly kept up their support for the SALP, as it went into the 'Pact' in 1924[15] with Hertzog's nationalists to win the election.

The SALP and the T&LC became dependent on the support of Afrikaner workers and so the Afrikaner elite under Hertzog in the NP worked to 'Afrikanerise' the white workers in unions like the MWU. The Afrikaner nationalists had to break the SALP's hold over Afrikaner workers. The Afrikaner nationalists viewed the mainly Afrikaans-speaking membership of the MWU as being proletarianised by imperial subjugation and it was unacceptable that white Afrikaner labour was directed by skilled and organised, English-speaking workers. The leadership of the white trade union movement came from a proletarianised group of English workers and despite their considerable numbers, the white Afrikaner workers were not part of the SALP leadership, as mentioned. The major objective of the Afrikaner nationalists was to disrupt the influence of ideologies of class and to organise workers in terms of their class interests shaped by cultural and racial ideologies.

The Afrikaner workers had to be moved away from the 'fearful alternative' of class consciousness. The Broederbond-sponsored body, the *Reddingsdaadbond* or the 'rescue act alliance' was an Afrikaner support society and it proposed to "make the Afrikaans labourer part and parcel of national life and to thwart the Afrikaans workers from advancing as a class different from other classes in the Afrikaans national life", argues Lewis (1984:216). So that Afrikaner workers could feel comfortable in their own trade unions and not be mistreated by 'alien' unions (Visser, 2016), Moodie (1975) argues that this provided the motivation for

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[15] The infamous 'civilised labour policy' of the Pact government of 1924 was employed by the railway administration to weaken the position of skilled workers and create a path for the first Christian national trade unionism which was racially limited and for a state-oriented company unionism (Lewis, 1984).

mobilising Afrikaner workers into 'Christian national' labour unions. In nationalist indoctrination, it was normal to emphasise communism's non-racial and egalitarian doctrines and so anti-communism was equated with the fight for racial segregation and job colour bars. The offering of Christian nationalism as a substitute for class by Afrikaner nationalists was due to an ideology that highlighted the importance of cultural, racial and national loyalties. Christian nationalism stressed class alliance and the common dependence of capital and labour. The conflict of interest between the two was attributed to 'foreign' influence and the power of an imperialist capitalism. Communism and racial integration were considered as 'foreign tendencies' introduced to South Africa by outsiders (Vincent, 2000) and features of Christian national trade union ideology was that it was composed of racial separation and anti-communism[16].

Hertzog founded a competitive trade union, the Afrikanerbond van Mynwerkers (ABM) which was a 'Christian national' trade union. The National Council of Trustees delivered the financial support for the Christian national Afrikaner trade unions. All were to be incorporated into the natural unity of the *volk*. The ABM's application as a recognised union did not succeed. When the Chamber of Mines approved the reinstatement of the closed shop agreement in 1937, the MWU was the only union that white underground miners could become of a member of and so the ABM was disbanded in 1938 (Visser, 2016).

However, the white Afrikaans-speaking workers showed a hearty interest in working-class organisations and made no effort to organise themselves along cultural, 'Christian national' lines. The faction that supported Hertzog's Afrikaner nationalists battled for 12 years against the SALP and the T&LC for domination of the MWU. Then, in 1938, the Reformers' Organisation was initiated within the MWU and it was presided over by Hertzog. The goal was to revamp the MWU constitutionally internally and into an Afrikaans-speaking Christian-national trade union by appropriating the management of the MWU and its general council. As World War II was looming, this was political opportunism on the part of the Reformers. The Reformers operated to contest the pro-war bloc within the MWU. The distinct battle for hegemony in the MWU took place between the UP-SALP faction and the pro-NP Reformers (Visser, 2016). By this time, a

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[16] The Broederbond founded the White Workers Association to counter communism in the trade unions and defend 'white civilisation'.

large enough number of Afrikaner workers had become ideologically opposed to the bureaucratic SALP and T&LC structures that led to their political fragmentation. As the white miners were employed in supervisory posts but did not possess authentic skills and needed the state to impose job colour bars, the Afrikaner workers disagreed with the non-racial codes of the T&LC. It was also the case that the white miners were already inclined towards the racist policies of the Afrikaner nationalists.

The Afrikaner nationalists also realised that if a political party managed to gain the support of white labour and if it limited the militant African proletariat, then this political party could succeed politically. The Afrikaner nationalists consolidated their control over the MWU after two protracted strikes on the mines in 1946 and 1947 against state training schemes for African bricklayers. By 1948, Afrikaans-speaking workers in the MWU had been effectively dissuaded from the SALP and the T&LC when the HNP won their patronage (it had clear policies about the restriction of the African labour movement).

Hertzog struggled but eventually succeeded in capturing the MWU. It was made clear that white trade unions with large Afrikaner membership did not automatically embrace his Christian-national trade unionism brand[17]. Afrikaans white workers subsequently came to support the NP and this occurred through certain political measures purposively commissioned that advantaged white workers. The first of these measures included the Pact Government's 'civilised labour' policy, which saw unskilled black workers hired on the railways and other state-run ventures substituted by poor white people at 'civilised rates of pay'. The second measure was the endorsement by the Pact Government of a high statutory minimum wage in designated occupations where both white people and black people were employed. This would be maintained for a long time. A third measure was the creation of the Department of Labour by the Pact Government to cater for the labour demands of white people and to protect them from 'unfair competition' by black people. The fourth measure was the statutory colour bar which the Pact Government enacted in 1926, the Mines and Works Act, which preserved by law certain categories of occupations for white people and was enforced for a long time.

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[17] Left-wing trade union leaders, many of whom were Afrikaans-speaking, had to be taken out of their positions by the state under the Suppression of Communism Act in the 1950s. This is when the strength of white trade union opposition was shattered and 'Christian-national' trade union ideology made momentous headway, according to O'Meara (1977).

The extensive assault on trade unionism by the Afrikaner nationalists focused on the least skilled workers in the mining, textile, building and steel industries. For the Afrikaner nationalists, the risk was that the urbanised Afrikaner poor could be organised according to 'class interests' and by 'alien class organisations', which would distance them from the Afrikaner people (Visser, 2016). White Afrikaner workers reacted socially and politically to their workplace challenges in terms of their perceived economic interests and joined the MWU. Afrikaans-speaking workers clearly acted in terms of class rather than cultural interests, were members of class organisations and had their interests expressed in these terms and supported the SALP. This weakened the ability of creating a mass base for Afrikaner nationalism. The Afrikaner worker had to be deterred from what was considered as un-nationalistic and English-dominated labour organisations. Communist ideology was even more perilous as it promoted racial equality and poor white Afrikaners had to be saved from its influence. As the T&LC was a multi-racial trade union federation, it too was a threat. Severely challenging it meant that the colour bar could be maintained in the mining industry (Visser, 2016).

To summarise at this point, the review of the MWU demonstrated that these trade union members, under very precise circumstances only, came to absorb the subjectivity expressed in the Afrikaner nationalist discourse and that the construction of the Afrikaner identity through discourse alone was insufficient to accomplish this. It was under particular material historical and extreme political processes that the Afrikaner identity was approved and accepted, as this was when these white trade unionists came to see their identities as Afrikaners. The nationalist movement eventually succeeded among the MWU as it solidly delivered the foundation for the cementing of racial identity which the trade unions at the time could not counter (they had no consistent substitution to this, nor could they accomplish class unity across the divisions of race). The MWU trade union eventually made room for Afrikaner ethnic identity (Vincent, 2000). However, the Afrikaner nationalists did not successfully capture all the trade unions that had among its members white Afrikaners during this period, as the discussion of the GWU reveals. Initially, the working-class Afrikaner women who were recruited into the GWU were viewed as one of the communities that defied the central definitions of ethnic identity as marked out by Afrikaner nationalism. However, the Afrikaner nationalist movement eventually succeeded in drawing its imaginary community across the margins of gender and class (Vincent, 2000), as the next section outlines.

3.2.2.6 The Garment Workers Union

Berger (1987) argues that the garment industry offered fertile material for investigating the connections between class, race, nationalism and gender in South African history and this study was interested in these intersections. In 1928, the GWU was founded by Emil Solomon (Solly) Sachs as a trade union for female factory workers of all races and classes. Just like their counterparts in mining, the bulk of garment workers were not skilled and were Afrikaans-speaking. The core constituency of the GWU was primarily Afrikaans-speaking women. The president of the GWU was Anna Scheepers and Johanna Cornelius succeeded Sachs as general secretary of the GWU. Both Scheepers and Cornelius were the daughters of Afrikaner farmers; Cornelius's father had fought in the South African war and her mother had been imprisoned in a concentration camp (Vincent, 2000). After the South African war, industrialisation proceeded promptly and white working-class women migrated from the rural areas to find work in the urban areas. This carried them away from the unwaged service to their fathers, husbands and sons.

The GWU could not rely on job monopolies built on skill shortages like the craft unions had. The GWU had to guard members from labour replacement practices and from undercutting by combining all workers jointly on a multi-racial footing. It was also the patently discriminatory views towards female workers that aided the formation of a sense of unity among the women. According to Lewis (1984), the GWU stirred up class consciousness among the women, especially those who possessed little or no convention of working-class organisation or cohesion. The GWU offered working-class identity as a substitute for ethnicity. The obligation to class solidarity spread across racial boundaries as the GWU had a socialist outlook. The GWU stressed a working-class consciousness in the 1930s and believed in the indivisibility of politics and trade unionism. The working-class women of the GWU also successfully focused on women's issues.[18] A convergence between class issues and nationalist matters took place when internally the GWU was challenged in 1944 in Germiston. A protest strike was arranged by two pro-nationalist workers, who contested the employment of coloured women working in the same clothing factory. These workers were eventually excluded from the GWU and they forfeited their

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[18] The male craft-oriented tailoring workers broke away from the GWU in 1934.

jobs as a result of the closed-shop agreement. GWU members had confidence in both class and nationalism concurrently without noticing any contradiction, as this amalgamation reinforced a working-class identity. [19] In addition to this, the environment of poverty, exploitation but also consistency in wages and working conditions (both were poor) coupled with discrepancies in the treatment of female workers provided the conditions for the appearance of a class-conscious ideology. Sachs was concerned that the garment workers should be united against attempts to divide them along racial lines and so these female workers, through their trade union, saw that higher wages and better conditions were obtained[20].

However, the white female members had a strong awareness of their Afrikaner exclusiveness. The GWU leaders were as adept as their adversaries were at maneuvering the symbols of Afrikaner nationalism as the GWU became contested by the Afrikaner nationalists in the 1930s. Sachs succeeded in enlisting Afrikaner women into the GWU as he merged their innate identity that formed an indispensable part of women's ethnic heritage with the 'derived' ideology of socialism and class struggle (Vincent, 2000). Sachs' strategically neutralised the nationalist's onslaught by acknowledging the sincere cultural and language desires of the Afrikaner female members. For example, the GWU's view of the nationalist commemorations for the Voortrekker Centenary that took place in 1938 was that Afrikaners had an exclusive heritage deserving to be observed. The GWU arranged for its members to form 'kappie-kommandos'; leaflets were distributed with directions for making traditional Voortrekker dresses and kappies, and Voortrekker dances were arranged and buses were leased to transport members to Pretoria for the festivities. Afrikaner garment workers participated due to their union membership as opposed to their insertion into the *volk*. Even though control of this event was firmly with the union and so the political influence of nationalist ideology was negligible, it is argued by Berger (1987) that the GWU had intentionally employed the images of Afrikaner nationalism for its own aims to foster beneficial nationalist aspirations among its Afrikaner members as it was under attack.

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[19] GWU overlooked the contradiction and this functioned to weaken a class consciousness ideology in later years. For black women in the clothing industry, the association between class and nationalism was high.

[20] The GWU was a hands-on union and helped its members with organising accommodation, medical care, picnics and sports day. This assisted in reinforcing the support of the GWU and these were linked to political education. Structurally the GWU was democratic and its members took part in decision-making at factory, branch and general meeting levels.

Nevertheless, the majority of GWU membership consisted of Afrikaner women who were not easily captured by the Afrikaner nationalists and the nationalist assaults tested the levels of the allegiance to the values of working-class unity held by these women. The circumstances in the clothing industry were not as conducive to Christian nationalism either, as it had been the case on the mines and the railways. The GWU craftily countered the challenge of the Afrikaner nationalists by championing the cultural rights of Afrikaners and employed Afrikaner cultural symbols for successful class mobilisation.[21] The tactic was to boost "healthy nationalist aspirations" and not those related to exploitative capitalist interests. The ultimate triumph of the GWU was to keep the loyalty of its predominantly Afrikaner membership to a class-based organisation (Berger, 1987).

However, in middle-class Afrikaner circles, these white Afrikaner female factory workers were thought of as morally questionable and some nationalist ideologues argued that it was incorrect for women to move from the farms into the urban areas. This was because some of the young Afrikaner women had settled in slum circumstances in the suburbs of Johannesburg's backyards when they migrated and had become detached from their families. They were considered a risk to the ideological and racial 'purity' of the *volk* (Vincent, 2000). The young Afrikaner women who had come into waged labour were seen as unconstrained and they mostly endangered the patriarchal relations of white society. Furthermore, it was believed that mixed marriages would undermine the gender hierarchy in Afrikaner families.

The key idea in the Afrikaner nationalist narrative was the responsibility of Afrikaner women to preserve the Afrikaner bloodline and protect it from 'contamination'. Some of these young women were recruited into a trade union that contested racial prejudice; they worked beside members of other race groups in the factories and they stayed in racially mixed areas. There was class divisions among the Afrikaner community and women, but the figure of the unpaid yet hard working housewife and charity worker, envisioned in the *volksmoeder* image, was remote from the experiences of the young and single newly urbanised Afrikaner women who were working in clothing factories in the 1920s and 1930s.

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[21] Between 1930 and 1960, the popular ideologies were either that of class or a racially defined nationalism as the conceivable foundations for identification and political engagement. Groups adopting these alternative ideological stances energetically vied for garment worker support.

However, both the Afrikaner nationalist leadership and the Afrikaner garment workers found common ground in their dismissal of the growing fascism and the planning for the Voortrekker Centenary in 1938, which was a pivotal moment not just for the class-based GWU but also for the Afrikaner nationalists. The attacks on the GWU carried on and escalated to insults against the 'Jew, communist Sachs' as well as physical attacks on GWU meetings by the Greyshirts. The garment workers rejected the fascist ideas of the far-right organisations, as the fascists also attacked the idea of women in paid employment. The female leadership of the GWU viewed the celebration of the Voortrekker Centenary as an opportunity for the white Afrikaans working-class women to be integrated into the Afrikaner nation. The female leadership of the GWU secured approval from those inside the imagined community's borders through the image of the *volksmoeder*.

The *volksmoeder* image was inconsistent – on the one hand it acknowledged the power of white motherhood and yet on the other hand it confined that power to the realm of domestic service. This was successfully taken on by the Afrikaner women of the GWU. When Sachs was interdicted in 1952, Anna Scheepers and Johanna Cornelius assumed control of the GWU. They continued to stress the importance of 'bread and butter' matters and, as a result, they effectively improved earnings in the industry. This was another good reason why the Afrikaner nationalists could not sway the membership of the GWU.

Vincent (2000) argues that as they viewed themselves principally as women, but as Afrikaner women, they welcomed the prevailing discourse of Afrikaner nationalism and its *volksmoeder* symbolism and racial traditions. The racial question worked together with the *volksmoeder* ideology and the Afrikaner garment workers consented to the racial ideology of Afrikaner nationalism. The racial mixing accusation had been one of the recurrent themes in the attacks against the GWU and its members, and the Afrikaner nationalists' racism was one of the most potent anti-union tools wielded by the nationalist movement. Yet, due to its socialist outlook, the GWU was vulnerable to the link that the nationalists successfully drew between communism and racial integration and this was enabled by the prejudices that were present among the Afrikaner garment workers (Vincent, 2000).

The white Afrikaner women did not reject ethnic identity, but they wanted to be recognised as Afrikaners who were striving to lead prosperous lives in a swiftly changing world, which was as per the custom of Afrikanerdom. The *volksmoeder* image was appealing for these women whose social standing was precarious. Therefore, gender was used by the Afrikaner nationalists to 'discipline' minority groups like working Afrikaner women within the nation state, as this was also a way of enforcing a uniform national identity as much as it was about eradicating class differences, which were important goals for the nationalist project. Even though they were poor, the white Afrikaans garment workers were of the view that they should be seen as a respectable part of the Afrikaner nation and so they found a way to challenge their own exclusion from the *volk*. They were keen to show that they had not abandoned the racial and sexual codes of Afrikaner nationalism just because they worked in racially mixed factories or lived in racially mixed areas. They connected with the ideology of the *volksmoeder* so that they could prove that they qualified to be members of the white Afrikaner *volk*. They also firmly repudiated the nationalist idea about the irregularity of women being in paid employment (Vincent, 2000). They turned the *volksmoeder* into a political concept in a way as it was one that could not be simply imposed on active women like the Afrikaans white garment workers of the GWU. These Afrikaner women employed in the clothing factories and members of the GWU used the positive gender features of the *volksmoeder* image, such as resourcefulness, morality and pride, to improve their lives as factory workers inside the GWU and to improve their social standing within the Afrikaner community.

3.2.2.7 Afrikaner nationalism and trade unions: A conclusion

The review of the work above on Afrikaner nationalism, race, class, gender and trade unions was extremely useful to the study in a few ways. It confirmed that one of the functions of nationalism was to unify groups of people and bind individual members of diverse classes together as members of a common *volk*. In the case of the mineworkers who were unhappy with the MWU, the Afrikaner nationalists seized the opportunity to enforce nationalist ideology to reinforce the Afrikaner workers' identification with the nationalist cause, rather than that of class. The objective was to build support for the Nationalist Party by winning the support of white labour. Afrikaner workers had to be discouraged from perpetuating dangerous class tendencies. Many efforts by Afrikaner nationalist organisations to split the trade unions along racial and national

lines were not initially successful and Christian national trade unionism also had not succeeded as a strategy in organising white Afrikaner workers.

In the case of modern Afrikaner nationalism, the mass internalisation of the new collective identity did not take place on its own, nor was it a natural reaction to the years that the agents of nationalism had dedicated to the dissemination of their nationalist messages. The Bond and the Afrikaner nationalist trade union organisations that were created had to work relentlessly to earn the patronage of a considerable part of white Afrikaner workers. This only took place by 1948, as this was when the Afrikaner workers were finally convinced that the nationalist agenda cared about the bread-and-butter issues of the working class and that the Afrikaner nationalist trade unions could fight on their behalf for the better wages, improved working conditions and certain benefits. As long as their material interests were given attention, the nationalists had the support of the white working class (and other class interests were catered for by Afrikaner favouritism in employment in the public service and in parastatals).

This review of the MWU provided evidence that the social democratic ideology of the trade unions included elements of class that initially clashed with the principles on which Afrikaner nationalist ideology was established. While the white workers had agitated for an exclusive state and socio-economic arrangement where white workers would not be exposed to industrial despotism – that is, production regimes in which the capitalist has despotic power over workers and coercion in the workplace is produced by workers' reliance on wage employment for their livelihoods (Burawoy, 1985),

The MWU obtained certain advantages in the name of the capitalist state and for the general welfare of a class society by spurning radical socialism. However, it was not Afrikaner nationalism that helped them obtain these concessions either. O'Meara (1977) argues that the Afrikaner nationalists only did very well where they twisted the class interests and genuine worker grievances, such as in the case of the MWU, to suit their needs. The Afrikaner nationalists set up their own racially exclusive trade unions as they asserted that, since the Afrikaner nation was merging, Afrikaners did not value classes (Vincent, 2000). The Afrikaner nationalists infiltrated the white labour movement (Davies, 1979) and the Broederbond worked to organise Afrikaner workers into ethnic trade unions (away from existing trade unions which

were dominated by English speakers) (Kruger, 1991) into 'Christian national' trade unions, to emphasise the 'organic unity' of the Afrikaner *volk* (Davies, 1979). These 'Christian national' trade unions emphasised the importance of cultural, racial and national loyalties over those of class. The MWU members were not convinced of this and did not leave the MWU. Therefore, the challenge for the Afrikaner nationalists was to organise Afrikaner workers within the nationalist context, as Afrikaner nationalism was a new identity to the white workers. To overcome divisions and to unite the different classes in ethnic terms, it was essential to incorporate class interests into the Afrikaner nationalist discourse (Davies, 1979). Afrikaner nationalism was ultimately successful in not only unifying the Afrikaner classes, but also driving a wedge between the different racial categories of the working class, in the case of the MWU.

Even though the GWU had a tradition of militant non-racial trade unionism, the basis for the participation of Afrikaner female garment workers in the 1938 Voortrekker celebrations were as female members of the *volk* more so than as trade union members. The GWU Afrikaner female members related to the concept of the *volksmoeder* the dominant symbol in Afrikaner nationalism. The nationalist gender ideology was a way of including the materiality of those women involved in waged labour into the *volksmoeder* mythology. This was despite the fact that it was a repressive set of gender stereotypes and that the garment workers had been subjected to more progressive ideas through their trade union (Vincent, 2000). It was the Afrikaner women's peripheral position within the Afrikaner nation and their pursuit for social status that inspired the working-class Afrikaner women to use Afrikaner nationalist ideology to illustrate their poverty, hardship and sacrifice in service of the *volk*. The significance of this was that the class position of Afrikaner female garment workers subsequently became pertinent to their involvement in the nationalist movement. This indicated that in the context of the GWU, Afrikaner nationalism was used by the Afrikaner female members of the trade union actively as they worked to attain respect for working-class women as authentic members of the *volk* by connecting to the notion of the *volksmoeder* (Vincent, 2000).

Therefore, in both the case of the members of the MWU and the GWU, the white workers were simultaneously members of an inferior class compared to their community and members of a racial elite. White workers wanted to be considered as citizens of the state and so pursued a white South Africa in which white workers would be totally appreciated, but also where they would be

included by the other social classes of the white community as much as being protected against the government taking the side of the capitalists and employers (Visser, 2016). White workers largely approved of the government's race policy (Davies, 1973) and the solution to white unemployment was achieved through a mixture of high minimum wages, colour bars and industrial development. The white working class was then primed for recruitment into the dominant political bloc due to ideology and the nation, but it was simultaneously an economic beneficiary of surplus-value that had accrued from the exploitation of African labour (Davies, 1973). The ideology of white supremacy nationalism aided class formation and it unified the different classes

Thus unskilled white workers had privileged positions in the labour market due to focused racial discrimination such as the colour bar and additional state support. Subsequently well-resourced public education ensured that their children did not face the same disadvantages. When this generation moved into the labour force, they did not need the colour bar to receive higher incomes. By the 1980s, the bulk of white people banked on their skills and so racial discrimination was dropped without weakening their privileged positions. The skills and education of white people are a consequence of the intergenerational transfer of accumulated wealth among white people, and apartheid transformed the state-connected benefits of race into the market-recompensed bonuses of class (Seekings & Nattrass, 2005).

This overview of Afrikaner nationalism and white trade unions in the period before 1948 confirmed, as Marks and Trapido (1987) assert, that studies of nationalism and race, and the relationship to class, are a profound part of South Africa's intellectual history; this is especially true of Afrikaner nationalism. In 1954, conservative or right wing trade unions left the T&LC to form the white, coloured and Indian workers' Trade Union Council of South Africa and African workers were barred from joining it. The Trade Union Coordinating Committee together with the Council of Non-European Trade Unions were established as non-racial trade unions. The Trade Union Coordinating Committee initiated SACTU in 1955. A review of the history of African nationalism and trade unions in South Africa is covered.

3.3 The ANC's African nationalism and trade unions

This section provides an overview of African nationalism, as well as African nationalism and women in the period from the inception of the ANC until 1994. This section draws on a review of literature on black and African trade unions and African nationalism before 1994 and literature that considers the connections between gender, feminism and African nationalism.

3.3.1 African nationalism in South Africa (1912-1994)

Before 1994, African nationalism encompassed many political activities and ideological components to advance the status, the rights and position of Africans in a divided society where wwhite people had asserted their supremacy through settlement and colonialism, segregation and apartheid. Like Afrikaner nationalism, African nationalism too was fashioned in the context of imperialism, mining capitalism and rapid industrialisation. African nationalism, like any other nationalism, but particularly like its Afrikaner equivalent, was intentionally created and had its own particular cultural and political mediators. It differed to Afrikaner nationalism in terms of its racial and gender components, which will be explained in detail.

From the start, African nationalism had a precise class element as it emanated from the small number of urban intellectuals and petty bourgeoisie who formed the South African Native National Congress (SANNC). This is because the members of the SANNC were mainly mission-educated teachers and clerks, chiefs and lawyers, small businessmen and traders, who were urban, anti-tribal and adaptable as they wanted to partake in the great British Empire (McClintock, 1991) and so they pushed for civic equality and political rights. African nationalism started with the quest for the protection of the Cape's non-racial franchise and in appeals for its expansion to the northern provinces of the colony (Simons & Simons, 1969). In other parts of Africa, national liberation entailed the handover of political authority from a foreign imperial government; in South Africa it was interpreted as divvying up power with the white minority, but Africans' national interests could not be differentiated from class interests (Simons & Simons, 1969).

Van Niekerk (2017) asserts that African nationalist leaders urged Africans to consider themselves as South Africans instead of viewing themselves along ethnic lines. It was assumed

that the people of South Africa meant the inhabitants of the Union of South Africa, which entailed the communities that had gathered collectively in a mutual territory by processes of colonial annexation and imperial war, deemed to be the common people. The African nationalists were cosmopolitan, multi-cultural and materialist in their outlook (Chipkin, 2016). The SANNC's African nationalism was based on an extensive view of the South African people with a single society in a unitary state and the notion of 'non-racialism' suggested a recognition of the 'cosmopolitan' nature of South African society, rather than a vision or hope of racial harmony. According to Adam (1994), this ideology of non-racialism favoured a civic nation over an ethnic nation and it was founded on the rights of individuals, irrespective of where they came from, and equal acknowledgement of all cultural customs in the public arena. The civic nation was established on consensus and not on descent. Initially the members of the African nationalist movement of the SANNC pressed for a multiracial, democratic society which was a wide and inclusive kind of nationalism. The emphasis was on equality and equity, and the eradication of discrimination and obstacles grounded in race.

There were also many streams of socialism and liberalism to challenge racial oppression, but Africans were politically hesitant and much more receptive to nationalism than socialism for a number of reasons. The SANNC or the Congress was a liberal movement and did not envisage the socialisation of land, mines, factories and banks. Simons and Simons (1969) point out that African nationalists sought equality and not black supremacy, as they wanted to be liberated from racial subjugation. They were not Marxists either, as the basic fault line was not solely along class lines. There were clear reasons why African workers did not welcome Marxist notions with open arms. White labour had insisted on industrial colour bars. Its segregation plans and fervent racialism had isolated African and coloured leaders and they viewed class theories like that of Marxism as something related to the white workers' conduct (the Rand Revolt of 1922 and the communists support for the demands for a white South Africa refer). The African (and coloured) workers understandably questioned the validity of the socialist vision or viewed it too improbable to be the correct model to action. They favoured radical liberalism to radical socialism, and nationalism as a political response to the struggle against racial oppression was more dominant as the existing political style of resistance to racism (Simons & Simons, 1989).

The racial persecution of black people in South Africa gave rise to a range of political responses from the oppressed sections of society, but not all were expressed through the ANC. Multiple and competing forms of African nationalism developed, such as those between the ANC and the Pan African Congress (PAC), which was founded in 1959, and other forms of black nationalism. One form was the Non-European Unity Movement, which was a Trotskyist organisation established in 1943 with links to the Workers Party of South Africa, WPSA. It stressed non-racialism and rejected race-based organising. Another form was the Black Consciousness Movement, which was a grassroots anti-apartheid activist movement that appeared in South Africa in the mid-1960s. There was also solidarity expressed with the oppressed from the non-oppressed sectors of the population, particularly the Communist Party of South Africa (CPSA) (founded in 1921; it had mostly white members). There were both radical nationalists and radical socialists on either side of the colour divide united in an alliance with the ANC and the CPSA. The task of the CPSA was to sort out racial, tribal and national hostilities that impeded the development of a shared class consciousness and advance a plan for mass action against white supremacy (Simons & Simons, 1969). The precise relationship between apartheid and capitalism would receive a lot of attention from scholars and is covered later in this chapter.

As already noted, a feminist understanding of nationalism was useful for how women related to nationalism. Where appropriate it is given consideration in this section. The language of the ANC was urban-based and it was the racially inclusive language of national unity, but the ANC was predominantly male, exclusive and hierarchical, ordered by an upper house of chiefs in whose interest was the upholding of traditional patriarchal authority through descent. The lower house of elected representatives were all male and the executive was all male. Women could enlist but as 'auxiliary members', so they were precluded from formal political representation. The Bantu Women's League of the ANC was inaugurated in 1918 and its membership was composed of the small and educated, Christian elite. Women's initial speculative incorporation into African nationalism was not at the request of men, but from their own politicisation. Nevertheless, the women's prospective militancy was subdued and their political activity was curtailed by the language of female service and subservience. Indeed, women's roles were restricted to creating a nation for their husbands and children. This took place on a voluntary basis and with the provision that it operated in the interests of the male 'nation' (McClintock, 1991).

Between 1912 and 1952, the ANC operated to obtain citizen rights using non-violent tactics (Van Niekerk, 2017). The chief concern of the ANC was to pursue civil and political rights for the African majority. Dr AB Xuma, president of the ANC from 1940 to 1949, promoted social policies and the 'public good' that addressed the needs of politically excluded Africans in segregationist South Africa. In 1942, Dr Xuma took the lead in an ANC deputation to the UP's deputy prime minister, Jan Smuts, to appeal for full representation in government. Dr Xuma was mindful that only a mass-based unified movement could procure the national liberation for politically excluded population. Only a full and absolute franchise could safely guard the social rights of citizenship for Africans (indeed, the belief was that political rights should be non-racial) and this was mirrored in the 'African Claims Policy' document of 1943 (Van Niekerk, 2017). The comprehensive approach to non-racial political collaboration was used by Dr Xuma during his term as ANC president in the 1940s (Van Niekerk, 2017).

As mentioned, African women were limited to a defined political place in the ANC: they lacked voting rights and were merely 'all the wives' of the male members. Finally in 1943, the ANC bestowed full membership and voting rights on women (as women had insisted this take place). The change in status of women within the ANC could be partly ascribed to economic change, increasing urbanisation and unionisation, as well as women's particular struggles in the urban townships (Hassim, 2004).

In 1944, the ANC Youth League (ANCYL) was founded and its members called for Congress to turn into a full national movement. This was significant as it marked a move by the African nationalists to a more exclusionary Africanist but also an anti-communist position under the ANCYL. The ANCYL was both the PAC and the Black Consciousness Movement's predecessor. The ANCYL's policy, 'Programme of action: Statement of policy', was approved at the ANC National Congress in 1949. The ANCYL was composed of young and primarily male African elite who were all blatantly Africanist (Callinicos, 2017). The ANCYL spurned 'foreign ideologies', and class analysis of African subjugation was viewed as contentious. The move by the ANC to political mobilisation around an inclusive franchise was associated with the apartheid regime's ascent to power in 1948. The extensive use of suppression in response to forms of mass-based resistance influenced the dynamics of black resistance to segregation, which progressed into a more challenging stance in the 1950s. The ANCYL members held

exclusive African nationalism views which contested the universalist concept of non-racialism that had been established by the teachers, ministers, editors, lawyers and doctors of the liberation movement. They preserved prevailing rights and opposed discrimination in the relentless struggle against white supremacy. Their concepts of the ideal society supported equality before the law, the vote, freedom of trade, labour movement and residence, and equal opportunities of education and employment (Simons & Simons, 1969). There were indeed contested views of African nationalism within the ANC itself.

The exclusionary Africanist position shifted again in 1952 with the 'Defiance Campaign against Unjust Laws' and the politics of radical non-racialism under Oliver Tambo and Nelson Mandela, who were both prominent members of the ANCYL. There was, in other words, a return to the non-racial, politically inclusive agenda which had been started by Dr Xuma in the 1940s. The ANC encouraged white democrats who had an interest in persuading other white people to join them to oppose apartheid. During the defiance campaign, the ANC expanded its notion of the 'nation' to involve white people. Albert Luthuli became ANC president in 1952 and led it until 1967.

The ANC's Women's League was formed in 1948 and was the product of the ANC's efforts to assemble a mass membership foundation; as a result, women were envisaged as prospective recruits. However, the notion that surfaced was that the position of women had to be promoted as part of the budding and modernising nationalism in the ANC. Despite this, the women's league maintained its secondary position as the base of the ANC. The function of the Women's Section from the period that ANC went into exile was to mainly to function as the movement's social worker, carrying out the caring tasks necessitated by people being far away from their traditional support networks (Hassim, 2004). In the 1950s, the ANC Women's League flourished as it was the decade of the Defiance Campaign, the Freedom Charter and the Congress Alliance. This is when the Federation of South African Women was founded, as some women felt suffocated by the male-dominated organisations. This was a non-racial body that expressed a distinct voice for women (Hassim, 2004; McClintock, 1991).

In 1955 Oliver Tambo, secretary-general of the ANC, confirmed that women's emancipation was of national importance and a requirement for victory. Even so, women's political agency was

guided by the dominant ideology of motherhood. Figures such as Winnie Mandela (who was a South African politician, a globally recognised anti-apartheid activist and was married to Nelson Mandela) were upheld as the 'Mother of the Nation'. Gaitskell and Unterhalter (1989) point out that ideology of the 'mother of the nation' was not the same as the *volksmoeder* in Afrikaner nationalism, as African women accepted and changed the ideology in many ways which will be covered later on in this section.

The ANC entered into a period of militant resistance and was met by the passing of brutal legislation. The ANC moved to reinforce its position on the place of democracy, social policy and the public good regarding the state in a deracialised nation. At this point, it was pertinent to return to national liberation, women and feminism. In the African context, as Buhlungu (2010b:195) argues, it was "an ideology and a set of practices that constitute the struggle against colonial subjugation and the denial of dignity to the colonised". There were many strands to the politics of national liberation, such as unity between the colonised, giving precedence to the national liberation struggle over others as well as the national movement as overseer of liberation, among other features. Accordingly, African women nationalists (in contrast to their Afrikaans counterparts) changed and permeated the ideology of motherhood with that of women as insurrectionaries and in turn these women labeled themselves as the 'mothers of revolution'. Women mobilised to become the radical defenders of their communities and their militant children. It was this image of the militant, revolutionary and political mother that was inserted into formal ANC rhetoric (McClintock, 1991).

What was important in this active part of the ANC's history was that there was an awareness that national liberation would not inevitably lead to women's emancipation. Women in the ANC were brought together in a Women's Section from 1969 after the suggestion made at the Morogoro Conference and was directed politically by a Women's Secretariat. In 1983, the Women's Secretariat created a sub-structure known as the National Women's Executive Committee that managed the daily business of the Women's Section.

In 1985, the Women's Section requested that a regional seminar be convened to examine the role of women in the struggle and within the ANC. The Second ANC National Consultative Conference in Kabwe in June 1985 granted a dedicated session to women. A discussion paper

was disseminated for the conference and it directly broached the complicity of men in the ANC with customary and traditional restraints that were inflicted on women by male-dominated structures within the national liberation movement. The discussion paper asserted that there had to be a fight against chauvinism and male domination in all spheres of life such as in the home and in the factory, as well as in the movement. The Women's Section felt that their work was being disparaged by the movement (as the ANC was still viewed as the prominent organisation, the means through which democratic ultimatums could be furthered) but nevertheless viewed the women's movement just as key and unavoidable as the working class was to the movement. Significantly at Kabwe, the National Executive Committee (NEC) deviated from the earlier tactic of rallying women only for national liberation to officially accepting that women's equality would intensify and augment the value of democracy itself (McClintock, 1991).

For Hassim (2004) and Cock (2003), this is why the ANC could be seen as an exemplary nationalist movement when compared to other nationalist movements – it had a track record of overcoming the propensity to emphasise women's standing as secondary political subjects. The ANC, at this point, was distinguished by its inclusionary attitude towards women and with respect to the belief of gender equality. It was ANC president, Oliver Tambo's closing speech at the conference that upheld the obligation to strengthen women's voice inside the ANC. Tambo advanced the proposition that South Africa would be restricted as long as women were repressed. Knowledge about what happened to women in Africa in the 1980s prompted women in the ANC to devise more effectual policies to combine gender equality with the ANC's fundamental principles. The grave predicament of nationalism was that women were assured of genuine transformation in the course of the resistance period, but as soon as the liberation movement ascended to power, women's issues became less important in the quest for national development.

The post-liberation documentation of nationalist movements in many African countries was a powerful reminder that women did not make meaningful progress after independence, even though there were symbolic promises made by political leaders. To address this, in 1988 the ANC issued its 'Constitutional Guidelines for a Democratic South Africa' which was as politically significant was the Freedom Charter. These guidelines accepted the demand for gender equality in the public and private domains and championed Affirmative Action as the way to achieve equality (McClintock, 1991). During the 1987-1990 phase, the liberation

movement grew and thus was capable of also situating the matter of homosexuality on the schedule of the anti-apartheid struggle, both in South Africa and internationally (Cock, 2003)[22] (up until the late 1980s, the ANC did not have a strategy for sexual orientation and senior officials regarded gay issues as unimportant).

To summarise at this point, for a great part of the 20th century the ANC was the principal protagonist of the 'idea of South Africa', specifically as a distinct society in a unitary state. African nationalism sought to unify all the groups in the struggle for freedom from political oppression and to counter racism, sexism and discrimination. This developed into the nationalism of the ANC as the organisation came into being on the basis of a historically racially divided society and so strived for the building a non-racist, non-sexist, democratic society in a future non-discriminatory society. This was not a narrow African exclusive nationalism which was centred on race, but one that was centred on democracy. Added to this, it was this nationalism that was the political form of the working-class struggle across the African continent for democracy and was undeniably a significant source of empowerment for black people (Van Niekerk, 2017).

The ANC had three main ideological influences that contributed to its character and to its complexities. Even though it was not covered above, one of these was the Christian liberal democrat tradition that emanated from its founder members and subsequent leaders such as Albert Luthuli and Oliver Tambo. The second strand was Africanists and the advancement of a black African-biased African nationalism. The third strand was that of the Communists, their non-racialism and socialist economic ideals (De Jager, 2009). In the 1920s, the ANC was also shaped by the traditions of pan-Africanism. The influence of communist and Africanist groupings within the ANC also had a substantial and enduring impact, with each being located at the opposite ends of the ANC. The communists stressed non-racialism and class solidarity, while the Africanists highlighted African self-sufficiency and the primacy of the racial struggle (Dubow, 2000). The Africanists were skeptical of communism, as they thought that it functioned to obscure the reality of Africans as a conquered race that did not suffer class oppression. At key

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[22] The then ANC Director of Information, Thabo Mbeki, officially acknowledged gay and lesbian rights at the ANC's policy conference in 1992. This was due to the determination of Peter Tatchell in London and Simon Nkoli in South Africa, who were the 'carriers' of the linking of gay rights to the anti-apartheid struggle by activating an extended notion of liberation (Cock, 2003).

periods, these two traditions merged to generate a form of indigenous radicalism expressed in the idea of African socialism (De Jager, 2009).

In order to examine the precise connections between African nationalism and trade unions in South Africa before 1994, the literature specifically consulted for the links between trade unions and African nationalism is focused on. This includes literature on the workerist tradition and the charterist tradition. Literature on the connections between race, class and oppression; the various political traditions of African nationalism, namely the Freedom Charter, CST and the NDR; and the critiques of these are discussed in more detail.

3.4   African trade unions and nationalism

As pointed out earlier, in many other countries on the continent, African trade unions sought to align themselves with broader anti-colonial forces and political parties to address issues of colonialism and racism, and to guarantee the unions a seat at the post-liberation negotiations for a new state. Unlike the Christian national trade unions, the efforts by African trade unions were to consolidate non-racial unions in South Africa. This inevitably took the unions into the territory of the National Question.

There were four waves of black trade unionism in South Africa. The first phase was the Industrial and Commercial Workers' Union (ICU) of the 1920s. The second wave was the Council of Non-European Trade Unions, which was started by the CPSA activists and the Trotskyists in the Joint Committee of African Trade Unions in the 1930s and 1940s. The third wave was SACTU in the 1950s, which was a part of the Congress Alliance spearheaded by the ANC, united by the Freedom Charter (Pillay, 2013). However, in the fourth wave, the new black trade union movement of the early 1970s did not initially acknowledge that the Charter was pertinent to its needs. Fine (1989) contends that the Congress tradition among black workers in the latter half of the 1960s and 1970s was weak and only returned as a powerful political force in the 1980s. The workers who organised the political activities in the 1970s and 1980s were primarily industrial and mining sector workers. African nurses in the public sector belonged to the racially exclusive South African Nurses' Association (SANA), which effectively countered the need for a trade union for African nurses. African teachers in the public sector set up a variety of trade unions across the country and in different provinces, where there were great

tensions between professionalism and activism, with the former establishing its iron grip at key historical points in order to survive state repression. Different departments of education were established for the race groups and 17 authorities that employed teachers were set up. It was only in the 1990s that profound changes took place in the independent school sector (or the private sector) and the character of the independent schooling sector was substantially transformed. Before this there were very few mixed independent schools; and so, by 1990, the bulk of the learners in traditional and high-fee schools were white. Thereafter, there was a substantial increase in the number of black learners enrolling and mid-to-low-fee black independent schools opened up as well (McCay & Hofmeyr, 2010).

After the 1973 Durban strikes, union activists were split on what types of unions should be formed. One group recommended the 'Durban model' of industrial unionism, which envisioned organising the working class, industry by industry. The aim was the setting up of robust shop-floor organisation and the avoidance of politics and thus open conflict with the state. The other group made a case for the 'Cape Town model' of general unions, in which workers in different industries and services were joined by mutual concerns which would have political consequences. This latter group were known as the 'ultra-left' and the industrial union cluster were identified as 'reformist' (Naidoo, 2012).

Union behaviour can be grouped into three distinct categories. Firstly, economic unionism or business unionism is when trade unions restrict their activities to the workplace and they concentrate on upgrading the working conditions of their members. They are politically independent, usually conservative but they can be militant. When trade unions are occupied with the state and political struggle, they are drawn into or are become minor players to the political party and this is known as political unionism. These trade unions are either Marxist-Leninist, Nationalist or Social Democratic. Social movement unionism is society focused, progressive and either reformist or anti-systemic; if they are the latter, they are either popular-democratic (that is, they combine class and nationalist politics) or they are syndicalist. In reality, trade unions exhibited elements of two or more types or sub-types in a given period (Pillay, 2013).

Subsequently, two major black trade union federations emerged in South Africa during the 1970s and 1980s. One was non-racial and consented to having white intellectuals as officials in its

ranks. It ultimately morphed into COSATU. COSATU welcomed non-racialism and the Freedom Charter after in-house debates about these issues. Different affiliates dedicated themselves to the principles of non-racialism, but also to socialism. The mass movements of the 1980s under the United Democratic Front (UDF) contained different entities that were independent of the ANC, but there were ANC sympathisers, including in COSATU. The UDF also adopted the Freedom Charter and this boosted the mass drive for radical non-racialism (Satgar, 2019a).

The other black trade union federation were Africanists and held Black Consciousness views (although Black Consciousness was not its official ideology) and chose black people as officials. However, some white people were involved in that three white trade unionists had relations with a federation of registered trade unions and the Young Christian Workers of the Catholic Church. They founded the Urban Training Project (UTP) which was Johannesburg-based. The UTP rapidly managed to establish a number of African unions and provided them with training and other services. The unions established by UTP formed a loose grouping known as the Consultative Committee of Black Trade Unions (CCOBTU). In 1980, they became a federation, the Council of Unions of South Africa (CUSA). In 1987, they merged with what remained of the Black Consciousness unions to establish the National Council of Trade Unions (NACTU). NACTU had a Pan-Africanist leaning and operated on the principle that only Africans should be officials and leaders of the unions. NACTU was never as large nor as powerful as COSATU (Maree, 2006). For the bulk of the 1970s, the Black Consciousness tradition was "by and large the dominant force" among these nationalists; however, it was "a very disparate and disorganised movement", as the ANC was a minor player during this period (Callinicos, 1992, cited in Byrne, 2012).

However, a third African trade union movement also appeared in the 1970s, and it was a Black Consciousness movement. It began as the Black Allied Workers' Union (BAWU), which was initiated by staunch Black Consciousness-oriented intellectuals. With the exception of one union (SAAWU or the South African Allied Workers' Union), this movement stayed weak throughout the 1970s and early 1980s. Some of the remaining small unions joined COSATU in 1985 and others joined NACTU in 1987 (Maree, 2006).

The African trade union movement by the 1980s was considerably bolstered by the state-legislated Wiehahn Commission changes, which broadened the 1924 industrial conciliation system to black and African labour. The Wiehahn Commission recommended that African workers be permitted to set up registered trade unions and take part in industrial councils on a par with white workers. The industrial conciliation machinery was reorganised and kicked into action as it incorporated the legalised black trade unions. This led to significant changes in wage-bargaining and so the outlines of employment and wages for Africans changed positively in the decades that followed. The wage-setting machinery saw an increase in the wages of less-skilled workers (Seekings & Nattrass, 2005). As the share of racial national income changed and the racial wage gap decreased across sectors, growth in semi-skilled employment began, especially in manufacturing. This also provided a strong basis for the growth of the independent trade union movement that cohered into COSATU (Seekings & Nattrass, 2005). The officially accepted status of the post-1979 trade unions indicated that the state and the business sector deemed them to be essential (Eidelberg, 1993). Friedman (1987) contends that the reforms were initiated to counter the growing labour shortage which had been apparent since the mid-1960s and that the need for skilled black labour was one of the reasons why the trade union movement was crucial to the state after 1979 – and that this gave the unions more power. The recognition given to black trade unions helped them to expand their membership and to negotiate from a strong position. What ideologies influenced the African trade unions, before and after the Wiehahn reforms, is now considered.

3.4.1 Charterism and the National Democratic Revolution

As already noted, trade unions for black workers initially developed in the second decade of the 20th century and passed through phases of deterioration and recovery until the mid-1960s, when SACTU had to go underground. From 1965 to 1973, labour was dormant as labour mobilisation waned as a result of the banning of liberation movements such as the ANC and the imprisonment of their leaders (Baskin, 1991; Friedman, 1987, cited in Buhlungu, 2006).

One political tradition, charterism (also called populists or the Congress tradition), was prevalent in 'community' trade unions and was the national democratic tradition which argued that South Africa could not be understood in simple class terms and that social reality was that of CST, in

which the struggle was not class-based (Wolpe, 1988). Historically, the Congress tradition was powerful in the 1950s, but its authority was contested by the black working class in the 1960s and 1970s. It re-emerged as a potent political factor in the 1980s.

Populism was linked to predominantly black unionists who insisted on combining shop-floor struggles with the wider community and political battles. Populists were usually keen on intimate links with the liberation movements. Indeed, the black intellectuals were motivated by developments such as the achievements of national liberation movements in Africa as well as the rest of the developing world and so recognised a different kind of activism, which was national liberation movements (Buhlungu, 2006).

The ANC-aligned SACTU was a non-racial union founded in 1955 and was aligned to the Congress Alliance. SACTU was an example of a political union and this persisted among many trade union groups in the 1950s, mostly those which were community-based. These trade unions were preoccupied with the broader political struggles. Lambert (1987) asserts that SACTU's political campaigns from 1957 to 1961 had been directed at the state but given the circumstances at the time, it was the most effective strategy for mobilising workers at factory level as this enabled the development and reinforcement of the trade union base. This model of trade unionism was termed 'political unionism' (Lambert, 1987). Political unionism was intended to 'politicise' trade unions and shift them from being orthodox economistic unions dedicated to only bread-and-butter issues. Key to political unionism was the presence of factory committees, which was the foundation for the unions, whereby the leaders were directly answerable to the rank-and-file. The function of factory committees was that it was supposed to safeguard the trade union leadership, even though allied to political movements such as the ANC remained accountable to its membership and so avoiding external domination.

The passing of the Native Labour (Settlement of Disputes) Act of 1953 and the Industrial Conciliation Act of 1956 resulted in the regulation of workers' unions, the nurturing of racial divisions in trade unions and the denial of the official recognition of black workers' trade unions. Many trade union leaders, such as those in SACTU, were arrested and had to go underground.

The anti-apartheid movement symbolised a nascent multi-class, non-racial 'new nation'. The nation and the class alliance it characterised had to be led by a political party, the ANC. Through

the ANC, the 'new nation' would assume state power, rule South Africa and overthrow apartheid and its vestiges. The NDR was a multi-class project and so the Alliance had to embrace all classes. There was no space for a revolutionary anti-capitalist stance, as this would exclude the capitalist class. The goal of the 'national democratic' struggle was to defeat apartheid. A two-stage theory, the ANC's nationalism was the holder of the first stage and so nationalism was cast as the essential form of national liberation. Socialism would result only after the efforts of the ANC-directed 'national democratic' action.

The populists in the trade union movement were centred in the NUM and SADTU. They were known as UDF trade unions. The UDF was an anti-apartheid body that included many anti-apartheid organisations such as churches, civic associations, trade unions, student organisations and sports bodies to contest racial oppression. It was formed in 1983, which was when the ANC rematerialised as the foremost force in the battle for national liberation. Supplementing this, a cohort of young student activists who were part of the vanguard of school and youth struggles in 1976 and 1980 entered the workforce and the union movement. This group was far more confident due to the empowering Black Consciousness Movement and radical politics. Their immovable attitude to the struggle propelled them into leading the nascent worker's movement (Buhlungu, 2006). The populist trade unions followed this particular style of ANC politics, which was the Congress or the Charterist-oriented struggle against apartheid (the Mass Democratic Movement). Their goal was that of a 'popular front' of all subjugated classes and levels in the black population, which would incorporate black capitalists and homeland leaders as well as white anti-apartheid democrats. Their programme was nationalist in that the whole nation was to come together across class lines and convey its will through a nation state. The populists differed on how independent from or subordinate to the Congress they should be and who they were mainly accountable to – their own trade union members or the ANC (Baskin, 2019). Nevertheless, via the ruling Alliance, the working class was connected to the ruling class of capitalists and politicians and all entities had to assist the ANC to assume state power, even trade unions.

Byrne, Ulrich and Van der Walt (2017) argued that there was a widespread tendency to conflate the history of black resistance in South Africa with the history of black nationalism, where the left (including the SACP) and labour (including the unions) were relegated to bit players, despite

often being larger than any of the nationalist formations. Thus, workerism represented a different approach to national liberation politics and it is examined next.

3.4.2 The Federation of South African Trade Unions, workerism and the National Democratic Revolution

In April 1979, FOSATU was launched (Friedman, 1987). Its affiliates included the Metal and Allied Workers Union (MAWU), which would subsequently become NUMSA, which eventually became an affiliate of COSATU. When it formed, FOSATU claimed that it had 45 000 members in 11 unions, registered and unregistered. By the end of 1984, its membership had climbed to 120 000 (Byrne, 2012). Most of the FOSATU activists disapproved of the earlier efforts at unionising black workers and primarily the close connections between unions and liberation movements (Buhlungu, 2006).

3.4.2.1 The Federation of South African Trade Unions

In the early 1970s, three black trade union movements appeared with an array of ideologies. Labeled as the independent unions, it was due to the fact that they ferociously defended their autonomy from the state and employers. One of the most robust movements was the one with a non-racial and socialist outlook. There were also white intellectuals who were included in these unions. Generally they held neo-Marxist views and came from the universities of Natal, Witwatersrand and Cape Town. The non-racial feature of these unions was revealed by the fact that organisers were drawn from all population groups in South Africa: African, coloured, Indian and white. However, these unions recruited African workers only, despite it being illegal for African workers to become members of registered unions while white, coloured and Indian workers could and did belong to registered unions (Maree, 2006). Then these evolving autonomous unions underwent various phases of struggle.

There was a fight for survival against antagonistic employers and an exceptionally aggressive state. In an attempt to quash the growing unionisation, the state banned 20 trade union movement officials at the end of 1976. As the unions had fostered many resilient leaders, structures and procedures, they successfully weathered the assault by the state. The unions then fought for recognition. They were triumphant and the state conferred the same collective bargaining and

labour relations rights given to white, coloured and Indian workers on African trade unions and workers (Maree, 2006).

Significantly, FOSATU added an important element to the uncertainty about the association between unions and the liberation movements by pointing out the experience of SACTU. SACTU had affiliated to the Congress as noted and instead of using the opportunity of the alignment to intentionally transform the ANC, what did happen was the reduction of the 'independent' trade unions to the Congress, to middle-class politics and to political leadership. Some analysts (see Masiya, 2014; Feit, 1975) contend that SACTU failed because it neglected its core business of making its economic requests known to employers and that SACTU was held hostage to the nationalist movement because of its involvement in the Congress Alliance (Sithole, 2007). FOSATU was of the opinion that its task was to advance an independent union movement that would be more tactical in its political engagement.

FOSATU trade unions focused on strengthening participatory democracy in the unions at shop-floor level and representative democracy at upper levels. The white union officials helped build up the unions and laid the base for the unions to become strong enough to contest the apartheid state successfully (Maree, 2006). White intellectuals in African unions encouraged the instilling of worker participation and democracy at shop-floor level, accountable and representative leadership at the managerial levels of the unions as well as that of union officials, which strengthened these unions.

The FOSATU unions advanced through three phases of democratisation. The first phase was the formation of democratic structures in which the bulk of worker representatives were instituted at all levels in the unions and coordinating bodies. FOSATU affiliate members were harassed by management as many carried out 'divide and rule' by supporting management-created works committees and liaison committees. The second stage coincided with the first and entailed the expansion of the workers' abilities to take active control of the structures formed in the unions and the coordinating bodies. This stage was not entirely completed by the end of the 1970s, but there were enough worker leaders who took responsibility in the unions and coordinating bodies. The third stage also took place at the same time as the other two and it involved rendering leadership of the unions' representative of the members and answerable to

them. This was accomplished by the end of the 1970s. There was representative and responsible leadership at the shop floor, as there were active shop steward committees although not at the level of the coordinating bodies or federations level (Maree, 2006).

FOSATU affiliates' organisers had created the kind of 'proper organisation' that distinguished them from the more 'political unions' (Naidoo, 2012), particularly as the ANC was banned. FOSATU deemed any connection between unions and an ANC kind of political activity as dubious. However, it was anticipated that there would be worker resistance from unions that went beyond the shop-floor industrial matters into wider political issues. One such union was SAAWU, which was a non-racial trade union founded in 1979 and adopted an ANC perspective. There was immense antagonism towards the ANC by other constituents of the trade union movement. FOSATU evidently avoided politics, even when worker organisation and militancy increased, as they recognised the possible economic strength of workers had to stimulate change. They were considered as practical unionists who understood workers as the mechanism for change (Naidoo, 2012).

3.4.2.2 Workerism

A tendency which insisted that union mobilisation be restricted to the shop floor became known as workerism and it emerged as an alternative to populism, the latter being the form of shop-floor trade unions from 1973 onwards (Southall & Webster, 2010, Ndlovu-Gathsheni, 2009). The workerism and populism rift among union activists overlapped with race, as most populists were black while most workerists were white (Buhlungu, 2006). Workerism presented an anti-capitalist and class-based critique of the National Question. Workerism probed the argument that national oppression could only be contested by nationalism (Byrne et al., 2017). Workerism engaged with the national liberation struggle, but argued that the equating of national liberation to nationalism was not exact. In reducing South Africa's contradictions to national and racial ones, resolved through conflicts between white and black nationalists that is between Afrikaner nationalism and African nationalism, this approach to 'the struggle' made the implications of the country being a capitalist society quite secondary (Legassick, 1979, cited in Byrne et al., 2017).

There was no motive to suggest that workerism would be any more foreign to black workers than nationalism was. Workerism symbolised a left-wing vigor centred on a bloc of trade unions,

originating primarily from FOSATU. The workerist labour leaders were in the main industrial trade unions and comprised FOSATU's Moses Mayekiso and Joe Foster. They both disapproved of alliances with black elites and they took an anti-capitalist stance.

Workerists in FOSATU had assembled mass structures, factory by factory, which were founded on meetings and mandated shop steward structures. Workerism rested on workers functioning through the unions and thus there was no need for a political party to manage the struggles of workers and their communities. It laid emphasis on the value of independent but political unions which would have their own political vision that would not be dictated to by external parties. The emphasis was on democratic, worker-controlled unions which would offer leadership to other working-class sectors such as township movements.

Workerists pursued mediations in neighbourhood affairs via union locals in townships and endorsed democratic versions of community organising. They favoured a working-class 'united front' which stood in contrast to the ANC's 'popular front'. They were of the view that the new nation had to be non-racial and working-class controlled, not divided on the lines of race; and that racial domination could be halted via a radical working-class politics. To eradicate racism, capitalism had to be abolished and this could only be accomplished by a workers' movement. Therefore, worker-oriented definitions of the struggle understood national liberation in class terms and as the conflict between labour and capital. Thus, workerism highlighted both national oppression and class differences, and offered a formidable counter-narrative to African black and Afrikaner nationalist visions of South African history being a continuous race struggle. Working-class unity was thus one the factors in the vast task of building a 'national democratic' movement and the aim was to foster immense working-class power for a participatory and anti-capitalist transformation, a truly transformative working-class movement (Byrne et al., 2017). The nationalist struggle could be led by any of several classes, but the different classes had distinct aims. The workerists were informed by Marxist theory which in turn advocated that the material interests of the non-proletarian elements in a national liberation movement would at serious stages endeavour to deceive the proletariat and prevent it from attaining its own objectives. For the South African proletariat to take a revolutionary outlook and for the working class to struggle for the goal of a socialist society (Davies, 1973), it was imperative that trade unions be capacitated through building shop-floor democracy.

Workerism deviated significantly from the charterists by insisting that the workers' movement not be a component of the larger multi-class popular front. The philosophy of workerism was that which joined the essentials of anti-nationalism, anti-apartheid and anti-capitalism in a marked move toward the national liberation struggle. FOSATU union leaders fostered democratic workers' control from the shop-floor level up to the highest organisational level in the union categories (Maree, 2006). They fused this with deliberately avoiding any political conflict with the state until the unions were strong enough to cope with retaliation by the state.

Workerists drew attention to the reality unfolding on the African continent – African nationalist governments normally clashed with trade unions and the working class after independence. There was no evidence to suggest that the ANC would be more accepting of trade unions than any other independent nationalist capitalist government had been on the continent (Byrne et al., 2017) and that the ANC would, too, abandon the working class once in state power. The term workerist was a wide-ranging perspective and workerists were divided among themselves. Some workerists were more economistic and syndicalist, while others were more revolutionary socialist and 'vanguardist' in their ideology. The prominent workerists were the South African Clothing and Textile Workers Union (SACTWU) and in MAWU, which later became NUMSA, which is in the industrial unions. NUMSA saw its origins in the context of the trade union movement which appeared in the 1970s that was autonomous of the ANC and SACP (Satgar & Southall, 2015).

Workerists considered nationalism, incorporating the alliance, the PAC, Africanists and BCM, as exemplifying 'petty bourgeois politics' and 'capitalist' positions (Byrne et al., 2017). Some workerists wrote off the ANC's Freedom Charter as a capitalist document and considered the idea of two stages towards emancipation as wasting time. Even though the workerism of FOSATU connected with political issues, it clearly eschewed nationalist or communist instruction as it preferred a more profound working-class politics.

3.5   An evaluation of the populists, the workerists, the ANC and the emergence of COSATU

There were clear political differences between the trade union camps. The workerists were cautious of working with movements motivated by populists. The ANC's populist style was

heavily critiqued by workerists for discouraging democratic mass organising, for trade unions apparently becoming appendages to the ANC and being subjected to the discipline of the ANC, turning into political unions. The workerists debunked the claim by populists that class politics was embraced to evade the palpable racial realities as many African, coloured and Indian workers in FOSATU, and eventually COSATU, were part of the nationally oppressed. The coincidence of class, socialism and workerism indicated that the black working class challenged both racial domination and class rule, as argued by Byrne et al. (2017).

FOSATU unions were suspected of having the wrong leadership by the populists. In particular they were seen as being governed by a faction of white, university-educated individuals and as obstructing the nationalist feeling among its black members. Workerism was criticised for lacking a clear strategy of change or a policy of a future society, which became clear when contrasted to the ANC, who had a tangible NDR project. Populists were on the whole more organised and so gained ground at the expense of the workerists.

There was clearly a wide range of views held by trade unions that were part of the workerist tradition and those who had a populist orientation. The divisions among the workerists and the populists intersected with other differences, e.g. allegiance to principles and practices of worker control and organisational styles, the receptiveness to shop-floor demands, the obligation to union independence, the role for white officials (Buhlungu, 2006; Maree, 2006) and several ethnic and cultural traditions. These all intersected with the different political traditions (Baskin, 2019).

That there were no clear-cut lines between workerists and populists in practice was well illustrated by Buhlungu (2006), who argues that the resurrection of mass mobilisation was independent of the trade union movement in the early 1980s as the popular resistance and stayaways by workers involved their own agendas which were not limited to the workplace. This programme included matters such as rents, education, police harassment and political power. Even though there were some (Lambert, 1987) who saw what was taking place in the townships as populist, workerists had some influence in particular areas. Indeed, FOSATU participated in township politics from the time of the turbulence in the Vaal Triangle (this is the area in which the protests began in the townships and it was an industrial hub) in late 1984, and even assumed

a leading role. FOSATU affiliates took part in stayaways and some trade union leaders such as Moses Mayekiso of MAWU represented FOSATU on the stayaway committee. There were thus links forged between trade unions and communities, politically and ideologically, in the townships in the 1980s (Paret, 2015).

Buhlungu (2006) argues that this marked a break with economic unionism as FOSATU had given into growing township revolutionary pressure. Even though it was politically implicated in the township uprisings of the mid-1980s, FOSATU remained detached from the ANC until late 1985. The workerists could not be accused of not taking account of the National Question. For some, individuals in FOSATU became 'uncritical' supporters of the ANC within COSATU in 1985-1986, such as Legassick (2019) who argued that this signaled that FOSATU had given up fighting for a working-class programme. As nationalist black leaders rose in the mid-1980s, some workerists moved into pro-ANC positions in the late 1980s and the 1990s. Joe Foster, who was the general secretary of FOSATU and who had said that the ANC's populist politics would be catastrophic for the working class, subsequently became an ANC member of parliament.

It was, however, the populists who acquired the political space in various townships. The traditional and grassroots intellectuals from the echelons of black unionists preferred to concentrate their efforts in the direction of national liberation politics, as national oppression and not economic exploitation seemed to be the most direct stumbling block to the achievement of their class ambitions. Many moved towards movements such as the ANC, the PAC and the Black Consciousness Movement (Buhlungu, 2006). The workerist endeavour weakened swiftly so that by the end of the 1980s, only remnants of workerism endured in some unions as COSATU pursued Alliance politics with the ANC, but this did not mean that workerist ideology with significant support was altogether gone.

As noted, beginning in the 1980s, the labour movement moved from the workerist political tradition which was focused on shop-floor issues to a populist articulation with the broader liberation struggle. For many unions, the shift from workerism to populism was effortless. However, Hickel (2012) notes that in the many sugar mills across KwaZulu-Natal, this transition produced serious conflict between workers who identified with the NDR and workers who scorned it. Hickel (2012) also argues that the workerist unions opened up the space for subaltern

workers to organise as activists without having to align with material political modernity. The history of unionism in the sugar industry implies that workerism in the South African labour movement, long characterised as having a tendency to favour class struggle over nationalist politics, also unintentionally created an exceptional place for political engagement free from the liberal politics that many South Africans would have considered as unacceptable at the time.

From 1979, 'Sweet Food', which was built up under the umbrella of FOSATU, became populist and connected to the ANC; and 'National Union', which arose as a result of the works committee system, remained workerist. Workerists in 'Sweet Food' were Inkatha supporters and rural migrants antagonistic towards the NDR led by the ANC. Hickel (2012) points out that these workers joined the workerist trade union as the workerist philosophy of National Union did not compel workers to become secular individuals separated from their prized cultural values and beliefs. Workers did not need to enlist in the revolutionary struggle intended to attain a liberal social order with which they did not identify. Sweet Food was faithful to the ideals of workerism in that they respected class-based, shop-floor concerns over the broader goal of nationalist and anti-colonial struggle.

In the 1970s, 1980s and early 1990s, South Africa's trade unions both organised for political change and resisted managerial despotism on the shop floor as they struggled for better working conditions and higher wages (Baskin, 1991; Von Holdt, 2003, cited in Seekings & Nattrass, 2005). Eidelberg (1993) argued that regardless of its alliance with the ANC, COSATU maintained its hegemony over the unions and that this averted ANC control during this period, as the state preferred a union-dominated Alliance to an ANC-dominated one.

Significantly, though, the NDR facilitated the laying of the ideological and organisational groundwork which resulted in the formation of COSATU in 1985 (Eidelberg, 1993, Naidoo, 2012). Accordingly, the unions that comprised that pillar of COSATU undertook a leading role in the political change in South Africa in 1994 (Adler & Webster, 1995, cited in Maree, 2006). Many trade unions were overtaken by populism and Congress nationalism as they became affiliates of COSATU. COSATU's role was to prop up the ANC's NDR by furnishing it with working-class support. COSATU's founding congress took place in 1985, after more than four years of negotiations between CUSA, FOSATU, the Azanian Congress of Trade Unions

(AZACTU) and the SAAWU. AZACTU and CUSA had been sympathetic to Black Consciousness ideology, and thus pulled out.

The workerist and populist traditions were theoretically combined within COSATU, but populists supporting the ANC and SACP became increasingly dominant inside COSATU in the late 1980s (Callinicos, 2017) and by 1987, populism was predominant in COSATU. At its second national congress in 1987, COSATU had to consider a significant issue which had been placed on the agenda. The NUM suggested that COSATU embrace the Freedom Charter just as they had done, but this was opposed by NUMSA, whose predecessor MAWU was part of the workerist tradition. The NUM was an enthusiastic advocate of Alliance politics and by the late 1980s there was a new compromise within COSATU with the acceptance of the ANC's Freedom Charter. The NUM created the atmosphere for the new militant black trade union movement. However, NUMSA went beyond the NUM in its membership and influence.

The NUM's resolution was accepted and COSATU was significantly more divided by this move (there were others who, too, were critical of the Charter and charterist political forces).

The nationalist strands formed the background against which union mobilisation was conducted and the precursor to COSATU and its trade unions were no exception to this. This was not surprising, as the rise of militant black trade unionism from 1973 and the founding of COSATU in 1985 were both about the desire to uphold non-racialism of the organised working class in South Africa. As already mentioned, the workerist group, FOSATU and the populist-orientated group had both aligned with the UDF in the 1980s, and together they formed COSATU. At its inception in 1985, COSATU represented popular-democratic, transformative social movement unionism as the democratically organised workers engaged in both 'production politics' at the workplace and the 'politics of state power' in opposing apartheid. This meant that COSATU had to form alliances with movements and organisations external to the workplace, but along the lines of COSATU maintaining its independence.

The Freedom Charter was adopted in 1987 as the 'stepping stone to socialism'. At the time, this was possible as the creation of COSATU was a mitigating factor for the tension between the two traditions and provided a way to incorporate the best features of populism (cross-class unity in opposition to the apartheid state) and workerism (safeguarding working-class independence)

(Pillay, 2013). The outcome was a supposed popular democratic synthesis, where the working class took the lead in the struggle against apartheid.

Yet what this clearly demonstrated is that there were factions within COSATU itself and Baskin (1991) argues that as the relationship between the ANC and COSATU strengthened, it did not triumph over this factionalism. By 1989, COSATU's programme comprised a general approval of the ANC national-democratic perspective of the liberation struggle that linked to the trade union socialist's transformative visualisation (Baskin, 1991).

There were some who were sympathetic to the position adopted by COSATU in relation to the charterist tradition during this period of time. In looking at the relationship between the ANC and COSATU in the 1980s, Baskin (1991) claims that the alliance between the ANC and the unions was meant to guarantee harmony and equal, even treatment between the partners. COSATU was sympathetic to the ANC and the Congress tradition, but it was thought that the alliance between COSATU and the UDF was strong due to their common perspectives. Lambert (1987) reasons that COSATU was establishing the new alliance with the ANC with the proviso that the trade union federation would have more power, not less. Lambert (1987) also argues that COSATU had disciplined leadership as it entered into a phase of industrial mergers, as this provided the base for securing workers' power that propelled the socialist project forward. Lambert and Webster (1988) stress that an alliance with the ANC would be to the advantage of the unions, as it provided the opportunity to finally build union hegemony. This was based on the assumption that COSATU took the lead in the Alliance so that it could impress the working class; that is, socialist pleas on the nationalist cause. Lambert (1987) contends that this was the disciplined basis of the Alliance.

Others were far more critical of COSATU's adoption of charterism. Friedman (1987) had warned that the alliance worked as a power game that aided the ANC just as SACTU's alliance with the ANC did in the 1950s, when the unions became the instruments of the nationalist movement, struggling for ANC interests rather than for their own. In the 1980s, the formation of COSATU signalled that unions were under pressure to relinquish their control over political action to the nationalist movement. It was unlikely that the union movement would become the centre of national resistance (Friedman, 1987).

Eidelberg (1993) contends that when the UDF was banned, COSATU took advantage of the political void in the townships; yet when the ANC's renewed validity and its attendant influence increased, it became the centre of defiance of the apartheid state and that this would prove a test COSATU. The Alliance was now based on a fairly formidable trade union federation but also a considerably strengthened and legal ANC. COSATU's objectives of hegemony which had been convincing for the mid-1980s, were now less attainable for Eidelberg (1983) and so the unions looked for new ally in the old ANC partner, the SACP. Concerns were raised about the nature of the Alliance between the ANC, SACP and COSATU as stressed by Pillay (1990). Some trade unionists urged that the union and party structures be broken to avoid the party dominance of the unions and that the party structure made subservient to the trade union structure. Other unionists saw their task as supporting, strengthening and democratising the ANC and not distancing themselves from it (Baskin, 1991; Von Holdt, 2003, cited in Seekings & Nattrass, 2005).

Then clear signs of tensions within COSATU itself and between the SACP and COSATU on the one side and the ANC on the side developed. This materialised in the work to construct a Workers' Charter in 1989. There were two workers' charter drafts available by the end of 1989. One of the drafts included the view that COSATU must provide the leadership, that COSATU had to maintain its independence and that they had to mobilise for a socialist future (Pillay, 1990). This version of the Workers' Charter demonstrated that COSATU was aware that the ANC was increasingly flexing its political muscle, making Lambert and Webster's (1988) claims of COSATU being able to assert union hegemony less pertinent and Friedman's (1987) call for union independence more convincing (Eidelberg, 1993).

COSATU finally emerged in the 1990s and apart from being a militant labour federation, it had the largest number of members. COSATU consolidated their power by means of democratic worker organisation, with elected leaders who were answerable to their members. This was true at the level of the workplace, where workers elected shop stewards. In a survey of COSATU shop stewards in 1991 and in 2012, it was clear that trade unions affiliated to COSATU considered their shop stewards as the "backbone of the union movement" (Satgar & Southall, 2015:3). Shop stewards were given mandates by their members and they had to report back to their membership. As trade unions grew in membership and in geographic coverage, this placed a strain on democratic practice (Maree, 2017a), but in the longitudinal survey of COSATU

members, the data confirmed that there was still strong shop-floor democracy in COSATU unions. Workplaces had elected shop stewards, members held that the shop steward had to be accountable to them, meetings were held regularly and COSATU members had their shop stewards mandates (Maree, 2017a).

COSATU, through its alliance with the ANC, had great expectations that were created by the RDP specifically. The origins of the RDP stem from a NUMSA proposal submitted in the late 1990s about creating a reconstruction accord that would link COSATU's electoral support for the ANC to its obligation to a working-class programme. The RDP helped the ANC to realise a social partnership between business, the government and labour, even though the ANC changed the original plan and moved the macroeconomic orientation away from the unions' commitment to 'growth and redistribution' in a direction more appealing for international and local capital. The pursuit of GEAR during the years of the Mandela presidency and the tenure of President Thabo Mbeki (1999-2008) introduced a substantial chasm between the ANC and its Alliance partners, only bridged at election time.

A democratic rupture developed between COSATU leaders and members, in that only a small minority of members were consulted or provided with feedback by leaders with regard to what they do at national level. Some union leaders disregarded their members' feedback and developed policies based on their own preferences and ideologies (Maree, 2017a). In addition to this, leaders do not build consensus within and between unions in COSATU. Members are not given the opportunity to formulate their needs, demands and interests. There is, therefore, no dialogue between the different constituencies within the union. This form of participatory democracy, one that provides members with a voice inside their trade unions, is the weakest.

The brief coverage of the establishment of COSATU and the deterioration in its unity in the post-apartheid years serves to stress that there was very little unity among the labour movement and that the major differences hinged around ideology (the NDR) and commitments to trade union democracy (workerism), with an increasing class division within organised labour (Satgar & Southall, 2015).

To summarise at this point, the overview of the literature on African nationalism in South Africa before 1994 revealed that the ANC historically viewed South African people as a single society

in a unitary state. As the African trade unions made efforts to consolidate non-racial unions in South Africa and to challenge national racial oppression, this took them into the territory of the National Question in South Africa. The history of SACTU demonstrated that it was nationalism that was key, ideologically speaking, in the trade union's relationship to the national liberation struggle, of which the black working class was a part. However, at certain stages, workerism and radical working-class politics also featured for a vast part of the black working class as the overview of workerism showed. The early 1970s heralded the re-emergence of political mobilisation overall and working-class organisation specifically. The advent of the Black Consciousness Movement in 1969 had been at the forefront of these acts of political revival, followed by the Durban strikes, which gave rise to the establishment of new unions for black workers. The various political traditions of charterism and workerism in the trade unions were reviewed to understand African nationalism in relation to these trade unions. Fine (1989:99) argued that in South Africa "the spontaneous uprising of black workers, particularly in the 1970s in the form of trade unionism, had working-class identity as its central unifying principle as much as it had nationalism (be it Black Consciousness or Congress)". Historically, the appeal of nationalism for black workers had been uneven in South Africa and black workers made sense of their oppression via the available dominant political framework. If it was a nationalist one, then that was what was reflected in popular consciousness (Fine, 1989), but there were other political traditions as well. This suggested that African nationalism was just one of the ideologies that appealed to African trade union members in the fight against racial oppression, just as the white supremacy ideology had been appealing to white trade unionists in their quest for racial solidarity. However, within the African nationalist agenda, the overwhelming focus had been on overcoming colonialist, imperialist and apartheid oppression. Class differences within the nationalist project tended to be minimised, criticised or even denied (Johnson, 2005).

Nevertheless, some African trade unions in South Africa were deeply moulded by the politics of national liberation and the movements and the leaders backed these politics. The adherence to nationalist ideology within trade unions had led to their suppression by the state in the 1950s, was less of a concern when COSATU was formed in the 1980s but significantly it was feared that COSATU would be subjected to the ANC's nationalism in the post-apartheid era.

In terms of racial and class oppression, within both the SACP and the black trade union movement, non-racialism was extended by the various races belonging to the same organisation and in its leadership roles. Non-reductionist notions of racialised and gendered class interpretations were conveyed in SACP ideas, as well as in trade union organising and in mass organisations with an ethical responsibility towards ensuring working-class leadership. Class and race were thus associated not just theoretically but also in mass organisations, such as trade unions, that were in opposition to capitalism, its racialised configuration and racial subjugation and a critique of capitalism all of which were interconnected (Satgar, 2019a). The ANC's idea of national democracy had overlapping racial, class and other social parameters; it is to the issues of race, class and oppression that this section turns to next.

3.6 Race, class and oppression in apartheid South Africa

As both race and class were crucial in shaping 'who got what' in South Africa (Seekings & Nattrass, 2005), theoretical traditions that analysed the relationship between race and class developed. The value of class was not gained just from theory but from noticeable connections between class and other variables. There were two sides in the literature about the connection between apartheid and capitalism, namely the 'liberal' argument and the 'radical' (or revisionist) argument (Posel, 1983; Nattrass, 2001, cited in Seekings & Nattrass, 2005) in connection to the racial and economic oppression of the black population.

The liberal side concentrated on racism and its economic consequences; the radical side focused on capitalism and the connection between economic and political matters. For the liberal advocates, what was good for big business was good for democracy, and capital was viewed as being a significant if not the key player in the battle for democracy. The radical school considered capital to be in a partnership with apartheid and so political liberation necessitated the defeat of capitalism in addition to apartheid. Scholars on both sides of the debate concurred about the effects of apartheid on the interracial allocation of wage income. Revisionist academics argued that white workers were better remunerated for what they produced and so benefitted from the surplus value created by black workers (Davies, 1973). The revisionists argued that under apartheid, the bond between race and class was conditional. While resistance to racial domination largely integrated black people across class lines, their class interests separated them

along class lines. Whether race or class succeeded was contingent on the conjuncture and it was not determined by either the class or the racial structure (Van Niekerk & Fine, 2019).

It was noted in Chapter 2 that a theoretical tradition of using the 'triple oppression' notion was used to assert that under apartheid, black women had experienced three different oppressions. They suffered discrimination as black people, as women and as members of the working class (Rabe, 2017). It is to the issues of class, race, gender, sexual orientation and nationalism as covered by the political traditions of the Freedom Charter, CST and the NDR before 1994 that this section now turns to.

3.6.1 Class, race, gender, sexual orientation, nationalism, the Freedom Charter, Colonialism of a Special Type, and the National Democratic Revolution pre-1994

The ANC recognised that there was a tension between race and class in South Africa but stressed that unity among all Africans was paramount. In the battle to defeat national racial oppression, the class relationships that bred inequality in South African society had to be tackled too and so the struggle could not be reduced to only a challenge to apartheid racism. Apartheid, an ideology upheld by the NP was launched in South Africa in 1948 and it called for the separate development of the different racial groups in South Africa. At the 'Congress of the People' in 1955 in Kliptown, Soweto, where most anti-apartheid activists were part of the ANC, the Freedom Charter was launched, and it was passed by the ANC as its official programme in 1956. The Congress Alliance was founded at the Congress of the People at Kliptown when the Freedom Charter was presented; this charter was a vision for a unified and non-racial South Africa (Callinicos, 2017). The Freedom Charter of the ANC, along with the 'Strategy and Tactics of the ANC' document, were two of the most noteworthy ANC policy documents on the ANC's nationalism before the 1990s. The Freedom Charter marked the shift from the Africanism of the earlier period of the ANCYL.

Satgar (2019a) points out that radical non-racialism, as an element of people's history of struggle, was not exclusively the ANC's non-racialism. The proposal to devise the Freedom Charter was not only the ANC's plan but that of the Congress Alliance, which comprised the ANC, the South African Indian Congress, the South African Coloured People's Organisation and the South African Congress of Democrats. The Freedom Charter had served as the programmatic

centre of national liberation politics and it signaled the hopes of all the people, together with the idea of a comprehensive non-racial democracy and nationalism.

Within the ANC, there was great disagreement over the redistributive basics of the Freedom Charter (the aims of the Charter were reliant on a redistribution of wealth and resources). Satgar (2019a) notes that this was because the Freedom Charter was anti-capitalist, fashioned by Soviet socialism, revolutionary nationalism and social democracy. The 'Africanists' in the ANC argued that since it was a socialist document and so alien to African nationalism, their contestation of the Freedom Charter was justified. However, Mandela at the time vehemently rejected the claim that the Charter epitomised 'a blueprint for a socialist state'. Furthermore, he stressed that the dispossession of the white 'mining kings' and 'land' "opened up opportunities for the development of a prosperous non-European bourgeois class" (Hudson, 1986a). Nevertheless, the Africanist tendency within the ANC was furious and this resulted in the breakaway of the Africanists into the PAC (their view of the ANC's multi-racialism was also perceived of as pandering to the white oppressors). The PAC broke away in 1959 and this possibly diluted the Africanist ethos of the ANC, but it was never eradicated.

Turning to the connections of race and class, that is the class analysis of apartheid, Hudson (1986b) argues that one very significant reading of the Freedom Charter was founded on the opinion that South Africa was a colonial society 'of a special type' and it called for the introduction of a 'national democracy' in South Africa. This was a common South African left political view and according to this view, racial oppression in South Africa was best understood when thought of as an occurrence of colonial oppression. As the South African case varied in major ways from other instances of colonialism the term CST or 'internal colonialism' was proposed. According to CST, South Africa was a special colony distinguished by the presence of two political societies: a substantially advanced white capitalist community with imperial connections and an African polity that has been conquered, was a colony of the former and that this took place within the same geographic territory (Jordan, 2004). Notably the socialist struggle could not progress separately to the larger movement for independence. The CST argument was that of a linear analysis of the two-stage theory, represented by a proposition on the obligation of developing a multi-class national democratic bourgeois struggle, or the NDR, first and foremost and subsequently, the socialist revolution (Lenin, 1906, in Mbasa, 2019).

The theory of national democracy was formed by Soviet and allied Marxists in an attempt to deal with hindrances challenging the battle for socialism in societies in which there had been little development of the productive forces and where the working class was both numerically and politically minor. It was accepted by advocates of the CST notion that neither of these features were characteristic of South Africa, but it was still maintained that the theory of the NDR was most appropriate to South Africa at the time (Hudson, 1986b). The NDR recognised that as there were many classes in South African society (this was reflected in the CST assessment), the working class could not struggle for specifically working-class interests, as the path to socialism (and eventually communism) could only take place via national democracy (Hudson, 1986a). The assumption was that South African society was structured in a particular way and within the working class, national consciousness prevailed in relation to class consciousness. This is why the national democratic strategy had to be carried out first (Hudson, 1987). As "nearly all the land and other assets" (Cronin & Suttner, cited in Hudson, 1986a) were commandeered by members of the dominant white nation, it was thought that the repressed nation would secure control of these economic resources first.

To be sure, the key statement of the CST analysis of South Africa was that there was an obligatory pre-eminence of racial over class subjectivity within the black working class in South Africa and there could be no straightforward changeover to socialism in South Africa, as a national democratic stage had to be traversed before socialism (Hudson, 1986b). The initial phase was vital for advancing capitalism, as it produced 'class demarcation' which was effective for developing the political conflict necessary for the crucial transition to socialism.

This formed the initial theoretical analysis of race and class in South Africa and revolved around the CST notion that originated from various deliberations about the character and substance of racial oppression in the 20th century. It was refined by the CPSA, who in turn were guided by the international communist assessment of the transition to socialism in colonial underdeveloped states (Mbasa, 2019). In particular, the creation of the democratic non-racial polity would expose the underlying unequal class relations in society and non-racialism would promote the class conflict in South Africa.

Directing this gradual approach was revolutionary nationalism and the Freedom Charter, which was crafted as a political programme that demonstrated the allegiance to this approach. In this way, both the national and the class question were effectively linked; in practice this meant that Marxists established relationships with multi-class formations as they all struggled for national liberation (Mbasa, 2019).

The theory of the CST and the ideology of the NDR were very powerful and were both inserted into the Freedom Charter by the ANC. The ANC remained committed to the notion that the main content of the NDR should be the "liberation of black people in general and Africans in particular" (Hudson, 1986a). The SACP maintained that class-based action was not on the agenda and could only be pursued after a victorious national revolution which would abolish the structures of racial oppression (Davies, 1973). Hudson (1986a) argues that the SACP acknowledged that the Freedom Charter was not a socialist document; that it did not call for the eradication of capitalism in South Africa and it did not raise, even indirectly, socialism. The SACP entered into an alliance with the ANC and could do so as the 'colonial' oppression in South Africa meant that the non-proletarians were also racially the subjugated classes (that is the bourgeoisie and the petty bourgeoisie), and there was a 'convergence of class interests' which implied a political pact between all the 'colonially' dominated classes in South Africa (Hudson, 1986b).

Patently then, the NDR and the Freedom Charter did not focus on the particular interests of the working class, as it never intended to do so (Hudson, 1986a). The Freedom Charter did not call for the socialisation of the means of production, nor for the setting up of a dictatorship of the proletariat in South Africa (this, however, has never stopped some from interpreting it as 'socialist' or 'anti-capitalist') (Hudson, 1986b). Van Niekerk (2017) concurs and argues that the Freedom Charter was not class-based nor was it socialist. Its claims were nationalist, based on a state that was democratic and would mediate in the economy to ensure both employment for bulk of citizens and the redistributive social policies of health, education and welfare were congruent with a deracialised South African social democratic welfare state. The theory made it plausible for the resources in the national democratic phase to be re-appropriated and transmitted to a class of black capitalists and state functionaries to control. Hudson (1986b) believes that this is indeed what Mandela predicted in 1956 would take place. In both the NDR and the CST thesis, the

handover of state power as required in the Freedom Charter would not result in the installation of a non-capitalist or supposed proto-socialist path of development, as there were no clauses in the Freedom Charter that necessitated the destruction of capitalism.

It was asserted that the two-stage theory of the NDR was more important, as the national/racial identity had not been shown by the CST theory to be predominant in South Africa. However, Hudson (1986b) contests this and argues that it was not given that the nationally oppressed proletariat did not distinguish themselves in terms of their class identity and that a much broader range of political identities existed in South Africa than what the CST analysis recognised. Yet neither of the CST and the NDR claims adequately revealed why the striving for socialism had to pass through the national democratic stage and subsequently, as legislation and state strategy, it was amended to advantage the colonially oppressed classes; it was peculiar that an amendment did not take place in light of these changes (Hudson, 1986b).

The ANC was banned in 1962 and the Charter was latent in South African politics until the emergence after 1976 of a political movement which allied itself with the Congress beliefs of the 1950s (Hudson, 1986a). The question of national oppression was to be a recurring issue for the ANC from the 1960s to the 1990s. In 1969, the ANC's 'Strategy and Tactics of the ANC' adopted by the Morogoro Conference of the ANC in Tanzania, stated that:

> *"The national character of the struggle must, therefore, dominate our approach. But it is a national struggle which is taking place in a different era and in a different context from those which characterised the early struggles against colonialism. It is happening in a new kind of world – a world which is no longer monopolised by the imperialist world system; a world in which the existence of the powerful socialist system and a significant sector of newly liberated areas has altered the balance of forces; a world in which the horizons liberated from foreign oppression extend beyond mere formal political control and encompass the element which makes such control meaningful – economic emancipation. It is also happening in a new kind of South Africa; a South Africa in which there is a large and well-developed working class whose class consciousness and in which the independent expressions of the working people – their political organs and trade unions – are very much part of the liberation front. Thus,*

our nationalism must not be confused with chauvinism or narrow nationalism of a previous epoch. It must not be confused with the classical drive by an elitist group among the oppressed people to gain ascendancy so that they can replace the oppressor in the exploitation of the mass … We are revolutionaries, not narrow nationalists."

What was significant about this statement is that the ANC was referring to the apartheid society which was marked deeply by racial inequalities; and this was the ANC's stance on non-racialism. The Morogoro Conference document explicitly stated that the ANC's national liberation movement and its nationalism was not to be confused with narrow nationalism. In Fanon's (1961) 'The Pitfalls of National Consciousness' chapter, he warns that even radical organisations, social movements and parties could slip into chauvinism and that democratic movements could be converted into professionalised and authoritarian organisations. Indeed, after succeeding in the battle for independence, African nationalism in other African countries, whether linked to assorted 'African socialisms' or not, at best led to the development of an African bureaucratic bourgeoisie, or an African class of elites, even though they had wished to empower the underprivileged.

It was argued, then, that in some cases and in the worst cases, this functioned as a smokescreen for the pillage of the national resources by the new elites. The ANC political circles were well aware of the dangers of the negative consequences of the national democratic stage as demonstrated in these countries, as nine years had passed since 1960, the year of African independence. The ANC's Morogoro 1969 document was optimistic that this would not be their fate. There was, however, great uncertainty in the Morogoro Conference document towards 'black capitalism' (Jordan, 2004), as the ANC recognised that there were discrepancies in the lifestyle, life chances and incomes among Africans. Nevertheless, the ANC believed that the common weight of national oppression would encourage the African petty bourgeoisie and the majority of African working people to unite (Jordan, 2004). The Morogoro Conference was significant as it also opened up the possibility for non-Africans to become members of the ANC, but the practical problems connected to the non-racial politics within the ANC were not decided (Ndebele, 2002).

It is to the work of Wolpe's (1972) critique of the CST and the NDR (as cited in Legassick, 2019 and Van Niekerk & Fine, 2019) that the review now briefly turns to. Wolpe's (1972) views represented another theoretical understanding of the relationship between race and class in South Africa when he wrote *Capitalism and Cheap Labour-Power in South Africa: From Segregation to Apartheid*. Wolpe (1988, cited in Legassick, 2019) accepted that there were various understandings and interpretations of the Freedom Charter due to the different historical contexts. Wolpe (1972, cited in Legassick, 2019) disputed the CST thesis and proposed that it neglected the significance of the political economy of racism and white supremacy. Wolpe (1972, cited in Legassick, 2019) thought that the CST ignored the links between racial superiority and the socio-economic power structure that generated it. In the middle of the 20th century, the rural economy of South Africa deteriorated which weakened its ability to support the marginal wages of migrants, but that this was restored by the exploitative legal system of apartheid (Scully & Webster, 2019). By overlooking this, the CST restricted the debate on national oppression to race relation presumptions and racial superiority, which were separated and considered as an independent event. In other words, it was detached from the racialised capitalist political economy that had formed and had arranged social relations that emulated unequal economic patterns (Mbasa, 2019).

Influenced by Wolpe's (1972) work, Legassick (2019) is personally unclear about the connections between race and class. There were many problems with the two-stage theory, one being that the working and timing of a struggle for socialism were not stipulated. The way that the deracialisation of capital would provide for a socialist transition were unclear too. Would the patriotic capitalist class acquiesce to the downfall of capitalism or would the liberation movement lead the majority black working class in a quest to secure its defeat (Satgar & Southall, 2015)? Legassick (2019) accepts that the CST could be understood as a description of national oppression in South African society, but this did not require agreeing with the two-stage theory of the NDR, which Legassick (2019) explicitly does not. Legassick (2019) resolves this dilemma through adopting Trotsky's theory of permanent revolution – that national oppression could be conquered only through ending capitalism in South Africa and that the permanent revolution was more appropriate for the task of launching socialism and a democratic workers' state. Legassick (2019) takes this position as ideologically he was allied with the Marxist Workers' Tendency (MWT) in the ANC. Legassick was suspended from the ANC in 1979 and

then banned by the ANC in 1985. Wolpe, a loyal SACP member and an ANC member, was friends with Joe Slovo, but was not expelled from the ANC, even though academics close to his work, such as Legassick, were (Friedman, 2015). Members of the MWT comprised exiled trade unionists (SACTU) and intellectuals. They adhered to a Trotskyist argument which was opposed to the ANC's attitudes towards black trade unionism and to the SACP's policy of a 'two-stage' revolution; that is, national liberation had to be pursued prior to the shift to socialism. Legassick was also severely critiqued by the Alliance partners who backed the ideas and practices linked to the NDR, as the MWT was often charged with overlooking the National Question. The MWT[23] argued that the struggle for national liberation could not be achieved by the black middle-class nationalists and the tools and creed of nationalism could not obliterate national oppression. Their view was that apartheid and capitalism were connected and this is why there were reservations about the idea of the two-stage revolution, first 'democratic' and then 'socialist.' Although the MWT encouraged a partnership of the working and middle class, they urged it be done according to the terms of the working class as the middle class would gain from a workers' democracy. The MWT upheld that the middle class would change course in its politics to fit the balance of forces between the capitalists and the working class. Thus, the middle class would turn to the left when the working class was dominant and it would switch to the right when the working class experienced losses. Politicians who allegedly acted for the middle class feigned this as they actually served capitalism (Wolpe, 1972, 1988, cited in Legassick, 2019).

Drawing on Wolpe (1972, 1988), Legassick (2019) too has a view that national oppression was rooted in capitalist exploitation and that logically national liberation had to be entrenched in class struggle in order for workers' democracy to be attained in South Africa. Legassick (2019) asserts that the communists were not in favour of the linking of the national democratic and socialist tasks through workers' revolution. The ANC were concerned that if the national movement committed itself to the ideology of Marxism-Leninism and openly pledged itself to the socialist alternative, that this would limit the lineup of socialist forces (Legassick, 2019). However, the

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[23] The MWT of the ANC were of the view that the idea of a two-stage revolution was a Stalinist one due to the dogma of protecting the interests of the bureaucratic caste that had seized power in the Soviet Union. It was a belief system that resisted the struggle of the working class for workers' democracy and in practice the second stage, namely the struggle for socialism, was never reached (Legassick, 2019).

ANC remained favourable to the building up of the trade union movement as they would truly speak for the interests of the working class and this would ensure their involvement in the struggle for national liberation.

To summarise at this point, Erwin (2017) helpfully pointed out that an examination of the National Question (the goal of one united nation living prosperously under democracy) spanned the breadth of politics, schools of thought and organisations, including the trade unions in South Africa, the national liberation movement in South Africa and the ANC. The reality was that as African workers were exploited economically, their day-to-day experiences created a consciousness around colonialism and racialism which trade unions used to mobilise workers along nationalistic lines (Misra, 2008). The National Question was confined to three popular narratives. One of the narratives was the CST, which stressed that South Africa was made up of two nations, the colonising and the colonised inside the same country. Another notion was that the indigenous Africans were the most subjugated members of society and so the conditions of Africans needed to be prioritised (which was more akin to narrow African nationalism or exclusive African nationalism). The third approach highlighted that South Africa was composed of many identities as it had different populations (Mistra, 2014). The difference in views held by various schools of thought of the links between race and class in apartheid South Africa were also covered. The review demonstrated that the NDR view prevailed even though the ANC at the Morogoro Conference in 1969 acknowledged the dangers of NDR as in other African countries after independence, it worked to the advantage of the new elites only.

The next section looks at the ANC's nationalism in South Africa from 1994 onwards. The literature reviewed in this section includes literature on the ANC and African nationalism, the analysis of the ANC's nationalism and hegemony, the evaluations of the NDR in the post-apartheid era. There is also a review of the literature on the ANC's nationalist policies such as BEE and literature on the trade union investment companies.

3.7   African nationalism, COSATU and the Alliance in South Africa from 1994 onwards

3.7.1 Introduction

By 1990, the ANC was a non-racial movement for all South African democrats and among its leadership and ranks were South Africans of all races. The ANC's electoral victory in the first inclusive, parliamentary election in 1994 was formed on a class alliance that it had advanced during the anti-apartheid resistance and was fortified during the lead-up to the elections in 1994 (Chipkin, 2016). The coalition encompassed elements of the black middle class, such as African teachers and nurses, the middle classes in the Bantustans and, as a result of political transformation in the 1980s, workers in trade unions and the unemployed (Southall, 2016). The ANC was politically triumphant in realising the non-racial conception of the people in the street, in the village, in the factory and in community halls and at the ballot box in 1994. With unambiguously African aspirations, the ANC viewed itself as a movement struggling for democracy and an end to white racial domination. The ANC leadership also became reconciled with white capital in the early 1990s and promised to protect private property as a way to sustain and restore white business confidence.

In sections of the ruling Alliance in post-apartheid South Africa, it was anticipated that the trade union movement would play a great and effective part in improving members' rights at work and in terms and conditions of their employment. The ANC's election pledges about political, economic and social liberation for all that were nationally oppressed and other post-apartheid government's policies were represented in the RDP. Trade union membership stood to benefit from worker-friendly policies from the government and had the opportunity to exert some authority on the government (Gall, 1997). Wolpe (1995) (cited in Fine, 2019) commends the RDP for being an inspiring progamme for welfare capitalism and the democratisation of the economy was on the agenda. The RDP did not, however, place socialism on the agenda (Fine, 2019).

As indicated already, within the labour movement, there were advocates that the independence of trade unions were paramount and they came from sections of the workerist tendency. Alongside them were senior trade unionists who argued for far more categorical support for the ANC in government, as they were optimistic that it would produce the kinds of changes that would

benefit the poorest sections of society via a social contract (and that this restructuring would be directed by a socialist perspective). Many prominent figures of the trade union movement were in favour of reinforcing the Alliance, as indicated, and they came from the powerful trade unions at the time and the general secretaries of the Food and Allied Workers' Union (FAWU), NUM, the Post and Telecommunication Workers' Association (POTWA), SACTWU and SADTU (Gostner, 1996, cited in Gall, 1997).

In a way, attention was paid to the way to reach a socialist society but working-class demands had to be tackled through the state (Pillay, 2013). That is, COSATU debated their participation in the Alliance, the advantages and disadvantages, and the role for labour. Specifically, the discussion revolved around whether 'strategic unionism' and 'bargained corporatism' (which meant constructing 'building blocks' for socialism within capitalism) signified a pact with the state and capital, that being a social contract. On the other hand, it was possible that it meant an opportunity to change society by setting up the basis for socialism and the radical transformation strategies entailed the need to establish a worker's party that would facilitate the exit from the Alliance to protect workers' interests and independence of the labour movement (Gall, 1997). Baskin (2019) advocates for 'bargained corporatism' and for it to work, what was required was strategic unionism, centralised bargaining, centralised employer organisation, the state to create the conditions for capital and labour to join in instituting a new non-voluntarist regulated industrial relations structure. Von Holdt (1991) contends that strategic unionism sidestepped the earlier 'errors' that trade unions made as they were too economistic, rash, sectional and unproductively militant.

3.7.2 The ANC and non-racialism, nationalism and the National Democratic Revolution in the post-apartheid era (1994 onwards)

As noted, the ANC's idea of national democracy had overlapping racial, class and other social parameters, it is pertinent to pay particular attention to gender and sexual orientation briefly before moving onto issues of race, non-racialism and the nationalism of the ANC in the post-apartheid era.

In terms of gender, the efforts to achieve gender equality, within the ANC and by the ANC, was uneven and not straightforward from 1912 to 1994 and was even more indirect from 1994

onwards (Hassim, 2014). The reason for this was that an order of oppressions was established within the principles of national liberation that was reconciled via the potentials of the struggle within the NDR (Satgar, 2019a). Before 1994, women's empowerment was acknowledged in its own right and as separate from the national, democratic and socialist revolution, but as an essential component for the full social transformation of the nation. There were many allowances made over the 20th century in the context of the immense pressure for gender equality to remain within the discourse of national liberation and these fed into the tensions and contradictions which became blatantly apparent in post-apartheid South Africa.

Within the post-apartheid state, the ANC's women's league performed an active and a gatekeeping role. Loyal ANC women were assigned to government departments, parliamentary committees and parastatals. Their choices were motivated by sympathies to the party and political succession instead of best performance in gender activism. Feminism in the ANC became gradually linked to positions in government and thus the principles of quotas and inclusion in the official political field propelled a few fortunate women into places of authority and wealth (Hassim, 2014).

In terms of sexual orientation equality, it was included as an item in the post-apartheid constitution predominantly as a result of the capacity of a male-directed gay rights movement to enter into tactical alliances with key figures in the anti-apartheid struggle. This movement rallied the leading narrative of equality and non-discrimination and successfully petitioned for the inclusion of sexual orientation rights during the course of the creation of the constitution (Cock, 2003).

In terms of race, when political liberation was granted in 1994, the ANC concentrated on rectifying the institutions so that they would cease to function in the interests of the white population and would attend to 'the people' instead. The ANC had struggled against apartheid's racial differences which were underscored by material inequalities which tended to homogenise the racial groups. At the time of the transition to democracy, the ANC's official emphasis was on

inclusiveness and racial reconciliation and this was in stark contradiction to the global resurgence of ethnicity and nationalism[24].

Under the administrations of President Mandela (1994-1999) and President Mbeki (1999-2008), certain government policies that advantaged facilitated the increase of the black bourgeoisie and middle class were passed, which were objectively important in a deracialised society (Southall, 2004). To be clear, non-racialism was the ANC's nation-building project and its plan for national unity in the post-apartheid era. It was the 'unbreakable thread' between the ANC and its Alliance partners in the quest for a non-racial South Africa (Anciano, 2014; Ndebele, 2002) even though the ANC had been practically organised along multi-racial lines (separate but equal) rather than on a non-racial basis.

To be clear, the ANC's non-racialism had developed alongside policies that dealt with the National Question, the NDR (and these two dealt with the empowerment of those who were the most historically oppressed) and the class analysis of apartheid.

In the post-apartheid society, the ANC claimed that it would be committed to non-racialism and to the deracialising of South African society (Filatova, 1997). This could be considered as the ANC's 'inclusive nationalism'; that is, it was humanist and universalist (Anciano, 2014) and attention was paid to transforming the political economy of institutions so that they would function for 'the people' instead of white people only, which was the promise of national liberation. The ANC remained in the eyes of many South Africans the major significant force that challenged and dismantled the apartheid regime. There was a recognition of the cultural diversity of the South African population and so there was an emphasis on the multi-culturalism of South African society, which included gender and sexual orientation equality.

The ANC affirmed that it would institute major economic transformations that would benefit the majority in post-apartheid South Africa. The ANC's version of the NDR was that of fundamental restructuring by an alliance of all classes and those committed to non-racial democracy. The non-

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[24] The globalisation era is characterised by increasing inequality and social stratification within societies, among other grave problems by some. In an attempt to address these social ills, the dominant force contesting globalisation is not class-based. Recent events in the United Kingdom, in parts of Europe and in the United States of America have shown that it is the authoritarian, conservative and neo-nationalist forces (both economic nationalism and divisive political nationalism) supported by the working class, that is prevalent.

racial trade unions that preceded COSATU also played an influential role in the transitioning process and democratisation of South Africa. The ANC recognised this by asserting that the battle against apartheid was national in character with the 'the collective of black workers whose class position and social existence placed it at the head of the struggle for freedom' (ANC, 1997b:10). South African civil servants and employees such as African nurses and teachers, for example, were aligned with the broader liberation movement and were active in the struggle against apartheid in their respective trade unions (Ngoma, 2017). However, the size of these layers are small and the black majority had experienced national racial repression. Accordingly, a black bourgeoisie and a bigger black middle stratum had to be built. What connected the new African petty bourgeoisie and black middle strata was an adherence to the ANC's African nationalism, that is non-racialism.

To understand the ANC's post-apartheid approach to non-racialism and existing views on non-racialism, information had to be inferred from the ANC's economic, political and social policies, direct statements on non-racialism as contained in documentary sources which included the NEC documents, the ANC's discussion documents, the ANC's policy documents and speeches made by top ANC officials. There was, in other words, a noted lack of a public, clear and thorough policy by the ANC on how non-racialism in post-apartheid South Africa was to be put into operation. The concept of non-racialism was symbolic (there is no doubt that the ANC wanted to build non-racialism in the post-apartheid society) but there was great ambiguity around how to action it, that is guidelines for building non-racialism were scant (Anciano, 2014). A review of some critical ANC documents in the post-apartheid era shed some light on this.

In the ANC's 1994 election document titled 'Building the Foundation for a Better Life', the ANC referred to 'a nation built by developing our different cultures, beliefs and languages as a source of our common strength' (ANC, 1994). In 1996, Deputy President Thabo Mbeki delivered the 'I am an African' speech which was the manifestation of the 'rainbow nation' (Archbishop Desmond Tutu, a South African Anglican cleric, theologian and famous anti-apartheid activist, used the term 'rainbow nation' in relation to the unity of multi-culturalism and that many different nations had come together in a country once notoriously known as one that divided the white and black races) on the adoption of the new Constitution in 1996. President Mandela stressed reconciliation, but President Mbeki highlighted the Africanism of the united nation,

although this was an Africanism that was inclusive as opposed to one that was racially defined (Cope, 2007).

Subsequently at the ANC's National Conference held in Mafikeng in 1997, a document titled 'Nation-Formation and Nation-Building' was presented. In this document there was a distinct African nationalist perspective which patently contradicted the 'melting pot of broad South Africanism' as articulated in the 'Building the Foundation for a Better Life' document (Filatova, 1997). As the ANC's credentials were that of a liberation movement, it was obligated to ideologically sustain its commitment to the past. This necessitated compliance to the belief that post-apartheid South Africa was undergoing an NDR. The intention of the NDR was to thwart the legacy of racial subjugation of the black majority, to build a united nation, to accomplish democratisation and to revolutionise power relations as the core for societal equality. The state had to take up the vital task of safeguarding equitable economic expansion and ensuring political stability (ANC, 1997c).

The reason for the publication of the ANC's 1997 'Nation-Formation and Nation-Building' document, when compared to the ANC's 1994 document, was that it was the product of debate which had been sparked by the growing intensity of Africanist feeling and the solidification of Africanist inclinations within the ANC. Indeed the 'Nation-Formation and Nation-Building' document highlighted the African quality of the emerging nation. The ANC now championed the picture of the South African nation as "an African nation on the African continent ... in outlook, in the style and content of its media, in its cultural expression, in its food, in the language accents of its children" (Filatova, 1997). The authors of the document suggested that "what is required is a continuing battle to assert African hegemony in the context of a multi-cultural and non-racial society" (ANC, 1997b, cited in Filatova, 1997). However, the context for this was that as the post-apartheid South Africa was still challenged by the relics of colonialism and apartheid (this nationalist ideology had been rife in the liberation movement, where colonialism and apartheid were viewed as a disavowal of sovereignty, self-determination and a rejection of African rights) which the predominantly African government confronted, to resolve the National Question it was necessary to strive for equality and autonomy by the many communities that had historically politically fused into a single nation state (Johnson, 2005).

Thus, significant weight was placed on Africanness, but this did not take place at the expense of an acknowledgement of the reality of the variety and continuity of cultural, religious and other identities in South Africa. What this highlighted, though, was that the ANC's conceptualisation of non-racialism was not consistently understood nor applied by the ANC throughout its history (Anciano, 2014) even though non-racialism was at the core of the anti-apartheid struggle.

Furthermore, the document made no mention of the African working-class but in place of this, the document spoke to the urgency of the upgrading of the quality of life of the poor who were 'black people in general and Africans in particular'. In other words, the 1997 ANC document raised the question of the charterist understanding of citizenship and the ANC's principles of non-racialism, but it marked a subtle shift in a direction away from the traditional notion of non-racialism in the ANC. The Africanist leaning of the document had to be placed in the context of the Africanist tradition of the ANC, which during the first decades of its establishment was ardently represented in the 1940s by the ANCYL. As indicated by Callinicos (2017), there was an Africanist tendency within the ANC at that point which lacked class connections and it articulated itself in terms of political unity rather than cultural homogeneity. It was noted, too, that this had shifted from the middle of the 1950s when the Freedom Charter became the fundamental programme document of all charterist organisations, including the ANC. The Freedom Charter programme was designed to offer a platform for a wide-ranging unity of anti-apartheid and democratic forces (Satgar, 2019a). Increasingly, the ANC's response to the divisive policy of apartheid, firstly, and its intimate connection with and then closer alignment with the SACP, secondly, all led to the enhancement of its nationalist platform. Thus ideas of class camaraderie, across the national and racial borders, of non-racialism and the nation in South Africa then took root, as already detailed.

Filatova (1997) contended that the Africanist turn might have also been encouraged by the SACP's ideology of 'colonialism of a special type' (and the ensuing need for a two-stage revolution where the matter of the first phase was 'the national liberation of the African people', which was first expressed in the 1962 programme of the party and formally accepted by the ANC at the Morogoro conference in 1969). This document was clearly aligned with the traditional Africanism section of the ANC and had to be placed in the context of the time that it was produced. There were frustrations about the lack of Africanisation of the public sector and that

minorities dominated it despite ANC appointees. The cultural agents of African nationalism were at work, stressing the contention of pride, the inventiveness (and reinvention) of black identity, styles and fashions, culture, as well as ideology ('ubuntu'), the discovery of 'Africanness', in the form of renaming of places and personalities, the reinvention and reconsideration of a black legacy in search of a new, a particularly African way forward (Filatova, 1997). Although South Africa was not exceptional when compared to the rest of the continent; in this, including Afrikaner nationalism, the Africanist tendency was voiced more forcefully and in clearer terms by the ANC leadership (including the communists) rather than by the PAC or Black Consciousness groupings (Filatova, 1997). Furthermore, racial classification could not be avoided if society had to become more representative demographically and so this reintroduced an essentialised notion of race in the post-apartheid era (Anciano, 2014).

The change in the ANC's nationalism was due to this faction of the ANC that asserted the movement was nationalist in its make-up as opposed to being socialist. The ANC (1997) noted that, "the rising black bourgeoisie and middle strata are objectively important motive forces of transformation whose interests coincide with at least the immediate interests of the majority". Indeed, the 'Nation-Formation and Nation-Building' document stressed both the ANC's non-racial position and its commitment to the strategy of deracialising South African society by being faithful to the thesis that, "the liberation of black people in general and Africans in particular" should be the core matter of the NDR.

To be clear, the Africanist turn was not a clear-cut political movement but it had acquired momentum both inside and outside the ranks of the ANC and its allies. The significance of this switch was that it prompted other important revisions and debates that took place subsequently among the Alliance partners, notably the SACP and COSATU about the NDR and non-racialism. The SACP argued that as the Soviet-style state socialist model had lapsed, there was no 'Chinese wall' between capitalism and socialism (Cronin & Mashilo, 2017) (due to the collapse of the Soviet Union). What this meant was that the SACP recognised that the stagism of the NDR reinforced misrepresented views of Marxism, which had validated colonial capitalist dispossession by maintaining that it was indispensable for the transition to socialism. The SACP subsequently proposed a third vision on revolutionary stages articulated through the refrain of 'socialism is the future, build it now' (Mbasa, 2019). This change was also necessary, as pointed

out by Cronin & Mashilo (2017), because the discussion of the National Question had become dominated by matters of race, nationality, ethnicity and identity in the post-apartheid era.

Southall (2007) argued that this is because the nationalist section had already taken control of the ANC during the political transformation. Johnson (2005) pointed out that this is why the National Question had been the focus of debates in South Africa about race and class which then took place between COSATU, the SACP and the ANC. This debate and tensions were seemingly resolved by the argument that overcoming the apartheid legacy was not the unique challenge of the National Question [25] but 'building socialism now' had to occur within the NDR agenda via advances made in reindustrialisaton, 'delinking' and the development of a non-commodified economy (Cronin & Mashilo, 2015, cited in Legassick, 2019). This brought the NDR into sharper focus.

The NDR in the post-apartheid era had become an issue of contention between activists, specifically between the socialist and the non-racial capitalist blocs within the ANC and their assessments of democracy (Mbasa, 2019). The socialist bloc emphasised ending capitalism, which they argued was reliant on race-based oppression and the intense exploitation of cheap black labour. The non-racial capitalist bloc underlined the importance of building a non-racist type of democratic capitalism and so the rise of the black bourgeoisie was the appropriate move in the direction of deracialising capitalism. The objective was not to destroy the capitalist relations of production, but to institute an arrangement for eliminating racial preferences in the development of capitalism. Although these debates were theoretical, they actively guided political policies and activity in post-apartheid South Africa at this point (Mbasa, 2019).

Although ostensibly supportive of a critical, independent civil society, ANC government leaders often attempted to marginalise civil society critics (including those within its trade union allies), by stigmatising them as defenders of a 'sectional' interest, rather than reflecting those of society as a whole (Beresford, 2012). Indeed, the ANC worked to preserve its identity as a 'liberation movement' and advanced the idea that the ANC was the base for its radical and working-class

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[25] Cronin and Mashilo (2017) argued that overcoming the apartheid legacy was not the unique challenge of the National Question. At the heart of addressing South Africa's contemporary National Question was the struggle against a persisting and specific pattern of combined and uneven development that preceded apartheid, that was reproduced in new variations during apartheid and was being continuously and actively reproduced in the post-apartheid era.

communities to achieve their liberation. The NDR was the frame for the official discourse in which the ANC, the SACP and COSATU engaged in contestation of its in-built ambiguities but this served to permit the glossing over of repeated disparities between them.

Hart (2013) argues that the formal articulation by the ANC of the 'nation' were not cynical manipulations from above. They carried powerful moral weight and connected with specific histories, memories and experiences of racial oppression, racialised dispossession and struggles against apartheid. National unity and nation-building were ideologically detached from radical non-racialism for the purposes of reconciliation in 1994. This is when nationalism in post-apartheid South Africa was turned into 'rainbowism' in order to attend to the profound old fault lines of racial repression, class exploitation and sexism. Non-racialism was consigned to the performance of racial variety in the rainbow (Satgar, 2019b).

Evidently, the post-apartheid ruling bloc's capacity to tap into deep veins of popular understandings of the National Question formed the linchpin of its hegemonic power. Expressions of the nation, African, national liberation and the NDR were deep-seated in the ANC's hegemonic project. This became the post-apartheid ANC's nationalism (Van Niekerk & Fine, 2019). Cope (2007) argued that the ANC's notion of nationalism, or South African nationalism, was specifically syncretistic. This was because the ANC's nationalism was the product of varying and conflicting assimilations of diverse theories of nationalism and the National Question, as it was based on many narratives such CST (to recap, a tactic that recognised the numerical dominance of indigenous Africans as the most subjugated members of South Africa) plus the rainbow nation approach (to recap, which stressed the many identities that made up South Africa's diverse population) (Mistra, 2014; Webster & Mawbey, 2017).

To make further sense of the ANC's nationalism, one had to place it in the context of a post-apartheid era that continued to be marked by high levels of unemployment, escalating public debt, the unfortunate weakening of democratic institutions and the ANC-led Alliance and state adopting another ideological aspect as part of post-apartheid national liberation, namely market deregulation, among others. Satgar (2019b) views these issues as evidence of the erosion of the ANC-led national liberation politics and that this provided the context for the disintegration of the nation-building nationalist narratives of the ANC. The ANC's rainbowist nationalism had led

to the deracialisation of the state and the economy, but it had not been deeply reworked via radical non-racialism. The deracialised state was seen as the equivalent of an African state, but the ANC-led ideological hegemony through radical non-racialism had been reformatted contrary to the benefit of the historical subjects of the liberation struggle, to be precise the oppressed black majority and the working class (Satgar, 2019b). The ANC-led Alliance had assembled its own intra-class connections, the working class, the middle class and parts of capital and this had been the basis for the counter-hegemonic contestation of apartheid. However, in the post-apartheid era, the hegemonic pieces had worn down, as the institutions of the mass movements, the trade unions and others, had become embedded within the national liberation movement and they were weakened (Buhlungu's (2010a) 'paradox of victory' refers).

Furthermore, within the ANC a dangerous tension developed between inclusive nationalism and populist politics over the decade of the 2000s, particularly under President Jacob Zuma's leadership, which for Hart (2013) represents dangers for the ANC's nationalism as it risked morphing into a more grave expression of nationalism, namely narrow nationalism[26]. Butler (2004:32-33) concurred that since 1999, "a quasi-Africanist" conception of history and politics has become gradually ubiquitous in the movement's leadership, and the doctrine of non-racialism has been, to some extent, eroded. The ANC's emphasis on Africanness linked it directly to the ANC and pre-empted it being claimed by the PAC.

Electoral patterns also indicated that the ANC's own devotion to African nationalism was dwindling in certain areas of South Africa such as rural provinces and regions, like KwaZulu-Natal, where its power was contingent on chiefs and traditional authorities (Hart, 2013), which was of concern to the ANC. Gumede (2013) argues that the potency of the ANC during the Mandela era was its capacity to depict itself as a more racially inclusive option as opposed to the racially segregated colonial and apartheid ruling parties of South Africa. The notion of civic nationalism was germane to Mandela's idea of a future South Africa. In civic nationalism, the various communities were bonded together by equal rights and mutual democratic cultures, values and institutions (Adam, 1994) (this was opposed to ethnic nationalism, which employed ethnicity as the key determinant of belonging). It was proposed that civic nationalism would

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[26] Hart (2013) notes that there had been a populist shift within the ANC.

conquer the race, gender and class divides as well as access to resources. Not only did Mandela not counter narrow Afrikaner nationalism with narrow African nationalism, his African nationalism was far more inclusive and non-racial in its stance. Satgar (2019b) believes that the ANC's authoritative non-racialism faced immense difficulties as its non-racial tradition was becoming shunned, especially in parts of South African society where the political traditions were founded on generalised and essentialised considerations of race and racism, as Hart (2013) argues. Gumede (2013) is convinced that there is a growing narrow Africanism that is promoted by many leaders in the ANC itself, the ANC Youth League.

The weakening of the ANC's hegemonic non-racialism nationalism opened the space for the Black Consciousness politics, ethnic nationalism and narrow populist Africanist nativisms to emerge inside of the ANC itself. The black nationalist perceptions, for example, highlighted the pre-eminence of race in the race-class debate without placing it in the socio-economic context. Another perspective, black bourgeoisie nationalism, promoted the establishment of an African capitalist class that would supersede white capital, dependent on an identity-based nationalist economic development model (Mbasa, 2019). The fashioning of nationalistic capitalists as well as the insertion of African economic elites into the upper strata of racialised capitalist arrangements was stressed. This meant that the vital power structures remained unbroken, that these positions were removed from working-class struggles and that the deliberation on creating equal race relations had morphed into sustaining social privilege and not the promotion of the welfare of the African working class (Mbasa, 2019).

Bond and Saul[27] (cited in Beresford, 2012) assert that post-apartheid South Africa was edging closer to a post-nationalist epoch and towards new class-based politics as the ANC government failed to address South Africa's socio-economic problems. This political economy reading posited that the 'exhausted nationalism' of the ANC was confronted by a new class-based politics, one which disputed the ANC's claim to a monopoly as the valid advocate of South Africa's poor. This was somewhat flawed as this review of the shifts in the ANC's African

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[27] Intellectuals such as Bond and Saul, who were part of the left politically, highlighted the negative impact of state nationalist ideologies as only encouraging anti-democratic and repressive governance traditions as well as promoting neoliberal economic policies that kept Southern African countries in a subordinate relationship to the developed world (Johnson, 2005).

nationalism in the post-apartheid era showed. Bond and Saul are wrong for 'consigning nationalism to the dustbin of history', according to Johnson (2005:4).

However, Bond and Saul (cited in Beresford, 2012) have looked only at the bourgeois and elitist foundation of nationalism. Indeed, a closer examination of how the NDR guided some of post-apartheid's racial policies signified that the nationalist project did function for elites such as the BEE policies which will be covered briefly, next. However, the ANC's nationalist politics had progressive potential for other sections of society (Johnson, 2005) such as workers and trade union investment companies, which will be examined in more detail as well.

3.7.3 Post-apartheid South Africa's racial policies

The incoming elites found in the 1990s that South Africa was marked by a sluggish economy and one that was being deregulated. A number of important events took place in the early 1990s that concerned labour that will be examined briefly.

The Convention for a Democratic South Africa (CODESA) took place in December 1991 and absent from this process was the role of labour in the democratic era (Van Wyk, 2009). To address this, in 1992 COSATU recommended that negotiations between the NP government, business and labour commence and the outcome of this was the National Economic Forum (NEF) with business and political representatives. As noted above, the ANC had endorsed the Freedom Charter in 1955, which was strong on wealth distribution and nationalisation. As South African society was marked by acute inequalities in the economy, this entailed wide-ranging state involvement for reconstruction and for growth that should take place through redistribution. However, the ANC's 'Ready to Govern' document of 1991 essentially renounced the ANC's 'socialist' trends but catered for legal acquiescence and reparations in the 'taking of property' as well as reinstatement of land rights. The Macro Economic Research Group (MERG), backed by the ANC and COSATU, published the 'Making Democracy Work: A Framework for Macroeconomic Policy in South Africa' in 1993. The document, considered as the ANC's blueprint, contained Keynesian proposals striving to find equilibrium between the radical and moderate economic angles in the ANC. The ANC announced the RDP in 1994, making it the ANC's macroeconomic policy document. Some critics saw this as evidence of the ANC submitting to big business and the international community and were concerned that the RDP

marked the ANC's deviation from some of the key ideological parts the Freedom Charter. This is why the RDP placed BEE at the centre of its redistributive policy (Ponte, Roberts & Van Sittert, 2007). However, the kind of BEE policies that were promoted under Mbeki, or which were embodied in GEAR, marked a distinct shift from the meaning embedded in the RDP.

Once elected, President Mbeki, who served as South Africa's second president, set out to fill powerful positions with his supporters. He almost immediately embarked on modernising the ANC from a broad-based liberation movement to a governing political party with market-orientated policies. At the same time, the state passed the types of policies related to social democracy, comprising labour market policies that benefitted organised labour and corporatist institutions which were set up for social dialogue about a range of public policies. The National Economic Development and Labour Council (NEDLAC) was set up in 1994 and the new Labour Relations Act was promulgated in 1995; and in it, the right to strike and organise at plant level was provided for. The Commission for Conciliation Mediation and Arbitration (CCMA) was inaugurated and the post-apartheid government addressed the legacy of the apartheid regime through the introduction of the Skills Development Act (1998) to fast-track skill development. The Employment Equity Act (1998) offered equal opportunities for the historically disadvantaged parts of the workforce. The institutional improvements that emanated from this new labour regime produced very favourable conditions for labour. This combination of pro-capital and pro-labour policies was evidence of South Africa moving closer to a class compromise, according to Webster and Adler (1999).

Yet as discussed extensively, the ANC's strategy was its focus on increasing the black middle classes and principally an entrepreneurial bourgeoisie that would become the vanguard of black incorporation into the economic mainstream. The National African Federated Chambers of Commerce (NAFCOC), an ANC-aligned body, championed black involvement in the economic mainstream as this would increase their numerical political influence. In this way, racial difficulties were posited as requiring a class response even if this advanced the formation of a prosperous capitalist economy in South Africa. This led to the ANC becoming the enabler for admission to not just the cabinet, top positions in the civil service and admission to the political elite but significantly, to the leading corporate boardrooms.

3.7.3.1 Black Economic Empowerment: The philosophy behind it and its roll-out

The ANC exercised state power to champion considerable black ownership and control of the economy, which was politically needed and unavoidable, they argued, due to the great degree of white domination of the economy in 1994. However, the employment of state power to gain greater black ownership and control was in harmony with the values of the ANC's discourse of the NDR as indicated (Beresford, 2012).

Southall (2007) argues that the foundation of a black capitalist class and the political function allocated to it advanced through three stages. Firstly, black business was used as a defence against black militancy in the late apartheid period, especially after the 1976 Soweto revolts; white business coerced the apartheid regime to extend the capitalist base by accelerating the development of a black middle class to offset the gradually radicalised local anti-apartheid efforts. The second phase was the indecisiveness in the direction of black capital under the Mandela government and the third phase was black business as the means of regime validity under Mbeki's presidency.

McKinley (2011) argues that a well-defined consideration of the central historical context within which BEE was nurtured and consequently pursued was necessary. Like Southall (2007) argues, Mckinley (2011) also points out that BEE policies had been shaped by the ANC's own history, the type of the democratic resolution that took place in 1994 and not just by the organisation of the economy. In other words, both Southall (2007) and McKinley (2011) argue that the ANC was inherently inclined to apply BEE-like policies and that in line with their own economic interests, the leadership of the earlier and post-apartheid ANC wanted a special segment of the black population to become an internal part of the capitalist system. Therefore, the notion of political independence for all black South Africans was aligned to a nationalist politics that consented to the capitalist class system. The BEE approach was more consistent with the expansion of the historic corporatist reasoning of the ANC leadership than at odds with it. The ANC believed that dividing the capitalist pie more equally with no 'revolutionary' interruptions to the political economy of South Africa would be the way to resolve any class tensions. There was no recognition that the actual problem was who was cutting up the pie and which 'pieces' were going to be consumed by whom (McKinley, 2011).

Bond (2000) points out that the circumstances for BEE during the 1990s in post-apartheid South Africa were vastly different to the environment that had existed for Afrikaner economic empowerment a half-century earlier. For example, there was robust macroeconomic growth during the Afrikaner empowerment phase, but in the 1990s but there was a global economic slump with tenable economic growth and over-traded markets. During the Afrikaner empowerment phase, South Africa's international competition was prohibited by trade barriers. The Afrikaans bourgeoisie had received patronage from a newly formed state with ambitious politicians. In the 1990s, rapid trade liberalisation took place and South Africa's industries were subjected to global competition. In the 1990s, there was an English-Afrikaans monopolisation of the economy which many of the black firms had to contend with, in addition to a contracting state with market interventions as practised by ANC leaders being put into place, as concluded by Bond (2000).

The ANC's 1997 Mafikeng National Conference firmly approved of the concept of a black capitalist class and undertook to "empower the black community in general and African people in particular', and so BEE was offered as a nation-building policy" (ANC, 2002b).

Once implemented, there were three stages of black empowerment that concerned the private sector. The first stage was dedicated to improving black ownership of the economy, which was restrained by the 'Asian crisis' of 1997-98[28]. In this phase, the ANC took over management of South Africa's parastatal sector as the ANC instantly regarded them as a vehicle for expanding black control of the economy, but also as way to increase the black middle class and for pushing for BEE through privatisation and procurement. A boom in the number of black-owned firms followed and they became considerable competitors in many sectors of the economy, such as financial services and other sectors such as the media, forestry and paper, pulp, food and beverages, and fishing. These sectors were the beneficiaries of extensive black investments (Carter, 1999, cited in Southall, 2007). Initially the advancement of black-owned firms was dependent on the acquisition of shares at the uppermost tier of corporates. This was considered as the 'minimalist' style of BEE and it revolved around encouraging black businesses.

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[28] The Asian countries affected were South Korea, Thailand, Malaysia, Indonesia, Singapore, and the Philippines. These countries has grown economically and were known as 'tiger economies' but their stock markets and currencies lost about 70 percent of their value due to their massive trade deficits. These economic tigers had been touted as models of successful capitalist development by both the International Monetary Fund and World Bank.

Furthermore, 'elite pacting' took place when large South African corporations voluntarily unbundled and appointed ANC elites to their boards. Therefore, a number of 'empowerment' arrangements between emergent black capitalists, the majority of whom had intimate political relations to the ruling ANC, and white corporate and finance capital took place. Almost instantaneously, South Africa had 'created' new black millionaires. ANC politicians praised South Africa's extremely rich individuals and some ANC political elites, beneficiaries of unbundling and BEE, circulated to business after the 1999 elections (Bond, 2000).

The Johannesburg Stock Exchange (JSE) foundered in 1997-98 (due to the Asian crisis) which impacted on this phase of BEE strategy and facilitated its collapse. Those affected by this event accused the government of failing to safeguard them, raising parallels with the measures the apartheid state implemented to safeguard white Afrikaner capital from harsh economic conditions both domestically and internationally (Southall, 2007; Bond, 2000). Furthermore, it was alleged that the ANC state's neoliberal macro-economic policy framework was essentially hostile to advancing a nascent black capitalist class since its basic policies were efficiently enabling the interests of domestic (white) and international corporate capital instead of 'its own'.

Thus, by the end of the 1990s, the 'maximalist' view of BEE started to gain traction and it stressed the need for a wide-ranging shakeup of institutions and society; not just the substitution of white individuals with black individuals (Southall, 2007). BEE had to be rescued and persuasive pleas were made to the state to adopt a more radical role in fostering black empowerment. The second phase of BEE introduced the formulation of industry empowerment charters, the Broad-Based Black Economic Empowerment Act 53 of 2003 (BBBEE) and a series of codes of implementation (Ponte, Roberts & Van Sittert, 2007, cited in Southall, 2010). The World Bank provided limited lending and grants, and between 1995 and 2007 the International Finance Corporation (IFC) invested more than US$600 million in support of BBBEE, for the development of small and medium enterprises, and supported South African companies expanding into Africa (World Bank, 2007, cited in Bond, 2000). The appointment of an ANC stalwart and former trade unionist (previously secretary-general of both the NUM and the ANC) and post-1994 businessman (chairman of media company Johnnic), Cyril Ramaphosa, currently the president of South Africa, to head a BEE Commission, was made. The second stage of BEE

was inducted by the BEE Commission in 2001, where the state implemented a firmer policy towards BEE through charters in various sectors of the economy.

Southall and Tangri (2008) argue that COSATU and the SACP harshly criticised the ANC government's neoliberal policies, with BEE at its core, as the reason for massive job losses, mounting destitution and inequality, a shortage of basic services and above all else, a betrayal of the redistributive ethos and the idea of socio-economic equality of the liberation struggle. This will be covered in more detail in Chapter 8 of this study. Evidence of this was the creation and favouring of a small and politically connected black elite that had clearly disadvantaged the bulk of the population, the poor black people. The ANC state's response to this was that the development of a planned approach to 'mainstream' BEE was part of an increasing 'developmental' state that was committed to the social and economic improvement of the black majority. The ANC asserted that this would be accomplished by generating a 'national consensus' that acknowledged but cut across racial and class lines. At the ANC's 51st national conference that took place in December 2002, it was pledged by President Mbeki that the government would draft a 'Transformation Charter' to operationalise the government's interventionist perspective.

By 2004, the ANC government had privatised R33.7 billion worth of state assets, which represented approximately 20 percent of total assets of between R150 million and R170 billion.

State-owned enterprises (SOEs) were worth 14 percent of GDP and the state and public corporations managed 44 percent of the country's reserve of fixed capital. In the period after the 2004 national elections, the ANC NEC declared that SOEs were poised to play a key role in job creation and skills development (Southall & Tangri, 2008). COSATU commended this move by government, as it was vehemently opposed to the privatisation of SOEs, as it argued that it would lead to job losses. However, COSATU and the SACP were worried that the plans to dispose of non-core assets would only benefit the 'new black elite' (Ryan 2004, cited in Southall & Tangri,

2008)[29]. The topic of privatisation had been the cause of enormous tension within the Alliance before the 2004 elections.

To address the persistent levels of inequality and poverty, the NDP identified that the state has to play a transformative and developmental role and to do this it needed a "well-run and effectively coordinated state institutions, with skilled public servants committed to the public good and capable of delivering consistently high-quality services while prioritising the nation's developmental objectives" (Southall & Tangri, 2008).

To summarise at this point, COSATU's response to the legacy of contesting the white domination of the economy via BEE was multi-dimensional. To be sure, the Alliance partners, COSATU and SACP were more uncertain of BEE, but they did not call for it to be removed. COSATU was critical as both the neoliberal and BEE intercessions of the ANC government had been ineffective in tackling the persistent proliferation of racialised inequality, poverty and unemployment in South Africa. Neoliberal policies and BEE policies had become the means for elite accumulation, rent seeking and corruption and it functioned as the ideological screen for extreme inequality (Southall, 2007). COSATU insisted that the National Question be linked to the Social Question, which was the demand for the redistribution of wealth and the right of all citizens to education, health and welfare which still had to be realised. COSATU participated in the elaboration of an industrial policy, were keen partakers in the sector job summits and made significant inputs to the Growth and Development Summit in 2003.

Even though COSATU had demanded a 'socialist South Africa' and COSATU and the SACP were critical of the ANC government's neoliberal policies, including BEE, parts of the labour federation (and the SACP) embarked on a wealth creation or 'labour capitalism' path as the federation and its affiliates inaugurated union investment companies and vast for-profit businesses (Iheduru, 2001).

Indeed, COSATU and some of its affiliates established union investment companies under the auspices of BEE. A number of independent entrepreneurs located in the financial sector took the

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[29] COSATU and the SACP vehemently disapproved of privatisation, as it led to job losses. This was the cause of enormous tension within the Alliance before the 2004 elections and was the cause of the government's change in plans.

lead in setting up union investment companies and pension investments. A review of the literature on trade union investment companies is reviewed next.

3.7.3.2. Trade union investment companies

Trade unions had built up considerable retirement (pension and provident) funds which had accrued to the affiliates in addition to trade union membership dues, which also represented an immense prospective asset. Both could be used to create jobs and 'socially responsible' investment. Therefore many 'ex-socialist' unionists used trade union investment funds to invest in various sectors of the economy such as easy money casinos, cellphone and television deals (Bond, 2000). Theron (2017) argues that COSATU money was siphoned off into investment companies without much debate. The union investment companies enabled leaders to pursue their own interests and class of 'unionaires' was created.

The investment appendages were theoretically detached from the unions, but union office bearers were appointed to attend to the trusts. It was argued that businesses had been established to deliver an autonomous supply of income for the unions and to help workers to benefit from these new economic opportunities. Initial undertakings encompassed NACTU Investment Holdings, the Mineworkers Investment Company, SACTWU Investment Holdings, the Food and Allied Workers' Union Ikwezi company, SADTU Investment Holdings, Kopano Ke Matla (COSATU's investment arm), South African Railway and Harbour Workers Union (SARHWU) Investment Holdings, and NUMSA's Investment Company[30].

The NUM's Mineworkers Investment Corporation (MIC) and the SACTWU Investment Group (SIG, housed in Hosken Consolidated Investments or HCI) became extremely prosperous union investment vehicles, providing extensively to trusts designed to help union members and their families by way of educational bursaries and social programmes (Cargill, 2010; Southall &

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[30] SARHWU Investment Holdings invested in Sanlam's Development Fund and in doing so had control over a range of substantial holdings in various firms such as Mercantile Bank and Rent-A-Bakkie. It moved into investing in information technology and financial services. COSATU's Kopano Ke Matla had a sizeable stake in Prosperity Insurance and Nicor Outsourcing, which offered IT solutions for government, parastatals and their associate interests (Iheduru, 2001). SADTU investment company (Sihold) was founded in 1999 and offered members well-priced financial services like loan consolidation and group insurance schemes (Iheduru, 2001). Far from Sihold's investments being directed by the values of social responsibility, workplace reform or extending workers' interests, their investment decisions are made on the basis of what will offer the best returns on investment.

Tangri 2006, cited in Nattrass & Seekings, 2016). HCI was 51 percent owned by NUM and SACTWU's investment arms. SACTWU Investment Holdings also had a share in Cape Talk Radio, in Vukani Gaming Corporation and Sun Hotels. MIC had a share with SACTWU Investments in Midi-TV (via Sabido Investments), a substantial investment in Primedia Outdoor, and control of Highveld Radio (now 94.7 FM). By the mid-2000s, SACTWU and NUM encompassed over 90 percent of union company investment interests, which COSATU credited to the improving stock market, BEE deals and being able to 'take advantage of opportunities in regulated telecommunications and casino industries on extremely favourable terms' (COSATU 2006). SACTWU administered six pension funds (for their members in various subsectors). These former unionists became rand billionaires due to the trade unions' investment strategy, but these trade union investment companies also delivered complementary and crucial sources of income for some of the COSATU affiliates who were short of money, as their membership had declined. On the positive side, the income earned from the trusts were dispersed to union members or their families via education bursaries or housing loans. Those who advocated for trade union investment companies also pointed out that BEE deals presented opportunities to trade unions to accrue extensive strike funds, provide workers with more influence over investment choices and theoretically to help adjust the economy in a more progressive direction which would help to strengthen democracy (Nattrass & Seekings, 2016).

The reality was that a small number of the shares that were owned by union investment companies were committed to job creation for retrenched workers and those without any employment. A lot of the investment companies focused on economic activities that were rapidly expanding like finance and information as opposed to manufacturing, agriculture and mining sectors which were languishing, but it is where most unionised black people in the private sector were employed (Iheduru, 2001). In SACTWU and the NUM, the substantial clothing worker and mineworker pension funds were used for the purchase of shares in companies. Yet when some of the trade unions took advantage of BEE deals, the outcome was that some mineworkers were retrenched. Clearly these were the downsides to the trade union investment companies. Some companies set up by NUMSA and SARHWU were not very prosperous (Southall & Tangri 2006; Vlok 1999, cited in Nattrass & Seekings, 2016). COSATU's investment arm, Kopano Ke Matla, ran a pension fund administration business that had not been approved and was implicated in the disappearance of millions of rands (Welz, 2015, cited in Nattrass & Seeking, 2016).

SACTWU's investment company lost a substantial amount of money on a botched luxury property development project and because of risky loans. The deputy general secretary of SACTWU had to be put on leave as he was the trustee of three of the five funds and legal action was instituted against various people involved, including the officials of the union.

The vociferous critics of trade union investment companies argued that they were conceptually unable to advantage workers and were more likely to undermine any struggle for socialism by COSATU (Bond, 2000). It was argued that trade union investment companies were a setback for the strategic focus of South African unionism as they came "to resemble a combination of narrow workerism and social capitalism" (McKinley 1999:85, cited in Nattrass & Seekings, 2016). The managers of the investment companies were blamed for introducing elitism and a bourgeois lifestyle that purportedly ran right through organised labour and resulted in the rapid enrichment and creation of this additional layer of the bourgeoisie. These processes obstructed the interests of the poor from being advanced. Indeed, the trade union investment companies highlighted that BEE was riddled with tensions and contradictions, particularly when it came to the participation of unions in BEE (Nattrass & Seekings, 2016).

Another contradiction of BEE and trade union investment companies was that it deepened the ties between COSATU and the patronage politics of the ANC. SACTWU had become deeply reliant on its political alliances with the governing party, not just for improved wages and industrial policies, but for BEE policies as well. SACTWU's HCI enabled it to both directly and indirectly procure considerable business benefits, which included the biggest clothing producer (Seardel) and it did this in other sectors (like the casino and media deals). SACTWU had become acquainted with capitalist risk and through its investments in the casino industry, it had secured a share in 'casino capitalism'. HCI's holdings in casinos and hotels were due to it owning its subsidiary, Tsogo Investment Holdings, which was a BEE holding company (Nattrass & Seekings, 2016).

SACTWU's membership had been traditionally located in low-wage sectors and so needed the state for the control of non-unionised employment through wage regulation and industrial policies which expedited better wages for SACTWU members. However, SACTWU's intensifying business interests strengthened its preference for fairly high-wage and capital-

intensive production models that delivered fewer but better-paid jobs. To be clear, SACTWU opted for shedding fragments of the lower-wage, more labour-intensive end of the clothing industry (Wood & Bischoff, 2019). Clothing and textile manufacturing companies in South Africa faced intense competition from abroad once the move away from a protected market, which had been maintained by active industrial policy, took place. The implementation of higher value-added production paradigms helped some firms to compete internationally and these were ones that SACTWU opted for. SACTWU's membership came to consist of better-paid workers who were paid higher union dues, but to Nattrass and Seekings (2016) this clearly indicated that SACTWU had evolved into a business union. SACTWU, its investment company and its change in recruitment strategy clearly reflected the bonds between unions, the state and capital in South Africa which had radically transformed since the end of apartheid. That is, SACTWU moved away from the low-skilled to the high-skilled section of the working class and its association with the state was more complex due to its double role as union and investor. Unions affiliated to COSATU like SACTWU gained considerably from BEE policies which increased opportunities for the up-and-coming black elite. Therefore, BEE had also benefitted largely by 'black-owned' organisations such as COSATU trade unions. Granted, the financial dividends from shares were directed by SACTWU to support its social programmes such as assisting schools and cover for victims of domestic violence, sport and recreational activities for its members, tertiary education for members' children, a housing loan plan at rates less than that of commercial banks and assurances for members to obtain loans through the National Housing Trust. Nevertheless, Nattrass and Seekings (2016) argue that SACTWU's character had changed from a working-class union into a self-sufficient moneyed entity.

Therefore, the real contradiction lay in labour's ownership of capital which was its employer and its assumed exploiter. This was a fundamental restructuring trend which also had some impact on the character and composition of COSATU trade unions in South Africa in the post-apartheid era. Known as 'labour capitalism' it emerged at the apex of the labour movement and 'behind the backs of union membership' (Iheduru, 2001). Labour capitalism involved the contradictory acceptance of capitalist accumulation in the appearance of conventional business unionism and the institution of multi million-rand trade union investment corporations (and some had listed on the stock exchange and even had international interests). For COSATU in particular, Iheduru (2001) critically remarks that labour capitalism had commercialised the integrity and ethics of a

labour movement allied to the national liberation movement that once had depended on solidarity and collective action. Indeed, Buhlungu and Psoulis (1999) argue that the distinguishing feature of the national liberation struggle was its organised nature, which meant that there was a shaping of consensus among those who were a part of it. A well-defined culture of 'us and them' developed, whereby people were welcomed as 'one of us' (a 'comrade') due to their contribution to the struggle and importantly their allegiance to its ideals of liberation, democracy and non-racialism. The 'them' represented the class (capitalism) and race (apartheid enemy) and those who broke ranks were sidelined and were even viewed as the enemy (Buhlungu & Psoulis, 1999). Trade union investment companies were not the unit of analysis at the time of Buhlungu and Psoulis' (1999) study, but as some of the anti-capitalist trade unionists were converted and became part of the accumulation of the wealth drive in the form of a resolution to create union investment companies, this was an extraordinary change in trade union policy, ideology and practice.

To summarise at this point, trade union investment companies were part and parcel of the ANC's commitment to create economic empowerment for black people as part of its non-racial nation-building plan (Iheduru, 2004). The review of literature on the ANC's strategy of BEE and labour's response to BEE and COSATU investment companies revealed that there was a palpable contradiction between the ideology of COSATU's commitment to socialism and the profitable business deals accomplished by its own trade union investment companies. This contributed to the growing distance that has developed between union leadership and its members as new 'union entrepreneurs' had the space to commence their investment undertakings in secrecy. The era of 'comrade capitalism' was boldly part of COSATU and one of the reasons for the growing weakening of COSATU as the culture of self-enrichment among the trade union leaders who had substantial shares in trade union investment companies that grew. Trade union investment companies represented the clearest blending of the state, capital and organised labour for the expansion of labour capitalism in South Africa.

3.8 Conclusion

A selection of the historical literature on trade unions, anti-colonial mobilisation and national liberation in Africa; of nationalism, nation, the nation state; of the history of Afrikaner

nationalism and trade unions and of African nationalism and trade unions in South Africa before 1994 formed the main sections that were reviewed in this chapter. A consideration of nationalism and trade unions in post-apartheid South Africa, including BEE and trade union investment companies was provided as well. The reason why these areas were examined as the historical and contemporary connections between trade unions and nationalism in South Africa were important to pay attention to. The next chapter is a review of the research design and the methodological approach used in the study and the relevant literature sourced and drawn on to support this.

Chapter 4: Researching class, contradictions and intersections – A mixed-methods approach

4.1 Introduction

This chapter starts by outlining the research design and the methodological approach used in the study. The chapter provides a justification for a mixed-methods approach by reviewing the quantitative and qualitative features of the research design, which encompasses drawing on COSATU, DENOSA and SADTU documents and policy analyses, secondary databases on labour force data for nurses and teachers of the public sector in post-apartheid South Africa; qualitative data from the 'Taking Democracy Seriously' 2014 study and, lastly, qualitative data as a result of interviews with teachers and nurses, as well as COSATU, SADTU and DENOSA officials. The chapter also outlines how the data collected for the class location of teachers and nurses was analysed. The chapter discusses the mixed-methods approach, but also why the philosophy of critical realism offers an ontology that does not compel the researcher to follow certain theories and methods. The intra-categorical approach in the intersectional analysis of the boundaries of social locations and social groups is also outlined. The chapter concludes by reflecting on the methodologies used and the ethical considerations.

4.2 Research design

Research design is a plan that outlines the elements of the research and how they are related to each other. It is an overall framework which consists of a research question, the data needed to answer the question, the methods to be used in collecting the relevant data and the analytical techniques used in order to allow the data to answer the question. The research design of this paper has two parts to it, namely a quantitative and a qualitative component (Creswell, 2003). The quantitative part consists of two main sources of data, namely (1) a statistical analysis of labour force data for teachers and nurses employed in the public sector in post-apartheid South Africa already collected by Statistics South Africa, and (2) a statistical analysis of the educational levels of teachers and nurses from the 'Taking democracy seriously workers survey' data sets. The qualitative part also draws on two main sources of data, namely (1) an analysis of

data gathered by conducting in-depth interviews with key respondents and (2) a collection of COSATU, DENOSA and SADTU documents for the documentary analysis of nationalism in COSATU.

Issues such as public sector employment and educational levels of African teachers and nurses in the South African labour market had to be probed so as to provide evidence of their class location. Once the class location of the African teacher or nurse was detected, the impact of this on COSATU, which its trade unions are affiliates of, could be investigated and implications for COSATU's membership and changes in COSATU itself could be understood. It was a quantitative approach that triggered the research and provided evidence for these factors.

4.3   Methodological approach: Mixed-methods and critical realism

Methodology is a logical set of ideas about the philosophy, methods and data for the research process and the formation of knowledge (McCall, 2005). Methodologies involve combinations of methods (these are the tools of data collection and their transformation), the systems used to implement them, and the interpretation engaged in by the researcher. On the one hand, quantitative and qualitative signify the differences about the nature of knowledge, how one comprehends the world and what the essential aim of the research is. On the other hand, the terms also represent research methods, specifically how data are collected and analysed, and the kinds of generalisations and representations that arise from the data (McMillan & Schumacher, 2006). Mostly one understands the value of collecting both quantitative and qualitative data and that there are merits of combining both qualitative and quantitative data in a single study. Social scientists have increasingly recognised that having to choose between qualitative and quantitative data is unnecessary and most have focused on the combination of both in such a way that the valuable features of each is emphasised. The challenge for the researcher is to decide at which interval the one is used and then when the other approach is more suitable. When using the mixed-methods research, one of the recommended designs that should be used is explanatory (or exploratory) design, which requires two stages to the process of data collection: quantitative data-gathering followed sequentially by qualitative data collection.

The choice of research approach is importantly connected to the research problem which the study is addressing and it could be based on the researcher's personal experiences (Creswell,

2003) as well as the type of research question in the study. In this study, distinctly identifiable qualitative and quantitative data were collected and analysed separately, but both elements were used to inform the conclusions of the study so that these were more comprehensive and meaningful than those of the qualitative or quantitative strands could have been on their own. This is known as the mixed-methods approach. The kind of research question the study had called for mixed-methods to answer research questions as it needed interrelated qualitative and quantitative elements to be combined for the response to the research question.

Mixed-methods research entails gathering both quantitative and qualitative data and linking the two sources of data (and possibly conducting more research) as a single study. The belief was that one can 'mix' the qualitative and quantitative approaches at all the stages of the research approach. Tashakkori and Creswell (2007:4) state that, "mixed-methods research is both a method and methodology for conducting research that involves collecting, analysing, and integrating quantitative and qualitative research in a single study or a longitudinal programme of inquiry. The purpose of this form of research is that both qualitative and quantitative research, in combination, should provide for a better understanding of a research problem or issue than either research approach alone". Mixed-methods research had not replaced quantitative and qualitative approaches, but worked alongside both. In mixed-methods research, the quantitative and qualitative strands were not separated but should be combined or linked in a way (Creswell, 2003). In mixed-methods research, the data collection analyses and interpretations comprised the qualitative and quantitative data from interviews, many observations, documents and questionnaires some of which is obtained directly from research participants within a single study or programme of research.

Therefore, in order to answer the primary research question of the study, which is, 'What is the significance of COSATU's public sector membership, particularly the teachers and nurses, who are members of SADTU and DENOSA, their class location and the nationalism of the post-apartheid ANC state?', a response that relied substantially on descriptive statistical deliberations that could be interpreted using the in-depth information was considered to be most advantageous.

As another part of the research question wanted to explore how the changes in COSATU itself could be used to explain the rise of nationalism in COSATU and as this had to be explored as

very little research has been done on it; then a qualitative approach to this was warranted, through the documentary analysis and case studies of COSATU, SADTU and DENOSA.

To be specific, the qualitative results of interviews with teachers and nurses as well as interviews with COSATU, DENOSA and SADTU officials and the quantitative analysis of the labour market data from African teachers and nurses of the public sector and COSATU affiliates were used to answer the research questions. This entailed using different methods to arrive at explanations. This is known as triangulation and involves employing a number of methods or sources of data in the study of social phenomena. Denzin (1970:310, cited in Bryman, 2014) claims that triangulation refers to an approach that uses 'multiple observers, theoretical perspectives, sources of data, and methodologies.' Triangulation works within and across research approaches and although connected to a quantitative research strategy, it could appear within a qualitative research approach. Triangulation is used as a method of validating results obtained from both quantitative and qualitative research (Deacon et al., 1998, cited in Bryman, 2014). Triangulation is a powerful method of combining qualitative and quantitative research and is a way of asserting that the results arising from a study using a quantitative research approach is augmented by the use of more than one way to measure a concept (Bryman, 2014). To be clear, the study uses a triangulation of procedures which is a sequential application of more than one data-collecting technique or research approach in order to look at the same phenomenon (Weyers, Strydom & Huiseman, 2008). This is known as methodological triangulation. The notion of triangulation is a key part of mixed-methods research, but one is challenged with finding a successful way of integrating the theories and the different methods with their various philosophical assumptions (Blaikie, 2000).

To do this, the research philosophy of critical realism as developed by Roy Bhaskar (1978, 1998), Margaret Archer (1998) and William Outhwaite (1998) was briefly considered.

Critical realism is a movement and a series of philosophical positions about issues such as causation, ontology, persons, structure, people and types of appropriate explanation as well as a general approach to social science. Archer (1998) asserts that critical realism is a philosophy of science, specifically a 'philosophical ontology' about which structures make up the social world. Reality is considered as a structured open system in which the actual, real and the empirical

domains are organically connected. Social structures are enduring sets of interpretations. Social structure and social action are 'intransitive objects'; that is, they are things that act and exist separate to our portrayal of them (Archer, 1998). Society is both the pervasive form or the material cause, and the persistently reproduced consequence of human agency. This is the duality of structure. Praxis is both the conscious production as well as the largely unconscious reproduction of the conditions of production – in other words, society. This is the duality of praxis. The realist meta-theory does not prescribe that explanations take place along the lines of social action or social structure. The framework for a discussion of ontological questions is what the critical realism meta-theory provides. The ontological framework is derived from the common-sense assumptions about the social world. Critical realism does not downplay the understanding of the world held by those whom we study, nor does it prioritise the social scientists' explanations of the social world.

Furthermore, critical realists consider that relations between people and structures are important to pay attention to and that the connections between structure and agency should be understood in a non-reified way. Archer (2010:202) argues that a crucial feature of relations is that:

> "It is not merely the product of perceptions, sentiments and inter-subjective mental states of empathy, but is both a symbolic fact, ('a reference to') and a structural fact ('a link between'). As such, it cannot be reduced to the subjects even though it can only 'come alive' through these subjects."

Significantly proponents of critical realism point out the stratified nature of reality and thus, in the social world, certain entities are usually invisible such as oppression, exploitation and discrimination. Although these are not necessarily detected at the empirical level, they can be observed if one, for example, measures inequalities (Haigh, Kemp, Bazeley & Haigh, 2019).

Proponents of critical realism contend that many analyses of intersectionality neglect to account for the ontology, or the 'actual' inequalities, as the bulk of attention is on the relations between them, with the result that the analyses of the inequality is usually superficial. To avoid superficiality, critical realism allows for the use of multiple methods, for theory and researcher-driven analytical processes. Causal analysis as well as a thick empirical description of a given context in analysing social problems (Fletcher, 2017) is achievable. The advantage of critical

realism is that it accommodates both positivist data (where researchers use information that is derived from many observations, recorded in a single data set and the data are reduced to look for links and relationships among variables) and interpretivist positions (which is a qualitative approach that draws on the participants' views of the situation) being combined in a single research project. Clearly more than one research approach and research strategy are possible within the same study and the arrangement of methods are essential in obtaining the answers to research questions, but this is open. It is the case that interpretivist researcher can also rely on a combination of both qualitative and quantitative methods (mixed-methods), as quantitative data may be used in a way which confirms or develops the qualitative data and actually deepens the description.

Critical realism consists of three layers, the first being the data we gather, the second being the theories we use to explain our empirical data, and the third is our metatheories, which are the philosophy and theory that underpin our theories.

Before the research starts, the researcher decides on what sorts of objects will be studied, described and explained. Whether the objects are a result of the interpretations of human beings, and to which extent they are structured by deeper causes which the human consciousness cannot know, are some of the ontological questions on which the researcher has to decide. The researcher starts with the common-sense descriptions of social phenomena in social scientific theorising. The object of enquiry is the focus. The definition of objects of social inquiry and the ontological questions are set before the choice of methods of investigation. Critically, the object of inquiry shapes the sorts of method which are fitting for the investigation.

Critical realism asserts that the social world is not observable, but what the researcher must do is ask questions about it as well as look carefully at identifying and explaining the links between social structures and the activities they direct. A distinction between the real world and the observable world is made. The real world cannot be observed, and it is separate from our human perceptions, construction and theories. We construct the world from our perspectives and experiences, through what is observable. The depth of reality, according to Bhaskar's (1978, 1998) transcendental argument, is that there are three layers in social reality, namely the real layer, the determined and actual layer and the empirical layer. The real layer is where the

mechanisms, structures and processes that are not observable but embody the actual causal mechanisms that cause the apparent phenome and events, are to be found. The actual layer is where the events and phenomena that are evident, but it is often mistaken for the real layer. The empirical layer is composed of the concrete and observable phenomena that are generally observed in the process of data collection. This layer is valuable when a researcher does not have direct access to knowledge of the actual layer and via the empirical layer as well as some models based on it, the researcher attempts to reach the actual layer (Banifatemeh, Shields, Golabi, Ghoreishi & Bayani, 2018). The real layer is the central layer of the reality and is key in the appearance of events as well as in the creation and development of the quality of social phenomena. This layer performs the dual function of providing the basis for causal explanation and it is also a critical structure and mechanism on which the solid empirical layers are accomplished. This is the layer that is independent of the scientist (Banifatemeh et al., 2018).

Critical realism emphasises the stratification aspect of reality and thus there is a need to develop particular explanations of it within the broader context. To do so does not entail drawing on social totality to explain the most atomic social activities. The dominant mode or logic of inference is neither that of induction (the shift from particular instances into a generalised conclusion) nor that of deduction (the shift from generalised beliefs that are acknowledged as true to a true and definite conclusion), but that of retroduction. Retroductive logic as the 'mode of inference' is one in which events are explained by proposing and then detecting the mechanisms that generate them. The aim is not to cover a phenomenon under a generalisation, but to recognise a factor responsible for it, that helped create it or at least assisted it. The researcher provides information on the mechanism which, if it was present and acted in the assumed manner, could explain the phenomenon that has been identified for explanation. The process of retroduction draws heavily on the investigator's viewpoint, beliefs and, importantly, their experience. Knowledge is articulated and informed by the subjectivity of the respondents and the researcher. Critical realism accepts the fallibility of knowledge and guards against the researcher believing that they succeeded in making a connection between reality and their knowledge of it.

Retroduction involves the 'triangulation' of research methods. The triangulation is used to combine the parts of the research so as to go beyond or transcend the application of particular

disciplinary methods. There is thus an ontological defence presented by the critical realists for the use of different methods of analysis or pluralism of method. Retroduction is not a formalised logic of inference, but a thought operation that shifts between knowledges and the researcher moves past a particular ontic context to another, thus creating an explanation that includes ontological depth (Outhwaite, 1998).

Critical realism separates ontology from epistemology. Epistemologically, our knowledge about reality is always culturally, historically and socially situated. Knowledge is expressed from numerous standpoints, has different effects and interests and is also altered by human activity. Critical realists, therefore, adopt the position of epistemic relativism. There is, of course, the obligation to truth, but representations of the world are eternally based on our perspectives; they are historical and they are fallible. The choice of method is not one of ontology nor model, but one that reflects the details of the question being asked. For this reason, methodological pluralism is a necessity. Thus, critical realism fits with a variety of methods, as long as the analysis corresponds to the applicable level of abstraction and the material being examined. Critical realists do not subscribe to the argument that triangulation is about qualitative insights that have to be corroborated by quantitative analysis or that only statistical generalisations are useful for inferential claims (Outhwaite, 1998).

The researcher working in the critical realism framework can employ either an interactionist and interpretivist approach to the study of the object or they can take a structuralist and materialist approach. Critical realists do not entirely reject the use of either statistics or that of interpretivism. Any of these approaches will yield an acceptable understanding of the key structures and reproductive mechanisms of social life; they will only vary in their interpretation of the composition of social reality and of how this reality can be known. That is, critical realism is the ontological theory which can then be used to standardise the explanatory concepts employed in research.

Clearly, the meta-theoretical enquiry does not limit nor validate any specific approach or empirical study, but the requirement is that the explanation model used needs to capture the empirical research. The critical realist model of explanation comprises three straightforward steps, namely the statement of a likely mechanism, the efforts involved in gathering evidence for

or against its existence, and the exclusion of probable alternatives. Critical realists use horizontal explanation, which is an account of events by mechanisms that produce them, in other words, the stimulus. In addition to this, a vertical explanation, that is a description of one mechanism by another more straightforward one, is also necessary. Reduction to either the micro level of agency or to the macro level of structure is to be avoided as both are considered as relevant to the analysis.

The point is to find qualitatively new ways to comprehend social reality, in a way that accords with our common-sense understandings. Social science is always unavoidably hesitant, theoretically pluralistic, and 'half-done'. The researcher takes on a serious and focused study of society and ideally intellectually re-tools, so as to not rely on the established and older assumptions and paradigms. As social scientists, we have to be ontologically reflexive and attentive to our investigations and in our analysis. In turn, we have to understand our own opinions about the character of the social world and our own 'ontological baggage' that informs the language we use in our analysis and we have to find a way whereby we can reflexively focus on what we claim in our accounts of the social world that we are trying to explain.

Critical realists rely on judgemental rationality and contend that there are measures for deciding which accounts about the world are better than others. Descriptive or explanatory accounts can be deployed in investigations; not all accounts are equal and one can decide which of the competing accounts is the better one and there are objective reasons that can be used that supports one model over the other one.

To be clear, adopting the critical realist philosophical stance is not a way to look for justifying using a mixed-methods approach. Critical realism positions itself as an optional paradigm to both positivism, which pays attention to issues such as looking for patterns in data and finding statistically relevant relationships between different variables, if that is the case and to the interpretivism with a focus on hermeneutics (the branch of knowledge) and description, which are used instead of causal explanations. Critical realism does not require methods of analysis to be connected to ontological positions, but those methods can be brought together in the analysis. The combination of methods in the process of drawing inferences have ontological and most usefully practical sides, and quantitative and qualitative data can be used in ways that allow the

analyst to delve into the complexity of social reality. Critical realism offers an alternative way of building on research and theory in ways that overcome the limitations of quantitative and qualitative data. Critical realists rely on combining interpretation and explanation; and the ideal objective is to provide a historical account of the social structures, the culture, the people and the like which shape interaction and action. Critical realism is a framework within which the alternative social ontologies can be reasonably compared and deliberated on without one or the other being dismissed.

Proponents of critical realism have been criticised for the weight they place on ontological realism. Critical realists believe that the power of philosophical argument must be used to establish the appropriate course for social scientific research, but one has to carry out the research successfully in order to know if the ontology is sound (Kemp, 2005). Lastly, there is very little information on the precise methods, including methods of data collection, coding and analysis that work for applied critical realism research.

Quantitative methods were the primary method for investigating the changes that had taken place in public sector employment of African teachers and nurses, in post-apartheid South Africa, from 1995 to 2018. They were also useful for the investigation of the class location of African teachers and nurses as the structured macro-level quantitative data on the labour force in South Africa as well as the educational levels of teachers and nurses from the 'Taking democracy seriously workers survey' data sets were used.

Khunou (2015) reminds us that a lot of research that was carried out on the black middle class that was either quantitative or general was on its own inadequate. Research on the black middle class needed a life history approach if one wished to fathom the phenomenon from the point of view of the inhabitants of their class location. Taking this advice, this study was complemented by drawing on qualitative data emanating from interviews carried out with African teachers and nurses who work in the public sector and are SADTU and DENOSA members, respectively, at the time of the study. The study also drew on qualitative data gathered from interviews conducted with COSATU, SADTU and DENOSA officials. The qualitative research on DENOSA and SADTU members and the quantitative findings of the changes in the employment, educational qualifications and trade union membership of African nurses and teachers in the

public sector in post-apartheid South Africa were both used to answer the research questions. In addition to this, COSATU membership affiliate data, which was available for 1994-2012, was used with qualitative data gathered from interviews with COSATU, DENOSA and SADTU officials, in order to understand the changes that had taken place within COSATU and in the Alliance of which COSATU was part. The analyses of this information guided the examination of a selection of COSATU, DENOSA and SADTU documents, another qualitative method, to look for evidence of nationalism within COSATU. A sequential process was followed in which quantitative data was analysed first and then qualitative data was used to supplement the quantitative data, but the qualitative analysis drew on the quantitative data gathered on the employment, educational levels and trade union membership of African teachers and nurses of the public sector in South Africa. This then helped to explain the changes in DENOSA and SADTU membership, which in turn helped to understand the changes in COSATU itself. This, in turn, helped mainly in assessing the qualitative data gathered from COSATU, SADTU and DENOSA documents when looking for evidence of nationalism within COSATU. Furthermore, for the class location of COSATU members of two affiliates, DENOSA and SADTU – that is, teachers and nurses who work in the public sector – qualitative data was gathered from interviews with COSATU, DENOSA and SADTU officials to build on the analysis of the quantitative data. This approach, collecting both quantitative and qualitative data, helped to bring together the strengths of both forms of research. For the investigation of nationalism within COSATU, qualitative methods only were used by carrying out a documentary analysis of COSATU documents. This was supplemented by qualitative data which had been gathered from interviews with COSATU, DENOSA and SADTU officials in order to interpret and make sense of the information that had been elected from the COSATU documents to investigate nationalism.

Thus, adopting the mixed-methods approach suited what was being investigated in the study. It would have been impractical to address the research question by relying on only one methodological approach. The mixed-methods approach also suited the researcher, as she relished both the structure of quantitative research and the flexibility of qualitative inquiry. The latter point was particularly important for this study, as teachers and nurses had to be interviewed in their private capacities (that is not in their workplaces). Of concern was the length of time it would take to complete the fieldwork among the teacher and nurses. This was elaborated on

further along in the chapter. Nevertheless, gathering a variety of evidence helped construct a more robust response to the research question.

Collecting and analysing quantitative and qualitative data provided the opportunity to use mixed-methods research, particularly one that was explanatory in nature (Creswell, 2008), which was simultaneously a method and methodology. It was used for conducting research that involved collecting, running analyses and integrating quantitative and qualitative research in a single study, that is methodological pluralism. Using both qualitative and quantitative research, in combination, provided a comprehensive understanding of a research problem than either research approach would on its own. Critical realism provided a framework in which the alternative social ontologies were compared and deliberated on without one or the other being dismissed.

4.4   The quantitative research

This part of the study relies on the analyses of two data sets. Both of these extensive databases constitute 'existing data' and so secondary data analyses was conducted by carrying out statistical analyses. This was considered as secondary research, as the data was already published (Neuman, 2000) and had been gathered from many individuals employed at various hospitals and schools in Gauteng (Creswell & Garrett, 2008). The advantages and disadvantages in using these data sources are also reviewed and finally how these data sources assisted with the findings is considered.

The reason for using data already collected was that it was already reduced numerically and was available over a 22-year period. Over this period, the number of African teachers employed in the public sector increased from 153 757 to 247 723 and over a 23-year period, African nurses employed in the public sector increased from 119 335 to 143 470. Both these increases and the vast time periods were sufficient to plot the trends in the employment levels, educational levels and trade union membership levels of African nurses and teachers. These trends could also be investigated and explained in order to provide answers to questions about the phenomenal increase in public sector employment in post-apartheid South Africa and the attendant increased in public sector trade union membership as well, particularly in COSATU. The analysis of these data sources also provided the opportunity to investigate the class location of African teachers and nurses in the public sector trade unions, SADTU and DENOSA.

The Statistics South Africa data set is precise and the research design employs the survey method of data collection using a highly structured questionnaire as the main research instrument. This is government quantitative data on employment in the South African labour market and consists of data collected from a sample of thousands using a lengthy questionnaire. The analyses provided for a more generalised picture as point of comparison and for statistical trends in the labour market in order to compare and contrast the employment, educational achievement and trade union membership for African teachers and nurses in the public sector among the various data sets. The sample is representative of the population and so inferences could be drawn if these kinds of tests were to be carried out. The descriptive statistical tests carried out concerned cross-tabulating different variables in order to plot trends in the employment of African teachers and nurses, their educational levels and their trade union membership. The output of the cross-tabulations were presented in the form of frequency tables, in that the number of people and the percentage belonging to each of the categories for the variable in question was presented and by using bar charts, which was the most frequently used method of displaying quantitative data. A hypothesis about the relationship between the variables was not under consideration for the study[31] and so the margins of error did not have to be calculated.

This data was supplemented by also analysing data on the highest educational levels for teachers and nurses by drawing on the longitudinal data set tracking COSATU's membership from 1994 to 2014. The aim of the analysis of quantitative data was to descriptively examine the relationship between variables. This study investigated the trends over time of the highest educational levels for teachers and nurses to understand if there were any changes in the educational levels. Therefore, descriptive statistical tests were carried out that did not necessitate the calculation of margins of error, as there were no inferences to be drawn about the relationship between the variables. Both data sets were analysed using the Statistical Package for the Social Sciences (SPSS). The advantages and disadvantages of using these data sets is assessed and how the use of this data helped with the findings and conclusions is discussed.

Statistics South Africa's October Household Survey (OHS), Labour Force Survey (LFS) and Quarterly Labour Force Surveys (QLFS) data sets were obtained from the 'DataFirst' website,

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[31] That is there is no working hypothesis developed which is to be tested and there is no argument being made that there is a relationship between the variables that needs to be tested for statistical significance.

which was a research data service that provided those who registered with them open access to data from South Africa (and other African countries), including the Statistics South Africa data. The OHS, LFS and QLFS data sets were available in SPSS format and were downloaded from the site. There were also two important changes implemented by Statistics South Africa to take note of that contextualised the variation in the data that were illustrated and tabulated in the various chapters on the public sector and the analysis of the African teachers and nurses of the public sector. The OHS data were not comparable to the LFS and QLFS data, but the LFS and the QLFS data were comparable. From 1994, the government's Central Statistical Service (subsequently Statistics South Africa) performed annual OHSs with a large sample of households. In 1995, the OHS was merged with a comprehensive 'Income and Expenditure Survey'. The OHS were discontinued after 1999 and put into its place was the twice-yearly LFS (Seekings & Nattrass, 2005).

Additionally, there is a lack of consistent data on income across the various Statistics South Africa LFS due to the instrumental and methodological changes, as confirmed by Forslund and Reddy (2015). Therefore, the analysis of income for the public sector was not carried out. However, it is useful to note that the Post-Apartheid Labour Market Series (PALM) is a database that contains data on earnings which can be disaggregated. This study drew on secondary data on the public sector earnings provided by credible, sources, which is disclosed in Chapter 5 on the public sector.

There were two important changes implemented by Statistics South Africa to take note of. In 2005, Statistics South Africa revised the LFS results to reflect the new population estimates released in February 2005. The data was benchmarked to the Census 2001 data and previous data had been benchmarked to the 1996 Census. This made all the data across the LFS data series comparable (LFS, September 2000 to March 2005: Historical series of revised estimates). Starting in 2005, Statistics South Africa embarked on a major revision of the LFS, which entailed making adjustments to the survey methodology, the survey questionnaire, the regularity of data-gathering and data circulation, and the survey data capture and processing systems. This was all done in order to produce the QLFS, which was now the main instrument for gathering labour market information quarterly. The LFS data from 2001 to 2007 were redesigned again to

make this entire period comparable with the QLFS data series, which started in 2008 (LFS Historical Revision: March Series, 2001-2007).

The analyses of the labour force data available for the African teachers and nurses of the public sector in post-apartheid South Africa took place first. This analysis was carried out in late 2017 and data from the Statistics South Africa databases on the various labour force surveys, namely the OHS, the LFS and the QLFS, were used. The analysis of the highest educational levels of the teachers and nurses of the public sector in the 'Taking democracy seriously workers survey' was carried out next to supplement the Statistics South Africa data.

However, the analysis of the quantitative data, like other kinds of data, only represented an aspect of 'reality'. To comprehend the trends in the employment levels, educational levels and trade union membership of African teachers and nurses, it was quite necessary to gather data from the perspective of those in the COSATU affiliates who were part of the change. Therefore, in order to explain the results of the quantitative analysis, qualitative analysis was carried out, which focused predominantly on making sense of the quantitative data and the quantitative results were further supplemented by the qualitative part of the study.

One of the challenges relied on data already collected and there were missing data. This study found that this was particularly the case for the Statistics South Africa data sets for some of the variables on which the analysis depended. The distinct disadvantage of the formal employment and educational statistics was that they did not smoothly alter into class categories and one of the aims of the study was to investigate the class location of the African teachers and nurses of the public sector. A pertinent point made by Southall (2018) is that there is the problem of defining the (middle) class, especially for those using quantitative survey data, where the data is cross-tabulated by measures of income and education.

Thus, various secondary data sets were used as sources of quantitative data and analyses were performed using basic descriptive statistic measures. These data sources were of enormous value to this study, but on their own could not answer the research question. Therefore, qualitative data was gathered and used to expand and elaborate on quantitative findings. In addition to the analysis of the survey data, references were made to individual teachers and nurses employed in

the public sector. This was indicative of the use of mixed-methods and next which qualitative methods used were considered.

4.5   The qualitative research

This section describes the qualitative methods used in this study. Semi-structured interviews with teachers and nurses were carried out, using a questionnaire that included a number of questions that had been decided on in advance as they corresponded to what was needed to answer the research, but also included space for the respondents to elaborate on their answers and to include anything the researcher had not thought of. This study used this method so that the quantitative data analysis of labour force data for the teachers and nurses of the public sector could be supplemented by the qualitative data. This was accomplished by interviewing them, asking them certain questions that were closed so that a profile of teachers and nurses in the public sector could be built. The data that was generated was used to generalise to the theory rather than to populations. The teachers and nurses also provided comprehensive answers to questions as the questionnaire had open-ended questions in it. The nurses and teachers interviewed provided important case studies for the intersectional analysis of class, race and gender.

The main impact that the qualitative method had was that the data generated was used to confirm the class location of African teachers and nurses of the public sector, which were initiated by the results of the quantitative research. The most important contribution that the qualitative data made was that it also provided empirical information that was essential for helping to further develop the study's theoretical understanding and explanations of the complexities of the social lives of African teachers and nurses so that differences, diversities and heterogeneities were exposed, through the respondents' interpretations of their lives. This study used intersectionality in the micro analysis of teachers and nurses in the public sector and this allowed for the identification of groups at the intersection of multiple categories that exposed the variations and complexities of experiences.

This study also used the data from personal interviews with trade union leaders and bargaining council officials in order to understand the income, working conditions, educational levels, broader labour issues and the labour relations system for public sector workers and the state in

order to better analyse the changes that took place in the public sector that has been revealed by the quantitative data.

Another secondary qualitative method used is secondary documentary analysis. Prior (2008, cited in Bryman, 2014) observed that documents were normally regarded by social researchers as resources to be worked on for their essential importance to be worked out. This was termed as "an unobtrusive measure of observation is any method of observation that directly removes the observer from the set of interactions or events being studied" (Denzin, 1978:256). Fifteen COSATU, DENOSA and SADTU documents were downloaded from their websites. These were considered as documents at an institutional level. Importantly, these documents were not necessarily detached from official documents that functioned at a societal level in that there were interconnections between the concepts, explanation and solutions at one level and the preparation and application at another (Sapsford & Jupp, 1996). The trade unions, like the state, had a repository of textual material such as congress reports and trade union policy documents. These documents revealed what happens inside the trade unions, the labour federation and the Alliance, and this helped to understand the culture of all of these organisation. Therefore, the documents provided an opportunity to scrutinise the social and organisational realities and were crucial in the case studies of the nurses and teachers and their trade unions. Documents were meaningful for what they were believed to accomplish and who they were created for.

Apart from the fact that the proceedings of the various trade union conferences were a record of the issues and the various actions to be taken, they did reveal such things as the preoccupations of the organisation. The proceedings of various congresses were scrutinised for the ways in which language was used to express the messages that were contained in them. Atkinson and Coffey (2011, cited in Bryman, 2014) argue that documents assumed the form of a separate reality, which they refer to as a 'documentary reality' and should not be considered as 'transparent representations' of a basic organisational or social reality; thus documents should be regarded as a clear level of 'reality' in their own right. Documents had to be analysed in terms of the environment in which they were created as well as who their audience was. Atkinson and Coffey (2011:79, cited in Bryman, 2014) convincingly argue that, 'equally, we cannot treat records – however 'official' – as firm evidence of what they report.' Therefore documents were produced for a clear purpose and were not simply reflecting reality.

Employing the interpretive approach, which was one of the palpable trends in documentary analysis, the documents under consideration were trade union and labour federation memoranda which were produced as a normal part of bureaucratic functioning. These were accessed electronically to study key aspects of institutional processes in order to look for evidence and make assertions of nationalism in COSATU. It was only at the level of COSATU, DENOSA and SADTU that the research was confined to and the aim of the analysis was not centred on challenging what was contained in the documents, but interpreting the meaning behind various sections of the documents. Key excerpts from the documents were selected and was supported by the analysis of certain newspaper reports on COSATU documents as well as conclusions written by other academics and labour scholars who, too, had examined COSATU documents. These academic texts were considered as another type of document and as 'social research findings' (Sapsford & Jupp, 1996). These kinds of documents could be challenged in terms of their explanations. A very important reason for the use of COSATU, SADTU and DENOSA documents to answer the question about nationalism within COSATU was that because interviewing officials from the federations and affiliates would not have produced the necessary information, access to the labour organisations would have been challenging and it would have been pointless trying to determine which federation official or affiliate official would be in the best position to answer questions as they may not have agreed with the question in the first place.

Most important of all, nationalism in COSATU was a question of the study and the documents were used as 'sensitising devices' as they made the researcher aware of the important issues. The most important function that the documentary analysis of COSATU, DENOSA and SADTU documents served was that they were intentionally used to advance the theoretical notion that there the ANC's nationalism in COSATU impacted on its worker-centred politics in the post-apartheid era. Furthermore, the documents served as objects of the research.

Qualitative content analysis was the most dominant approach to the qualitative analysis of documents. Importantly it involved looking for primary themes in the materials being examined. The methods through which the themes were extricated were not determined upfront. The separate themes were usually illustrated with quotations from the source document. Apart from formulating a research question to guide the documentary analysis, the researcher also had to understand the context within which the documents were produced. The researcher needed to

become acquainted with a small quantity of documents, approximately six to ten, and use these to sharpen the initial categories and then select more cases for the collection of data from documents. Therefore, the strategy of searching for themes in the data was at the core of the coding approaches that were often used in the analysis qualitative data (Bryman, 2014).

The combination of qualitative and quantitative findings produced a more complete and consistent analysis of the class location of African teachers and nurses of SADTU and DENOSA and employed in the public sector and for the study of nationalism in COSATU.

4.6   Particulars of the research process

The descriptive statistical analysis of the quantitative data was supplemented with qualitative data, mainly collected using the semi-structured interview method during the months of April, June and July of 2018. All the interviews took place in Johannesburg. A questionnaire was designed and used in semi-structured interviews with the DENOSA and SADTU members, respectively nurses and teachers who worked in the public sector. The questionnaires were administered in face-to-face interviews with the participants. It was proposed that 20 interviews would be conducted in total spread evenly among the two groups in Johannesburg and that purposive sampling to select the respondents for the interviews would be used. Purposive sampling had to be used as the participant had to be SADTU or DENOSA members. This was a typical approach to sampling in qualitative research and the research question gave a direct indication of what units (African teachers and nurses) were involved in the study and had to be sampled to answer the question (Bryman, 2014). The generic purposive sampling approach was used with respect to the selection of cases. The criteria were that the participant had to be African, teach or nurse in a public school or hospital or clinic, be members of SADTU or DENOSA, but they could vary in terms of gender, whether they were a primary or high school teacher and whether they were a professional nurse or an enrolled nurse. The snowball method of sampling was used as the teacher or the nurse had to refer me to the next teacher and nurse to interview. The other participants had to have the same characteristics as these were relevant to the research.

Next details of the data collection methods used are provided and the advantages and disadvantages of each are considered.

4.6.1 Data collection methods and analysis

In total, eight face-to-face semi-structured interviews and one telephonic interview with African nurses who worked in the public sector hospitals at locations and times that were convenient to the nurses were conducted. This made a total of nine in-depth interviews. Each interview lasted for one hour and the semi-structured questionnaire was used in the interview. In this study, to overcome the problem of hearing, recollecting and documenting only some of what was said during the face-to-face interviews with the participants, the interviews were recorded using a digital recorder (with permission obtained from the participant first), in addition to keeping extensive field notes of all that was said by the participant for each and every question asked, which could be referred back to if necessary. Both of these tactics help improve the validity and reliability of research. Personal contacts were used to make contact with one nurse for the first interview and then that nurse referred the researcher to the next nurse, whom the researcher then contacted to make arrangements for the interview.

This study had hoped to use the same method for collecting data from African teachers in the public sector who were SADTU members. The researcher managed to interview one African teacher in a public school and asked to be referred to another teacher, but instead the teacher suggested that the questionnaire be handed to teacher colleagues who could complete it in their own time. The researcher could collect the completed questionnaires after a month. This method worked. The teachers had completed the questionnaires in full and wrote comprehensive answers when they were collected. This was the advantage of qualitative research, as it is a flexible method. The method used to collect data from the African teachers who teach in public sector schools and were SADTU members was the self-completion questionnaire method (Bryman, 2014). The researcher was given the phone number of another African teacher at another school. The researcher made contact with the teacher, went to visit the teacher and agreed that the same method would be used at this second school. The researcher gave the teacher a number of questionnaires which would be handed out to teacher colleagues at this school to be completed by the teachers in their own time. They were also collected and returned after a month. Bryman (2014) proposed that the semi-structured interview and the self-completion questionnaire are similar methods of social research. This was true for this study, as the researcher used the same questionnaire for the semi-structured interviews with nurses for the teachers. The researcher had

a list of topics covered in every interview, but had more flexibility in presenting the questions to the nurse in a face-to-face interview. Far more information could be gathered in detail and complexity added during the interview with the nurses, but unfortunately this was not the case with the teachers. The researcher could delve into issues or ask the nurses to elaborate on their answers to clarify issues or really understand the sentiments behind the answers.

The questions on the questionnaire that were used for the teachers to complete on their own were designed to be easy to follow and simple to answer. The questions on the questionnaire consisted of questions that had closed questions that the teachers would find easier to answer, as they were presented with a set of fixed alternatives from which they had to choose an appropriate answer. Closed questions greatly decreased the likelihood of variability in semi-structured interviewing. The questions asked included personal factual questions such as age, occupation, marital status, income and benefits received.

The open-ended questions were used so that the teachers could answer them in their own terms. The overall design of the questionnaire was one that was easy to follow (there were no 'skip' questions) and so the risk that the teachers would fail to answer questions was reduced. There were only four open-ended questions, so the questionnaire was not too long. The biggest advantage of self-administered questionnaires is that the 'interviewer effect' is removed; that is, features like ethnicity, gender and the social background of interviewers that may have worked to prejudice the answers that respondents offered is minimised (Bryman, 2014). The researcher managed to collect eight completed self-administered questionnaires from the teachers, making a total one completed interview, and eight self-completed questionnaires with teachers.

All in all, this study collected information on the attributes of the nurses and teachers such as their age, income, educational qualifications, how many dependents they had, the work they did and what they had in their households. This study also probed their political attitudes. All of this information gathered from the nurses and teachers was used to supplement the analysis of the broader labour market data on nurses and teachers. This was done as even though the data gathered from the semi-structured interviews was rich, it was combined with the labour force data so that the weaknesses of the semi-structured questionnaires could be complemented by the strengths of the labour force data analysis. Furthermore, the qualitative analytical research was

conducted so that the quantitative analysis did not stop at the phenomenon being documented as the qualitative analysis explained why it took the form it did.

In total, 18 interviews and self-completed questionnaires with African teachers and nurses who work in the public sector and are members of SADTU and DENOSA were achieved. The strength of this approach was that there was far more comprehensive information as narrated by the voices of the participants that were provided in the form of quotes (Creswell & Garrett, 2008). The information gathered from a few cases, from essentially a community of public sector teachers and nurses, was from their own perspectives. As it was only a small group of people from whom the qualitative information was gathered and the sample size was small, the individuals selected could not be considered to be representative of the wider population. The information gathered was detailed enough for analysis, but it was not generalisable. This represented the biggest disadvantage of the method. However, this did not mean that the qualitative research in my mixed-methods study was given secondary or auxiliary status. Mason (2006:10) argues that qualitative research played a significant role in social life and argued that "social life is not defined by either quantitative or qualitative, or by simply the macro or the micro approaches". Mixed-methods researchers choose to highlight the qualitative data that they collect to explain the results of quantitative surveys or explained the method behind quantitatively measured relationships among variables (Bryman, 2014). In turn, quantitative data is an equally valuable complement to qualitative research for the purposes of theory development and the quantitative data is helpful as it is based on larger numbers that could be feasibly interviewed by the researcher in the single study (Creswell & Garrett, 2008).

In-depth interviews were conducted with one DENOSA official, one respondent who was a representative of the Public Health and Social Development Sectoral Bargaining Council and one respondent who represented the government in the Public Health and Social Development Sectoral Bargaining Council (but was part of DENOSA before this and was a provincial secretary for DENOSA). Purposive sampling was used to identify these representatives as they had to be officials of DENOSA or the bargaining council. They were identified via their websites which are public and contain contact information. They were contacted using the contact information given on the websites and they were all responsive and open to being interviewed, either at their offices or at a place that was convenient for them to meet. The researcher had

hoped to do so the same for teachers, but unfortunately after making the appropriate contact with SADTU officials and officials from the Education Labour Relations Council (ELRC), SADTU never responded to the request for an interview, despite assurances that the request would be considered. A representative of the ELRC also assured the researcher that an interview could take place provided that the research questions was sent to them ahead of the interview. The researcher complied, but the response thereafter was that the representative was unavailable for an interview and that the requested information could be found on their website. Unfortunately the 'voices' of organised labour and the labour relations bargaining system for teachers was 'missing' in the study, but this does not mean that these omissions limit the researcher's analysis, nor did the researcher need this data to draw conclusions.

Documentary analysis was conducted by seeking information directly from the content of the reports (Finnegan & Thomas, 1997), which were all available on the COSATU, DENOSA and SADTU websites. These documents constituted what could be considered as factual information in that they were prepared for COSATU, SADTU or DENOSA congresses or in the case of the policy documents, were COSATU's, SADTU's or DENOSA's statement and position on various issues. The purpose of the documentary analysis is to highlight the discrepancies between the policies, what they intend to serve (to express COSATU's disapproval of neoliberalism, their concerns about the ANC's factionalism, or their endorsement of the ANC at election time) and the practices of the trade unions and the labour federation (COSATU's failure to organise informal sector workers, factionalism within COSATU and corruption related to trade union investment companies in some unions). This study used the intra-method form, which means that two techniques of the same method to collect data, namely semi-structured interviews (conducted in 2015 with COSATU, DENOSA and SADTU officials) and documentary analysis (of COSATU, SADTU and DENOSA documents), which are both qualitative methods, to understand the impact of the ANC's nationalism in COSATU.

For the analysis of the contradictory class location of teachers and nurses, the study drew on quantitative data (the OHS, LFS and QLFS data); that is the data on occupational, employment and educational levels of the teachers and nurses of the public, to look for the trends in their occupational status (professional or registered nurses), employment (increases and decreases) and their highest educational level. This constituted the structured part of the study of the

contradictory class location of the teachers and the nurses. The teachers and nurses were interviewed (semi-structured interviews were conducted with nurses and self-completed questionnaire administered to teachers) and this was the qualitative part of the study of the contradictory class location of the teachers and nurses of the public sector, with the intersections of class with the race and gender of the teachers and nurses being the focus of the intersectional part of the analysis.

The challenge in the analysis was how to address class, which was distinct in intersectionality debates, from other inequalities. To address this, the critical realist approach was helpful too (Walby, Armstrong & Strid, 2012), as this study looked at class inequalities, among other types of social stratification. An empirical inquiry requires the investigation of all the probable issues and an evaluation of which in the precise context being studied has the most impact.

Critical realism was also helpful as the ontological framework is derived from the common-sense assumptions about the social world. The researcher had personal insight into what approach to follow in this study due to her involvement in the 'Taking democracy seriously workers survey', which was a longitudinal study of COSATU members (Nthejane, Nomvete, Malope & Tame, 2017). The research team members each brought different research skills, particularly skills in both quantitative and qualitative research, and experience of studying trade union members. Each time the survey of COSATU members was conducted, which was prior to the national elections in South Africa, the quantitative data, gathered via a nation-wide survey of COSATU members, was always supplemented by the collection of qualitative data through interviews with selected COSATU officials which helped to explain both the quantitative data but also the changes that had taken place in the quantitative data between the surveys (Nthejane et al., 2017). Used in combination, the data gathered relied on quantitative and qualitative methods. This yielded not only consistent data on COSATU's membership over a 20-year period (the surveys were conducted in 1994, 1998, 2004, 2008 and 2014) but also incredibly rich data on COSATU membership. The outcome of the success of this methodological approach was most evident in the latest publication based on the results of the fifth survey, 'Labour beyond COSATU: mapping the rupture of South Africa's labour landscape', edited by Andries Bezuidenhout and Malehoko Tshoaedi (2017). It was commended by Webster (2018) as "an excellent collection of research-based essays; informative, innovative and well written". This methodological approach

to studying both trade union members, their affiliates and labour federations in South Africa in the post-apartheid South Africa served as great inspiration for this study as it demonstrated how the strength of two approaches, when joined, led to an enhanced understanding of the research questions than either approach could accomplish on their own.

4.6.2 Data management and analysis

This study contained both qualitative and quantitative parts. Although there was no explicit 'mixed-methods question', the use of quantitative and qualitative approaches to gather data helped answer the research questions and were conducted in a sequential manner. The follow-up qualitative findings helped explain the initial quantitative results (Creswell, 2003). For this study to be fully effective, both approaches were needed in the data collection, in the analysis and in the integration of the data at certain parts of the study (Creswell, 2003).

Part of the qualitative data came from the interviews conducted with teachers and nurses. The data emanated from the questions asked and the data are summarised or presented in the form of quotes in order to show partiality towards the participants' own voices before the contents was analysed. As far as possible, patterns in the data were detected and the similarities and the differences were discussed. An intersectional approach was used for the analysis of data for the class location and its intersections with the race, gender and political identities of the African teachers and nurses. At the micro level, this involved paying attention to the experiences of the African teachers and nurses of the public sector in a qualitatively distinct way. The qualitative method allowed COSATU members to elaborate on their experiences of their working conditions, trade union experiences and societal experiences. At the macro level, the intersectional analysis focused on the specific conditions of oppression that were based on the coinciding processes of race, class and gender relations of power that were central factors in the prospects and barriers that the teachers and nurses of the public sector unions dealt with working in the public sector schools and hospitals. Where appropriate, the data from the quantitative analysis of African teachers and nurses of the public sector was also drawn on to produce explanations of the findings and the implications for the research questions. In addition to this, the literature review and conceptual framework was used to provide evidence of where the findings corresponded to or differed from the prevailing knowledge on the topic of class location

and its intersections with the race, gender and political identities of the African teachers and nurses in post-apartheid South Africa.

The data from the interviews with the DENOSA official, the bargaining council official and the official who represented the government in bargaining council were also used for the chapter on the public sector and the public sector trade unions in post-apartheid South Africa. The literature review and conceptual framework was returned to in order to provide evidence of where the findings corresponded to or differed from the prevailing knowledge on the changes in the public sector and public sector trade unions in post-apartheid South Africa. The data from the documentary analysis of COSATU, DENOSA and SADTU documents were used for the chapter on nationalism within COSATU. The literature review and conceptual framework were returned to in order to provide evidence of where the findings corresponded to or differed from the prevailing knowledge on nationalism in post-apartheid South Africa.

4.7 Limitations of the methods used

Using data already collected in such as the statistics of the labour force by a national agency like Statistics South Africa was challenging in that some data for certain variables were not present in some of the data sets of some of the years. For example, the variable of 'highest educational level' data for 2001 was not available at all and for the 'trade union membership' variable, data was not available for 1997, 2008 and 2009. Running analysis for the incomes of public sector workers would have added some texture to the analysis, but this was not necessary as information on the salaries earned by public sector workers was easily obtained and was discussed in the chapters on the public sector, the teachers and the nurses. The closest variable to income in the national statistics was 'salary increment', and data relating to how salaries were negotiated for the categories of the variable, such as 'bargaining council or other sector bargaining arrangement', were only available from 2010 onwards. These restrictions informed the number of variables available for the analysis. Even though three key variables were analysed for nurses and teachers, highest educational level, trade union membership and the number employed in the public sector, the reduction of the vast amounts of data from 24 data sets took four weeks to extract from the DataFirst website, which involved downloading the data set, applying the weights, selecting the variables for the cross-tabulations, exporting the output

into excel sheets for further manipulation, cleaning the multi-variate tables for graphical or tabular summaries of the data and then copying the graph and table into the final report.

The limitations of national statistics necessitated the collection of data for nurses and teachers from the public sector using another method and the interview method was proposed and the semi-structured interview was the tool. However, this necessitated initiating contact with the nurses and teachers and then contacting them many times before an interview could be set up. These are busy professionals who worked fixed hours during the day. It was not possible to do the interviews at their workplaces, so alternative venues had to be found for when they were available for the interview.

At least an hour was needed to gather the data from each of the nurses as quality of information was being sought. As discussed, the semi-structured interview method was not possible in the case of the teachers, but at least the questionnaire could be adapted and changed into a self-completion questionnaire for teachers to complete in their own time. This slightly compromised the quality on information gathered from the teachers and not as many open-ended answers could be used as quotes for the teachers when compared to the quality of data obtained from the nurses.

To thoroughly investigate the labour process of nursing and teaching, the actual meanings given to the work that teachers and nurses did could really only be obtained by carrying out ethnographic research, as Ozga and Lawn (1988) argue. An investigation into the experience of nursing or teaching was only properly understood from the teacher or nurse's point of view when spending time either in the classroom or in the ward. This would have helped to firmly establish the class location of the teacher or the nurse. Thus, fewer cases but more time spent with the participants, also time spent observing them in their natural setting – the hospital or the school classroom – would have provided far more comprehensive data. However, the postgraduate committee recommended that teacher and nurses not be interviewed at their place of work, due to issues of both accessing state workplaces and then the question of ethics as nurses and teachers worked with the most vulnerable sections of the population, namely those who were ill and were minors.

4.8   Ethical considerations and reflections on the research

Concern for participants was paramount in the social sciences and researchers know that they had to take steps to protect their participants and outline how they would achieve this. This was especially true for qualitative research that involved humans as the study subject. Ethical issues were the 'concerns, dilemmas and conflicts that arise over the proper way to conduct research. Ethics also guided the researcher about what to do and or what the 'moral' research procedure involves' (Neuman, 2000:90).

Postgraduate students had to apply for ethical clearance to commence with their fieldwork. The researcher submitted an application together with this research proposal to the Research & Ethics Committee of the Faculty of Humanities, University of Pretoria. The Ethics Clearance number for this study was GW201710041HS.

The study relied on the use of many sources and methods and suitable consideration was given to the ethical codes of social scientific research. For the quantitative part of the research, the researcher asked requested permission from the team of scholars who worked on the longitudinal study of COSATU membership to access the 1994, 1998, 2004, 2008 and 2014 data in order to run statistical descriptive analyses. In order to run the secondary analysis of the OHS and LFS and QLFS data, the researcher had to register with 'DataFirst', which was a data service at the University of Cape Town. The website contained South African (and African) microdata sets. The data were available in SPSS format and all that was needed was a disclosure as to what the data was used for when the various data sets were downloaded.

As teachers and nurses and representatives of trade unions and the bargaining council were to be interviewed, the prospective research participants had to be given as much information as might be needed to make an informed decision about whether or not they wished to participate in this study. This was known as informed consent and participation was voluntary. Once they had agreed to take part in the research, they were given a participant information sheet that provided an outline of the research and detailed what participation in the research required of them. The research participants were also given informed consent forms to sign, which signaled that they had consented to participate in the research and to the conditions under which they granted their consent. These forms were completed before the interview commenced. The actual names of the

respondents were not disclosed; their identity was protected, they were given a pseudonym and the school or the hospital where they were employed was not disclosed either. The researcher was advised by the postgraduate committee of the Sociology department to not interview teachers and nurses at their place of work. This meant that heads of schools or heads of hospitals could not approach to request access to interview teachers and nurses, not could the respective provincial departments of basic education and health impose bureaucratic restrictions on this study. As such, there were no gatekeepers who controlled access to subjects (Neuman, 2000) and there were no delays in the fieldwork. Personal contacts were used to recruit African teachers and nurses for the study.

For the national office bearers of COSATU, DENOSA and SADTU, the best method of contact was via an email that fully explained the purpose of this study. This worked best in securing access to the DENOSA official, the Public Health and Social Development Sectoral Bargaining Council official and the official who represented the state in the bargaining council. The actual identities of these respondents were not disclosed either and they too had to complete a participant information sheet and an informed consent form prior to the interview. The email method did not work for the SADTU official, as there was no response to the follow-up email, nor was there a response after a follow-up call to the official's office. The researcher assumed that the SADTU official did not want to participate in the study. The official from the ELRC declined the invitation to participate in the study.

The primary data obtained through the research consisted of hard copy questionnaires that were completed by hand or were in handwritten interview notes. These documents were stored in an A4 arch lever file in the rsearcher's home study and were accessible only by her and the research supervisor. All the data had been captured digitally and as the raw data was coded appropriately to protect participants' identity, there was no identifying information that could be linked to the interview transcripts.

4.9   Conclusion

This chapter discusses the use of mixed-methods in the study that enabled the production of theoretically generalisable findings. The chapter provides detail of how the secondary data from Statistics South Africa as well as from the 'Taking Democracy Seriously' surveys were analysed

to descriptively explain the trends in the employment, educational levels and trade union membership of African nurses and teachers employed in the public sector in post-apartheid South Africa, as evidence for the class location of these teachers and nurses and the implications for their labour federation, COSATU. Qualitative data from the personal interviews with the African teachers and nurses working in the public sector schools and hospitals was used to confirm their contradictory class locations and how this intersected with their other identities using an intersectional approach. Furthermore, the philosophy of critical realism (Bhaskar, 1978) was adopted as recommended. This was because this study looked at class inequalities and intersections with race and gender inequalities among COSATU public sector union members. In other words, as there was complexity in the social phenomenon under study, adopting the critical realist approach was best suited to the endeavour of uncovering these various forms of stratification. The critical realist framework and the mixed-methods approach are compatible. Critical realism offers an ontology that does not compel the researcher to follow certain theories and methods nor does it discourage the researcher from using a combination of methods. As this study used the intra-categorical approach in the intersectional analysis of the boundaries of social locations and social groups, this was complemented by the critical realist approach as the structural relations and the effects on COSATU public sector union members were being observed.

This chapter also discusses how the COSATU, SADTU and DENOSA documents and interviews with COSATU, DENOSA and SADTU officials were analysed to present evidence for nationalism in COSATU. The researcher reflected on her experience in the collection of data material within the chapter and the chapter was ended with a consideration of ethics of the research.

Chapter 5: The history of public sector employment, trade unions and the growth of COSATU public sector trade unions in post-apartheid South Africa

5.1   Introduction

This chapter presents a concise overview of the public sector, employment and trade unionism in South Africa. This chapter starts with a brief history of the public sector in South Africa and draws on available employment data and relevant literature. The chapter examines the public sector in post-apartheid South Africa and looks at employment by race as well as the increase in trade unionisation of public sector employees. It does this by drawing on the national statistics, that is the OHS, LFS and QLFS data sets. This is done in order to provide for a more generalised picture as a point of comparison and for descriptive statistical trends in the labour market, so that the increase in overall employment with African employment in the public sector in the post-apartheid era and the increase in trade unionisation of employees in the public sector can be better understood.

The chapter also looks at the bargaining council system in the public sector, income, budgets and expenditure for the public sector and the trade unions of the public sector. The extensive literature that exists on all of these issues is drawn on and presented in sufficiently brief format. The chapter also looks briefly at the public sector strikes that had taken place in post-apartheid South Africa. The chapter examines COSATU public sector trade unions in detail and tracks changes in COSATU's membership in the post-apartheid era. Where appropriate, the chapter draws on qualitative data emanating from the interviews conducted with COSATU officials, the public sector bargaining council officials, the results of the documentary analysis of COSATU's own policies and reports and the secondary analyses of the findings from the 'Taking democracy seriously workers survey' to support the analysis that is provided in the chapter.

As this study is interested in understanding the changes that had taken place in the composition of COSATU's membership, the argument is that this could be best understood by examining the changes in employment of Africans in the public sector generally and their trade union membership. This also provides the necessary framework for the study of the changes that have

taken place in the employment of African teachers and nurses of the public sector in post-apartheid South Africa. When the chapter on the public sector and the chapters on the nurses and teachers of the public sector are considered together, a more comprehensive understanding of the changes in COSATU's composition is provided.

5.2   The history of employment in the public sector in South Africa

The earliest history of public sector employment started with the South African Transport Services and the railways, which was a significant employer of white labour rather than black labour in the 1920s. The significance of this sector and the Afrikaner nationalists was covered in Chapter 3 of this study. Employment figures for Eskom were available from 1929 and for Iscor from 1928. According to Brandish (1987), total employment in the public sector was assessed to have increased from 160 000 in 1920 to 1 500 000 by 1980 and to 1 600 000 in 1985, with an average growth of four percent per annum. The Central Authorities was the chief employer in the public sector and provided for 21 percent of total employment for white people and 20 percent of employment for black people. Black employment increased in the periods 1954 to 1965 and 1974 to 1980 in the Central Authorities, with the result that by 1980 the public service employed more black people than white people. Therefore, the public sector had employed more people and the employment of black labour overtook that of white labour. The next section provides a brief overview of how these changes took place.

5.3   The apartheid state and the civil service: Employment (including occupation and skill) and unionisation trends

5.3.1 Employment trends

After the NP victory of 1948, the expansion of the apartheid state and the significant growth of the civil service, structurally and in employment, was linked to efforts by Afrikaner nationalists to change its ethnic composition and political leanings (Posel, 1999). As discussed in Chapter 3, Afrikaner nationalists saw the state as the means for the *volk* to achieve the objectives of the Afrikaner project. Therefore, the Affirmative Action policy in the civil service was a patronage plan by the NP (also known as the Nationalists). Significantly, the Public Services Act of 1957 prevented public servants from taking part in party politics, although many Afrikaner civil

servants were loyal party supporters. The legislation remained in place to prevent the materialisation of political opposition within the civil service. During the 1950s and 1960s, the Nationalists stressed the importance of quantity rather than quality in recruitment practices in order to 'colonise the civil service for the volk' (Posel, 2000:53).

To understand the trends in the number of people employed in the civil service during apartheid, one could refer to data compiled by the Public Services Commission (Posel, 1999) as data for all races employed on the civil service were available. A note of caution was that plotting the expansion of the public service during this time was not possible, as there were different sources for the employment statistics. This was linked to the fact that the number of departments which fell under the administration of the Public Service Commission (PSC) differed over time (Posel, 1999). However, a paper by Brandish (1987) provided some statistics on development in public sector development in South Africa from 1920 to 1980 and drew on Central Service Statistics data for state employment in South Africa for white and black employees from 1921 to 1980.

Despite the emphasis on quantity, labour supply to the civil service under apartheid was always limited as pointed out by both Posel (2000) and Brandish (1987). Indeed, the apartheid state had created its own labour shortages due to job reservation, which prevented the state from training black people to fill the vacant positions, but the jobs in the private sector were also more attractive. The need for more labour in the civil service in South Africa first occurred in the 1950s; yet the capacity to employ more white public servants was limited by budgetary constraints and there were difficulties in attracting white people into the civil service due to the low wages offered. Black people began to make substantial inroads into the civil service in the 1960s in order to fill the gap in employment. They were hired on a temporary basis, but the number of black people employed could not exceed the number of white people employed. They were not called public servants, but 'general temporary workers' (Brandish, 1987).

Yet it was white women, who had previously been barred from high posts, who also became employed in the civil service in the 1960s. In 1976, the public service reported a turnover of more than 50 percent of its staff in three years. There were attempts made to recruit outsiders into top positions to not only address staff shortages but also counter the incompetent and 'reactionary' bureaucrats who blocked racial reform (Posel, 2000). By 1980, employment in

education was the second most important employment activity and involved 20 percent of state employment with employment in health services representing the third largest area of public sector employment. As a proportion of total expenditure, health services ranked as the third lowest proportion of expenditure in 1980 and education expenditure actually decreased from 11 percent in 1925 to 1960 to seven percent in 1980. Both of these sectors were labour-intensive.

High levels of frustration about civil service wages was expressed by many as a result of staff shortages and many civil service staff were overloaded. During this time, public service jobs were also fragmented in addition to being poorly remunerated. There were many occupational classes and salary differentials between those in different positions in the occupational hierarchy. Wages were particularly low for public servants involved in service delivery, such as nurses and police officers, and wages differed by race and gender. Occupational differentiation persisted, with Africans and women concentrated in the low skill levels of work, except for nursing and educational work (Macun & Psoulis, 2000).

The apartheid state's homeland policy also resulted in the increase of size and number of bureaucracies in the homelands (less euphemistically and even less politely called Bantustans), the self-governing homelands and a bloated state bureaucracy (Abedien, 1984). The trends in Africans employed in the homelands were obtained from the data in Chipkin and Meny-Gibert (2012), who in turn drew on Picard's (2005) work. Brandish (1987) also confirmed that data on employment by homeland authorities only became available in 1972. Employment trends in the homelands was pertinent to look at, as the homeland governments had centralised control over education, health, agriculture and forestry, roads and works and general administration. Indeed, the greatest expansion in the number of black people was in those working for the state concentrated in the public services in the Central Authorities[32] in the 1950s and the homeland governments since the 1960s. Due to the passing of the Bantu Homelands Citizenship Act of 1970, 10 homeland territories were created, namely Gazankulu, Lebowa, KwaNdebele, KaNgwane, KwaZulu, Qwaqwa, Transkei, Bophuthatswana, Venda and Ciskei. The homelands

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[32] These were government departments that served common interests such as general administration (e.g. the Auditor General, Inland Revenue), black administration (e.g. Bantu Administration), economic services (e.g. labour, mines, transport departments), public order (e.g. police and prisons), defence, community services (e.g. the social welfare and pensions department), health and education (e.g. National Education and Bantu Education).

were supposed to be independent, but they continued to be subservient to and reliant on the Republic of South Africa economically, politically and administratively (Brandish, 1987).

Specifically, Chipkin and Meny-Gibert (2012) found that homeland administrations grew quickly between 1965 and 1971, so much so that by 1971, 3 581 black Africans served in the Transkei civil service[33] and that by 1980, the Bophuthatswana public service had 55 000 employees. In terms of teachers employed in the homelands, Brandish (1987) found data for teachers employed in Ciskei, KwaZulu, Bophuthatswana and Transkei. In Ciskei there were 2 375 teachers in 1970 and by 1973 there were 3 483 teachers; in KwaZulu, the figure for teachers was not available in 1970 and by 1973 there were 8 247 teachers; in Bophuthatswana there were 3 795 teachers in 1970 and by 1973 there were 5 094 teachers; in the Transkei, there were 7 089 teachers in 1970 and by 1973 there were 8 132 teachers. The employment data that was available for these four homeland governments was divided into officials, teachers and labourers.

By 1990, there were 197 455 public servants in the self-governing territories and another 438 599 personnel in the independent states. By 1992, the civil service in the homeland areas had increased to 638 599 people or 16 percent of their economically active populations. Quite significantly, these civil servants featured prominently among the black middle classes.

The homeland civil servants were typically in possession of basic qualifications and 'operated less according to standing orders and impersonal processed and more through patronage and personal rule' (Chipkin & Meny-Gibert, 2012:7), with the result that very few members of this cohort had experience in administering a modern state and interestingly an insufficient number of staff populated the administration. For various reasons, the structuring of the homeland system hindered the formation of reliable, neutral and rule-based bureaucracies. Nzimande (1990) argued that the strengthening of monopoly capitalism and apartheid which occurred in the early 1960s impacted the organisation of the African petty bourgeoisie. By the late 1980s, there were four different blocs, one of them being the Civil Petty Bourgeoisie. This bloc was made up of the civil servants and state employees employed in the central state administration and the Bantustans, which was the biggest layer of the African petty bourgeoisie but also included

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[33] The Transkei was the leading homeland government employer (Brandish, 1987).

nurses, teachers and clerks or the professionals. Nzimande (1990) points out that the teachers and nurses of the state and Bantustan authorities had once shared many of the conditions of the working class such as poor salaries and repressive working conditions.

The demands enacted on the ANC to fulfil the desires of racial equality were driven largely by this civil petty bourgeoisie. The black middle-class administrators of the homelands became a significant base of political support for the ANC (Hyslop, 2005 cited in Chipkin & Meny-Gibert, 2012). In total, the three houses of parliament, a president's council and the numerous white and black local authorities – the homelands of Lebowa, QwaQwa, Bophuthatswana, KwaZulu, KaNgwane, Transkei and Ciskei, Gazankulu, Venda and KwaNdebele – all together comprised 14 legislatures and 151 departments (Picard, 2005, cited in Chipkin & Meny-Gibert, 2012). South Africa was indeed administered by a complicated arrangement of governments, agencies, departments and legislatures. This inflated system was the result of the duplication in establishing administration for the individual homelands.

By 1993, there were 60 352 bureaucrats working in apartheid South Africa's then four official provinces, namely the Transvaal, the Orange Free State, Natal and the Cape; and 349 832 employees in the entire apartheid era bureaucracy, comprising the central, provincial and local government levels (Chipkin & Meny-Gibert, 2012). Just before 1994, there were nearly 650 000 homeland officials with basic qualifications, working in dysfunctional administrations that operated through patronage and personal rule and not according to formal rules and impersonal processes.

The homeland elite had political clout and this was noted in the negotiations of the early 1990s (Picard, 2005 in Chipkin & Meny-Gibert, 2012) as they collaborated with the white apartheid civil service in trying to secure their continued employment in the new administration. The homeland officials were retained and merged into the new provincial departments of the democratic period. Then the black homeland officials were promoted under the ANC administration's policies of Affirmative Action. Demographic change in the transformation of the apartheid era public service can be partly attributed to this historical political unification process. Picard (2005, cited in Chipkin & Meny-Gibert, 2012) noted that as Affirmative Action targets were rapidly achieved, the testing and establishment of qualification criteria to "address

the past limitations of the homeland system" were not implemented (Chipkin & Meny-Gibert, 2012:10).

5.3.2 Unionisation trends in the civil service in the apartheid era

Posel (2000:41) argued that even though the Affirmative Action strategy of the state was connected to a party-political project, the NP used the Afrikanerisation of the civil service as a strategy of industrial discipline in the public service. White civil servants looked to the party for jobs and patronage operated as a highly authoritarian mechanism of control. The trade unions for the white civil servants were incapable of defusing the patronage. The NP was triumphant in politicising industrial relations in a way that seriously hindered the possibilities of organised opposition or pressure on the part of civil servants. Despite their representation being curtailed, the civil servants exercised immense power as a large bloc of Afrikaner votes supporting the NP.

Favouritism, patronage and authoritarianism personified labour relations in the civil service. The Public Servants Association (PSA) (formed in 1920), a staff association, represented the interests of white public servants. The PSA remained the only organisation within the public service until the 1980s. By 1985, the PSC had granted recognition to the Public Service Union (PSU), which was for Indian public servants, the Institute of Public Servants (IPS), which was for African public servants and the Public Service League (PSL), which was for coloured public servants. Although the public sector staff representivity worked along race lines, all the organisations were represented in the Public Service Joint Advisory Council. These organisations did not think of themselves as trade unions and the question of industrial action was not significant in their mode of operation. As there was no collective bargaining in the public sector, these organisations played by the rules and thus it can be concluded that the South African civil service before 1994 was submissive to the state. The PSA and indeed even the PSC were largely seen as toothless organisations. The PSC was responsible for the state's employment code and it coordinated and regulated employment in different state departments. It was the organisation accountable for all facets of the employer-employee relationship (Macun & Psoulis, 2000).

The Public Services Act was revised in 1970 and this led to the open politicisation of the civil service and strengthened the politics of patronage (Posel, 2000). In 1979, the Wiehahn Commission noted that there would be benefits that would accrue should workers' rights be

extended to the public servants. The Wiehahn Commission recommended the extension of collective bargaining rights to the public sector and its inclusion under the Labour Relations Act. These recommendations were not politically acceptable to the government of the time (Posel, 2000).

The ANC inherited a state that carried this legacy (Posel, 2000), but under question was whether the ANC would resist the temptation to which the NP had succumbed; that is, applying political patronage as a mechanism for industrial discipline (Posel, 2000). To be clear, state employees did not have the option of unionisation before the 1990s and the unions affiliated to COSATU initially viewed organising workers within the state as too risky (Macun & Psoulis, 2000). In fact, the swift unionisation and the worker militancy of the 1980s circumvented the state until the 1990s, when the trends in the expansion in public sector industrial relations changed and mirrored those in the private sector (Macun & Psoulis, 2000).

In 1989 and 1990, it was the public sector that erupted in a wave of strikes among health workers, teachers, police and prison wardens. Many striking workers were not trade union members. Their grievances were wages, union recognition, solidarity with dismissed or harassed workers and discriminatory treatment. These African civil servants and state employees, mainly nurses, teachers and clerks, had actively resisted apartheid (Southall, 2003, cited in Modisha 2007) and were poised to play an important role in the democratic transition.

5.4   The public sector in South Africa in post-apartheid South Africa

5.4.1 Background to the transformation of the public sector in post-apartheid South Africa

The growth of public sector employment[34] in South Africa, especially since the first democratic elections in 1994, grew in tandem with the establishment of a democratic dispensation at the same time as poverty levels among black South Africans, particularly Africans, presented a challenge to the state. To address the absolute levels of poverty and inequality and their racial structure, the ANC government increased social expenditure through an expansion of the system of social support grants from 1998 onwards. Developments in the public service included those

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[34] It must be noted that employment in South Africa is still predominantly located within the private sector of the economy or 6.9 times the number of public sector employees (Van Zyl, 2017).

involved in service delivery such as teachers, health personnel and the police service (Macun & Psoulis, 2000). The Government of National Unity's (South Africa was governed by a Government of National Unity under the ANC from April 1994 to February 1997) programme for the creation of a new public service presented the vision "guided by an ethos of service" and "geared towards development and the reduction of poverty" as well as being "based on the maintenance of fair labour practices for all public service workers" (*White Paper on the Transformation of the Public Service*, 1997:14). The 1996 *White Paper on Affirmative Action in the Public Service* stated that bringing about a demographically representative public administration was crucial to attaining the legitimacy and credibility that the bulk of the South African population was looking for (Southall, 2016). In order to address the persistent levels of inequality and poverty, the NDP (a programme to address the persistent high rates of unemployment and inequality in post-apartheid South Africa) of 2012 maintained that the state had to play a transformative and developmental role and to do this, it needed "well-run and effectively coordinated state institutions, with skilled public servants committed to the public good and capable of delivering consistently high quality services while prioritising the nation's developmental objectives" (National Treasury, 2015:15).

As noted earlier on, the Civil Petty Bourgeoisie was an important recipient of ANC rule and was part of the ANC's ongoing tendencies functioning to deracialise the economy. The ANC has become South Africa's largest employer as the ANC has control over the public service and is in charge of the parastatals (Southall, 2016).

5.4.2 Employment trends of Africans in the public sector in post-apartheid South Africa

Since 1994, there had been great attempts made to demographically change the public service and the state. As mentioned above, the racial transformation initiatives included methods to incorporate the diverse governments and administrations of the apartheid period into one public service and the aim was to make the public service more typical of the make-up of South Africa's population. The reforms that took place in the public sector after 1994 in post-apartheid South Africa were initiated with the intent of broadening services to areas purposefully ignored by the apartheid state, making services accessible and aligning the services between black people and white people and regions. Black homeland officials were kept on the books when they were

amalgamated into the new provincial governments of the democratic period and they were gradually supported as the ANC administration prioritised Affirmative Action and demographic amendments in the transformation of the apartheid-era public service. In fact, Affirmative Action requirements were promptly addressed through the incorporation of homeland administrators into the new provincial system.

The *White Paper on the Transformation of the Public Service (Notice 1227 of 1997)* guided the transformation of the public sector and this was motivated by the concept of person-centred or person-driven public administration as well as the principles of equality, quality, high ethical standards and professionalism (Brand & Stoltz, 2001). The passing of the <u>Employment Equity Act of 1998</u> further strengthened the employment of Africans in the public sector. Employment of Africans had increased at all levels of the public service, including management positions. The scope of career and occupational opportunities in the public and private sector had opened up vast opportunities for black people (Brand & Stoltz, 2001) due to efforts to address past discriminatory practices.

A significant part of the transformation efforts included changing the way the public service functioned, but this was not examined in detail in this study (see Chipkin, 2016 for more information). However, a relevant point was that the incorporation of former homeland officials into the public service in post-apartheid South Africa had, according to Chipkin and Meny-Gibert (2012), led to a view of seeing the overlap of Affirmative Action with the weakening of public service in terms of skills and training. Questions of skills and training in the public service had become politicised; resulting in, as Von Holdt (2010b) argues, especially in respect of the nursing profession, an 'ambivalence to skill'. This meant that there was continuous questioning over the meaning of skill and its link with race, and what comprised skill. Von Holdt (2010b) argues that the result was that there was a diminishing of skill and an increase of incompetency across the public service bureaucracy. In the post-apartheid state, the ambivalence towards skill has found a voice in nationalism of the ANC and its policy advocates, but it had not met the needs of the poor (Von Holdt, 2010a). The ANC was concerned about the poor, but the members of influential public sector trade unions negotiated higher salaries for the Civil Petty Bourgeoisie and a growing gap between the black classes opened up. The result was that there was greater, not less, social equality between the classes (Southall, 2004). In the state, there were individuals

who comprised a tiny but extremely palpable elite. There was a hierarchy of high-ranking politicians and civil servants who were in control of the key decisions that regulated policy. The Civil Petty Bourgeoisie itself was composed of a vast and assorted portion consisting of those engaged in white-collar and service occupations, such as teachers and nurses, and so comprised the mass of civil servants below state manager level. There was also a section of state managers who were the chief political decision-makers and were united by an ideology of public service and loyalty to the ANC. These two groups were intertwined through the makeover of the public sector (Southall, 2004).

In relation to employment and using the Statistics South Africa Quarterly Employment Survey (QES) as a source of information, the public sector had become a significant part of the South African economy. In 2019, 2 106 036 people were employed by the state in South Africa, which constituted 21 percent of all employment and included 463 814 employees in national departments, 1 060 147 employees in provincial departments, 122 661 employees in extra budgetary institutions, 341 879 employees in local government and 117 535 employees in universities and technikons (Statistics South Africa, 2019). It must be noted that the QES statistics do not provide a break down employment in the public sector by race, gender nor age.

However, Bhorat et al. (2016) used the Statistics South Africa QLFS data to work out the breakdown of the public sector workforce by demographics such as race and age. The Public Service Sector Education and Training Authority (PSETA) at one point also provided some information on public sector employment in 2014 and so this is given some consideration now (as more current information than what is presented below is not available).

In 2014, 80 percent of those employed in the Public Service were African, nine percent were coloured, eight percent were white and just over two percent were Indian. Africans were clearly the predominant race group employed in the public sector when compared to other race groups (PSETA, 2014). The average age of public sector workers was 41 years, compared to 38 years of age in the private sector.

Furthermore, the majority of people employed in the public sector were women, accounting for 58 percent of employment in the sector in 2014. Women's largest share of employment in the public sector could be ascribed to the occupational and sectoral differences between the public

and private sectors. For example, two major occupations, nursing and teaching, were female-dominated and predominantly public sector occupations (PSETA, 2014).

In terms of education, in 2014, 20 percent of people working in the public sector (excluding SOEs) had a higher education degree, just over a quarter (27.4 percent) had a Grade 12 or matric qualification and a quarter (24.8 percent) had achieved an educational qualification that was below Grade 12 (PSETA, 2014). Public sector workers had a considerably higher average educational level when compared to the private sector workers and in terms of the skills profile, the public sector was more skills intensive.

Elementary occupations, or unskilled workers, such as sweepers and labourers, cleaners and helpers, farmhands and labourers, maintenance and construction labourers as well as garbage collectors have been a significant supplier of public sector job growth. Public sector jobs creation has also taken place in the service and related workers category or medium-skilled workers such as traffic officers and police, prison guards, other kinds of protective services, institution-based and home-based care workers, technikon teacher training, cooks and childcare workers. Higher skilled jobs such as finance and administrative managers and legislators as well as primary and secondary school teachers are also responsible for public sector job growth (Bhorat et al, 2016).

Bhorat et al. (2016) contend that there was continued growth in employment in the South African public sector which was statistically significant, even when strikes in the public sector took place or global financial crises hit, such as the one in 2008, both examples of periods of 'extreme labour market distress' (Bhorat et al., 2016). Public sector employment grew rapidly during 2009 after the 2008 financial crisis, predominantly in unskilled and medium skilled labour[35], and it was the state that was the creator and sustainer of employment during economic shocks. The public sector in South Africa was resilient to these structural events which should have negatively affected employment, but did not.

The availability of employment in the public sector also presented an opportunity for those employed in the sector for upward social mobility, especially at the top end of the income distribution. It was argued that it had been this labour market trend which could be linked to an

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[35] Public sector employment declined from the mid-1990s (Bhorat et al., 2016) by freezing posts due to budget restrictions.

increase in the black share of affluence in South Africa's post-apartheid era, as the public sector was more likely than the private sector to employ Africans (Yu, 2007).

In terms of teachers and nurses employed in the public sector, as of 2014, there were 490 884 filled positions in the education sector in provincial government (or 54 percent of all public sector employment) and 307 042 in the health sector (in other words, 33 percent of all public sector employment) (National Treasury, 2015). The education sector accounted for more than half of the provincial workforce. Across the public sector, earnings per employee grew and since 2008, these growth rates were comparable to those in the private sector (National Treasury, 2015).

As the number of state employees in the central and provincial government increased, by as much as 27 percent between 2005 and 2012, the average per capita remuneration doubled during this period as well (the remuneration bill increased by 76 percent) (Satgar & Southall, 2015). In 2019, as was the case in the past, education received the greatest portion of South Africa's 2019 budget, with R262.4 billon allocated to basic education in the next financial year. The funds were used to pay teachers, with R30 billion set aside for building new schools and repairing current infrastructure (Presence, 2019). South Africa boosted spending on the National Health Insurance (NHI) programme, which was budgeted at an average annual rate of 36.6 percent. In 2018/19, R1.2 billion was set aside for NHI; this will increase to R3 billion in 2021/22. The NHI was a health financing system intended to reserve funds, so that access to quality, inexpensive personal health services for all South Africans regardless of their socio-economic status, could be provided. A total of R23.5 billion have been allocated over the medium-term expenditure framework (MTEF) to improve health infrastructure such as new facilities and refurbishments. There were plans to employ more health professionals and the budget for this has been increased by R1.6 billion over the MTEF (Mapenzauswa, 2019).

To assess what the public sector employee earns, the best source of information for this data was the analysis of compensation trends that complement the mid-term budgets. As expected, spending on the remuneration of state employees has also grown in the post-apartheid era. Currently, in terms of the overall budget for the public sector, it accounts for 35.3 percent of consolidated expenditure. Therefore, over a third (35 percent) of South Africa's R1.67 trillion

budget is dedicated to paying the salaries of public sector workers. In 2016/17, the average public servant's salary was almost R338 000 a year, or just over R28 000 a month (Donnelley, 2017). Therefore, increased remuneration in the public sector had been driven by salary increases and part of this increase was due to above-inflation increases to basic salaries because of annual cost-of-living adjustments and the introduction of occupational specific dispensations (OSDs) to improve the pay and conditions of service such as those of teachers and nurses (teachers earn more than any other large OSD group) and promotions and salary progressions.

According to Forslund and Reddy (2015), mean wages in the economy increased by between 37 percent and 35 percent for all workers between 2003 and 2011. For public sector workers, wages increased by 22 percent in the same time period. The median and mean wages of union members also increased between 1997 and 2011. The median wages for union members increased by 27.43 percent and the mean wages for union members increased by 42.36 percent.

However, the mean wages for highly skilled workers, who are mostly managers and professionals, increased by 69.4 percent between 1997 and 2011 (Forslund & Reddy, 2015). Wages for blue-collar workers, some of whom are in the public sector too, remained stagnant over this time. Once average real wage trends were disaggregated, only a minority of the best-paid workers made up this change, making the professional and managerial petty bourgeoisie the real labour aristocracy (Forslund & Reddy, 2015).

Growth in public sector employment was driven by employment in national, provincial and local government structures. According to the Department of Public Service and Administration (DPSA), a project with the objective of improving the quality of data capturing into the Persal system had taken place and this had enhanced the consistency of Persal data (PSETA, 2014). It was not possible to access the Persal system without formal permission, which was beyond the scope of this study, to obtain the actual employment figures.

In order to gain some picture of employment in the public sector, Table 1 was constructed. It provides figures for all employment in the public sector, government employees only (that is those who are employed at the national, provincial and local levels) and contrasts this to Africans employed in the government (that is those who were employed at the national, local provincial and local government levels), from 2000 to 2018, drawing on the labour force data in selected

quarters contained in the LFS (2000-2007) and the QLFS (2008-2018) as collected by Statistics South Africa. To recap, the LFS and the QLFSs are household-based sample surveys conducted by Statistics South Africa. Data on the labour market activities of individuals aged 15 years and older who live in South Africa were collected for information on those employed in the public sector in South Africa.

The Statistics South Africa data files were downloaded from the DataFirst website. The Statistical Package for the Social Sciences (SPSS) was used to run the analysis of the data. Excluded from Table 1 are those employed in SOEs. It was possible to distinguish within the public sector between individuals employed by government (national, provincial and local) and those employed in SOEs, or 'government-controlled businesses'. To obtain data for 'All Government' employees (national, local provincial and local government)' a frequency for the variable, 'type of business' across all LFS and QLFS data sets from 2000 to 2018 was run with data weighted. This weight is "calibrated such that the aggregate totals will match with independently derived population estimates (from the Statistics South Africa Demographic Analysis Division) for various age, race and gender groups at national level and individual metropolitan and non-metropolitan area levels within the provinces" (Statistics South Africa, 2018:15). The weight had been applied in order for population figures for the employment data to be obtained and this enabled the examination of the trends in employment over time. The output for the variable of 'type of business' was recorded in the column 'All Government' employees (national, local provincial and local government)'. To derive data for 'African Government' employees (national, local provincial and local government)' a cross-tabulation for the variables, 'type of business' and 'population group' across all LFS and QLFS data sets from 2000 to 2018 was run with the weight applied to the analysis so that population figures for the employment data were obtained to look at the trends in employment over time. This output was recorded in the column 'African Government' employees (national, local provincial and local government). The proportions for 'African Government' employees (national, local provincial and local government)' (Figure A) to the 'All Government' employees (national, local provincial and local government)' (Figure B) were calculated by dividing Figure A by Figure B and multiplying the product by 100 to get a percentage.

Table 1: Employment in the public sector, 2000-2018

Year		All 'Government' employees (national, local provincial and local government) (Figure B) (N)	African 'Government' employees (national, local provincial and local government) (Figure A) (N)	Percentage of African 'Government' employees to all 'Government' employees (%)
2000	LFS	1 759 272	1 177 467	70
2001		1 642 471	1 079 869	66
2002		1 546 236	1 066 168	69
2003		1 570 478	1 074 028	68
2004		1 614 462	1 064 977	66
2005		1 662 160	1 126 415	68
2006		1 619 703	1 153 959	71
2007		1 831 650	1 335 570	73
2008	QLFS	1 909 544	1 420 878	74
2009		1 921 257	1 413 626	74
2010		1 966 687	1 458 246	74
2011		2 114 550	1 628 442	77
2012		2 223 094	1 708 404	77
2013		2 328 133	1 830 380	79
2014		2 374 953	1 924 432	81
2015		2 469 306	1 950 869	79
2016		2 397 403	1 938 947	81
2017		2 412 598	1 934 252	80
2018		2 564 160	2 107 057	82

Source: Statistics South Africa LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000, QLFS Quarter 4 (2008, 2009, 2010, 2011, 2012), Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017), Quarter 2 (2018) (Researcher's own calculations)

According to Table 1, the total number of public sector 'government' employees had increased from approximately 1 759 272 in 2000 to 2 564 160 million in 2018, which was a loss of almost a million jobs (929 590) in an 18-year period. The presentation of this data was not to suggest that was a reduction in the public sector workforce in some years, but the decrease in some jobs was offset by the increase in other jobs in the public sector (Maree, 2017b). Figure 1 examines the increase in the Africans government employees in order to elaborate on the trends.

According to Figure 1, the trend in public sector employment of Africans is one that increased steadily over time. The employment of Africans in government increased from 70 percent in 2000 to 82 percent in 2018. The employment had only increased and it had not decreased at all over the 18-year period.

The Statistics South Africa data were verified by government employee information. In terms of employment equity, the current Public Service and Administration Minister, Ayanda Dlodlo, announced that as of 2018, the public service had met employment equity targets for racial quotas. The Commission for Employment Equity confirmed in its annual report that a considerable number (73 percent) of top management positions in the public sector were filled by the African population. The Minister remarked, 'The public service largely mirrors the demographics of the country and consists of an African population of 81.4 percent (or 927 446 employees), a coloured population of 8.6 percent (98 333 employees), a white population of 7.5 percent (85 422 employees) and the Asian population of 2.5 percent (28 514 employees).' As of April 2018, the public service employs 1 139 715 public servants (Phakathi, 2018).

5.4.3 The growth of the public sector trade unions in post-apartheid South Africa

Unionisation in the public sector had changed dramatically as Macun and Psoulis (2000) argue that 'in discussing unionisation during the 1970s and 1980s, Steven Friedman had identified agricultural and domestic workers as workers the eighties forgot and that he may as well have

added workers in the public service' (Macun & Psoulis, 2000:1). In South Africa, trade unions had been divided along racial lines (Southall & Webster, 2010). Historically, in South Africa many African state employees did not have the option of unionisation until the 1990s. With the transition to democracy, this rapidly changed as the public sector industrial relations sector developed (Macun & Psoulis, 2000), and public sector unionisation took off in the late 1980s and early 1990s. Labour organisations which developed within the ex-Bantustan areas were also part of the public sector structure of unions and staff associations.

Public sector workers were included in the Labour Relations Act of 1995 (LRA), which replaced the previous Labour Relations Act of 1956.

Section 35 of the LRA inaugurated the Public Services Coordinating Bargaining Council (PSCBC). The PSCBC control all the rules and norms that pertained to the entire public sector and where pay and working conditions are negotiated. It has authority over all employment conditions. The Educators Labour Relations Council (ELRC) was bestowed the status of a bargaining council by the LRA in 1994 (Maree, 2017b). The ELRC is an occupational council, as it covers only educators employed in national and provincial departments of education. The PSCBC established a bargaining council for employers and employees employed in the health and social development facilities and national and provincial departments, the Public Health and Social Development Sectoral Bargaining Council (PHSDSBC). It covers the whole of the health and welfare sector. Thus, collective bargaining is highly centralised and takes place in the public sector coordinating bargaining council between the state and all public service employees.

Another major change within the public service was the statutory recognition of trade unionism under the PSLRA and then the LRA. This marked a turning point for trade unions, which had struggled to achieve a presence within the state from the late 1980s. This also facilitated the creation of new trade unions, particularly those that had a similar political outlook as their employer. There was a rapid growth in union membership in the public service and by 1997 there were 20 organisations representing 760 000 employees with a union density of 54 percent (Macun & Psoulis, 2000). By 2012, the public sector workers made up nearly half (48.7 percent) of formal sector union members (Forslund & Reddy, 2015), with a shift towards the higher-skilled, white-collar workers among unionised workers.

The most organised workers in the economy are now skilled workers, who are mainly the clerks and the professionals, but they are also public sector health and education workers, who have increased their union coverage by 53.4 percent between 2001 and 2011 (Forslund & Reddy, 2015).

This increase is significant as in terms of the COSATU public sector trade unions. Some of them, such as DENOSA for nurses and midwifery professionals, were only formed in 1996; but others such as NEHAWU, formed in 1987 for workers from the education, health, government and social welfare sectors; POPCRU, formed in 1989 for police officers, traffic officers and correctional officers; and SADTU, formed in 1990 – were already COSATU affiliates before 1994. Some of these public sector unions are not supportive of a radical break with present policy (that is, that inequality, poverty and unemployment are tackled more directly), are not too critical of the ANC nor of COSATU's weaknesses, and led the accusations against Vavi of playing a key role in trying to split COSATU from the ANC and the SACP (Satgar & Southall, 2015). Indeed, some of the public sector affiliate leadership are persuaded that the state is an eternal ally and that class-based opposition to the state's policies is counter-revolutionary (Vavi, 2014, cited in Satgar & Southall, 2015). Importantly, their membership now consists of police, government administrators, nurses and teachers who have bonds on their houses and own cars.

There is a diversity of organisations representing workers in the public sector in terms of the trade unions which are affiliates of COSATU, but there are trade unions affiliated to the other labour federations, too. In particular, the Federation of Unions of South Africa (FEDUSA) has public sector affiliates such as the Health and Other Services Personnel Trade Union (HOSPERSA), the 'Suid-Afrikaanse Onderwysersunie' (SAOU) and the United National Public Service Association of South Africa and Allied Workers Union (UNIPSAWU), to name a few. The PSA was independent, but recently rejoined FEDUSA.

Trade unions in the public sector affiliated to SAFTU include the South African Liberated Public Sector Workers Unions (SALIPSWU), the National Union of Public Service and Allied Workers (NUPSAW), South African Police Union (SAPU) and the Young Nurses Indaba Trade Union (YNITU), to name a few. The NACTU public sector affiliates include the National Public Service Workers Union and the Professional Educators Union (which is also affiliated to the

Confederation of South African Workers' Unions, CONSAWU). CONSAWU is affiliated with the International Trade Union Confederation and its public sector affiliates include NUPSAW and the National Union of Education. Lastly there is an independent trade union for teachers called NAPTOSA, with 55 000 members. A feature of the public sector trade union membership is that there is overlapping membership between organisations, which is prevalent among the white-collar and semi-professional workers. The membership of COSATU is spread across several classes, namely semi-professionals which include teachers and nurses, the intermediate class which comprises office workers and skilled workers, and the core working class which contains the semi-skilled and unskilled workers (Seekings & Nattrass, 2005).

The COSATU and FEDUSA unions operate as two powerful blocs within the public service. In total, all the public sector trade unions represented 1.3 million workers in the public sector (COSATU, 2018). The public sector trade unions have immense economic power in this system and the earnings of all public sector employees have risen considerably since the PSCBC was established. All the organisations engage in collective bargaining on behalf of their members around remuneration and conditions of service. COSATU affiliates are known for their commitment to working-class interests through their Alliance with the ANC and the SACP and so have a political orientation (Macun & Psoulis, 2000). However, all these organisations have different functions and vary in their interaction with the state as an employer. There are trade unions with a clear commitment to negotiate on behalf of members and adopt a member-centred approach in their organisational structure and functioning. All the organisations represent a wide spread of occupational groupings and they are heterogeneous in terms of gender and race. There are professional associations which represent the interests of highly skilled personnel and professional occupational categories.

The COSATU public sector trade unions have also contributed to the achievement of racial redress in the public sector. DENOSA's first deputy president, Modise Lesley Letsatsi, was elected as vice chairperson at the PHSDSBC. DENOSA's second deputy president, Thandeka Msibi, was elected as vice chairperson at the PSCBC. DENOSA's president, Simon Mlongani Hlungwani, was elected to the International Council of Nurses Steering Committee (DENOSA, 2019).

Table 2 examines trade union membership in the public sector (that is those who are employed at the national, provincial and local levels) and contrasts this to Africans employed in government (that is those who are employed at the national, local provincial and local government levels) who are trade union members, from 2000 to 2018 drawing on the labour force data in selected quarters contained in the LFS (2000-2007) and the QLFS (2008-2018) data sets as collected by Statistics South Africa.

To obtain data for 'All public sector employees who are union members' a frequency for the variable, 'trade union membership' was run across all LFS and QLFS data sets from 2000 to 2018. The weight was applied to the analysis for the population figure so that trends in unionisation over time could be examined. The figures for the various years were recorded in the column 'All public sector employees who are union members.'

To obtain data for 'African public sector employees who are union members' a cross-tabulation for the variables, 'trade union membership', 'population group' and 'type of business' was run across all LFS and QLFS data sets from 2000 to 2018. The weight was applied to the analysis so that population figures for the employment data could be examined for the trends in unionisation over time. The figures for the various years were recorded in the column, 'African public sector employees who were union members.'

The proportions for 'All public sector employees who are union members' (Figure C) to the 'All Government' employees (national, local provincial and local government)' (Figure B) was calculated by dividing Figure C by Figure B and multiplying the product by 100 to get a percentage.

The proportions for 'African public sector employees who are union members' (Figure D) to the 'All Government' employees (national, local provincial and local government)' (Figure B) was calculated by dividing Figure D by Figure A and multiplying the product by 100 to get a percentage.

Table 2: Trade union membership of the public sector for all employees and for African employees, 2000-2018

Year		All public sector employees who are union members (Figure C) (N)	Union members as percent of all public sector employees (%)	African public sector employees who are union members (Figure D) (N)	Union members as percent of African public sector employees who are union members (%)
2000		1 141 093	64.9	774 776	65.8
2001		1 105 254	67.2	752 768	69.7
2002		1 044 799	66.8	757 006	69.9
2003	LFS	1 071 271	68.2	759 614	70.7
2004		1 019 403	63.1	707 437	66.4
2005		1 087 772	67.7	780 405	69.2
2006		1 059 117	65.4	787 049	68.2
2007		1 277 890	69.8	967 058	72.4
2010		1 471 439	74.8	1 110 637	76.2
2011		1 546 544	73.1	1 195 920	73.4
2012		1 583 853	71.2	1 236 133	72.4
2013	QLFS	1 556 101	66.8	1 220 777	66.7
2014		1 605 819	67.7	1 306 950	67.9
2015		1 638 631	66.4	1 284 414	65.9
2016		1 575 742	65.7	1 282 873	66.1
2017		1 607 414	66.7	1 300 609	67.3
2018		1 712 388	66.9	1 390 872	66.1

Source: Statistics South Africa LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000), QLFS Quarter 4 (2010, 2011, 2012) Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017) Quarter 2 (2018) (Researcher's own calculations) (No trade union membership data for 1997, 2008 and 2009)

According to Table 2, trade union membership increased from 1 141 093 employees (or 64.9 percent) in the public sector in 2000, peaking at 1 471 439 employees (or 74.8 percent) in 2010 and in 2018; 1 712 388 employees were trade union members (or 66.9 percent). Table 2 above also demonstrated the public sector's workforce who were union members, known as the public sector's union density. Bhorat et al. (2016) also provided evidence that trade union density

in the public sector had increased[36] and that high levels of unionisation had been maintained from 2010 to 2017. Union density was much higher in the health and education sectors.

Figure 2 looks at the increase in the trade union membership of Africans who were government employees in order to elaborate on the trends.

Figure 2: Proportion of African employees who are trade union members in the public sector, 2000-2018 (%)
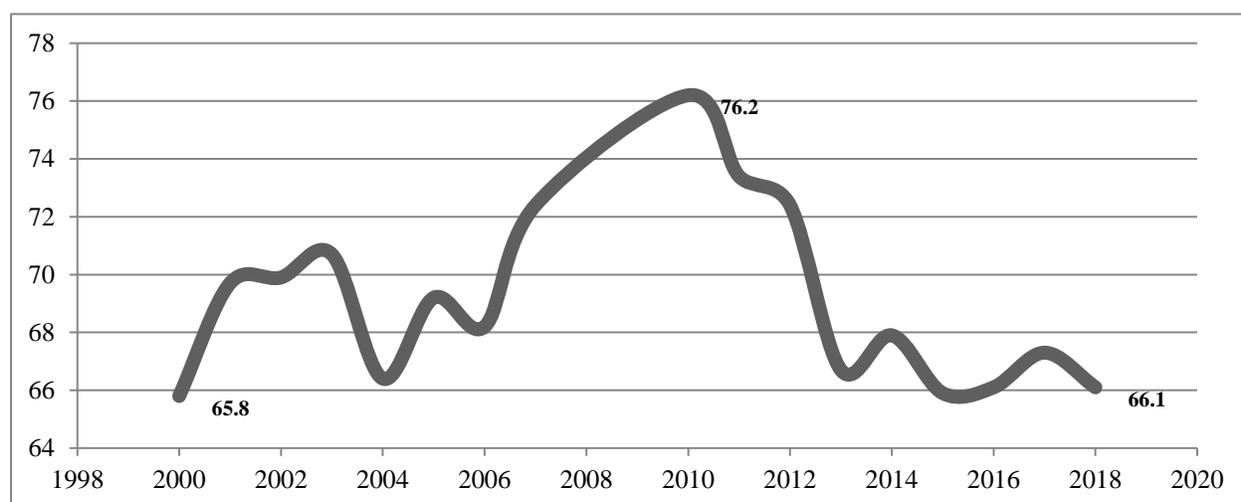
According to Figure 2, for African employees of the public sector, trade union membership increased from 65.8 percent in 2000, peaking at 76.2 percent in 2010 and then by 2018 it was 66.1 percent for African employees in the public sector.

Figure 3 examines the growth and contraction in trade union membership among African employees in the public sector over 2000 to 2018.

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[36] Trade union density has increased from 55 percent in 1997 (approximately 835 thousand workers) to almost 70 percent in 2007 (approximately 1.2 million workers). As at 2016, union density is now at 66.7 percent and there are 1.6 million public sector workers who are union members (Bhorat et al., 2016).

Figure 3: Growth and contraction in trade union membership among African employees, 2000-2018 (%)
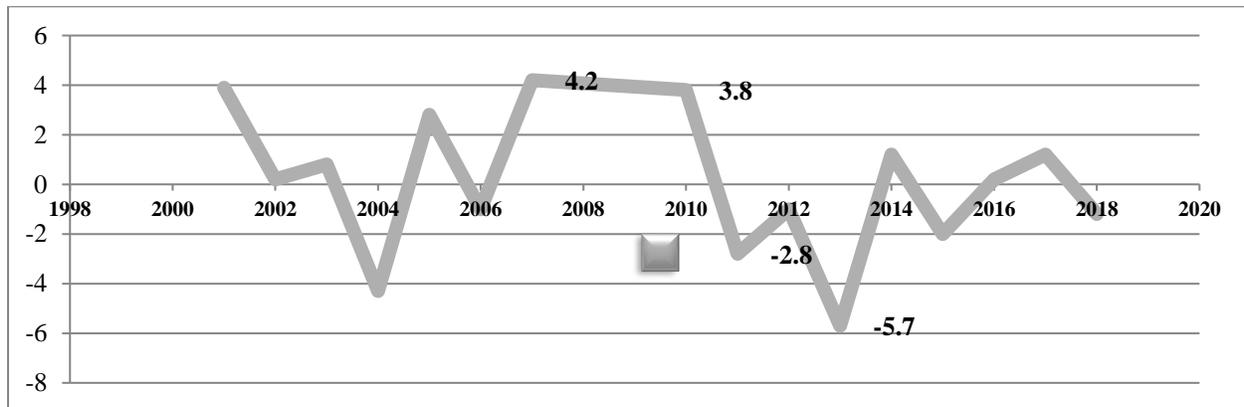
Figure 3 plots the growth and contraction in trade union membership among African employees from 2000 to 2018. Figure 3 shows that the largest growth in trade union membership, by 4.2 percent, occurred in 2007 which was when the first strike in the public sector took place in post-apartheid South Africa; and the second highest growth was 3.8 percent in 2010, which was the largest public sector strike in post-apartheid South Africa. These two percentages demonstrated the strength of employment and its associated trade union recruitment in the public sector. Trade union membership in the public sector grew rapidly in the period 1994 to 2010 and by 2010, public sector trade union membership was firmly established. The bulk of the public sector formal workforce were union members.

This increase in public sector union membership and the growing political influence of the unions enabled the unions to drive higher returns for their members, especially post-2000 and may provide reasons for why there were two major public sector strikes in 2007 and 2010 (as the trade unions were strong in membership during those stages). Bhorat et al. (2016) argue that the ability of public sector trade unions to demand higher wages for their members also presents a growing wage wedge between unionised public sector workers and formal non-agricultural workers in the labour market. According to a report on the survey of COSATU membership by the National Labour and Economic Development Institute (NALEDI), the average salaries of COSATU's members who were employed in the public sector was higher than the salaries paid

to those who worked in the private sector (Southall, 2016). Nevertheless, the 'union wage premium' model which is used by economists to determine the difference between wages for unionised and non-unionised workers needs to be cautiously used. The motivation for producing these statistics is usually linked to the ontology of neo-classical theory, which argues that the strong unions are exacerbating wage inequality and increasing unemployment. The composition of the models varies widely too and the variation in premiums among the models are broad (Forslund & Reddy, 2015).

However, Figure 3 does show that trade union membership for Africans in the public sector dropped by 6.6 percent from 2010 to 2011, and the public sector trade unions experienced some strain in their membership after the 2010 strike. Trade union membership picked up slightly in 2012 and then it dropped off again in 2013 to the lowest point that it has ever been in the post-apartheid era. This was just after Marikana in 2012, where 34 striking miners had been killed which marked a low point for industrial democracy in the post-apartheid era. The period 2012 to 2014 was a period of growing labour fragmentation in the landscape due to the emergence of rival and splinter trade unions (Bischoff, 2015). In December 2014, SADTU's expelled president, Thobile Ntola, set up a rival public service trade union[37] 'to take on' their COSATU public sector counterparts (Maree, 2017b). The public sector was not immune to the process of labour fragmentation and many new public sector trade unions also emerged during this period. As members settled into their new trade unions or stayed in their trade unions, trade union membership in the public sector stabilised somewhat from 2015 onwards with no dramatic peaks and troughs. As public sector employment had steadily increased in the public sector for African employees (and hence there was no decrease of employment as a factor in trade union membership variation), it was concluded that trade union membership was a dynamic phenomenon in the public sector, sensitive to major labour activities, such as strike action and it was highly politicised due to changes in the organised labour landscape.

As noted briefly above, a key feature of the public sector was that the higher rates of unionisation were associated with a wage premium (Bhorat et al., 2016). The total estimated premium to union workers within the public bargaining council was 22 percent. Therefore, according to this

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[37] The new trade union is called the South African Public Service Union (Maree, 2017b).

model, belonging to the union or to the bargaining council was associated with statistically significant wage premia. The median and mean wages of the public sector were significantly higher than the private sector. The real monthly wage of an average public sector employee as of 2016 was R11 668 compared to R7 822 for an average private sector employee (Bhorat et al., 2016). For government workers, the wage premium within the group of workers belonging to a union was 23.5 percent and Woolard (2002) discovered that there was a higher premium for women (21 percent) than for men, and especially for African women, who had a 36 percent premium.

It is not the remuneration of Africans in the same occupational category (the semi-professional, the teachers and nurses) in the public sector, which has increased in the post-apartheid era that is important. It is the income gap between the high-income and low-income earners which is much larger and drives inequality in South Africa. Therefore, the quantitative data on income for unionised African teachers and nurses in the public sector is of little help in understanding their class location nor does it support the 'embourgeoisement thesis.' That is, even if one uses the labour market data sets for the formal sector and unionised workers, including the public sector workers, there is little evidence that they have been the beneficiaries of the post-apartheid labour market and so this raises questions about the veracity that COSATU members are the labour aristocracy. In the public sector, the state managers have been the main beneficiaries (Forslund & Reddy, 2015). To be clear, although the wage data for the public sector African teachers and nurses was not analysed in this section and reference was made to the secondary analysis conducted by Forslund and Reddy (2015), the point is that, apart from the concentration of income being highest at the top echelons of the labour market, the labour force data shows that a tiny part of the white-collar workforce, of which some are in the top positions in public sector, are the insiders, or the labour aristocracy. To summarise, the review of employment and trade union membership data for the public sector in post-apartheid South Africa clearly provides evidence that there was a relationship between high rates of unionisation, which was usually related to a wage premium. The public sector wages were not widely distributed so there was a lower intensity of wage inequality within the public sector. Influential labour unions were often seen as establishing a wage premium for their members, as they could drum up industrial action and bargain for their members in periods of wage negotiations. As there was an increasing membership of public sector unions and they possessed political influence, the role performed by

unions was one that pushed for higher returns for their members. For unionised workers in the labour market there were high and positive returns to public sector employment. The public sector trade unions have immense bargaining power on the PSCBC and the government's commitment to employment equity had also seen racial wage inequalities fall (Maree, 2017).

There were, in terms of earnings and employment, an emerging form of segmentation in the South African labour market. A new feature of the South African labour market was a wage wedge between unionised public sector workers and other formal non-agricultural workers in the labour market. Some argued that the post-2000 period had produced a new 'labour elite' in the labour market, namely the unionised public sector employee (Gentle, 2015). This had implications for the class location of public sector trade unions as, if they belonged to a public sector trade union, their wages would increase. In addition to this, there was also the skills-biased nature of public sector employment as educational splines were formidable predictors of public sector employment. Thus, those with the greatest levels of education achievement were comparatively more likely to be employed in the public sector than the private sector.

The public sector wage bill had continually increased by more than five percent above inflation annually since 2007/08. The reason for the increase had been the increase in provincial expenditure on employee compensation as a result of the occupation-specific dispensation, for educators and nurses in particular. In 2014, the largest percentage share of persons receiving occupation-specific dispensation was educators (68.1 percent) followed by nurses (21.5 percent) (National Treasury, 2015). The bulk, that is 86 percent of total provincial personnel expenditure, was spent on education and health and it accounted for 52 percent of aggregate provincial spending (National Treasury, 2015). Civil servant salaries were one of the largest expenses that the government carried and it totaled close to R470 billion a year, representing over a third of government spending. This wage bill had expanded by over 80 percent over the past 10 years, and the annual increase had averaged more than 6 percent above inflation.

In 2015, unions organising civil servants settled on a wage deal that would allow teachers, nurses and other state workers to obtain a seven percent salary increase for the year and an additional one percent increase above consumer inflation for the next two years. This agreement resulted in a R12.5-billion deficit in the 2015 budget. The deficit had to be financed from the country's

R5 billion emergency funds. The persuasive bargaining clout of the public sector trade unions had given rise to a firm growth in the proportion of the Treasury budget that was dedicated to compensating public servants (Maree, 2017). Currently the government's public wage bill is at R587 billion and is one of the single biggest items in the national budget (Vallie, 2018).

The public sector provided the landscape for much contestation and evidence of this was the number of working days lost and where the influence of Alliance politics was felt (Chipkin & Meny-Gibert, 2012). Strikes in the public sector in post-apartheid South Africa are examined next.

5.4.4 Strikes in the public sector in post-apartheid South Africa

This section looks briefly at two major public sector strikes in post-apartheid South Africa. In 2007, the public sector strike that broke out was due to the failure of wage negotiations. That strike resulted in a complete loss of 12.9 million worker days (Van Rensburg & Van Rensburg, 2013). The strikes were related to political issues at the time and were led by COSATU and other factions of the political left to win the control of the ruling ANC before the 2008 presidential election. COSATU had disagreed with the then President Thabo Mbeki's various policies such as the alleged 1996 'Class Project' (that is elevating a small group of black elites to the detriment of the majority of the poor). The 2007 strike lasted for a month and involved many healthcare sector workers and teachers. As the health workers were involved in the strike, the government delivered letters of dismissal in June 2007. They are categorised as essential workers and their involvement in the strike was regarded as illegal. Many temporary agreements that were reached that had to be re-negotiated after three years, thus in 2010 (Van Rensburg & Van Rensburg, 2013).

As negotiations commenced in 2010, they were unsuccessful due to disagreements between the labour unions and the government. The public sector strike that took place in 2010 lasted for 15 working days and the loss of 12 million worker days followed this (Van Rensburg & Van Rensburg, 2013). The 2010 strike in July and August was coordinated by the affiliates of the various labour federations and in total they represented 1.3 million public sector workers. The strike lasted for six weeks and there were reports of intimidation of non-striking workers and of

nurses neglecting their patients in public hospitals (Bekker & Van der Walt, 2010). Indeed, many South Africans bore the brunt of reduced essential service delivery during this period.

When state sector unions strike, this is significant as those workers who are part of unions affiliated to COSATU (COSATU is part of the ruling Alliance) strike against the ANC ministers (Bekker & Van der Walt, 2010). Even with their historical relationship, there were clear strains between the ANC and its trade union supporters. It was linked to the lack of progress in the ANC meeting the election promises, particularly in the industrial relations arena and for the public sector strikes it was due to the government's denial of an increase in the minimum wage (Gall, 1997).

The strikes of 2007 and 2010 must also be placed in the context of South Africa following a macro-economic policy (which it had since the end of the 1970s and had actually implemented it by 1994). Fiscal austerity was being pursued by the post-apartheid state. This meant in practice that the state resisted an increase in the state sector wage bill, was trying to cut spending and taxes and so the state was determined to impose the neoliberal framework.

By 2007 there was a belief in COSATU that the ANC would reverse the neoliberal trend if they supported Jacob Zuma to succeed Thabo Mbeki, which happened in 2008. However, even under President Zuma, who was backed by COSATU, high levels of inequality in the country persisted and contributed to the willingness to engage in a protracted wage strike in 2010. State schools and hospitals, among other institutions, were closed. The strike was suspended in September, called off in October 2010 when the offer made by the state was accepted. The disruption of health and education only affected the working-class communities and some actions by the strikers were condemned, for example when entrances to hospitals were barricaded. The agenda of the strike was focused on income and so were economistic in nature and did not involve political or social issues (Bekker & Van der Walt, 2010).

In South Africa in 2010, according to the Department of Labour (2011), the number of working days lost to strikes, which is a product of the number of workers on strike or lockout multiplied by the length of the work stoppage, was the highest that South African industrial relations had ever seen. To be precise, about 20 674 737 working days were lost in South Africa in 2010, compared to 1 526 796 working days lost in 2009; and the 2010 number was more than ten times

the figures of 2009. For every 1 000 workers, 1 593 working days were lost due to strikes in 2010. Approximately 161 852 721 working hours were lost to strikes in 2010, which were the highest ever recorded.

Some felt that by focusing only on wages and working conditions in the public sector, it kept the strike unnecessarily narrow economically (Bekker & Van der Walt, 2010). That is, the same COSATU affiliates that participated in the strikes did not use the opportunity to build the broader solidarity with the communities affected by the strike. Maree (2017:191) contends that, "over the years, the COSATU public sector trade unions have flexed their muscle for all citizens in South Africa to see and feel" and argues that this has led some to ask whether they have become too powerful. However, collective bargaining for all public sector employees happen centrally and if trade unions went on strike, more than a million workers will stop working.

With this point in mind, it is to the transformation of COSATU's membership that the study turns to next.

5.5 The transformation of COSATU membership in post-apartheid South Africa and the significance of the rise of public sector trade affiliates

Established in 1985, COSATU is part of the governing tripartite Alliance with the ANC and the SACP. COSATU affiliates' organisational strength was affected by economic restructuring that took place on a global scale, from the period when the South African economy was integrated into the global economy after its first democratic elections in 1994. COSATU affiliates continued to organise permanent workers only and were not drawing in the atypical, flexible, casual workers. Overall, the benefits of democratisation for the labour movement had been undermined when one examined the impact of globalisation and the liberalisation of the South African labour market. In the first ten years, the economy experienced some growth, however with limited job opportunities. In a country of 20 million economically active citizens, the economy only had about 15 million people in formal employment. The manufacturing sector had been under the most pressure and has shed a number of jobs over the years. The number of unemployed had increased and wages had not increased significantly for the majority of the working class.

However, in the post-apartheid era, COSATU's membership had grown and the increase stemmed from the public sector trade unions affiliated to the federation, namely NEHAWU, POPCRU, SADTU and DENOSA, which represent a mix of blue-collar and white-collar employees, unskilled and semi-skilled employees and professional and semi-professional categories of workers.

Table 3 contains membership figures for all COSATU affiliates, past and present, from 1991 to 2012 and is available on COSATU's website. Although COSATU held its 12th National Congress in November 2015 and its 13th National Congress in September 2018, there are no updated membership figures, broken down by affiliate, as they were available in the past and obtainable from the Secretariat's reports and posted on the COSATU website.

Table 3: COSATU affiliate membership figures, 1991-2012 (N)

	1991	1994	1997	2000	2003	2006	2009	2012
CEPPWAWU	88 000	78 000	94 000	74 000	65 000	62 000	64 182	80 658
CWU	21 000	23 000	40 000	35 000	32 000	25 000	29 699	18 666
CWUSA	N/A	N/A	N/A	N/A	N/A	N/A	370	N/A
DENOSA	N/A	N/A	73 000	70 000	71 000	64 000	68 450	74 883
FAWU	129 000	121 000	140 000	119 000	119 000	115 000	118 974	126 930
NEHAWU	18 000	64 000	163 000	235 000	235 000	204 000	230 445	260 738
NUM	270 000	311 000	311 000	290 000	279 000	262 000	272 000	310 382
NUMSA	273 000	170 000	220 000	200 000	173 000	217 000	236 909	291 025
PAWUSA	N/A	N/A	N/A	N/A	N/A	17 000	16 169	17 146
POPCRU	N/A	N/A	45 000	71 000	67 000	96 000	125 732	149 339
SACCAWU	97 000	102 000	102 000	102 000	102 000	108 000	115 484	120 352
SACTWU	186 000	150 000	150 000	120 000	105 000	110 000	85 000	85 025

SADNU	N/A	N/A	N/A	8 000	8 000	9 000	9 093	8 655
SADTU	N/A	59 000	146 000	219 000	215 000	224 000	236 843	251 276
SAFPU	N/A	N/A	N/A	N/A	N/A	1 000	472	593
SAMA	N/A	N/A	N/A	N/A	N/A	5 000	7 246	7 759
SAMWU	60 000	100 000	117 000	120 000	120 000	118 000	135 906	153 487
SASAWU	N/A	N/A	N/A	18 000	18 000	9 000	7 804	7 074
SASBO	N/A	N/A	70 000	63 000	63 000	61 000	66 093	67 402
SATAWU	70 000	74 000	91 000	103 000	74 000	133 000	140 392	159 626
TOTAL	1 212 000	1 252 000	1 791 000	1 869 000	1 768 000	1 841 400	1 974 084	2 191 016

Source: 11ᵗʰ COSATU Congress Secretariat Report, 2012

Table 3 shows the momentous changes that took place in COSATU's membership with the emergence of the public sector unions who emerged more prominently after 1990, particularly in the post-apartheid era. This was facilitated by the LRA and both private and public sector employees were covered by the same labour legislation in terms of collective bargaining and organisational rights. Figure 4 looks at the growth of SADTU's and DENOSA's membership as a proportion of COSATU membership from 1991 to 2012.

Figure 4: DENOSA's and SADTU's membership as a proportion of COSATU membership, 1991-2012 (%)

Figure 4 shows that SADTU's membership as a proportion of COSATU membership had steadily increased from 1994 to 2012. Membership sharply increased between 1997 and 2000 and it hovered at 12 percent of COSATU membership for 12 years, with an average growth rate of eight percent from 1997 to 2012. DENOSA's membership had remained stable over the same period, hovering at around four percent of COSATU membership and at an average rate of 3.6 percent of COSATU membership from 1997 to 2012. By 2012, SADTU and DENOSA's combined membership made up 14.9 percent of total membership.

NEHAWU's membership was the largest of the public sector trade unions by 2012. The public sector trade unions had grown considerably in COSATU, they had prompted very noticeable strikes in South Africa, as discussed already above, and they had increased their membership from seven percent of total union membership in 1991 to 39 percent in 2012 (COSATU 2012:7) or 85 000 members in 1991 to 854 000 members in 2012. As a whole, COSATU's total membership increased from 1.8 million workers in 2006 to just over 2 million workers in 2012. According to COSATU's draft organisational report, submitted by its acting general-secretary at that point, Bheki Ntshalintshali to its 12th National Congress, COSATU's membership was

1 868 193 members and has decreased by 324 835 since the 11th Congress in 2012 (COSATU, 2012).

This was in part due to the expulsion of NUMSA from COSATU (NUMSA was expelled from COSATU in November 2014[38]) and the decline of the NUM as members defected to the Association of Mineworkers and Construction Union (AMCU). According to the the official who represents the state in the PHSDSBC:

> *"Some saw that the differences with NUMSA were about NUMSA wanting to walk away from the ANC rather than COSATU but they used their differences with COSATU to split away. NUMSA comrades at the ANC branches wanted COSATU to get out of the Alliance."* (Interview with PHSDSBC state representative, Johannesburg, April 2018)

There has been an increase in the membership of public sector unions affiliated to COSATU. Without NUMSA and a number of other affiliates and according to Quintal (2015), NEHAWU was COSATU's biggest affiliate with 277 317 members, followed by the NUM with 270 649 members, SADTU has 248 556 members, POPCRU at 154 008 members and SATAWU at 152 254 members. According to COSATU's financial statements the proportion of public sector trade unions in COSATU had increased to 60 percent in 2014 (Marrian, 2015) and SADTU's membership represented just over a quarter (28 percent) of all COSATU public sector membership (COSATU, 2015a). There is no doubt that the public sector trade unions are dominant in COSATU.

This understanding was reinforced by the official who represented the state in the PHSDSBC:

> *"The federation (COSATU) is public sector dominated. By and large it has progressively become a public service federation. Mantashe called it a yellow federation. DENOSA did call for the reinstatement of NUMSA after its dismissal as they did not want COSATU to*

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[38] In 2017, approximately 700 000 workers from 24 trade unions have become affiliates of a new trade union federation, namely the South African Federation of Trade Unions (SAFTU) (Chaskalson, 2017). According to the SAFTU website, the National Union of Metalworkers of South Africa (NUMSA) and the Food and Allied Workers Union (FAWU), former COSATU affiliates, are now affiliates of SAFTU.

lose its proletariat feel[39]." (Interview with PHSDSBC state representative, Johannesburg, April 2018)

These were phenomenal internal changes that had took place in the composition of COSATU's membership as there were more affiliates in COSATU who represent public servants. As Bezuidenhout et al. (2017) argue, there are now more professionals who are COSATU members than there were in the past. Drawing on the 'Taking democracy seriously workers survey' a cross-tabulation of the level of skill of the COSATU member and whether the COSATU member was part of a public sector affiliate or a private sector affiliate revealed that 78 percent of COSATU members who reported that they were professionals were from the public sector trade unions (Bezuidenhout et al., 2017). In addition to this, the number of COSATU members with a tertiary qualification such as a university degree or a technical diploma increased from three percent in 1994 when the first survey was conducted to 37 percent in 2014 when the fifth survey was conducted. The data from the five 'Taking democracy seriously workers surveys showed that there were indeed more skilled workers and professionals among COSATU's membership now. The public sector trade unions had not recruited members from the poorest of the poor but their members were the fairly privileged segments of society.

However, COSATU had also experienced a decline in membership due to the loss of the industrial affiliates which further shaped COSATU as a federation of the public sector, as over half (58 percent) of COSATU's membership was made up of public servants. Four of the 15 COSATU affiliates were now unsustainably small (they had under 20 000 members, which is not according to COSATU, a workable union) (Van Rensburg & De Lange, 2018). This was coupled with the fact that COSATU still does not organise many of the unorganised workers and according to Mosoetsa and Bischoff (2015), these are permanent workers, working in the private sector in small, medium and large firms and they work for the government or for parastatals. Some commentators argue that the lack of representation has provided the conditions for the emergence of rival trade unions in various sectors (Bischoff, 2015) and that the form that these

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[39] A 'yellow federation' means that COSATU is aligned closely to the state due to the dominance of its public sector membership (Mahlakoana, 2015).

trade unions take is that of entrepreneurial unionism in that their focus was on the interests of the officials as opposed to the members (Bezuidenhout, 2017).

As made clear, unions affiliated to COSATU used their dominance to demand better working conditions for their members in the bargaining system. The current system of collective bargaining depends on union unity, strength and consistency (Bischoff, 2015). According to the official who represents the PHSDSBC:

> *"The trade unions in the bargaining council could make a big difference, but some of them are conflicted due to the Tripartite Alliance. They need to bring matters of mutual interest before the council but they want to engage the minister to achieve a political settlement. New unions are emerging as COSATU unions are not servicing their members as they are seen as sweetheart unions. The COSATU trade unions have a dual membership in that they have a political consciousness but they join the PSA if they need representation even though they are a more expensive union. Yes, the bargaining council is dominated by the COSATU unions but no bargaining takes place in the bargaining council. I don't think that any of the resolutions produced over the past five years have improved working conditions. There will be a 'Marikana' in health. Now it is labour collapsing the bargaining council."*
> (Interview with PHSDSBC state representative, Johannesburg, April 2018)

This was a very worrying state of affairs as it was quite apparent that the major unions were split by their internal battles and the increase of smaller unions was not addressing what seemed to be a growing crisis in public sector bargaining.

The COSATU public sector trade unions had urged government, where it was reported in August 2018 that they wanted to cut 30 000 jobs, to stop plans to dismiss public servants (Magubane, 2018) by offering those workers over the age of 60 voluntary retrenchment. This was allegedly part of an effort by the government to cut its salary bill. As already noted, the public service wage bill corresponded to over one-third (35.2 percent) of all government spending (Letsoalo, 2018). Even though the restructuring was related to higher sections of the public service, such as director-generals as well as the number of departments in the state and so a growing headcount in the state (Magubane, 2018), COSATU would not agree to any retrenchment plans.

However, it was noted that there was a brain drain in trade union themselves, a lack of bargaining skills among organised labour and a growing fragmentation of organised labour in the public sector too, according to the official who represents the PHSDSBC, who notes:

> *"The new labour representatives coming in are the not the trade union representatives of the old days. The COSATU unions are overstretched and the representatives are victims of the 'revolving doors of the public sector'. They are not that organised and the officials are spread too thin. People are taking the foot off the pedal. There has been no upskilling of the new labour representatives and this is a huge gap. This is impacting on the quality of the unions. There is a growing skills gap within the unions. This is also why new unions emerge. The unions themselves are in trouble. They focus on other things and trade union density continues to decline. So some members start their own trade unions."* (Interview with PHSDSBC state representative, Johannesburg, April 2018)

The remarks made by the official above were revealing of a further pattern emerging in the labour landscape in post-apartheid South Africa. The LRA is premised on voluntarism; it does not compel anyone to bargain and it allows employers to negotiate with as many unions as they wish. The LRA does, however, reserve certain organisational rights for the majority union.

Trade union officials who were leading the negotiations were increasingly employed on a full-time basis. This change in security of tenure led to careerism among the officials and there was a growing social distance between the trade union official and the ordinary members (Chinguno, 2015). The increasing professionalisation of the trade union took place and the fulltime positions became a launching pad to new careers which were well remunerated (Bischoff, 2015). The impact of this upward social mobility among the union officials was, according to COSATU itself, "a lack of service, a lack of skills, a lack of discipline, a lack of commitment – that could generate a crisis if not addressed" (COSATU, 2004) and this was a pattern among the public sector trade unions too.

5.6   Conclusion: The public sector in post-apartheid South Africa

This chapter provides an overview of the public sector, employment and trade unionism in South Africa and starts with a brief history of the public sector and where the available employment

data that was available was drawn on to provide an overview of employment by race in the period before 1994.

The chapter examines the public sector in post-apartheid South Africa and looks at employment by race as well as the increase in trade unionisation of public sector employees. It does this by drawing on the national statistics from the OHS, LFS and QLFS data sets. This is done in order to provide for a more generalised picture as point of comparison and for statistical trends in the labour market in order to compare and contrast the increase in overall employment for Africans in the public sector in the post-apartheid era and the increase in trade unionisation of employees in the public sector. The analysis of quantitative data revealed that in the post-apartheid era, the public sector has evidently transformed its labour force more promptly than the private sector did.

The chapter looks at the state of bargaining in the public sector and draws on interviews with the officials. The data suggested that there were signs of some trends in the public sector in post-apartheid South Africa such as such as a lack of critical skills needed in collective bargaining, a growing indifference to the outcomes of bargaining among the trade union officials and the emergence of new worker representations in the form of new trade unions. This was not explored in depth but could be the focus of another study that looks at the growing fragmentation of the labour landscape in the public sector. The chapter also looks briefly at the public sector strikes that had taken place in post-apartheid South Africa. The chapter examines COSATU public sector trade unions in detail by tracking changes in COSATU's membership in the post-apartheid era. Where appropriate the chapter drew on qualitative data emanating from the interviews conducted with COSATU officials, the public sector bargaining council officials, the results of the documentary analysis of COSATU's own policies and reports and the secondary analyses of the findings from the 'Taking democracy seriously workers survey' to support the analysis.

As this study is interested in understanding the changes that had taken place in the composition of COSATU, the argument was that this could be best understood by examining the changes in employment of Africans in the public sector generally and in their trade union membership. This also provides the necessary framework for the study of the changes that have taken place in the employment of African teachers and nurses of the public sector in post-apartheid South Africa.

When the chapter on the public sector and the chapters on the nurses and teachers of the public sector are considered together, a more comprehensive understanding of the changes in COSATU's composition is provided.

Public sector trade unions have grown in COSATU and some organise members of the 'lower professionals' that is teachers and nurses, who have become increasingly unionised (Southall & Webster, 2010) in the public sector in post-apartheid South Africa. This is why it is argued that the working-class base of COSATU had changed as it has come to represent different class interests to those prior to 1994 (Bezuidenhout et al., 2017). It is concluded, based on the evidence presented in this chapter on the public sector that the ANC's employment equity policy has had a positive impact in the public sector and indeed on the social mobility of Africans working in the public. The analysis in this chapter provided evidence for the assertion that in post-apartheid South Africa, if one took educational levels and income into consideration, that the African middle class has increased and partly this can be attributed to their employment in the public sector and their trade union membership.

Thus, focusing on Africans employed in the public sector, particularly the employed teachers and nurses, their trade union membership and their educational levels, provides the context for the changes in the composition of COSATU that have taken place since 1994. The next two chapters provide quantitative data for the African teachers and nurses of the public sector, including their employment, their trade unionisation, their income and their educational levels. This quantitative data analysis is then supplemented with the qualitative data that was gathered as a result of the interviews with African teachers and nurses. The combination of quantitative and qualitative data is used to provide the evidence needed to understand the class location of the African teachers and nurses of the public sector and intersection with race, gender and political identities. In all this helps clarify the changes in the composition of COSATU membership.

Chapter 6: African teachers of the public sector

6.1 Introduction to the African teachers of the public sector

This study contends that the legislation, official policies and regulations as well as a myriad of other factors, guided by the NDR, played a role in the expansion of the African professionals and in making the public service more demographically representative in post-apartheid South Africa and their trade union membership, which in turn impacted on the composition of COSATU. The aim of the chapter is to assess the employment levels, educational levels and the unionisation of African teachers in the public sector in post-apartheid South Africa. It also looks at their attitudes to their trade union, SADTU, to their federation, COSATU, and to the Alliance and the ANC.

The chapter starts with a brief overview of the history of teachers, legislation, discrimination and their associations in South Africa and then it moves onto an examination of the employment levels, educational levels and unionisation of African teachers in the public sector post-apartheid, including a review of appropriate legislation. There is a focus on SADTU.

The chapter provides information on the post-apartheid labour market for the African teacher labour force, including employment, educational levels, income as well as trade union trends for African teachers. This is done by drawing on the national statistics – the OHS, LFS and QLFS data sets, which are quantitative data. This is done in order to provide for a more generalised picture as point of comparison and identify statistical trends in the labour market in order to compare and contrast the employment, educational achievement and occupational category among the various data sets. The statistical trends within the national labour market are assessed in order to understand the general educational qualifications and occupational changes that have taken place from 1994 to the present. The quantitative data of the educational levels, skill levels and occupational levels of the African teachers of the public sector provided the starting point for the gathering of qualitative data to understand the class location of the African teachers. The chapter draws substantially on the qualitative findings of the self-administered questionnaires completed by a selection of African teachers, who at the time of the fieldwork were emloyed in the public sector. These self-administered questionnaires were given to teachers to complete in

order to assess their highest educational levels, their income and benefits, how many dependents they have, their SADTU membership, their occupational status, their lifestyle, their working conditions and their political views. The analysis of qualitative data for the class location and intersections with the other social identities of the teachers was carried out. This, in turn, helps explain the changes in the composition of COSATU in the post-apartheid era. The chapter draws on existing literature on teachers in the public sector, where appropriate, to assist in the analysis of the trends in employment, educational levels and trade unions for African teachers.

What follows next is the history of teaching in South Africa and attention is paid to the labour legislation for teachers, the teachers' associations and teacher trade unions.

6.2   The history of teachers of the civil service, their professional associations and trade unions

The Africans who obtained a mission education regarded themselves as part of the African elite (Southall, 2016) and the bulk of the elite were African teachers. Thus these African teachers already had a petty bourgeoisie status; just like African nurses, the professions were part of the African middle class along with African farmers, the clergy and the clerks. The best employment option was teaching, as there were extremely limited professional opportunities open to educated Africans. The teaching profession drew in the intellectual elite and teaching was considered as a highly valued job. African women had the important opportunity to nurse, but for the rest of the black populace, teaching was the most they could wish for, practically speaking. Teachers were often spokespeople and community figures. Even if they did not achieve tertiary degrees and diplomas, they were well-read and dedicated (Glaser, 2016).

Opposition to segregated education dates back to the start of the 20th century. In 1879, the very first black teachers' union was formed, namely the Native Educational Association (Govender, 1996, cited in Heystek & Lethoko, 2001). The union dealt with educational matters in addition to social and political matters, such as the impact of the pass laws on education provision and the prejudiced character of the salaries paid to white teachers in contrast to black teachers who were in possession of the same credentials. In addition to this, the African teachers formed professional associations which served to encourage elite coherence and mutual interest (Southall, 2016).

African teachers' associations were founded in all four provinces of the Union of South Africa, but they were inconsequential. This changed rapidly during the 1940s, as teachers' salaries were cut as a result of the worldwide Great Depression in the 1930s and the serious inflation rates in the 1940s. Subsequently, these unions came to focus increasingly on other inadequate conditions in the profession connected with the Bantu Education Act of 1953 and associated legislation (Burrows, 1986; Moll, 1989; Maile, 1999, cited in Heystek & Lethoko, 2001). Historically, then, the objective of teacher unions – particularly black unions – was to struggle for the rights of teachers such as their working conditions under the various pieces of legislation, while simultaneously campaigning for the political interests of African teachers affected by racist laws and in doing so, they fought the government of the day. For example, the Transvaal African Teachers Association (TATA) started an effective propaganda campaign against discriminatory practices and laws, and directed a demonstration of teachers, parents and schoolchildren who backed teachers' salary needs in central Johannesburg. About 12 000 people marched and at the mass meeting, Dr Xuma, then president general of the ANC, delivered a speech (Kumalo & Skosana, 2014).

Before the establishment of apartheid education by the NP, the Department of Native Affairs oversaw the African education system. There had been some action by teacher activists that has been successful, for example, the teachers' wage campaign in 1944 in which the marchers designed posters that contained slogans such as: 'Hungry teachers can't teach hungry children'. This demonstration was successful in that soon after this, the government increased teachers' salaries and even authorised a commission to investigate teachers' complaints.

The unions with a majority of black teachers subscribed to a different ideology compared to unions with a majority of white members and some have analysed this as a struggle between 'militant' and 'professional' standpoints (Hyslop, 1986, cited in Heystek & Lethoko, 2001). In the 1940s and 1950s the radical type of organisation predominated but this was followed by a conservative professionalism which resulted in an iron grip on teachers (Hyslop, 1986).

6.3 Apartheid and teachers of the civil service, legislation and their professional associations

It was both the rise of the African urban working class, its struggles and the new African nationalist political activism, especially in the ascent of the ANC Youth League (ANCYL) that inspired the transformation in teacher politics. The ascent of ANCYL in Transvaal was instrumental in transforming teacher politics. Many people like AP Mda, David Bopape, Zephania Mthopeng, Eskia Mphahlele, Isaac Matlare, Ellen Khuzwayo, Moses Kekane and even Oliver Tambo, before he set up his law practice, entered the teaching profession and they added to the activism of the period, according to Kumalo and Skosana (2014), writing on the history of the trade unions for teachers.

The young teachers coming into the profession were encouraged by the ANCYL as they strove to change the structures of teacher organisations. In 1949, a group of young radicals won TATA leadership in Transvaal. The TATA leadership attacked the *Eiselen Commission Report*, the report which provided the motivation for the creation of Bantu Education. The Natal African Teachers Association (NATU) were equally offended by Bantu Education, as it was recognised that African teachers would shoulder the impact of Bantu Education since it stipulated double session teaching, hardly any improvements in salaries and job losses.

A commission of inquiry, directed by Dr WWM Eiselen, was set up in 1949 to amend African education. The 'Bantu Local Authorities' were created in the reserves and in white urban areas, made up of chiefs and designated members. These bodies were launched to administer apartheid educational policies and to monitor the labour force in the reserves. In 1953, the Bantu Education Act was passed and Dr Verwoerd infamously announced that 'education should stand with both feet in the reserves and have its roots in the spirit and being of Bantu society' (Heystek & Lethoko, 2001). By 1954, the Act was revised to do away with the missionary schools and training colleges. Government subsidies ceased and missionaries had the opportunity to sell their schools to the government. Thus, superseding the old endowed mission-run system in the second half of the 1950s, the Bantu Education system endeavoured to curtail African aspirations and in doing so the state essentially exchanged quality and autonomy for more extensive access to training. The main objective of Bantu Education was to breed a semi-skilled and restricted labour

force for the flourishing South African economy. The system was firmly divided, despotic and clearly devised to endorse racial and ethnic stereotypes and deter professional progression beyond teaching among the African population (Glaser, 2018).

The Bantu Education system led to racially split departments of education that were inequitably subsidised by the government. This partition gave rise to an inefficient replication of tasks executed by separate education departments for Africans, coloured people, Indians and white people. In total, 17 authorities employed teachers. In contrast to white teachers, African teachers were badly paid and there were differential rates of pay by region within the same national department, namely the Department of Education and Training. Female teachers occupied the lowest tier in the hierarchy, as their salaries were less than that of male colleagues in comparable posts (Kumalo & Skosana, 2014).

Authoritarian management and administrative systems were severely imposed on African teachers and many found themselves working in challenging environments. For example, the teacher assessment process was for administrative and control purposes, centred on the 'inspectorate system' and thus was extremely bureaucratic. Instead of being developmental, it castigated teachers by recognising compliance and punishing poor performance; and it did not help to develop teachers' skills. This system was overly concerned with bettering examination results and instead of the enhancement of learning and teaching. In addition to this, allegiance to the officials and the department overshadowed the welfare and needs of teachers (Kumalo & Skosana, 2014).

Therefore, there was a hierarchical and extremely regulated system for African teachers, known as 'bureaucratic authoritarianism'. Principals were powerful in that they served as 'watchdogs' in order to check that teachers abided by the policies of the department. Principals had control over transfers, medical aid and pension matters. Legislation specified what teachers would be paid, the terms of their service as well as grievance and disciplinary processes, even though there was no dispute resolution or collective bargaining apparatus. The codes and standards of institutional authority were determined by the Ministry of Education and Training, based on the recommendations of the key boards and councils. As a result, there was no participatory governance in African schools and African teachers were intentionally barred from giving their

input into educational policy development. This was a factor in the conservative view of teacher professionalism in which teachers were supposed to be deferential. This would subsequently contribute to the advent of teacher militancy and unionism (Kumalo & Skosana, 2014).

Nevertheless, resistance to the racist legislation from all parts of society, including academics, political organisations, academics, teachers' associations and unions and non-government organisations increased. The anti-Bantu Education supporters appealed for African education to be incorporated under one, democratic, non-racial structure. Bantu Education was divisive and inferior.

Resistance to apartheid education first took place in the 1950s. The significance of the resistance to Bantu Education and the militancy of the 1950s was that it was led by teachers who were also members of African nationalists' movements. Teachers' Associations like TATA and the radical Cape African Teachers' Association (CATA) vigorously resisted racist education as well. Many regional African teachers' organisations advocated for a boycott of school committees and other Bantu Education formations. In the Transkei region, chiefs were given remarkable authority to control school committees and boards, yet many of them were illiterate with no formal education. NATU in Natal was equally unreceptive to Bantu Education and demanded that the material conditions under which African teachers worked be upgraded.

Due to the fact workers' battles were emerging in this period, teachers were compelled to associate with worker objectives in light of the fact that the more conservative organisations were not appealing options. Some of the conservative teachers left TATA in the 1950s in Transvaal to form the Transvaal African Teachers Union (TATU). In 1958, the conservatives took over the leadership of TATA. In turn, TATA and TATU combined to form the Transvaal United African Teachers Association (TUATA) (Kumalo & Skosana, 2014). TUATA was the largest black teacher association in the country and was extremely unsympathetic to Bantu Education, which it called "abhorrent to all black people" (Glaser, 2016).

African and black teachers were excluded from participating in education policy processes (Govender, 2004) and teachers were the first to vehemently challenge Bantu Education. The ANC picked up on this at its annual National Conference in December 1954, where it called for an ongoing boycott of schools (Vilardo, 1996). Two influential teachers' organisations, namely

CATA and the Teachers League of South Africa opposed this and insisted that children stay in schools as the ANC's stay-away campaign was damaging to African children. This defiance movement was composed of teachers, parents and students, but it eventually collapsed due to the lack of organisation and being heavily suppressed by the apartheid state. It came to an end in 1960, when the ANC was banned.

Clearly the struggle between 'militants' and 'professionals', among African and black teachers in general, was rearing its head. The reason for this tension can be connected to African and Afrikaner nationalism. As it had attempted to do before 1948 (as discussed in Chapter 3 of this study), the Afrikaner nationalist state attempted to smash the African nationalist and worker movements in the 1960s. This was significant for the teachers as it is at this point that a 'petty bourgeois status' reappeared, it can be argued (Hyslop, 1986) as some African teachers decided to focus on professional matters in order to survive state repression. The other factor for this shift was that by the 1960s, the various provincial associations for African teachers were amalgamated into a lead national body, the African Teachers Association of South Africa (ATASA). Their attitude was that teachers' unions should not be involved in politics. In the 1970s, this line was challenged by the Black Consciousness Movement and by a number of young politicised young teachers inside ATASA's own ranks. ATASA was able to retain its control over the teaching profession for the time being (Kumalo & Skosana, 2014).

Up to 1972, expenditure on African schools was derived from African taxation. The attention had been on primary schooling, as there was a need for an increased supply of semi-skilled workers. Secondary and tertiary schooling investment in the 1960s took place in the Bantustans, not just to enhance the image of the ethnic reserves but to inspire those looking for further education to leave the 'white areas' (Glaser, 2018). From 1972, secondary schooling in urban areas expanded considerably (Hyslop, 1986). As capital needed more skilled and semi-skilled labour, the NP under President PW Botha dedicated more funds to black secondary schooling. The reformist apartheid government also devoted funds to enlarging black urban secondary schooling in the late 1970s as protests against the unacceptably unequal education system escalated.

To adjust its image, the Bantu Education Department changed its name to the less political Department of Education and Training. The steady falling off of the skills colour bar also functioned to encourage black students to complete their secondary schooling. As class sizes increased, the supply of teacher qualifications was poor. This could be connected to the ongoing change taking place in urban employment. As the quantity of African workers in unskilled employment decreased, an increase took place in the amount of semi-skilled, skilled, clerical and administrative occupations. Professional employment grew as well. Part of the change was attributed to changes in technology that were taking place. African workers progressed up the occupational ladder in urban areas such as in Johannesburg and the Pretoria-Witwatersrand-Vaal area. Where there was no colour bar, such as in the service sector, African workers could advance rapidly up the occupational ladder. African workers in routine white-collar jobs increased tremendously in the mid-1960s and 1980s. The number of African schoolteachers increased (Seekings & Nattrass, 2005), but unfortunately teaching quality did not match this occupational expansion.

There was a striking increase in tertiary education for African students and the greatest growth took place in the 1970s. The university campuses functioned as recruitment centres for the Black Consciousness Movement and university graduates exported the radical concepts back into schools and townships as teachers (Glaser, 2016). A new set of radical and urban political identities developed.

By the mid-1970s, political leadership in Soweto was in the hands of high school students. The youth of the secondary schools were amenable to the Black Consciousness ideology and took advantage of the political vacuum that had opened up due to the banning of the ANC, PAC and Congress movements. Secondary schools were also the site for the development of school-based organisations such as the ANC-aligned Congress of South African Students. Their graduates took up leading roles in the trade unions (the young teachers, well-disposed to the liberation movements, scorned TUATA and ATASA and established their own local teacher unions) and in township-based 'youth congresses' (Glaser, 2016). Enrollment rates for secondary schooling for African children increased and by 1980, secondary education changed from being the 'prerogative of an elite' into a 'mass phenomenon' (Bundy, 1987, cited in Seekings & Nattrass, 2005).

High schools became progressively politicised as student movements reformed. The formation of new militant teacher unions from the mid-1980s, the constant interruptions to schooling such as boycotts, shutdowns, political meetings and mass detentions, and the student movement worked in tandem to weaken the hated Bantu Education system. Orlando High School and Morris Isaacson High School were Soweto's two most significant high schools and attained moderate amounts of education due to robust leadership during the first two decades of Bantu Education (1956-1975) (Glaser, 2016). The Soweto schools had strong leadership and they chose 'strategic participation', which meant that they gathered and secured a cohort of committed teachers who had been trained in the pre-Bantu Education era or had been cultivated within their own schools.

The Soweto Teachers Action Committee was also founded to manage those teachers who were appalled by Bantu Education and by the outcomes of the violence of the apartheid state to the 1976 Soweto uprising. At the same time, the Department of Basic Education wanted power over the engagement of staff and student registrations. This saw teachers quit rather than acquiesce to these conditions. The outcome of this was the monumental phase in Soweto's education history, when some 400 highly proficient high school teachers left the public-school system. TUATA was critical of the mass teacher resignations. The schooling crisis extended to many other urban centres of the country. The political turmoil and the determination to transform Bantu Education unfortunately ruined the status of teachers and the culture of discipline in schools (Glaser, 2016).

Many more teachers left the profession altogether. The struggle against apartheid deepened after the 1976 Soweto riots and growing student radicalisation in schools. A key question was how teachers' involvement in resistance politics could be connected to national political movements, given the absence of 'progressive' teachers' unions or structures which could convey teachers' objections within the larger political battle for democracy in South Africa. All the African associations under ATASA did not rally their membership to explicitly contest the apartheid education authorities and combine teachers' matters with the greater social and political demands. Indeed, the unions put emphasis on 'professional' matters and not work-related issues. As educational and political struggles were unfolding, teachers across the political continuum had to examine their options. The younger generation of teachers were of the opinion that they had to willingly take on the politics of opposition in the region of educational and political matters. Teachers from these associations sent in their proposals on how to action the issues. Yet

in the period up to 1980s, the militant perspective of the old teachers' associations were quelled and they assumed a more moderate method in their engagement with the authorities, which led to them being viewed as 'sweetheart unions' of the government. However, the historical role that they played laid the groundwork for the later political denunciation of Bantu Education. The SACP also backed the teachers' associations and organisations (Kumalo & Skosana, 2014).

Sadly, Soweto's high schools were subjected to substantial damage which could not be fixed. The departure of qualified teachers left a huge gap – for example in 1978, 25 out of the 40 secondary school principals in Soweto were not in possession of university degrees. The new teachers came from the newly founded black teacher training colleges, where the standards were commonly denounced as inferior (Glaser, 2016). The result was that Soweto's high schools were staffed and managed by inexperienced headmasters and young teachers who had recently qualified from infamously deficient black teacher training colleges (Glaser, 2018).

To recap, teacher unions were split along racial lines and there were different teacher organisations for white people, coloured people, Indians and black people. At times, these organisations had to take on 'professional' tactics when engaging with the education authorities and used strategies of consultation and persuasion, while avoiding overtly militant and political action, in order to deal with the repressive apartheid state. The historical training of teachers that took place under the racially segregated and the apartheid system of education entailed that the quality of teaching and learning varied for people of different race groups. Many teachers from the working class went to schools under the administration of the Department of Education and Training and the schooling system was academically inferior, wracked by protests, under-resourced and teachers were trained in previously black institutions that were situated within or near working-class communities. Teachers' educational capabilities were divided along racial and class lines (Hartshorne, 1992).

After the 1976 Soweto riots, another phase in teacher militancy evolved. The mass community struggles of the 1980s revived the working-class burdens exerted on teachers for an alliance with the broader movement. For example, TUATA participated in community organisations and ATASA trade unions supported stay-aways. In 1980, the National Education Union of South Africa (NEUSA) was founded as a non-racial activist education organisation and affiliated with

the UDF (Kumalo & Skosana, 2014). To address the challenges in the beleaguered segregationist and unequal educational system, teachers who had a political outlook were bound to clash with the state bureaucracy. Black teachers led the movement, were more radical and took part in mass protest action against apartheid education. Dedicated teachers had to make a painful decision about delivering quality schooling under Bantu Education or ally with the students to fix the whole system. There were boycotts and disruptions and the Department of Basic Education were ruthlessly inflexible. With the restrictions on student organisation, the teachers were of the opinion that they had to ally with the students. They resigned in large numbers and this had a devastating impact on the education system yet again, as the best and most experienced high school teachers left the profession (Glaser, 2018). Indeed, many Africans who held post-school qualifications gave up on teaching as a career and pursued better-paying jobs. In 1984, Soweto's high schools were drawn into national politics mobilising against the tricameral parliament (this was the South African parliament and its structure from 1984 to 1994, brought about by the South African Constitution of 1983).

Educational and broader political issues became indistinct. Students did not accept their teachers' authority. By just remaining and attempting to teach, and for being employees of the education department, teachers were often considered as traitors by the boycotting youths. The ethos of the discipline was broken. Headmasters could not manage to get teachers and students into class on time, never mind compel students to concentrate on their academic studies. Practically speaking, teachers could not force the respect of their students. Teacher training colleges were planned for rapid turnover and not excellence, and so the good students did not attend them. There was no reason to be a teacher in the public sector – it was an unrewarding job, there was very little appreciation from students and from peers, and it was poorly remunerated. Working for the state also entailed political cooperation on the part of the teachers.

In 1986 there was no schooling and endless disruption ensued until the end of 1987. Exams were canceled, high schools were disturbed by almost repetitive bouts of boycotts, security force interferences, mass detentions, protests, student casualties and politicised funerals. The politically associated stoppages in the 1980s meant that some of the schools never recuperated. Some functional schooling could slowly reappear, but the culture of teaching and learning had changed.

Models of work inside black schools relied on external forms of control and supervision closely implicated in the overall system of white control[40]. The domination of teachers' work in black schools was bureaucratic, hierarchical and undemocratic. The inspector and subject advisor, principal and head of department and all departmental representatives were very much part of the lives of ordinary black teachers. Their command over the work of teachers was related more to the bureaucratic preoccupation of social control and departmental calls for fidelity and subservience. There were no teacher-directed forms of control over the curriculum and assessment practices. These models understandably lent themselves to a conceptualisation of schools as factories or industries, of departmental officials and others in the hierarchy as management or bosses, of teachers as workers and of unions as industrial associations. Chisholm (1999) contends that these connection of bureaucratic domination over teachers with the apartheid state also produced teacher resistance and the advancement of other professional forms and bases of authority and direction over work. Therefore, in the 1970s and 1980s the Bantu Education boards and committees were the focus of anti-apartheid protest actions. The authoritarian environment and the bureaucratic methods also led to the emergence of the young militant teachers of the 1980s. They viewed themselves as revolutionaries with the task of moving forward the revolution of the educational system. With the escalation of the political struggle for liberation, the increasing number of more progressive teacher unions that appeared on the scene would embrace a noticeable unionist attitude in fighting for educational change and policy.

Their desire was to affiliate with the labour movement bodies and their focus was on challenging the symbols of white domination and control over their work. There was also great interest in merging South African teachers into a single democratic and non-racial trade union with links to the labour movement (Hyslop, 1986, cited in Heystek & Lethoko, 2001).

Even though NEUSA was non-racial and was allied to the UDF in 1983, it was a diverse formation and battled to gain mass membership. Some considered NEUSA as being led led by

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[40] Chisholm (1999) argued that the professional methods of control of teachers' work in white schools were embedded in their relationship to citizenship in the apartheid system. Teachers in white departments had extensive representation in policy creation at the state level. White teachers possessed an extent of autonomy over their work and this was marked by the departmental structures that offered professional assistance to teachers and ensure that schools are well-resourced. White teacher interests were included on official curriculum and assessment structures which defined curricula for white and black schools.

white people, and thus considered the union racist. Some Black Consciousness Movement teachers felt that if they signed up with NEUSA, they would be disloyal to their fellow Africans. Some opted to join NEHAWU instead, which was a COSATU affiliate. NEUSA persisted as an educational movement that addressed the education crisis, recognised that the current teacher organisations were disjointed by the apartheid system and called for one federation for the representation of the country's educational issues, where all organisations could take part in the formation of a more fairly balanced education system. What transpired was the creation of many 'progressive' teachers' organisations which were headed by NEUSA, as it had a political affiliation to the national liberation movement, and that more young radicals entered the teaching profession. NEUSA used the strike weapon, or 'chalk-downs', to obtain concessions. In 1988, all the trade unions and educational movements were encouraged by the exiled ANC to join in the National Teacher Unity Forum which saw them cooperate with the National Education Coordinating Committee and even the conformist or narrow professional teacher associations formed a giant progressive teacher union (Glaser, 2016).

This gave rise to the formation of SADTU in 1990. Teachers' colleges and universities functioned as political mobilisation centres where anti-apartheid activists, upcoming SADTU leaders and students were familiarised with politics. The process of teachers' politicisation and radicalisation was not consistent, neither was it influenced by the 'professional association' in opposition to 'militant teacher union' differences (Hyslop, 1986, cited in Heystek & Lethoko, 2001). Teachers had advocated for better salaries and working conditions and so they were highly politicised and they viewed their union work as integral to the broader national democratic struggle (Glaser, 2016). SADTU was devoted to the development of a unitary education system and it passed on a militant trade union style to the schools, which overwhelmed the old conservative professional associations. These kinds of unions had a joint political and educational programme and would establish themselves as non-racial and affiliated to the vanguard organisations of the liberation struggle, notably the ANC, COSATU and the SACP (Kumalo & Skosana, 2014). Naturally, the apartheid state preferred the conservative professional form of teachers' organisations, but it was confronted with the emergent radical trade unions who criticised the professional associations for their conservatism and apolitical outlook. This was a new cohort of progressive unions that were branded as radical, considered themselves as 'workers' and would take part in strikes without hesitation (Govender, 2004).

Reforms in the education system resulted in officials implementing firmer control over teachers' work. The labour movement for teachers responded to these developments. As noted, SADTU and its predecessors were already hostile to external evaluation. They urged the teachers to consider themselves as wage earners and to recognise what they had in common with the broader working class. Thus there were among the various representation bodies for teachers, divergent organising ideologies. As the teacher organisations opposed to apartheid in the 1980s re-emerged, a new discourse appeared around whether teachers were 'workers' or 'professionals' and these were significant indications of political difference. The more conformist teacher organisations had different histories and these were of embeddedness in the consolidation of racially separated departments of education and so they considered themselves as 'conservative professionals'. Adhering to this professional status, they pursued career progression within the apartheid order, stating their obligations were in favour of the 'child' over those of 'politics' and they steered clear of radical methods action to achieve their ends and supported a racial federalism of teacher organisation (see Hyslop, 1990 cited in Chisholm, 1999). However, structurally as there were separate departments of education each had its own association, differences were acknowledged and organisational sovereignty was preserved, but links were made on the basis of common values based on an understanding of teachers as 'professionals'.

Therefore, historically teacher trade unions had used tactics of both unionism and professionalism separately or in conjunction but these were subject to the specific historical, political and ideological possibilities (Ginsburg, Meyenn & Miller, 1980, cited in Heystek & Lethoko, 2001).

At this stage it was these working-class ideas and matching types of organisation for teachers that encouraged them to enlist in the struggle for social change. Teachers clearly thought of their organisations as trade unions and not as professional bodies. The younger and far more militant teachers were influenced by the national democratic movement of the 1980s and so disassociated themselves from the ideas and approaches of the older teacher organisations. They defined themselves as educational 'workers' and viewed education and politics as inextricably connected. This assertion of a 'worker' identity, reinforced by representing the school as an industry, expedited the building of relations by teachers with COSATU. The 'teachers as workers' identity enabled the paying of attention to workplace issues open to collective action

and bargaining (Chisholm, 1999). During the late 1980s, student organisations drove departmental inspectors away; and in 1990, SADTU made certain that they would not come back – but no practical system of evaluation and observation was put into place. Headmasters could not discharge staff due to poor performance and typically inept and slack teachers were sheltered. Frequent complaints were raised about SADTU's undue involvement in the employment and promotion process. The unionisation of teachers had performed a constructive role in dismantling Bantu Education in the late 1980s and it was the same force that subsequently blocked the government from monitoring and evaluating the profession, prompting Glaser (2016) to comment that the heroic martyr of the 1980s was the status of the teaching profession.

During the transition period in South African; that is, from apartheid to democracy in the early years of 1990, former white schools had to open their doors to break down racial boundaries. This was the democratisation of schools and many African learners moved out of African schools into the former coloured, Indian and white schools, but the majority of African learners still attended township and rural schools. There tended to be more single race schools for the poor. Many working-class white, coloured and Indian schools opened their doors to African children and so these schools became racially diverse. Many white children who went to the white government schools moved into independent schools to avoid racial integration. Basic access to schooling expanded, but not so the quality of township education. Those who could afford it transferred from public school to private schools. Some went to schools in small towns or country schools, which had fewer students and were more settled. The black middle class departed from township schools as the system deracialised. The poorest were incapable of getting away and could only participate in radically degraded local high schools.

Teacher trade unions experienced a favourable political and legal environment in South Africa in the 1990s, which helped facilitate the growth of SADTU. The early 1990s marked the appearance of more trade unions in the transition phase and teacher unions embraced a professional unionist style when tackling organisational and political issues.

Chisholm (1999) contends that teachers' work was tested under apartheid but that in the transition to post-apartheid society it was restructuring of education within the neoliberal global economy environment that strained teachers. During the transition era, apartheid education

continued to inspire significant teacher opposition and labour process matters was at the middle of this. Chisholm (1999) maintained that teachers' militancy was connected to this transitional period as teachers associated with national movements that were outside of education. As also noted, the technique of teacher appraisal was the subject of teachers' opposition in schools from 1989-1994. The core trepidation with the processes for appraisal was monitoring and surveillance. This was carried out using checklists and teachers were assessed in terms of four modules which, in addition to curriculum matters, included personal issues like their personality and professional outlook and approach. As this was the period of struggle against apartheid education by teachers, the assessments were employed to test loyalty to the department controlling African education and teachers were suspended, re-assigned or dismissed if they were found to be disloyal. One clear indication of this was their SADTU membership or their participation in political or educational organisation practices that challenged the status quo (Mda, 1989, cited in Chisholm, 1999). Teachers embarked on a defiance campaign in their schools and started to try out new forms of work organisation. This is when the idea of teacher as the classroom manager of a learning process, driven inherently as a professional to apply curricula which can be adjusted to teaching conditions took root. The unions advocated for supervision and hierarchical forms of management to be eliminated and for internal and locally based forms of authority to be put in its place. As new departments and policies were being put into action, the new attitude to teachers' work was shaped by the discourse of cost reduction and the new managerialism. The range of protest activities in 1990 included stay-aways, 'chalks-down', marches to offices, listing their grievances, sit-ins and impeding departmental officials from visiting schools (Chisholm, 1999).

The purpose of government policy during this phase was to equalise salary scales for the whole teaching labour force with those of white male teachers, as the average salaries were different across race and gender groups. In 1992, the average salary for black female teachers was roughly half of what it was for white male teachers (Chisholm, 1999). The difference in pay for those teachers at the upper end of the scale and those at the lower end was also narrowed through adjustments due to trade union pressure.

6.4 The teachers of the public sector, legislation, their professional associations and trade unions and post-apartheid South Africa

6.4.1 Restructuring phase 1994-1997

The ANC's 1994 election promise was to turnaround schooling in poor areas by reassigning teachers from the overresourced schools. In the 1990s there was a process of rationalisation and part of this process saw some teachers privately hired in the government school that they had been teaching in (Gustaffson & Patel, 2008, cited in Seekings, 2004). In the phase of the restructuring of teachers' work from 1994 to 1997, the reorganisation and control of teachers' work took place against the backdrop of ending the inequalities of apartheid education. The 18 racially separate education departments were merged into one national and nine provincial education departments. In addition to this, in the newly integrated education department, some former SADTU officials were put into positions of authority and they attempted to redirect resources to township schools in the democratic era.

The post-apartheid state's vision was that the educational development should strive for promoting a new philosophy of learning and teaching in which old styles of learning would be replaced with critical thinking skills and competencies.

Yet during this phase, South Africa was not insulated from new global patterns and neoliberal globalisation. Via GEAR (1996), which was an internal structural adjustment programme, fiscal discipline and austerity was stressed. Global changes were occurring in the educational sphere as well. Among many changes, the advancement of marketised types of education and a revival of human capital theory, in which the role of teachers in the school system was again theorised as producers of human capital for 'economic growth' and competitiveness prevailed (Chisholm, 1999). These new discourses and practices in the post-apartheid era emphasised marketing and management. Significantly these formed the new and sustained forms of controls over teachers. While democratisation of the wider society and the circulation of democratic values meant that the previous forms of control were archaic, they were replaced with new forms of market control over teachers' work. In relation to other countries, South Africa's education expenditure was high and the country was embarking on immense social change while trying to keep social spending within limits. Ruling out an extension of the educational budget, the reallocation of

resources took place from white to black schools, from higher to primary education and from affluent to poorer provinces. This was an austerity-based fiscal policy in the educational sphere.

SADTU engaged with the government on the results of GEAR as the government merged the move to greater equality with these fiscal limitations. SADTU was critical of the cuts but accepted the policy in the hope that teachers would go and teach in the poorer schools (Southall, 2016). Not many teachers did and more teachers took the packages. When posts were frozen, there was room for improving salaries but the learner-to-teacher ratios increased, which impacted on the workload of the remaining teachers. This is something that SADTU became highly critical of. SADTU complained that President Mbeki's government's neoliberal strategies had led to even worse conditions in the poor communities, that teachers had to cope with these awful conditions, their pay was low and that the provision of resources was problematic.

Between 1987 and 1997, there was a notable increase in the teaching labour force as about 100 000 more teachers were hired in schools and remunerated from public funds as a result of the increase in enrolment in schools. Black teachers who had completed four years of post-secondary education were the recipients of actual pay increases as much as 25 percent in the mid-1990s (Gustafsson & Patel, 2008, cited in Seekings, 2004). Improvements in teachers' salaries in the mid-1990s had not turned into better-quality educational services for the poor. Pro-poor spending had not been converted into more equal opportunities. The quality of education remained low and this impaired total economic expansion (Seekings & Nattrass, 2005).

An extensive process of the redeployment of teachers took place after 1994. As national policy required the redeployment of teachers, those who did not opt in had to take a voluntary severance package. This was known as 'right-sizing of the public sector' (Chisholm, 1999) and involved the redistribution and rationalisation process of teachers. All of these measures were implemented to amend the working conditions of teachers. The unions brokered an agreement that redeployment would be mainly voluntary; the 'right-sizing' of overstaffed schools would be accomplished mostly through ample voluntary severance packages. The negotiated settlements over redeployment and retrenchment were pricey in terms of both skills and finances.

The result was an increase in the number of teachers as understaffed schools employed new teachers more rapidly than the overstaffed ones managed to let them go and the most experienced teachers opted for voluntary severance packages. Indeed, many white and black teachers chose the packages. Unfortunately, in 1997, the cost-cutting measures were extended to the contracts of temporary teachers, who were mostly black teachers in poor, rural and farm schools, to an end.

In 1998, SADTU objected and embarked on socio-economic mass protest action to protest against this. In 1999, SADTU accepted redeployment being carried out again. Teachers effectively sought to maintain the centralised system of 'post provisioning' that hindered the development of a more equitable fiscal allocation to poor schools. Most teachers' unions were firmly opposed to the decentralisation of decisions over post provisioning to schools as they were worried that it would weaken teachers' bargaining position. The Department of Education's allowance on this matter was "perhaps the most important education decision that was taken immediately after the election" (Fleisch, 2002:45, cited in Seekings, 2004).

It was the redeployment policy which was linked to the 1996 pay increases as propelled by the teachers' unions that led to a fiscal crisis for the provincial governments tasked with administering public schooling. By insisting on and obtaining higher salaries, teachers forced education into a fiscal predicament in the late 1990s and these actions made certain that fewer teachers would be employed ,which adversely affected the quality of education (Seekings, 2004).

Therefore, the post-apartheid state reallocated resources immensely by spending on services to the poor including especially public education. As already stated, there was an outlay of massive amounts of money on paying teachers in schools that poor children were enrolled in. This did not result in the upgrading in the educational prospects for the poor (Seekings & Nattrass, 2005).

The appeal for democratisation of control of teachers' work was transformed at a policy level into a managerial instrument for the control rather than empowerment of teachers in post-apartheid South Africa. Indeed, the previous checklist of behaviours were re-implemented, and they were the exact same ones that had been scorned in the 1990s. The new managerial ideas of the organisation of work clashed with professionally positioned ideas of control that were formed to challenge the bureaucratically based apartheid controls. The significance of this was that new

forms of control of teachers in the form of decreasing budgets and increasing workloads was established.

As countries endeavoured to control education budgets, a restriction in educational materials expenditure also took place. This impacted on teachers who had more work in an already challenging environment. The intensity of the workload led to higher rates of absenteeism or lower levels of motivation among teachers (Chisholm, 1999). Crucially, factors like the redeployment of teachers and making teachers redundant coupled with the new assessment methods, as a result of the new educational policies, resulted in the 'proletarianisation' of the teaching profession. Teachers became subject to more, not less, job insecurity – in addition to an amplified control of the pace, content and volume of their work as teachers (Chisholm, 1999).

6.4.2 Post-apartheid legislation in the educational sector

From 1994 onwards, the post-apartheid state worked on attaining progressive reforms. It reorganised the schooling system and merged the previously racially divided system. Teachers were central to the post-apartheid government's determination to attain a much-improved quality of schooling. Like nursing, the importance of the delivery of quality education in post-apartheid South Africa was one of the most vital 'public goods' of a democratic society which was signaled by the *White Paper on Education and Training* (Department of Education, 1995, cited in Govender, 2004) as well as the *Policy Framework for Quality Assurance in South Africa* (Department of Education, 1998, cited in Govender, 2004).

The Education Labour Relations Act of 1993 provided an official tool for collective bargaining and determination of labour policies and the ELRC was launched. Teachers were now represented in joint policy making forums like the ELRC, the South African Council for Educators (SACE), which was the creation by teachers, and the PSCBC (Govender, 2004). Due to the fact that most teachers were predominantly unionised workers, their trade unions were influential in the formation and application of education policies in schools (Mhlongo & Maile, 2017). The unions were involved in the endorsement of the South African Schools Act of 1996, which aided both learners and teachers.

One of the main goals in education in the 1990s was to reinstate the culture of learning and teaching (COLT) in schools. The aim was to adjust examination performance in the matriculation examination and raise the general standard of education. In addition to this, the South African Schools Act of 1996 and the Revised National Curriculum Statement (RNCS) transformed the education environment. The curriculum was also transformed and the rote learning of 'Christian national' and 'Bantu Education' has been substituted with a more skill-oriented 'Outcomes-Based Education.' Despite the immense changes in the curricula (known as Curriculum 2005), there was a shortage of textbooks in black schools and teachers also battled with issues of multi-culturalism and anti-racism, the values of a non-racist society and how to insert these in pedagogical practice in the desegregating schools (Heystek & Lethoko, 2001).

The National Education Policy Act of 1996 specified the management of education along national and provincial lines, which required teacher unions to rearrange themselves to secure a place in the nine provinces. In particular, teachers' rights to collective bargaining and strike action were defined in the Labour Relations Act of 1995.

6.4.2.1 Training the teachers

A new form of appraisal system was passed in 1999. In 2000, the Department of Education identified that about 85 501 teachers or almost a quarter (23.9 percent) of the teaching labour force fell below the Required Education Qualification Value (REQV) 13 benchmark qualification. To resolve this, the Department of Education and the teacher unions, with the support of teacher training institutions, worked on a qualification system to assist the teachers. A four-year teacher training programme started in 2001.

There was great variation in quality of education among teachers. Some teachers were industrious and surpassed 'even the high expectations placed on them by the system and the community', as the Department of Education had recognised that, 'these are the heroes of our schooling system, and there are many of them' (Department of Education, 2003b:1, cited in Seekings, 2004). At the same time there were too many teachers who were either simply ill-prepared for this or merely inept (Seekings, 2004).

According to Maree (2017), SADTU had attempted to advance teachers' working conditions and to implement training to improve their skills. The union stated that bad working conditions and low pay demoralised teachers. SADTU resisted connecting teachers' compensation to their performance at school as gauged by how their learners perform (SADTU, 2009b).

In terms of educational achievements, South African teachers were significantly more educated when compared to the rest of the labour force. It was estimated that teachers had approximately 56 percent more education that other employed workers in 1999 (Seekings, 2004). This gap was reduced by 2006 to roughly 44 percent as a result of the increase in the educational achievements of the rest of the labour force. Teachers had also obtained higher levels of education in primary, secondary and tertiary education than their colleagues in non-teaching professions (Armstrong, 2015).

The teaching force was substantially more female when compared to other non-teaching professions, with 64 percent of teachers being female in contrast to just 41 percent of non-teaching professions (Armstrong, 2015). In terms of tenure, teachers had on average stayed with the same employer for longer than non-teachers had done; teachers have an average tenure of 11.68 years in contrast to 7.10 years for non-teachers (Armstrong, 2015).

6.4.2.2 Education expenditure and teachers' salaries

In the mid-1990s, the proportion of public expenditure on education, health, social assistance, housing and water increased. Social spending increased for public education, but this entailed the elimination of implicit discrimination in teachers' salaries and putting extra teachers into the system (during the apartheid years, teachers were remunerated on different salary scales). In 1996-1997, teachers were shifted onto a combined salary scale which was matched to the scale of the previous white education departments so as to deracialise salaries, especially given pressure from African teachers and trade unions (Seekings & Nattrass, 2005).

Even though data for spending in the mid-1990s were erratic, the patterns were clear and revealed that spending on the whole and per learner increased quickly in real terms to 1996, then declined for three years, but has been increasing ever since 1999 (Department of Education, 2003a, cited in Seekings, 2004). The period 1996-99 was one of minor fiscal cutbacks and there

was reduction in actual spending of about 12 percent over three years. From 1995-2003 there was a small real growth in public investment in education. However, the distribution of funding had changed since 1994. It was assessed that the portion of public expenditure on schooling that was allocated to children from the poorest income quintile in the country (that is, from the poorest 20 percent of South African households) increased from 23 percent to 29 percent between 1993 and 1997. Simultaneously, the share spent on white children decreased from 22 percent to 10 percent (Van der Berg, 2001, cited in Seekings, 2004).

Teachers were in the topmost decile of income earners and were organised mostly by SADTU. Per capita spending on poor children had improved and the biggest percentage of this upgrading was dedicated to remunerating teachers at much higher rates, short of better-quality educational outcomes. This was touted as proof of a pro-poor change in the post-apartheid government's education spending. To be clear, it was the improved teachers' salaries which represented the majority of public spending share on education. There had been a noteworthy transfer in resources towards poor children; but in reality, these were moves towards teachers in schools that poor children attended.

The amended equity in the provision of public funds was due partly to the outcome of a salary agreement that the government accepted in 1996. Salaries were a key issue for teachers and their unions. Remuneration grew dramatically partly via the re-grading of teachers onto a new grading system. It was the lower-paid teachers who gained the most from the increases and some had their salaries double in real terms between 1993 and 1997 (Baskin, 2000; Garson, 2000, cited in Seekings, 2004).

Salary and linked costs were also higher than seemed to be warranted by the age of educators, their credentials and other labour market factors. The ratio of the regular cost of a teacher to GDP per capita in South Africa was roughly double that in countries with similar levels of GDP per capita (Crouch, 1997, cited in Seekings, 2004). Despite these gains, teachers in post-apartheid South Africa could not avoid 'down-sizing'. The great salary increases of 1996 resulted in a 15 percent decrease in the number of teachers working in public schools and teachers did determine the terms on which this took place.

As noted, public expenditure for education is the biggest share of the total budget and is equivalent to approximately six percent of GDP, which places South Africa in the uppermost category of international spenders on education. The ratio of the public education budget spent on schools in comparison to universities is remarkably high. The significance of this was that South Africa devoted a larger chunk of its GDP to public schooling than virtually all other developing countries do (Seekings, 2004).

Despite this substantial restructuring, the quality of primary and secondary schooling in South Africa remains below par. In other words, increasing expenditure on the schools attended by poor children and changing the curriculum did not produce the desired outcome of these children obtaining more skills in school. There were many reports on the failure of the schooling system in post-apartheid South Africa and studies of the alleged 'dysfunctional school'. These schools were poorly managed, their teachers employed substandard teaching methods, there were not enough textbooks for all the learners, the physical circumstances were not favourable to learning, teachers and learners were frequently not at school, and many teachers do not demonstrate essential subject proficiency (Seekings, 2004).

6.4.2.3 Trade unions and teachers in the post-apartheid era

The attempt to unify the teaching profession did not initially succeed and led to the formation of two extensive bodies in the early 1990s, one being the National Professional Teachers' Organisation of South Africa (NAPTOSA) and the other being SADTU. The main areas of disagreement between these two unions was firstly the inability to compromise on the issue of political alignment as well as the political position of teachers within and outside the classroom and secondly if a combined body should be based on unionism or professionalism. Traditionally the leadership of NAPTOSA was mainly male, but its membership was essentially female primary school teachers. SADTU's membership was predominantly composed of male secondary schoolteachers.

Teacher trade unions benefitted from new and structured labour relations environment, which paved the way for increased cooperation between unions and resulted in notable achievements around salary increases and parity, addressing racial and gender historical inequalities. Indeed in the post-apartheid era, trade union struggles extended beyond shop-floor concerns to embrace

broader policy issues in the mid- to late 1990s (Govender, 2004). Putting aside their ideological differences, trade unions like NAPTOSA and SAOU joined SADTU in August 1999 to embark on strike action for salary increases which was part of the broader public service strike organised by COSATU. SADTU, despite the fact that it has partisan allies in government, found that the shaping and influencing of policy was an ongoing contest (Govender, 2004).

Significantly teachers and their unions were powerfully vested at times in postponing or impeding policy reforms. Teachers had always presented a powerful political force and this was no different in post-apartheid South Africa. Teachers and their unions also blocked attempts to make teachers and principals more responsible for their performance. The concrete antagonism of the teachers' unions, especially SADTU, had prevented the state from even trying to implement major reforms and undertake teacher appraisals. The context for this was the breakdown of the apartheid educational inspectorate in the early 1990s, when SADTU led a 'No to Inspectors' drive. This campaign inadvertently collapsed all authority in schools as there was no mechanism to compel teachers to account for their performance. The post-apartheid state feebly attempted to initiate reforms 'from above', but this was opposed by teachers and their unions. Parents' roles in governing schools was implemented through school-governing bodies and this was contested by SADTU.

When SACE devised a disciplinary Code of Conduct for teachers for cases of violations of discipline, which was contested by SADTU. In 1998, the unions and state concluded an agreement on a new performance appraisal scheme for teachers. Classroom visits resumed, but improving teacher performance rested on voluntary in-service training.

6.4.2.4 The South African Democratic Teachers Union

SADTU started out as an assortment of disjointed and locally initiated teacher organisations connected to civil society opposition movements of the 1980s, shunning racial methods of organisation. SADTU was informed by the call of the Freedom Charter: 'The doors of learning and culture shall be opened!' Nkomfe and Moll (1990, cited in Heystek & Lethoko, 2001) assert that SADTU publically related to the political agenda of the ANC, especially, with the educational transformation based on the ideology of peoples' education. SADTU argued that

apartheid had created a 'race-based working-class' structure that had 'class similarities' within a race prism (SADTU, 2010).

Specifically, SADTU was formed when TASA brought its membership, resources, secretariat support service and a building in Durban. On 6 October 1990, in Johannesburg, the national SADTU structure was established due to the common challenges of the professionalisation, unionisation and advancement of teachers in the context of a changing education system. Various political leaders in post-apartheid South Africa were at one time in prominent leadership positions in SADTU, such Thulas Nxesi who subsequently served in many ministerial portfolios, including as the Minister of Public Works. The past COSATU president was Willie Madisha, who was a former teacher and SADTU president and then served as the deputy president of a political party that broke away from the ANC, namely the Congress of the People (COPE), formed in 2008. Previous SADTU leaders served as ANC Members of Parliament and were active in the parliamentary Education Portfolio Committee. Membathisi Mdladlana had trained as a teacher and served as Minister of Labour in 2004. Some went into positions in the Department of Education such as Duncan Hindle who was the Director-General in 2004. Teachers were a strong influence on education policy both the changes that were passed and on the reforms that did not make it onto the agenda.

As an affiliate of COSATU, SADTU considered itself to be the education union of COSATU to lead change in the education system in South Africa and to a certain extent to deal with the welfare of teachers as workers. In addition to this, SADTU asserted that 'the South African teacher needs to place him/her at the centre of any nation-building project undertaken during each of the socio-political development phases of South Africa' (SADTU, 2010) .

SADTU stated that it was a trade union movement that organises teachers irrespective of race, creed or gender across South Africa. Following its establishment, SADTU confirmed its unionist policies as it firmed up its alliance with COSATU. The union had remained an important part of the Tripartite Alliance and had maintained its commitment to the workers' struggle and the advancement of a socialist agenda in South Africa in spite of the ANC-led government's economic policies (SADTU 1995 and 2002). The main purpose included bargaining for members' compensation and better working conditions for school-teachers, representing and

supporting the professional ambitions of teachers, taking on the major role in the struggle for education transformation, to produce free and equal quality education for all learners, as well as contributing to the struggle to deepen the NDR. SADTU's view of Bantu Education was that it was 'a means of reinforcing white supremacy and ensuring the effective exploitation of African labour; politically, it aimed to frustrate the development of a national spirit among Africans' and it often referred to this in its documents. Hindle (1991, cited in Heystek & Lethoko, 2001) maintained that SADTU's ideology was inspired by the politics of its black membership. SADTU saw no inconsistency between a strong organisation, capable of protecting and supporting the labour rights and interests of teachers and the professional work of these teachers. As SADTU affirmed, 'we teachers of South Africa having committed ourselves to the transformation of education and dedicated ourselves to the development of an education system which is fully accessible, equal and qualitative, free of apartheid legacy and which is the just expression of the will of the people – as enshrined in the Constitution of the country – hereby proclaim the need for a single teachers' union in our land' (SADTU, 2010).

SADTU argued that if the teachers' conditions of work, salaries, amenities in schools and the efficient functioning of the Department of Education were adequate then the talk about professionalism could take place. In a survey conducted by Heystek and Lethoko (2001) it was found that SADTU confirmed that employment conditions of their members were a priority over their professional status and that it was up to the principal to look after the professional status of teachers. Indeed SADTU identified working conditions, qualifications and salaries as important in the hope that once they were resolved that the issues of professionalism of teachers would follow. SADTU asserted that if teachers were fulfilled then their teaching would be effectual and they would display professionalism towards their work.

According to SADTU's 2030 Vision, it acknowledged that the antagonistic mindset that inspired the then unionisation of teachers remained and was at the centre of development-oriented activities of unions like SADTU. It was also conscious of how persuasive the liberation movement was on SADTU as it had to confront difficulties within the broader social emancipation context of the NDR. It is further stated that socialism should be well understood in the context of the character of SADTU. The meaning of the NDR was to liberate Africans and particularly black people, since they had suffered national oppression and class exploitation and

to create non-racial, non-sexist, democratic, united and prosperous nation (SADTU, 2010). A decision was made to build SADTU into a 'working-class and pro-poor social force' committed to the NDR and to socialism (SADTU, 2010).

With the advent of the democratic government in South Africa, SADTU had a remarkable growth in its membership as more teachers joined its ranks, particularly the younger generation of black teachers. At its founding, SADTU had 30 000 members. From 1993 to 1995, 80 000 teachers became a member as SADTU embarked on a recruitment campaign, swelling the ranks to a membership of 100 000 (SADTU, 2010). SADTU's membership steadily increased to 200 000 between 1996 and 1999 and by 2010 it had about 250 000 members. This made SADTU one of the fastest growing trade unions in COSATU. SADTU also started a trade union-owned independent consumer services company in 2002 which offers a variety of assurance and financial services and products.

The 'non-racial' SADTU represented nearly two-thirds of schoolteachers in South Africa. SADTU campaigned for the ANC in elections, but openly connected its support to the ANC maintaining its support of SADTU[41].

SADTU was quite similar to other teacher unions in other countries, but not identical. The national teachers' unions in Korea (KFTA) as well as in Mexico were considered as legitimating the decisions of state elites and not working in the interests of educators (Govender, 2004). In Mexico, the National Union of Education Workers (SNTE) was founded with firm support from the Institutional Revolutionary Party (PRI) and it subsequently operated as a political machine for the party at elections. As the union was faithful to the governing body, union leaders were given management positions in the educational bureaucracy and they were selected for strategic positions at the legislative and executive ranks. This was similar to the rise of SADTU especially its close political association with the ANC (Govender, 2004). It had installed cadres into top management positions in the Department of Basic Education who were well remunerated where they could actively promote SADTU's interests. According to SADTU, the deployment of cadres by SADTU into these essential senior positions of the department in all levels gave the union the

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[41] However, former General-Secretary of the ANC, Gwede Mantashe, slated SADTU for 'sabotaging education' (Maree, 2017b), even though the trade union enjoys a much closer relationship with government than trade unions did before 1994.

ability to significantly shape the tone and content of the programmes and policies of the department.

There had been reports of SADTU members selling posts in schools and issuing death threats, even though the National Executive Committee of SADTU expressed their disapproval of this system. The Department of Basic Education appointed an enquiry into these purported practices led by Professor John Volmink. The Volmink Report was submitted in May 2016, but was embargoed as a result of a forensic examination that then commenced. The report found that in six of the nine provinces in South Africa, SADTU had employed teacher militancy to coerce its members to be unionists first and professionals second. It was also proposed that SADTU flexed its union muscle to entrench its power under the guise of deepening democracy or enhancing school autonomy (Southall, 2016). SADTU also obstructed efforts made by the government to connect upcoming pay increases to performance and productivity. As discussed above, during the 1980s SADTU resisted government's control over black teachers. In the post-apartheid era, SADTU rejected proposals for monitoring and evaluation as neo-liberal. Some had questioned this as it seemed as if SADTU acted to shelter their membership and questions about its commitment to professional unionism were raised (Southall, 2016).

SADTU was concerned that when the ANC recognised trade unions for teachers that it posed the danger that the middle-class identity assumed by many teachers might transform SADTU into a 'pro-capital teachers union' (SADTU, 2010). SADTU contended that the teacher was not correctly defined as 'middle class'. This was a misclassification and they stated that this confusion continued to influence the contradictory 'class identity' of teachers and thus their place in the nation-building pecking order. Interestingly SADTU recognised the tensions between professionalism (calling it the 'elitist interpretation of teacher unionisation') and trade unionism of teachers, stating that this had sensitised SADTU to the dangers of becoming a 'pro-capital' teachers union. SADTU stated that it was a strategic decision to build the trade union into a working-class and pro-poor social force with a militant contingent against unfair labour and conditions of service practices of any government. Thus SADTU declared that it had a trade union focus with a liberation movement with an inherited 'broad church' and 'hegemony dispensing' nature which had influenced its character.

This was consistent with its support of the broader politics of the liberation struggle and the development of a democratic state as per the NDR as its leaders needed to occupy key strategic positions in government and society at large. SADTU not only fought for equal education but positioned itself as being part of the political liberation of the nation. SADTU had gone on many strikes in the post-apartheid era and had urged learners, often from schools in townships and rural areas to join in the strikes. SADTU had great influence in the education system but teacher trade unions generally wielded power in the running of the countries education system (Mhlongo & Maile, 2017). SADTU had also become part of the factional battles which were pulling COSATU apart. Clashes within SADTU in 2014 led to the dismissal of its president and dissatisfied members left SADTU to start their own trade union (Southall, 2016).

6.5   Official statistics and quantitative analysis of the employment, highest educational level and trade union membership of African teachers in the public sector

To provide a description of the number of African teachers in the labour market, the study relied on information from the Statistics South Africa's OHS, LFS and QLFS. Teachers were defined as 'teaching professionals and associate teaching professionals in primary and secondary schools. Specifically, the group included primary education teaching professionals and associate professionals and secondary education teaching professionals and associate professionals.'

6.5.1 Employment of teachers in the public sector

Figure 5 provides an aggregate picture of the employment of African teachers in the public sector, from 1995 to 2018. The tables that follow this graph provide a more detailed breakdown of the figures and their variation over the numerous data sets. A cross-tabulation of three variables was conducted within each data set, namely 'population group' (for African), the 'type of business' (to isolate African teachers employed in the public sector) and 'occupation' for all the categories of nurse as mentioned above. The outcome of the data analysis are summarised and presented in Figure 5 in the form of actual number of African teachers in the public sector. The data are weighted to the South African population using the Statistics South Africa weightings. The OHS data sets are not comparable to the LFS and QLFS data sets, as noted in Chapter 4, but it is reiterated here. The LFS and the QLFS data sets are comparable as important changes in the LFS data were implemented in 2005 to 2007 to make the data comparable to the

QLFS data which started in 2008. The trends in employment of African teachers are also discussed.

Figure 5: Aggregate data of African primary and secondary school teachers employed in the public sector, 1996-2018 (N)
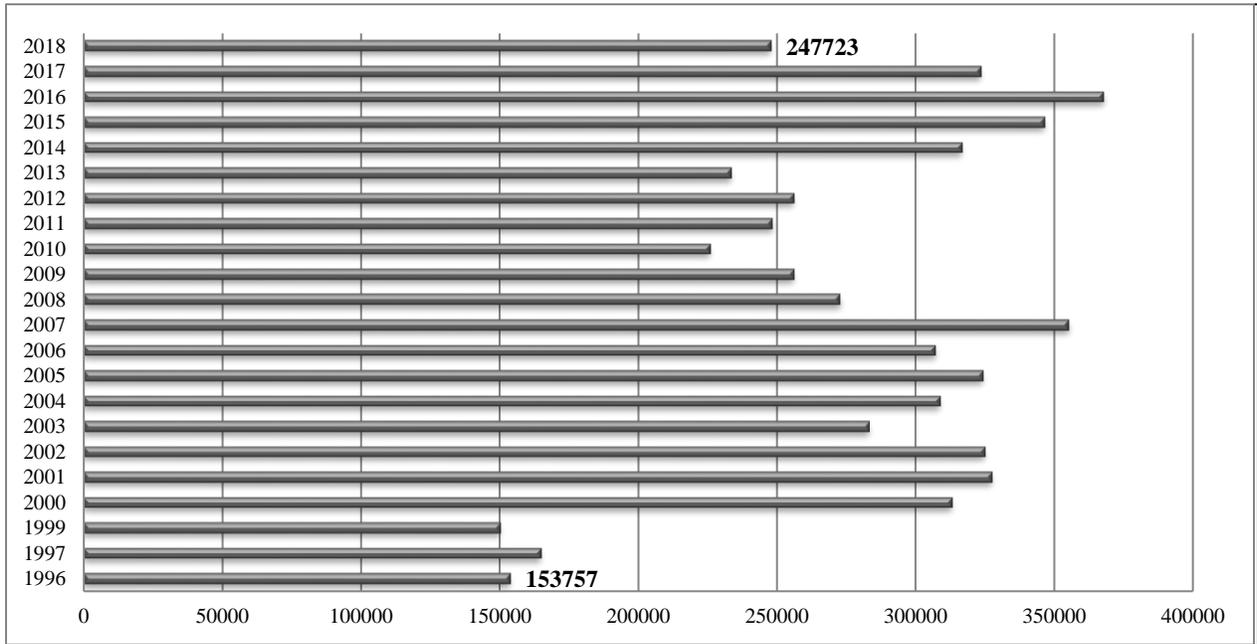
Source: Statistics South Africa OHS, 1996-1999; LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000), QLFS Quarter 4 (2008, 2009, 2010, 2011, 2012), Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017), Quarter 2 (2018) (Researcher's own calculations)

As Figure 5 shows, there had been an increase in the number of African primary and secondary school teachers employed in the public sector. In 1996, it increased from 153 757 African primary and secondary school teachers to 247 723 African primary and secondary school teachers by 2018. The Department of Education itself acknowledged that the 381 394 teachers working in 23 718 public ordinary schools represented about 3 percent of all employed adults in the country (Department of Basic Education, 2018).

Tables 4 and 5 look at the employment of African teachers in the public sector within the various Statistics South Africa survey periods, namely the OHS, the LFS and the QLFS.

Table 4: African teachers employed in the public sector, 1996-1999 (N)

	Year	Number employed	Variation
OHS	1996	153 757	
	1997	165 007	11 250
	1999	150 273	-14 734

Source: Statistics South Africa OHS, 1995-1999 (Researcher's own own calculations) (no data for 1998) (Researcher's own calculations)

As Table 4 shows and according to the OHS data, the number of African primary and secondary school teachers employed in the public sector increased by 11 250 members between 1996 and 1997 and by 1999 it had dropped by 14 734 employees, with an overall loss 3 484 African primary and secondary school teachers in this period. In the 1990s there was a process of rationalisation which saw some teachers move into employment privately. This seems to have affected African teachers in 1999 and explains why there was a drop in employment. There was a one-day strike in 1999 by public servants over wage increases. About 600 000 public sector workers joined the strike. This also took place against the backdrop of substantial public sector restructuring and the reduction of the number of people employed by the state was an outcome of this process.

Table 5: African teachers employed in the public sector, 2000-2018 (N)

	Year	Number employed
LFS	2000	313 143
	2001	327 455
	2002	324 940
	2003	283 270
	2004	308 704
	2005	324 214
	2006	307 208
	2007	355 294
QLFS	2008	272 776
	2009	256 149
	2010	225 883
	2011	248 385
	2012	256 108
	2013	233 616
	2014	316 857
	2015	346 483
	2016	367 909
	2017	323 576
	2018	247 723

According to Table 5 and the LFS data, there were more African primary and secondary school teachers employed in the public sector from 2000 to 2007 when compared to QLFS figures for African primary and secondary school teachers employed in the public sector. SADTU confirmed that there were about 400 000 teachers in the public school system by the time of the 2007 strike. As a result of the four-week strike in 2007, the extended industrial action period saw public sector workers lose wages (if they could not account for their absence, monies were docked from their salaries) and this loss was not covered by the increases (Rossouw, 2010). Teachers' working conditions, including their salaries, stimulated their increasing militancy and this played out in the 2010 public sector strike.

Figure 6: Variation in employment of African teachers in the public sector, 2000-2018 (N)
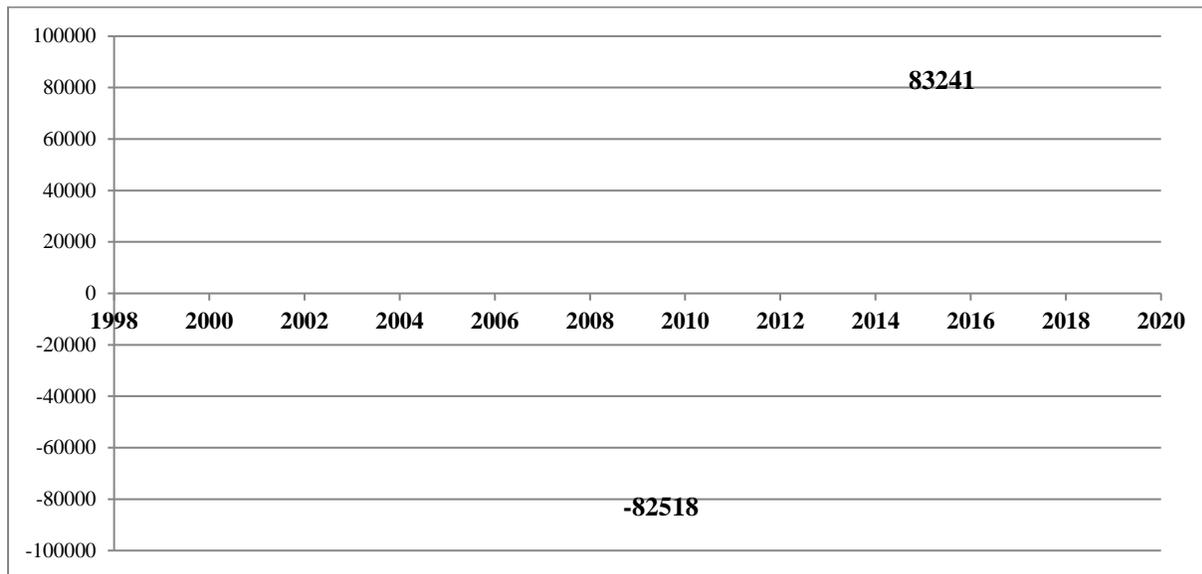
According to Figure 6, there was some variation in the employment of African primary and secondary teachers employed in the public sector from 2000 to 2007 with the numbers of those employed increasing and decreasing. In 2003 there was a decrease in employment of 41 670 teachers and in 2007 there was an increase of 48 086 teachers. Overall in this period, the employment of African primary and secondary school teachers increased by 42 151 teachers.

In 2008, there was a massive drop in employment of African teachers of 82 518. This may have been a result of the 2007 strike as the salaries of some teachers were docked in September and October (Mapumulo, 2007) which saw some trade unions approach the Labour Court to demand a repayment of the deductions. Employment fell by a further 46 893 teachers in the public sector in 2009 and in 2010, but employment increased by 22 502 teachers in 2011.

The biggest increase in employment was 83 241 teachers in 2014. In the last two years, 2017 and 2018, the employment of African primary and secondary school teachers had decreased by 44 333 and 75 853 employees, respectively. Between 2000 and 2018, employment of African primary and secondary school teachers has declined by 65 420 employees.

6.5.2 *Highest educational level of African primary and secondary school teachers in the public sector*

Figure 7 illustrates information on the highest educational attainment level of African secondary school teachers employed in the public sector since 2000 to 2018 relying on data sets from the various Statistic South Africa data sets on the labour market, namely, the LFS (2000-2007) and the QLFS (2001-2018). The data were filtered through the 'type of business' variable in order to extract data for African teachers in the public sector only.

According to Hofmeyr and Draper (2015) at the higher education institutions (HEIs), initial teacher education (ITE) programmes were offered to student teachers. They acquired either a four-year Bachelor of Education (B Ed) degree or a one-year Postgraduate Certificate in Education (PGCE) after a three-year undergraduate degree. These both were four-year qualifications and were the contemporary official prerequisite for a qualified teacher in South Africa. It is known as 'M+4, a matric (school-leaving) certificate plus four years of ITE' and so in the LFS and QLFS data below, this was the bachelor's degree.

However, the ' M+3 (matric plus three years of ITE)' used to be the official requirement and most teachers in the country held this qualification; this was the 'diploma with Grade 12/Std 10' in Figure 7. The Centre for Development in Education (CDE) carried out research on data for 400 7568 teachers, and the educational profile of the South African teaching force (as of 2013) that was compiled revealed that although the bulk were indeed qualified (81 percent), of these, 66 percent had an M+3 qualification and 15 percent had an M+4 qualification.

Figure 7: Highest educational level of African secondary school teachers (%)
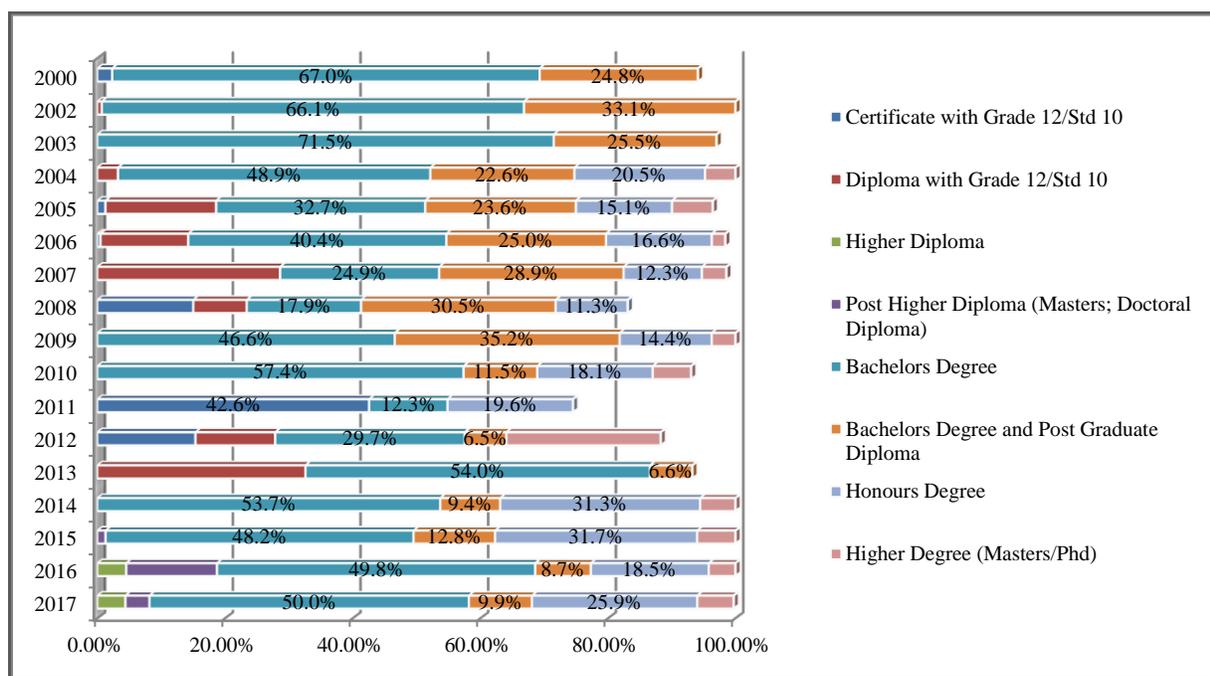
Figure 7 shows that there was some variation in the data for the highest qualification held by African teachers in secondary schools. From 2000 to 2003, more African secondary school teachers held a bachelor's degree than any other qualification (approximately two-thirds of African teachers had this qualification over these years – that is by 2003, 71.5 percent had a bachelor's degree). In addition to this, around one-fifth to one-third also held a bachelor's degree with a postgraduate diploma over the same period (it was 25.5 percent by 2003). Then from 2004 until 2006, the number of African teachers who held the bachelor's degree qualification dropped compared when to the previous period (it was 40.4 percent by 2006).

Nevertheless, more African teachers held a bachelor's degree than any other qualification (25 percent held a bachelor's degree with a postgraduate diploma in 2006). From 2007 until 2008, more African teachers held a combination of a bachelor's degree and a postgraduate diploma than just a bachelor's degree (it was 30.5 percent in 2008). In 2009 and 2010, the qualifications held by African teachers included a bachelor's degree, a bachelor's degree and a

postgraduate diploma and a honours degree, which suggested that although African teachers had a bachelor's degree, that more were acquiring a postgraduate qualification such as the postgraduate diploma and a honours degree. The year 2011 was the only year where there was an anomaly in the data in that more African teachers held a certificate with Grade 12/Std 10 than a bachelor's degree or a honours degree.

Although more African teachers held a bachelor's degree than any other qualification from 2012 to 2017, African teachers who held a honours degree was noticeably higher over these five years than any of the other years. Therefore, the trend in the highest educational qualification attainment among African teachers in secondary schools from 2000 to 2017 was that of a bachelor's degree plus the attainment of a postgraduate qualification such as a honours degree increasing and becoming part of the pattern from 2012 onwards.

Figure 8: Highest educational level of African primary school teachers (%)
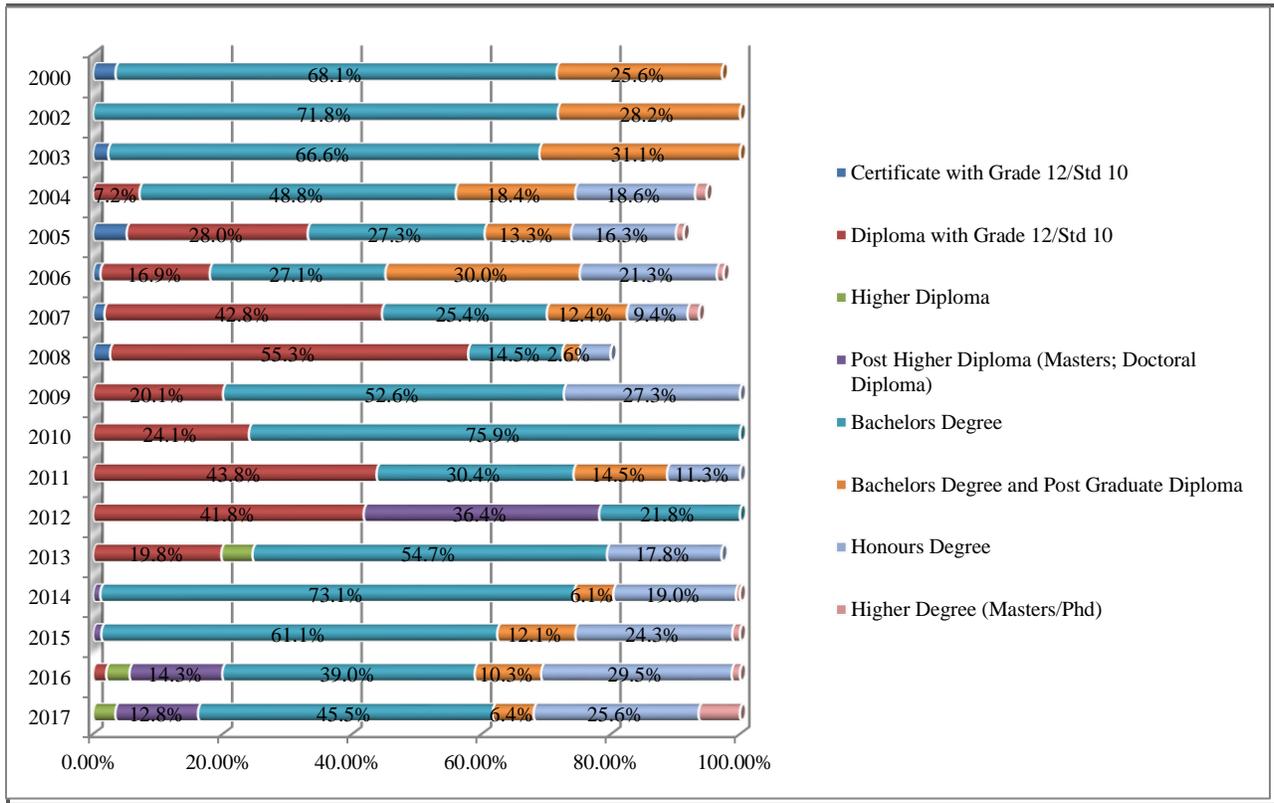
Figure 8 shows the same variation pattern in highest educational level qualification for African primary school teachers as that for African secondary school teachers from 2000 until 2017 (again, the data were filtered through the 'type of business' variable in order to extract data for African teachers in the public sector only). From 2000 until 2003, a higher proportion of African teachers, that is around two-thirds of them, had a bachelor's degree (it was 66.6 percent in 2003) with a lower proportion, that is around a quarter to almost one-third, holding a bachelor's degree and a postgraduate diploma (in 2003 it was 31.1 percent). However, the data for African primary school teachers corresponded to the CDE research, which held that more teachers hold the lower qualification such as the diploma. Indeed, in five years, 2005, 2007, 2008, 2011 and 2012, more African primary school teachers had a diploma with Grade 12/Std 10 (M+3 qualification) in these years than any other qualification. It must be noted that the CDE report was based on 2013 data and since then, a change had taken place in the educational levels of primary school

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teachers. From 2013 to 2017, the highest qualification that the African primary school teachers held started to shift towards the top end of the educational qualification spectrum, with more African primary school teachers holding either a bachelor's degree (it was 54.7 percent in 2013 and 45.5 percent in 2017) or a bachelor's degree and postgraduate diploma (it was 6.1 percent in 2014 and was 6.4 percent in 2017) or a honours degree (it was 17.8 percent in 2013 and 25.6 percent in 2017). Like their counterparts in the secondary schools, the trend in the highest educational qualification attainment among African teachers in primary schools from 2013 to 2017 was that of a bachelor's degree with those of them holding a postgraduate degree such as a honours degree increasing and becoming part of the educational pattern for African teachers.

6.5.3 Trade unionisation trends of African teachers in post-apartheid South Africa

This section contains a cross-tabulation of four variables conducted within each data set, namely, the race of the teacher, the sector the teacher was employed in, the occupation of the teacher and whether the teacher belonged to a trade union. The data are presented in Figures 9 and 10 as proportions of the total of Africans. The data are weighted to the South African population using the Statistics South Africa weighting.

Figure 9: Trade union membership of African primary and secondary school teachers in the public sector, 1994-2018 (%)
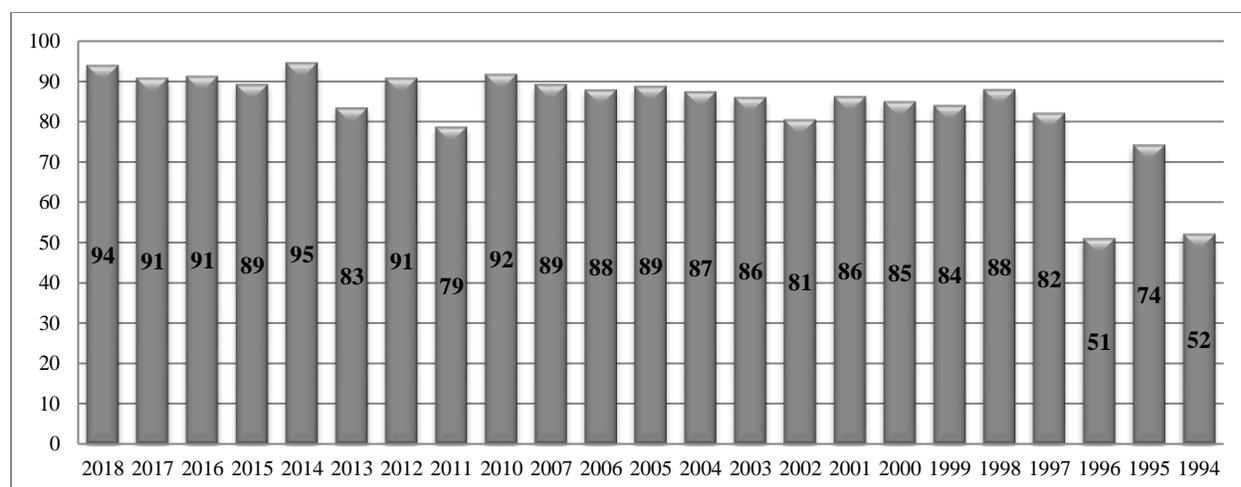
Source: Statistics South Africa LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000),QLFS Quarter 4 (2008, 2009, 2010, 2011, 2012), Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017), Quarter 2 (2018) (Researcher's own calculations)

According to Figure 9, trade union membership for African primary and secondary school teachers had dramatically increased from 1994 where it was 52 percent, to 2018 where it is 94 percent (once again, the data were filtered through the 'type of business' variable in order to extract data for African teachers in the public sector only). Teachers had become vastly unionised in post-apartheid South Africa and were also more unionised when compared to the other professions. This was the trend in the teaching profession in many developed and developing countries as the teaching workforce had become highly unionised. Unionisation rates among teachers increased until 1999 and had stayed consistent thereafter. Teacher trade union campaigns included those for improved conditions of service but at times other crucial responsibilities such as professional development and teacher learner support programmes (Chisholm, 1999). SADTU was the largest teacher union in South Africa (Smit, 2018).

Figure 10: Variation in trade union membership of African primary and secondary school teachers in the public sector, 2000-2018 (%)
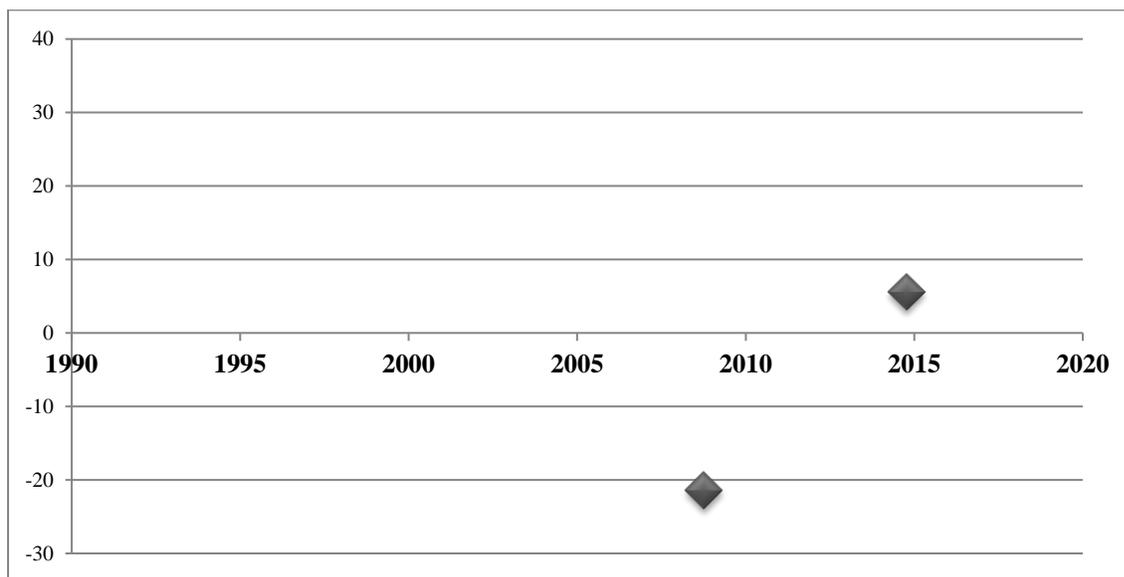
According to Figure 10 and what was already well known and why the study included the OHS data in this graph was that trade union membership of teachers rapidly increased and indeed the largest expansion of African primary and secondary teachers took place in the period 1994 to

1999 (in 1997 alone, the number of African teachers belonging to trade union increased by 31 percent). SADTU was one the fastest growing trade unions within this period. Between 2000 and 2018, trade union membership for African teachers grew by 17 percent overall.

To summarise, the official statistics clearly showed that the number of African teachers employed in the public sector had increased from 1994 to 2018; that the highest educational qualification held by African teachers are a four year or bachelor's degree plus that of a postgraduate degree which was becoming part of the trend and that there is a high trade union density for African teachers employed in the public sector.

The next section provides a summary of the data emanating from the qualitative interviews carried out with nine African teachers who are employed in the public sector.

6.6   Qualitative data of the employment, highest educational level, trade union membership and political views of African teachers in the public sector

In this section, the qualitative results of the one face-to-face interview and the eight self-administered questionnaires with African teachers working in the government primary and secondary schools in Johannesburg in June and July of 2018 are presented. All of the teachers are SADTU members – a criterion used in selecting the teachers for the study. The analysis includes a demographic profile of the African teachers, a lifestyle profile (the type of dwelling the teacher lives in, the number of people living in the household and the number of people who work, the number of dependents the teacher has, if household members received a social grant, if the teacher had insurance for various items, what the teacher earned each month and their satisfaction with their earnings, what items the teacher spent their salary on each month, what the teacher had bought in the past year and how the teacher funded the purchase); their SADTU membership details; their work and employment conditions, including information on strikes by teachers and their attitudes towards SADTU and their views on professionalism and trade unionism. Teachers' social class positioning was inferred through their social class background, the type of education they had acquired and the social and material circumstances of their lives. Only African teachers were the unit of analysis in the study and they had to answer a question on their gender in the interview.

Teachers were asked these specific questions and their answers were summarised for each individual teacher.

The teacher's political views towards the Tripartite Alliance, the ANC and COSATU was obtained and was presented in the form of quotes where possible. As members of SADTU, the professional milieu and the socio-economic conditions as well as the political conditions that affected the practice of their profession, including its status and image, were probed. The teachers were asked to comment on the Alliance and what they thought that the ANC had done for the country. If they supported the ANC politically, it was explored and the reasons why they did and why they did were examined. The qualitative data are presented in the form of quotes.

It is important to provide some background on where the African teachers are employed in the public sector. The teachers work at two public sector schools in Johannesburg.

One school is located in the western suburbs of Johannesburg used to be a whites-only school in a former white working-class suburb. It is in a Democratic Alliance (DA) ward. The suburb has become a racially mixed residential area in the post-apartheid era and there are still formal houses and townhouses that are situated around the school. However, an informal settlement has grown in the suburb since 1994, with many tin shacks and spaza shops that are situated next to the formal houses where there is vacant land. The informal settlement is powered by the many illegal electricity connections and there are factories on the major roads not far from the suburb. The children of the informal settlement do not go to the school, as it is a Quintile 5 school, which meant that it charges fees as the school serves an affluent community. It has 1 446, learners, 50 teachers and a student teacher ratio of 29:1. The learner population is predominantly African.

The other school is situated in the eastern suburbs of Johannesburg, in a former whites-only lower middle-class suburb and the area has a mining and industrial background. There are many mining houses and railway cottages left in the suburb. The suburb is located close to many engineering and manufacturing businesses, malls, shops, a gold refinery, an airport and there are major highways close by. It is a Quintile 5 school. There are 959 learners, 26 teachers and a student teacher ratio of 37:1. The school has a racially mixed population of learners.

6.6.1 Qualitative analysis of the nine African teachers working in the public sector

This section profiles the nine African teachers working at the two government schools as detailed above. They were all SADTU members at the time of this study. In all cases, pseudonyms were used. The qualitative analysis of teachers that follows took into account the teachers' family background, that is if the teacher has a family home somewhere else, if there are any teachers in their families; what the teacher earns per month, the type of dwelling the teacher live in, the the household items the teacher has in the dwelling and the number of household members and their working status; the number of dependents who rely on the teacher's salary for support and what the teachers has spent their salaries on purchasing in the last year; and lastly, the teachers' highest qualification. The teachers' assessments of the public education system and of SADTU are examined as well. This is followed by an exploration of the teachers' opinion on the Alliance and COSATU and the ANC in particular. These questions were asked in order to probe what COSATU members thought about how the ANC has used its position as the government to achieve social transformation, but also how the interventions made by the state were received and contemplated on by ordinary workers of COSATU, such as the teachers of SADTU. Wright and Singelmann (1982) argued that nearly half of all class locations within the class structure had a 'contradictory character' in that their class content was influenced by more than one basic class. This study is guided by this notion of the contradictory class location in the investigation of the class location of African teachers who were members of SADTU, which was affiliated to COSATU and how this intersected with their racial, gender and political identities.

6.6.1.1 Jabu

Jabu is a 27-year-old man; he is single. He has a diploma in teaching and is completing his Bachelor of Education degree at the University of Johannesburg. He joined SADTU in 2017. He teaches Geography, History and English to Grade 1 through to Grade 7 learners at a primary school and is employed on a temporary basis. He is the sports coordinator for netball, soccer and hockey. He used to volunteer at the school. He is the first teacher in his family. He earns R13 000 gross per month and uses his salary for petrol, car insurance and monthly rent. He tries to save when he can, but it depends on what expenses he has for the month as he pays 'black tax'. 'Black tax' is what black South Africans experience when they have to share their salary

with their family, which leaves them with little or no money as a result. He bought a car in the past year and financed it through a bank loan. He lives in a cottage close to the school where he works and his family home is in Soweto. Soweto was established in the 1930s, guided by the government's policy to divide the black and white populations in its quest to carry out is segregationist policies and to move black people away from Johannesburg and its white suburbs.

Jabu is not happy with his salary and he finds it hard to cope financially. He does not have a medical aid or provident fund, nor does he qualify for a housing allowance as his contract status is that of temporary employed teacher. He has a hospital plan and a short-term insurance policy. Seven people live in his household; only two people work and four people are unemployed. He has seven dependents whom he supports – his mother, his four siblings and his two nephews. His mother receives an old-age pension and a child grant. In his house, Jabu has a refrigerator, an electric stove, a microwave oven, a washing machine, a home theatre system, cellphones, a TV set, a DVD player, Pay TV, a computer and a motor vehicle.

Jabu struggles to fund all his expenses as he only has his salary to rely on. However, his mother is the recipient of two social grants. These social grants, or social security, are enshrined in the Bill of Rights in the South African Constitution and are aimed at the poorer sections of the population to uplift their standards of living but also as a way of reallocating wealth to produce a fairer society. Jabu's mother receives an old age pension, which is paid to people who are 60 years and older, and are either South Africans or permanent residents; it is R1 780 per month. She also receives a child grant, which is aimed at low-income households, with the objective of helping the parents to meet the costs of the basic needs of their child and is R430 per month. Jabu owns a car and has household items in his rented cottage, which means that he has a high standard of living and a disposable income, after his 'black tax' obligations are met.

The high number of dependents on Jabu's salary and the fact that he is the main breadwinner in his household emphasises Jabu's working-class location, on the one hand. One the other hand, Jabu has a tertiary qualification and is still studying towards his university degree, and is in an occupation that is compatible with a middle-class location, or as Wright (1985) argues, Jabu has acquired credentials and organisational status. In addition to this, the significance of Jabu's material conditions, or economic capital (such as the items in his household, the recent purchase

of a car and evidence of a disposable income), when connected to the social relations of his life, such as being an African teacher, brings to light important class differences. Jabu comes from a working-class background (Soweto, where household members are recipients of social grants). Indeed, Jabu considers himself to be a professional first (as he is focused on his learners and if he does not produce results, he would lose his job). The central features of intermediate classes (Burris, 1988) was skills and credentials and in tandem with Jabu's family background, his dissatisfaction with his earnings, that he pays 'black tax' and that he supports seven dependents, this places Jabu in a contradictory class location, where he shares class interests with the middle class (with his work and education levels) and with the working-class (with the material restraints and social relations, that is the number of dependents he has and that he has to pay 'black tax'). Jabu's contradictory class location is influenced by more than one basic class.

Jabu admitted that he feels intimidated by the headmaster of the school where he works, but his relationships with his head of department and with his colleagues are good. As resources are limited, he uses his own laptop, cellphone and games at work. For Jabu, the biggest challenge in the public education system is the learners who follow teachers to their homes and threaten them. Jabu has been threatened by a learner, who said that he would bring people from the hostel to hurt him. In the working-class settings, the behaviour of learners appeared to be strongly regulated by a community ethos. Teachers made constant reference to the types of homes and communities that the learners came from, and the social problems that they confronted. Jabu joined SADTU by mistake – when he was a netball coach, he was invited by one of the SADTU shop stewards to a union meeting where he received career advice. Thus, he was exposed to SADTU before he became a teacher. The advantages of belonging to SADTU include that they protect their members and if a teacher has problems at school, SADTU does help. Jabu did not realise how much administrative work teachers had to perform, that teachers were monitored and that inspectors could visit the school at any time without warning and sit in the classrooms, which makes Jabu feel stressed out. Jabu felt that teachers have to be protected. In relation to the composition of his gendered and racialised subjective identities, Jabu felt that SADTU was effective at issues of transformation. This meant that Jabu felt empowered by being a member of SADTU as it protects teachers who experienced racial and gender discrimination in their daily interactions with learners and other staff members at schools that were previously racially segregated and for white people only, like the school where Jabu works. Jabu also experienced

the advantages of trade union membership in that there was solidarity among the trade union members (who were predominantly African in SADTU) at his school.

Jabu considered the split in COSATU as evidence of people not wanting to work together, which was indicative of the weakening of the ANC's hegemony and the lack of unity among the Alliance partners which was what the NDR demanded. Jabu did not think that the working class supported the ANC any longer, that younger people did not have the same expectation that older people had of the ANC and that President Zuma's tenure had been damaging for society at large. Jabu would vote for another political party in the 2019 elections. Jabu thought that because of the ANC that women had been empowered and were more involved in decision-making and there was direct evidence of this where he worked as there were more female heads of departments.

However, Jabu felt that the ANC had to be given more time to build a non-racist and non-sexist society. This demonstrated that the ANC's nationalist appeal had not weakened among COSATU members like Jabu. Jabu identified that the ANC had pursued the elimination of racism first in its quest to address the National Question, and that this was incomplete, as the ANC was engaged in a continuous struggle for liberation from national oppression.

6.6.1.2 Gladys

Gladys, a woman, aged 48 years of age was married. She had a Bachelor of Education degree and she worked at a primary school on a permanent basis. She joined SADTU in 1996. Gladys lived in her own house with a bond but she had a family home in Bekkersdal. Bekkersdal is a township in the Gauteng province and it was founded in 1945 to accommodate Africans who worked at the adjacent gold mines. She earns R30 000 gross per month, has a medical aid and a provident fund and receives a housing allowance. Gladys spent her salary on food and groceries for the house, hairdresser, eating out, buying clothes, electricity and water, transport, school fees, healthcare and she saved money each month. Gladys spent money in the past year on renovating her house and buying household appliances. Including her, four people lived in her household, two people worked, and two people were unemployed. Gadys had five dependents and two were children and three were other relatives. She had a short-term insurance policy. Apart from her salary there were other sources of income in her household, such as social grants (but she did not provide details).

In her house, she had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, home security system, cellphones, a radio set, an air conditioner, a TV set, a swimming pool, a landline, a motor vehicle, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, a tumble dryer, a dishwashing machine, Pay TV, a home theatre system, a vacuum cleaner and a computer.

As Gladys was one of the top earners in the sample, she received the full suite of benefits such as the medical aid, provident fund and housing allowance but she found it hard to cope financially. Yet she had a disposable income as she had renovated her house and bought household appliances, had other sources of income in her household and had saved money each month. Gladys had a university degree and she considered herself to be a professional first. Gladys came from a working-class background, had five dependents, her household had social grants as sources of income and there were unemployed people in her household. This placed Gladys in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Gladys' contradictory class location was influenced by more than one basic class.

Gladys was of the view that she had enough resources to do her work. There had been strikes at the school since she worked there. There are advantages of belonging to SADTU, such as:

> "SADTU safeguards our interests in times of need. When you communicate with the union, they pay attention and assist as much as they can."

Conceivably, that SADTU safeguarded Gladys indicated that as an African woman she had racialisation and gendering experiences at the workplace and so had benefitted from the collectivity of the union for security which in turn represented an active worker identity (as she had not mentioned the professional aspect of the trade union when she used the word, 'safeguard').

When asked about the challenges in the public education system are, Gladys said that:

> "The wages do not meet the workers' demands. There is still a lot of racism in some ex Model C schools. Teachers are not given a chance to voice out thus they end up being frustrated and demoralised. There is a big challenge lately when dealing with learners

behaviour as most teachers are victims and the system does not protect us as employees. Teachers are always abused by the system and learners."

As an African woman working in a former white school (Model C school, which was introduced in 1991 when the educational system was transformed and racial segregation in schools was ended), Gladys did not feel personally that she was discriminated at work but that in the educational system, that there was segregation and racism at former white schools that women of colour like Gladys worked at and where learners from the different race groups came together. Female teachers like Gladys also joined trade unions like SADTU for security and protection against discrimination in a system of education that was based on racial segregation and racist practices. Gladys's gendered and racialised identities as an African female teacher were inter-related to the broader racial and gender inequalities that were still present in a transforming educational system that African women like Gladys encountered individually in their working lives. Gladys may have experienced racism from the learners from different racial groups to hers (which may be related to the behavioural problems that she mentions) and from colleagues from other racial groups whom she worked with, as part of a teaching team or the heads of department at the school.

Gladys was not a member of a political organisation but thought that the political party she intended voting for in the 2019 elections had her interests as a teacher at heart. Gladys had strong views on the Alliance that her labour federation is a partner of. Gladys thought that COSATU should stay in the Alliance with the ANC and the SACP. Gladys had a compelling political identity too as she recognised what the ANC had achieved since 1994 and what work the ANC still needed to do:

> *"The ANC did a lot as RDP houses have been built and also the poor and needy as well as the elders have been given a grant on a monthly basis. They make sure that in the education system that they dealt with racial issues but there is racism in most of the white or ex-model C schools. They should work harder to minimise unemployment and prevent poverty. Women should be recognised and given a chance to prove themselves."*

Gladys clearly placed her trust and faith in the ANC. Gladys celebrated the ANC's extended state welfare programmes in post-apartheid South Africa. Gladys identified that the ANC had

tackled racism in the educational system which indicated that for Gladys the ANC ensured that South Africa was going in the right direction. This was important to Gladys as a trade union member and so while she recognised unemployment and poverty as problems it was the ANC (as the head of the liberation movement and the centre of the NDR, and not the trade union) that would correct this and so she tolerated its weaknesses on this score. African female teachers like Gladys appreciated the social grants as they had mostly likely helped her to support her extended family members. Gladys attributed the RDP (or state-subsidised housing) to the ANC, had five dependents which the social grants were helpful in assisting her to meet expenses as these were other sources of income in her household. Gladys's contradictory class location intersected with her racial identity as low-income sections of the African population had access to RDP housing and social grants. On a daily level, these state-led continuous material interventions into workers' daily lives were easily identified by communities that Gladys was a part of. The political consequences were clear as Gladys attributed the positive changes in post-apartheid society as being the work of the ANC.

Gladys identified that the ANC successfully pursued non-racialism in the schools which they had managed with an unbroken exclusive African nationalist tendency (Ndebele, 2002) and Gladys approved of this. Gladys again drew on her individual experiences of racialisation and gendered discrimination in society and in the workplace to justify her continued endorsement of the ANC. The ANC still had political capital and as the symbolic spear of the liberation struggle, the ANC needed to show their leadership in the social and cultural spheres of society, where far more work needed to be done to end racism in former Model C or white schools. In addition to this ending gender discrimination, poverty and unemployment which, if accomplished by the ANC, would be significant for low-income households. For Gladys, the ANC was firmly in control of the state on these matters.

Gladys thought that if COSATU were to leave the Alliance, it would be better off forming its own party. She was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was low and this is why workers could not rely on political parties to protect their interests. Gladys disagreed that workers will always need trade unions to protect their interests and this may be as she is feels that the trade unions are too closely aligned to the ANC's politics and as a result, had neglected their members as Gladys did indicate that

wage demands were not being met and there were lots of problems in the public schooling system that affected teachers. However, Gladys thought that COSATU's Alliance with the ANC and the SACP should remain to contest the 2019 elections as it was the best way of safeguarding workers' interests in parliament. Gladys thought that in the next election (in 2024) that COSATU should maintain its Alliance with the SACP only and so she was keen for COSATU to exit the Alliance in order to focus on their members. On the ability of ANC to get the majority vote in the 2019 elections, Gladys said that:

> *"It depends on the existing president to deliver at least 60 percent of what is expected and then supporters will take it from there. The ANC still has got a bit of a chance to prove that they can take this country to the next level for them to get enough votes."*

Again, this showed that Gladys believed that the ANC was the only party that had attempted to transform the economic life of the bulk of its population in terms of its developmental agenda. For African public sector employees like Gladys, the ANC's success had clearly influenced her political loyalties as a COSATU member. Gladys recognised how the ANC had employed its tenure in the state to direct its nationalist project, the NDR to deliver its social policy programmes for the supporters. This demonstrated that the ANC's nationalist appeal had not weakened among COSATU members. Gladys identified that the ANC still had a trusted relation to the bulk of the people of South Africa and that the people recognised that the liberation project of the NDR unfolded in stages. Gladys identified that the ANC had pursued the elimination of racism first in its quest to address the National Question, that is the right of people who live in South Africa to self-determination (and then the ANC could move onto the transformation of the economy) and that this was incomplete, as the ANC was engaged in a continuous struggle for liberation.

6.6.1.3 Sam

Sam, a male, aged 31 years of age is married. He had a Bachelor of Education degree and he started working at the primary school in 2013 on a permanent basis. He joined SADTU in 2014. He lived in a rented family house and did not have a family home anywhere else. While he did not disclose what he earned per month he did indicate that the spent his salary on food and groceries for the house, rent for the house, eating out, live entertainment, buying clothes,

household items, electricity and water, transport, school fees and healthcare. In the past year he had bought a fridge, TV and DVD player and he paid off a big debt. He was not satisfied with what he earned and he found it hard to cope financially. He had a medical aid, a provident fund and he received a housing subsidy. Including him, three people lived in his household and two people worked. Two children, one spouse and one other relative were his dependents and he had four dependents in total. Apart from his salary there were no other sources of income in his household. He did have a short-term insurance policy.

In his house, Sam has tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, cellphones, a TV set, a motor vehicle, a DVD player, refrigerator, an electric stove, a microwave oven, a washing machine, Pay TV and a computer.

Sam considered himself to be a professional first, had a university degree, was permanently employed and received the full suite of benefits and with his disposable income he managed to settle a debt. Sam also had four dependents and even though two people in his household were employed his salary was the only source of income in his household which made Sam unhappy with what he earned. This placed Sam in a contradictory class location, that is he shared class interests with the middle class (with his work and education levels) and with the working class (with his material restraints and social relations). Sam's contradictory class location was influenced by more than one basic class.

Sam said that he had enough resources to do his work as a teacher and that there had been no strikes at his school since he has worked there. There were advantages of belonging to SADTU, such as:

> *"Unions can protect workers in most issues except when it comes to salary negotiations especially for teachers."*

Sam was of the view that SADTU had been most effective in promoting fairness in the workplace, ensuring that African teachers like him were the recipients of fair treatment irrespective of race (or gender) and so Sam felt that that the trade union protected its members from discrimination most effectively for Sam as an African teacher working in a formerly

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segregated school. Even though he has enough resources to do his work as a teacher, there are challenges in the public education system such as:

> *"Too much work and insufficient earnings to cover monthly costs but we are all working day and night. Lack of resources for effective teaching and learning. Too much rights of learners than teachers in other words, the system protects learners more than teachers."*

Sam did not disclose what his income was but he indicated that he was not satisfied with what he earned. African teachers like Sam had a great deal in common with colleagues in other industries as the bulk of South Africa's African middle and working class were profoundly occupied within the broader crisis of social reproduction in the country. This indicated that Sam was individually not disconnected from South African society as he used his salary to care for his family dependents. This was a trend that was strongly entrenched in South African economic history and persisted in post-apartheid South Africa (Beresford, 2012). The ANC's NDR struggle favoured race but in post-apartheid South Africa this had not meant that the needs of those historically oppressed, such as Sam were met. Occupying underprivileged race and class locations under apartheid, for people trade union members like Sam, race and class systems of exploitation and oppression intersected and reinforced each other. This is why many of the same people remained underprivileged in post-apartheid South Africa and were dependent on wage earners like the public sector African teacher. This also demonstrated that to understand race and class dynamics in post-apartheid South Africa, analysis could not focus solely on race or class. Class location was also far more complicated for African teachers like Sam who were employed in the public sector and are trade union members. Their experiences of race and class were also different compared to a White teacher's experience of race and class who was also employed in the public sector and is a trade union member.

Sam was an active member of a political organisation but thought that the political party he intended voting for in the 2019 elections did not have his interests as a teacher at heart. He thought that COSATU should leave the Alliance with the ANC and the SACP and that COSATU should not be aligned with any political party.

Although he was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was still high, Sam cautioned:

"ANC will still win the elections but the number of supporters is diminishing daily."

Sam's interpretation of support of the ANC demonstrated that he recognised that it emanated from how it drew its power historically from the marginalised members and the disadvantaged classes of racialised apartheid society. The ANC continued to receive support but that there was discontent among its traditional support base which constituted the core of the ANC's constituency. Sam was aware that among this base the ANC would still win the elections based on their incomplete nationalist project.

Sam thought that the ANC had achieved much in areas that were significant to him, as he said that:

> *"In some areas there has been improvement but some things are the way they were before for example racism, poverty and inequality."*

Sam was aware that there were many issues that the ANC's nationalist project had to realise.

Sam's political identity was clearly situated within two previously subservient groups, race (African) and class (as a teacher part of the African middle class but the lower rung who experienced oppression that worked repeatedly to disempower him). While this was what the ANC worked hard at to dismantle, the oppressions were still a feature of post-apartheid society's realities as not much had changed in post-apartheid South Africa. Sam identified the ANC's defects at the policy level – unemployment, poverty and inequality – were intractable problems. Sam strongly agreed that workers could not rely on political parties to protect their interests and that workers would always need trade unions to protect their interests. He thought that COSATU should not be aligned with any political party as a response to the question on what he thought about COSATU's Alliance with the ANC and the SACP to contest the 2019 elections and that this should be the case in the next elections in 2024.

6.6.1.4 Khanyi

Khanyi, a female, aged 37 years of age is single. She had Higher Diploma in Education and she started working at the primary school in 2006 on a permanent basis. She joined SADTU in 2012. She lived in an RDP house (state-subsidised housing aimed at the lower income group with financial dependents) which was previously owned by her mother and as she could not afford to

own a house with a bond. She paid for the rates, water and electricity. She earned R24 811 gross per month and she used her salary to buy food and groceries for the house, the hairdresser, buying clothes, furniture, electricity and water, transport, repaying loans, school fees and healthcare. In the past year she renovated the house, bought a car and bought a fridge, TV, microwave and a washing machine. She had a family home in KwaZulu-Natal. She had a medical aid, a provident fund and she received a housing subsidy. Including her, nine people lived in her household, three people worked, and three people were unemployed. She had two children dependents and four other relative dependents with six dependents in total. Apart from her salary there were no other sources of income in her household. She was not happy with what she earned, but she did not find it hard to cope financially. She did not have a short-term insurance policy.

In her house, Khanyi had tap water, a flush toilet inside the house, a built-in kitchen sink, cellphones, a TV set, a motor vehicle, refrigerator, an electric stove, a microwave oven and a washing machine.

Khanyi only had an education diploma although she was the second highest earner compared to the other teachers interviewed and she received the full suite of benefits such as the medical aid, provident fund and housing allowance. Khanyi had entered the middle class through teaching and considered herself to be a professional, Khanyi's disposable income enabled her to buy a car and other household items. Khanyi did not find it hard to cope financially but she did live in an RDP house that was owned by her mother, had six dependents and no other sources of income in her household (yet three people in the household worked). Khanyi was in a, contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Khanyi's contradictory class location was influenced by more than one basic class.

There had been strikes at her school since she has worked there. There were advantages of belonging to SADTU, such as:

> "Bullying of teachers by district officials who also need training on how to assist teachers than asking for miracles. This is the issue that needs addressing. The salary issue is another issue not resolved the 7 percent is an insult."

As an African female teacher, Khanyi's expression of her negative experiences of racialisation and gendering in her workplace which was a former white and ex Model C school, intersected with her political identity. It had been noted that SADTU rejected proposals for monitoring and evaluation of their members by district officials as this was an apartheid practice that further disadvantaged African teachers. SADTU worked to prevent unfair labour and conditions of service practices of its members.

Khanyi says that she does not have enough resources to do her work as a teacher and stressed that the following are the challenges in the public education system:

> *"Teachers are not heard. There is no bill of rights for teachers. Low salaries, stress and injustice, depression. IQMS – assessing teachers annually in order to get one percent salary progression is lame, as there is a lot of discrepancies. I think we deserve a break. A minimum of R35 000 per month will make a big difference. Little bit of respect for teachers. We are overworked, poor and suffering emotionally."*

Khanyi's response above showed that she understood the ANC's multi-phase NDR in relation to the public sector where capable adults of working age were endowed with the ability to attain income security through employment in the deracialised labour-market, especially if they had higher levels of education and skills, like Khanyi did. Yet, Khanyi lived in her mother's RDP house (that is state-subsidised housing) as her earnings were not sufficient for her to apply for a bond. Khanyi had only received a one percent raise as a result of the teacher performance system (the IQMS or the Integrated Quality Management System, which had been designed to improve and ensure the optimal functioning of the education system). For Khanyi, this was an injustice and clearly illustrated how in the everyday experiences of African female teachers like her, race, class and gender intersected and governed access to economic privilege in post-apartheid South Africa.

Khanyi was not a member of a political organisation and thought that the political party she intended voting for in the 2019 elections did not have her interests as a teacher at heart. She did not know if the Alliance should continue and contest the next election (in 2024). Khanyi thought that COSATU should leave the Alliance with the ANC and the SACP but that if COSATU were to leave the Alliance, it would be better off forming its own party. She was of the opinion that

the levels of support for the ANC from COSATU members, its traditional worker base, was low and she strongly agreed that workers could not rely on political parties to protect their interests. Khanyi strongly agreed that workers will always need trade unions to protect their interests and that workers need to form their own political parties to contest elections.

Khanyi acknowledged what the ANC had managed to achieve:

> *"Previously the ANC did work. I for one I am a professional and I got a bursary and later NFSAS funded my studies. My mom received an RDP house. There are feeding schemes in schools and exemptions for needy children. There are social grants for children. RDP houses were built for the people."*

As part of the ANC's nationalist project, to address the absolute levels of poverty and inequality and their racialised structure, the ANC government increased social expenditure through an expansion of the system of social support grants from 1998 onwards, which was acknowledged by Khanyi. The durability of the ANC's nationalist appeal is related to it fulfilling socio-economic objectives, which COSATU members like Khanyi conceded and for Khanyi the ANC was the most trusted political party on this part and worked in the best interests of the people. When asked about her support for the ANC, Khanyi said that:

> *"Then again teachers are at the lowest end of the food chain. There is no change there. It is better for learners but teachers still die as paupers. I think the ANC will not be so successful, like in the past. Ramaphosa is not helping by increasing VAT at 15 percent it is appalling. But then again you will never understand South Africans they might vote for the ANC."*

Khanyi's remarks illustrated that the ANC's nationalist appeal among South Africans was shaped by and coexisted in spheres that included class, race and gender politics in South Africa which intersected with national identity. Khanyi also demonstrated that her national identity was subjective and a socially defined imaginary as even though the ANC held political capital it sustained this as long as it made material interventions into the daily lives of the historically oppressed (the South Africans or the nation). However, some unpopular decisions that the state had taken recently such as the increase of the Value Added Tax (VAT) and the inability to

contain the government's budget deficit had affected people disproportionately, such as the teachers of the public sector.

6.6.1.5 Lindelwa

Lindelwa, a female aged 25 years of age, is single. She had a Bachelor of Education and started working at the high school on a permanent basis in 2017. She joined SADTU in 2018. She lived in a rented family house but she had a family home in the Eastern Cape. She earned R15 900 per month and she used her salary to buy food and groceries for the house, pay the rent, the hairdresser, eating out, live entertainment, electricity and water, household items, transport, repay loans, school fees and she managed to save money each month. In the past year she bought a car, a fridge and a dining room suite. She did not have a medical aid, a provident fund nor did she receive a housing allowance. Apart from her salary, there were no other sources of income in her household. She had seven dependents made up of four children, two parents and one other relative. There were eight people who lived in her household, two people worked and four people were unemployed. She was dissatisfied with what she earned and she found it hard to cope financially.

In her house, Lindelwa had tap water, a flush toilet inside the house, a built in kitchen sink, cellphones, a TV set, a motor vehicle, a DVD player, a refrigerator, an electric stove, a microwave oven, Pay TV, a washing machine and a computer.

Lindelwa had a university degree, earned one of the lower salaries compared to the other teachers but she received no benefits even though she was permanently employed. Lindelwa had entered the middle class through teaching and considered herself to be a professional. She had bought a car in the past year and had disposable income to repay loans and save money each month. Lindelwa was a domestic (or internal) migrant as she worked in Gauteng and she maintained a residence in the Eastern Cape. Gauteng has the highest number of internal migrants. Lindelwa found it hard to cope financially and had seven people financially dependent on her, even though two people in her household worked, there were no other sources of income in her household. Lindelwa was in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her

material restraints and social relations). Lindelwa's contradictory class location was influenced by more than one basic class.

There had not been strikes at her school since she has worked there. Lindelwa says that she did not have enough resources to do her work as a teacher and stressed that the following were the challenges in the public education system:

> *"Lack of resources, stakeholder involvement (parents and learners), curriculum changes and the public not being involved in the decisions taken in the education system."*

Lindelwa pointed out that the current curriculum is the Curriculum and Assessment Policy Statement (CAPS) gave teachers thorough guidelines of what to teach and what to evaluate by grade and by subject. CAPS was introduced to decrease the administrative load on teachers when posts were frozen, the learner to teacher ratios increased which increased the workload of the remaining teachers which SADTU was critical of. This had impacted on African female teachers, who were the most vulnerable in the system as they had to cope with these appalling conditions, where their pay was low, there was very little support from the community and parents and the provision of resources was problematic. Lindelwa's daily struggles as an African female teacher reflected the broader structural currents of the educational system in that the quality of education remains inadequate and mostly unequal and education was not a way out of poverty for poor South African children. Despite considerable curriculum reformation, restructuring and governance, after 25 years, South Africa had the worst educational record when compared to other middle-income countries which took part in the cross-national assessments of educational achievement. South Africa's mean scores for literacy and numeracy were extremely low (Ngozo & Mtantato, 2018). Many government schools had become dysfunctional and the teachers themselves were incapable of bestowing on learners the kind of knowledge that could only be obtained at school. Lindelwa was politically aware of the dysfunctional education system using the ANC's assurances of a better life for all and as a teacher this under-delivery served to accentuate the racial, gender and class inequalities of post-apartheid South Africa for the majority of the underprivileged. This is why Lindelwa thought that the political party she intended voting for in the 2019 elections did not have her interests as a teacher at heart.

Lindelwa was not a member of a political organisation but she thought that COSATU should stay in the Alliance with the ANC and the SACP but that if COSATU were to leave the Alliance, it should not be aligned with any political party. Lindelwa was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was low. Lindelwa agreed that workers could not rely on political parties to protect their interests and that workers will always need trade unions to protect their interests. She thought that COSATU's Alliance with the ANC and the SACP to contest the 2019 elections was the best way of safeguarding workers' interests in parliament. She also thought that in the next election (in 2024) that COSATU should maintain its Alliance with the ANC and the SACP. These comments by Lindelwa show that the ANC's track record was highly regarded, despite the challenges in the public education system that Lindelwa personally experienced. The changes that had taken place in people's lives in terms of the ANC's developmental agenda and for the African public sector employees like Lindelwa have a bearing on her political loyalties as a COSATU member.

6.6.1.6 Nandi

Nandi, a female, aged 29 years of age is single. She has a Bachelor of Education and started working at the high school on a permanent basis in 2012. She joined SADTU in 2012. She lived in a rented family house and had a family home in the Eastern Cape. She earned R22 796 per month and she used her salary to buy food and groceries for the house, pay the rent, buy clothes, pay electricity and water, household items, transport, repaying loans, school fees and healthcare. In the past year she had bought a bed, toaster, microwave and a printer. She had a medical aid, a provident fund and she received a housing allowance. Apart from her salary, there were no other sources of income in her household. She had seven dependents made up of four children. There were eight people who lived in her household, three people worked and two people were unemployed. She was dissatisfied with what she earned and she found it hard to cope financially.

In her house, Nandi had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, a TV set, a motor vehicle, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, a tumble dryer, Pay TV and a computer.

Nandi had a university degree and she was the third highest earner in the sample. She received the full suite of benefits such as the medical aid, provident fund and housing allowance. Nandi

found it hard to cope financially as she had seven dependents in her household and no other sources of income in her household (yet three people in the household worked; Nandi is a domestic migrant and maintains a residence in the Eastern Cape). Nandi's disposable income enabled her to buy a few household items and she considered herself to be a professional and as she was dissatisfied with what she earned. Nandi was in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Nandi's contradictory class location was influenced by more than one basic class.

There had been no strikes at her school since she has worked there. There were advantages to belonging to SADTU, Nandi said, such as:

> "Belonging to a union protects one in the workplace from many challenges for example, victimisation."

As an African female teacher being vulnerable to the practices of racism and sexism in her workplace, Nandi's constructed gendered and racialised subjective identities were inter-related to the broader racial and gender inequalities that were still present in the post-apartheid educational system that African women like Nandi had to endure individually. Nandi too was invested in the collectivity of SADTU which she had structured as a trade union that sincerely protected its members' rights in the workplace when it came to racist and sexist discrimination and protected her from the victimisation that she experienced.

Nandi also said that she did not have enough resources to do her work as a teacher and pointed out that the following were the challenges in the public education system:

> "The focus is on paperwork and results (quantity over quality). There is no development for both learner and teacher. There is corruption and nepotism."

On top of not coping with the curriculum overload, which included having to conduct an extraordinary number of assessments for the learners, which left very little time for teacher development, as an African female teacher, facing aggression, harassment or violence directed toward her, it was becoming increasingly stressful to be a teacher. In South African schools there was a lack of resources, overcrowding, a dearth of skilled personnel, an excessive workload,

inadequate support for teachers, behavioural problems among learners and violence among learners with respect to teachers (Woudstra, Janse van Rensburg, Visser & Jordaan, 2018). These issues impacted negatively on the mental health of teachers and there were no mental health services available for teachers in the public education sector. In terms of the nepotism and corruption that Nandi mentioned, it was assumed that this was about the 'selling' of teaching positions for cash which may not be practices at her school but Nandi acknowledged that this was a problematic practice that is part of the wider educational system which she was critical of.

Nandi was not a member of a political organisation, she thought that COSATU should leave the Alliance with the ANC and the SACP but that if COSATU were to leave the Alliance, it should not be aligned with any political party. Nandi strongly agreed that workers could not rely on political parties to protect their interests and that workers will always need trade unions to protect their interests. Nandi thought that COSATU should not be aligned with any political party when asked about COSATU's Alliance with the ANC and the SACP to contest the 2019 elections. Nandi thought that the political party she intended voting for in the 2019 elections did not have her interests as a teacher at heart. Nandi also thought that in the next election (in 2024) that COSATU not be aligned with any political party.

Nandi was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was high. Nandi was not personally supportive of the ANC, which may have signified that as a SADTU member she did not submit to the directions of COSATU's leadership and their continued support of the Alliance. This may have been Nandi's way of punishing COSATU and the ANC for the terrible state of education and working conditions in government schools. Nandi's political identity was that while she clearly understood that the ANC used its nationalist appeal among its traditional support base at election time when she remarked that:

> "Now every time they campaign, they (ANC) make it worse. They just appeal to the black population. Their aim is to win votes; they don't serve the public."

Nandi's comments illustrated that the ANC's nationalist appeal among the black population was far from being weakened, even though she does not support them personally. While Nandi did not elaborate on the ANC's successes, its weaknesses were that it only worked to win votes in

the post-apartheid era. That the ANC was not delivering on its policies to the people was indicative that the ANC remained hegemonic as even these weaknesses were not perceived of as a crisis among its supporters (Booysen, 2011).

6.6.1.7 Tsepo

Tsepo, a male, aged 52 years of age is married. He has a Bachelor of Education and started working at the high school on a permanent basis in 2010. He joined SADTU in 2010. He lived in his own house with a bond from the bank. He did not have a family home elsewhere. He did not disclose what he earned but he used his salary to buy food and groceries for the house, pay the bond, eating out, buy clothes, pay electricity and water, buy household items, pay for school fees, for healthcare and he managed to save money each month. In the past year he had bought household appliances. He did not have a medical aid, a provident fund nor did he receive a housing allowance. Apart from his salary, there were no other sources of income in his household. He had five dependents made up of four children and a spouse. There were six people who lived in his household, two people worked and three people were unemployed. He did not find it hard to cope financially.

In his house, Tsepo had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, a home security system, cellphones, a TV set, a motor vehicle, a DVD player, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, a tumble dryer, Pay TV, a home theatre system, a vacuum cleaner and a computer.

Tsepo has a university degree and although he did not disclose what he earned, he did not find it hard to cope financially. Tsepo's family background was uncertain as he did not have a family home elsewhere and he owned his own home with a bond from the bank, which made him the only one in the sample who did so. Tsepo saved money each month and he considered himself to be a professional and this with his education and his occupation made him part of the middle class. In terms of his social relations, Tsepo also had five dependents in his household and his other material conditions are that there were no other sources of income even though two people worked in his household. Tsepo was in a contradictory class location, that is he shared class interests with the middle class (with his work and education levels) and with the working class

(with his material restraints and social relations). Tsepo's contradictory class location was influenced by more than one basic class.

There had been strikes at his school since he has worked there and there were advantages to belonging to SADTU, Tsepo said, such as:

> *"The representation of teacher's needs."*

Tsepo's professional disposition provided useful insight about his subjective experiences of his work as a teacher which was a semi-professional occupation. He too worked in a former White school and so while he was invested in the collectivity of SADTU as it represented its members' needs in the workplace, it was assumed that he did not feel victimised.

Tsepo reported that he did not have enough resources to do his work as a teacher and that the following were the challenges in the public education system:

> *"Inconsistent policies. Inefficient management. Substandard quality of education."*

Tsepo pointed out that teachers had spent a large amount of time on carrying out their administrative tasks that their teaching time in the classroom was being reduced which leads to the substandard quality of education being delivered to learners. The issues that Tsepo had to deal with at school such as a lack of resources were social factors that teachers struggled with to try and give learners the required education. These were societal issues that had not been settled efficiently even though there has been changes in education policies. This highlighted that as a semi-professional Tsepo's experiences of the public sector educational system conflicted with his professional disposition. Tsepo's professional disposition spoke to the middle class part of his contradictory class location but this had to be situated in the framework of historical disparities and insufficiencies as the system of education remained vastly uneven in the post-apartheid era, where education continued to be substandard.

When it came to the subject of the ANC, the Alliance and workers, Tsepo did not have strong views. Tsepo was not a member of a political organisation but thought that it was important to him that the political party he intended voting for in the 2019 elections had his interests as a teacher at heart. He was ambivalent about the Alliance as he did not know if COSATU should

stay in the Alliance with the ANC and the SACP nor did he know what COSATU should do should it leave the Alliance. He did not know about the levels of support for the ANC from COSATU members, its traditional worker base yet he strongly disagreed that workers could not rely on political parties to protect their interests. He agreed that workers would always need trade unions to protect their interests. He did not have an opinion on COSATU's Alliance with the ANC and the SACP to contest the 2019 elections nor should the Alliance continue to contest the 2024 elections.

6.6.1.8 Thobeka

Thobeka, a female, aged 38 years of age is single. She has a Bachelor of Education degree and started working at the high school on a permanent basis in 2010. She joined SADTU in 2017. She lived in a rented room in house/flat. She did not have a family home elsewhere. She earned R16 002 gross per month and used her salary to buy food and groceries for the house, pay the rent, hairdresser, eating out, live entertainment, buy clothes, pay electricity and water, buy household items, pay for transport, repay loans, pay for school fees and pays for healthcare. In the past year she had bought a car, paid off a big debt and bought various household items such as a heater, a microwave and a couch. She did not have a medical aid nor a provident fund. Apart from her salary, there were no other sources of income in her household. She had four dependents made up of two children and two parents. There were three people who lived in her household and two people were unemployed. She was dissatisfied with what she earned and she found it hard to cope financially.

In her rented house/flat, Thobeka had tap water, a flush toilet inside, hot running water, a built in kitchen sink, cellphones, a TV set, a motor vehicle, a refrigerator, an electric stove, a microwave oven, a washing machine, Pay TV and a computer.

Thobeka has a university degree yet earned one of the lowest salaries and had no benefits. Thobeka did not have a family home somewhere else. Thobeka had crossed into the middle class through teaching, had bought a car, paid off a big debt and as she considered herself to be a professional. Thobeka's other material conditions was that she found it hard to cope financially and had four dependents in her household with no other sources of income in her household apart from her salary. Thobeka was in a contradictory class location, that is she shared class interests

with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Thobeka's contradictory class location was influenced by more than one basic class.

There had been strikes at her school since Thobeka had worked there. There were advantages to belonging to SADTU, Thobeka said, such as:

> "*Yes, the housing allowance. We need it in order to pay rent because some of us are not intending to buy houses.*"

Thobeka had four dependents and she had to rent a house as she could not afford a bond. The housing allowance was R1 200 per month, was in addition to the salary received by the teacher, may be used for rent or for a bond as long as the teacher was a permanently employed public sector employee.

Even though she was of the view that she had enough resources to do her work as a teacher there were the following challenges in the public education system:

> "*Overcrowding and a lack of resources.*"

Many government schools all over the country, in both rural and urban areas in South Africa, had overcrowded classrooms where teachers had to teach as many as 75 learners crammed into the classroom (Ngcukana, 2018). As per legislation, there should only be fourty learners in a classroom. This overcrowding in some areas of South Africa was unfortunately overlooked in the government's infrastructure plans (Navsaria, Pascoe & Kathard, 2011). Thobeka's professional disposition which spoke to the middle-class part of her contradictory class location had to be situated in the framework of historical disparities and insufficiencies as the system of education remained vastly uneven in the post-apartheid era. The increased learner and teacher ratio impacted on the ability to teach so many children, but this was also counter to the policy of inclusive education for all learners in ordinary schools.

Thobeka was one of the few in the sample that were active members of a political organisation and she thought that the political party she intended voting for in the 2019 elections had her interests as a teacher at heart but she did not name the party. Yet, Thobeka thought that

COSATU should leave the Alliance with the ANC and the SACP and that if COSATU were to leave the Alliance, it should not be aligned with any political party. This might explain why she was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was low. She strongly agreed that workers could not rely on political parties to protect their interests and that workers will always need trade unions to protect their interests. She thought that workers should form their own political parties to contest elections. Thobeka thought that in the next election (in 2024) that COSATU should not be aligned with any political party.

6.6.1.9 Anele

Anele, a female, aged 25 years of age was single. She had a Bachelor of Education degree and started working at the high school on a permanent basis in 2016. She joined SADTU in 2018. She lived in her family home. She earned R20 000 gross per month and did not use her salary for any household items nor had she spent money on any major purchases in the past year. She did not have a medical aid nor a provident fund, but she did she receive a housing allowance. Apart from her salary, there were no other sources of income in her household. She had three dependents made up of one child and two parents. There were four people who lived in her household and one person worked. She was dissatisfied with what she earned, but she did not find it hard to cope financially.

In her family home, Anele had tap water, a flush toilet inside, hot running water, cellphones, a radio set, a TV set, a refrigerator, an electric stove, a microwave oven and a computer.

Anele had a university degree and while she earned a salary that was at the middle point when compared to the salaries earned by the other teachers, she had no benefits, apart from the housing allowance. Anele had entered the middle class through teaching and considered herself to be a professional. As Anele still lived in her family home, she did not have to use her income for household expenses and she had not bought anything in the past year. Anele did not find it hard to cope financially but she was not satisfied with what she earned. Anele had three dependents and there were no other sources of income in her household apart from her salary. Anele was in a contradictory class location, that is she shared class interests with the middle class (with her

work and education levels) and with the working class (with her material restraints and her dependents). Anele's contradictory class location was influenced by more than one basic class.

There had been no strikes at her school since she has worked there. There were advantages to belonging to SADTU, Anele said, such as:

'SADTU does capacity-building."

SACE was required to oversee the Continuous Professional Teacher Development (CTPD) Management System and it was a process in which teachers were motivated to involve themselves in their own professional development. Teachers who did so collected professional development points for their efforts and SADTU was one of the organisations that provided programmes for Professional Development. As Anele was in a contradictory class location, the middle class part of her status was reflected in the reproduction of this social practice, that is, she engaged in professional development such as the CTPD programme (Hoadley, 2008). Anele values this professional aspect of the educational tradition and the role that the trade union plays in this. This appreciation of her continuous professional development was also an empowering strategy that was used by an African female teacher like Anele who were the least empowered in their workplaces. Even though Anele did not indicate if she thought that she had enough resources to do her work as a teacher she did point out the following were the challenges in the public education system:

"Paperwork. No meaningful support."

This is why Anele's recognition of the programme for Professional Development was in stark contrast to the victimisation and bullying mentioned by other African female teachers. Anele relied on the trade union for assistance in her capacity building efforts, to arguably strengthen her capacity as a teacher which in turn would minimise the chances of victimisation that African female teachers experienced, as Anele acknowledged that there was no meaningful support. Anele's subjective experiences were a reflection of the distinct social positive experiences of trade union members like her.

Anele was an active member of a political organisation and thought that the political party she intended voting for in the 2019 elections had her interests as a teacher at heart. She thought that

COSATU should stay in the Alliance with the ANC and the SACP and she did not know what COSATU should do were it to leave the Alliance. She was of the opinion that the levels of support for the ANC from COSATU members, its traditional worker base, was high. She strongly disagreed that workers could not rely on political parties to protect their interests. She strongly agreed that workers will always need trade unions to protect their interests. Anele did not have an opinion on COSATU's Alliance with the ANC and the SACP to contest the 2019 elections but she did think that in the next election (in 2024) that the Alliance should continue to contest the elections.

Anele thought that the ANC had done a lot but she was concerned about the ANC and corruption:

> *"It has been 24 years since the end of apartheid and the ANC has tried everything it can. There is only the problem of corruption because funds are been given to municipalities to cater for all needs required by the public. The municipalities don't so what they are supposed to and they don't answer to anyone. The public looks at the President forgetting that he is just the face of the country."*

Anele's political identity recognised that the ANC's ideology was that which was people-driven transformation, which was part of the ANC's nationalist appeal among its traditional support base like COSATU members such as Anele. It was threatened by the growing corruption and the ANC's frailty and vulnerability were on the horizon. The corrupt practices were noticeable at the municipal level where service delivery has been poor and were some social movements and trade unions have become more politically active. In government the ANC put into effect its patronage as the government was the major site of employment and career escalation for party loyalists. This was achieved through the policy of deployment or cadreship. At the provincial but especially at the local or municipal level, internal strife ensued to assure sites of political power and socio-economic empowerment by way of state deployment. Local municipalities became responsible for service delivery but those deployed were misplaced bureaucrats and communities observed the lack of accountability for non-delivery that fused with extensive evidence of corruption as there has been questionable expenditure and the issuing of irregular contracts and very few municipalities receive clean audits (Smit, 2019).

6.7   Conclusion: African teachers of the public sector

This chapter focused on African teachers who were trade union members and worked in the public sector in the post-apartheid era. From the 1990s onwards, teacher unions were substantially transformed which mirrored the different socio-political landscape of South Africa at the time. As a result of the changes in the state, teacher-state relations had changed as well so much so that now the teacher unions had a much closer connection with government than they did before 1994. The post-apartheid educational legislation has resulted in the entrenchment of teacher trade unionism in South Africa. There were powerful teacher unions in the policy arena and they shaped education policy and changes in schools.

African teachers working in the public sector in post-apartheid South Africa typically held a Bachelor's Degree or some other post-school qualification. This was a positive development in the public sector and it was as a result of both the educational transformations that had taken place in post-apartheid South Africa and the employment equity policies of the post-apartheid government. This was the locus for the creation of the semi-professional salariat of the society. The higher education of teachers themselves had played a role in promoting their upward social mobility and they were part of a semi-professional occupation. Yet the ANC took over a system that had an atrocious educational deficit among the majority population and generally the apartheid management of the public schooling system had been shoddy.

In the case of the nine African teachers who participated in this study, SADTU was a positive influence at work. SADTU played a traditional role and had a key responsibility of fighting for the improvement of the socio-economic conditions of their members, according to the teachers interviewed. SADTU had fought for the better remuneration of its membership and improved working conditions which was linked to the 'professional development of teachers and the struggle for free and equal quality public education' (SADTU 2010). This was acknowledged by the SADTU members in this study.

In this study, only one teacher joined SADTU in 1996 which was very early on in post-apartheid South Africa. There were two more recent recruits as two joined as recently as 2017 and 2018 respectively. Five teachers had been members of SADTU between four (2014) to eight years (2010). When asked what the advantages of belonging to SADTU were, five teachers said that it

was for protection mainly, such as their representation when they needed it and three female teachers reported that they had experienced bullying and victimisation in their workplace. Only female teachers directly mentioned that they had been bullied or victimised or were worried that they would be. No male teacher raised these issues at all. The teachers also felt that being a SADTU member had clear benefits such as teachers received a housing allowance and protection from dismissals. One teacher had embarked on the CTDP course to improve on her professional development. Only one teacher had their own house with a bond from the bank, most rented their house and one even lived in an RDP house. The majority of teachers had bought household appliances in the past year and less than half of them belonged to a provident fund and a medical aid. Most teachers used their salary to buy certain essentials such as food and groceries, pay for electricity and water and pay for school fees for children per month.

Many teachers had disposable income to buy household appliances and most had short term insurance policy to cover various items. The teacher with the lowest salary per month (R13 000) was one of the youngest teachers (27 years of age), had only recently started working for the employer (in 2016), had a lower qualification (Diploma after matric), worked in a primary school and was the only teacher employed on a temporary basis. The oldest teacher was 38 years of age and had been working for the employer for ten years (since 2010). Over half of teachers received a housing subsidy/allowance but less than half of them belonged to a provident fund and a medical aid respectively and over half of teachers received a housing subsidy/allowance.

The teacher with the highest salary (R24 811 per month) had one of the lowest qualifications, namely a Diploma after matric but had been working the longest for the employer (since 2006) than any of the other teachers and was the second oldest teacher (37 years of age).

However, most teachers reported that they were not happy with what they earned and most teachers were not coping financially. Of those who found it hard to cope financially, there was a teacher who earned the highest salary, had one of the highest qualifications (the university degree) but had two unemployed people in the household, two children as dependents and three others as dependents. However, the other teacher with the second highest salary (R24 811) had one of the lowest qualifications (diploma after matric/FET diploma) had three people who were unemployed living in the household, two children who were dependents and four other relatives

who were dependent on their salary. This suggested that the income earned when combined with the number of dependents that the teacher has were important factors for the teacher not coping financially.

Teachers said that there were many challenges in the public education system, including policies, management and the quality of education, poor salaries, stress, lack of respect, the lack of development of teachers, workload, racism, too much paperwork, corruption, nepotism, overcrowded classrooms and the lack of discipline among learners. It seemed that there were levels of demoralisation among some of the teachers when it came to their working conditions. Support materials are vital for learning and teaching. It was acknowledged as a priority goal in the government's Action Plan and the government had made significant progress in guaranteeing that all learners had access to the essential textbooks and workbooks (National Treasury, 2015). The issue was whether these support materials were directed to the schools that the teachers in this group teach at as they were in Quintile 5 schools. SADTU acknowledged that in the Quintile 1 to Quintile 3 schools (the schools at the lower end of the socio-economic ladder) that their members taught at, those learners were on a school nutrition programme and were from households that received social grants. These resources, in the context of the overcrowded classrooms that teachers taught in were critical in a public education system where fees had made little impact on assisting historically disadvantaged schools. Fees in the public schools had not freed up more funds for redistribution (Chisholm, 2004) and poorer schools struggled to collect fees.

Although the bulk of African teachers in this study could only complete a questionnaire and not be interviewed, the analysis of the data collected from them revealed the intersections of their political views as trade union members with their racial, classed and gendered identities.

This study looked at teachers' class location that is whether they were members of the middle class or the working class, and attention was paid to their subjective social class positioning by looking, where possible, into their background. As all the African teachers worked in public sector schools, it was not necessary to pay attention to their class location in relation to schooling type, that is state school or private as Metz (1994) did and Maguire (2005) who looked at the

social class background and identities of teachers to determine class location and their classroom practices.

The qualitative data showed that many teachers came from working-class backgrounds but that the teaching profession in post-apartheid South Africa presented opportunities for class mobility among all of them. Other factors were probed in the teachers' particular lived experiences such as their responsibilities to their households. Indeed there were features of class mobility among African teachers in the public sector in terms of educational qualifications and occupational position. The teachers had post-school qualifications, comprising degrees and diplomas, and supposedly earned middle class salaries but they came from or were embedded in working-class communities. Although this study did not look in detail at the teachers' social networks in terms of who they interacted with (were their social contacts from the working class or the middle class?) and what their leisure activities were (to get a better sense of their lifestyle) these could be the topics of future research. The analysis of the teachers' material and social circumstances revealed that the African teachers were salaried employees in semi-professional occupations, and they had a high level of education and this located teachers in the middle class.

The qualitative data also revealed that African teachers had domestic and financial obligations and many who were dependent on their salaries. African teachers were arguably different from teachers who were physically in the middle class (such as teachers who have more control over their salary and arguably White teachers who were historically paid higher salaries than African teachers were). From the analysis it was concluded that African teachers in post-apartheid South Africa and in a COSATU trade union were in a contradictory class location as they simultaneously occupied a superordinate position (middle class) and a subordinate position (working class) (Wright, 1978a, 1985). In this study, the contradictory class location, race, gender and political identity were not treated as independent factors. An intersectional approach was used and as far as possible, this study paid attention to where the African teacher's individual identity was linked with the broader environment such as the school, the education system and the social, political and economic structures which made clearer the oppressions that some African teachers experienced, such as victimisation and bullying in the case of African teachers.

For the African teachers, matters of race, gender and class were important factors in their lives and the intersectional analysis revealed that there were many dimensions of oppression experienced by African female teachers in particular, such as exploitation, marginalisation, powerlessness, bullying and harassment. That these identities and experiences were raised by the African teachers confirmed that an intra-categorical approach (McCall, 2005) was appropriate for the analysis of the different experiences of subgroups, the female teachers and male teachers, within the same category, African teachers. African teachers were in a contradictory class location and the intersectional analysis provided for a more dynamic understanding of their subjectivities, but these were also racialised and gendered and they intersected with their experiences and the challenges they faced in their employment at their schools, their views and experiences of SADTU, their views of the Alliance and of the ANC. Although African female teachers were trade union members and represented by SADTU, these women had experienced victimisation and bullying and were in a more marginal position than male African teachers were in this regard. However, a male African teacher reported that he had been victimised by learners. This clearly demonstrated that there was a complexity of experiences of victimisation and bullying among the African female and male teachers that were not confined to one group only. The intra-categorical approach ensured that their voices were not disregarded which could have been the case had the focus been on their class only (and as per the norm in labour studies where other identities were secondary to class). The African teachers and nurses of COSATU were in a contradictory class location but they were Africans, males and females too and their experiences of bullying and victimisation were rooted in a raced and gendered context. It is to their trade union, SADTU, that the teachers turned to in order to protect their interests.

The bulk of teachers said that the political party they intended voting for in the 2019 elections did not have their interests as a teacher at heart, although they did not reveal the party they would vote for. The teachers thought that the ANC had a lot of work to do to tackle issues such as racism and sexism (as part of the first phase of the NDR) as well as more work to do in the economic sphere as there was persistent unemployment and poverty.

However, SADTU constantly referred to the teachers' role in the struggle for liberation and the analysis of qualitative data showed that there was no evidence of post-nationalist politics, that is an era where class politics is central (Beresford, 2012) among the SADTU members, even in the

context of worsening workplace conditions in schools for African female teachers. At the micro level, there were clear indications from the evidence gathered that the ANC had hegemonised ideology within COSATU by means of the NDR. The African teachers' views on the ANC demonstrated that the ANC retained its political capital among the SADTU members. There was evidence of support for the ANC among some of the African teachers who were COSATU trade union members. This indicated that nationalism of the NDR was deeply rooted in a common history and culture that was referred to at times by those who had been oppressed in a language used to convey the oppression. The ANC's NDR still had significant meaning among this section of SADTU's membership in Gauteng. Indeed, the ANC's nationalist ideology and nationalism provoked a far more powerful and extensive commentary from the SADTU members in this study. This could also be attributed to the fact that SADTU had become deeply engrained in the politics of the party, the state and its leadership (Southall, 2016). There was an intrinsic 'political' side to the work of teacher unions and unions like SADTU had been responsible for social change, as shown earlier on this chapter. SADTU and its members who participated in this study were shaped by the political relationship that they had with the government of the day. This was reflected in some of the views held by the SADTU members in this study as many were supportive of SADTU and the ANC but critical of the public education system. As the bulk of teachers only completed a questionnaire and were not interviewed, that is their labour politics, or worker identities, could not be explored nor probed beyond what they had been asked and answered.

Chapter 7: African nurses of the public sector

7.1   Introduction to the African nurses of the public sector

The major aim of the chapter is to assess the employment levels, educational levels, the unionisation of African nurses in the public sector in post-apartheid South Africa and their attitudes to their trade union, DENOSA, their federation, COSATU and to the Alliance and to the ANC as the main argument of the study was that the ideology of the Freedom Charter and legislation, official policies and regulations as well as a myriad of other factors, guided by the NDR played a role in the expansion of the African professionals in post-apartheid South Africa and their trade union membership, which had impacted on the composition of COSATU.

The chapter starts with a brief overview of the history of nurses, legislation, discrimination and their associations in South Africa and then it moves onto an examination of the employment levels, educational levels and unionisation of African nurses in the public sector post-apartheid. The chapter draws on existing literature on nurses in the public sector, where appropriate and to assist in the analysis of the trends generally in employment, educational levels and trade unions for African nurses. A brief history of nursing in South Africa is given consideration and attention is paid to the labour legislation for nurses, the nursing associations and nursing trade unions. The chapter then moves to nurses in post-apartheid South Africa, legislation and their trade unions, with a focus on DENOSA, which is an affiliate of COSATU. The chapter then looks at post-apartheid labour market information on the African nursing labour force, including employment, educational levels, income as well as trade union tends for African nurses by drawing on the national statistics, that is the OHS, LFS and QLFS data sets which are quantitative data. This is done in order to provide for a more generalised picture as point of comparison and for statistical trends in the labour market in order to compare and contrast the employment, educational achievement and occupational category among the various data sets. The statistical trends within the national labour market are then assessed in order to understand the educational qualifications and occupational changes that have taken place from 1994 to 2018. The quantitative data is a useful starting point for changes in the public sector employment and unionisation of African nurses in the post-apartheid era as well as their educational levels.

The chapter draws on the data gathered from the interviews with a selection of African nurses who worked in the public sector at the time of the study. The nurses were interviewed face-to-face and an interview schedule that contained questions was administered to each nurse. Their responses to the questions were written down and the interviews were recorded with permission from the nurse. An assessment of the nurses' highest educational levels, their income and benefits, how many dependents they had, their DENOSA membership, their occupational status, their lifestyle, their working conditions and their political views was carried out to understand their class location and its intersections with the other social identities of the nurses. This in turn helps explain the changes in the composition of COSATU in the post-apartheid era.

7.2   The history of nurses of the civil service, legislation and their professional associations

In 1892, Sister Henrietta Stockdale started training nurses in Kimberley in 1877 and a total of 49 nurses were trained soon after this (Searle, 1965). The nursing profession was largely related to the work of the missionaries. Initially many white nurses in South Africa came from rural and working-class Afrikaner circumstances. Student nurses were significant numerically in the nursing labour force but they experienced exploitative rates of pay and often had to work and live under terrible conditions. Simple duties were performed by unrecognised auxiliary nurses, who were both black and white. Up until the 1940s, the nursing of Africans was conducted in mission hospitals where white people were senior nurses, Africans were nursing auxiliaries and orderlies moved the patients. White nurses were originally supposed to nurse white patients and were in position of authority over black nurses (Marks, 1990). Black nurses performed most of the rough work (such as rubbing) in the hospital and in separate hospitals, nursed black patients. By 1920, segregation was entrenched in South African hospitals (Marks, 1994). Significantly, nurses formed the elite of the black community and the nursing profession was a respected one for black women.

The provincial medical councils and thereafter the South African Medical Council (SAMC) regulated the registration of nurses and their training, curriculum, examination and discipline. The South African Nursing Association (SANA) and South African Nursing Council (SANC) were established as a result of the Nursing Act 45 of 1944 and both were founded on non-racial

principles. Even though the legislation did not make a distinction among nurses along racial or other lines, the SANC was white-dominated and gave preferential treatment to the training of white nurses at well-equipped hospital schools and nursing colleges. By contrast, black nurses were subjected to tougher conditions within badly resourced hospital settings, nursing homes and educational environments. However, any nurse was suitable for election or appointment to the council and anyone was able to vote in the election for members of SANC and the Board of SANA. It was mandatory for all registered nurses and student nurses and midwives to belong to SANA in order to practice in South Africa.

In effect, both SANA and SANC countered the need for a trade union for African nurses, although there was some concern that African nurses might just join trade unions, as the GWU had been organising junior and student nurses in Johannesburg in earlier times. Some thought that Afrikaner nurses would set up their own separate association. It was speculated that the Afrikaner nationalists would make the transformation of nursing part of their platform in the 1943 election. Marks (1990) remarked that most nurses were not attracted to unions and perhaps it was because the concept of a trade union was incompatible with their sense of professionalism.

As discussed above nursing was considered as a prestigious profession for black women, but was rooted in segregationist practices. Although there was no formal colour bar in nursing, the profession was nevertheless entrenched in segregationist practices. It was the nationalist ideologues who were to insert the historic principle of apartheid into a liberal minded profession (Marks, 1990). During the Second World War, the nationalist and fascist groups tried to split workers along racial lines and disapproved of white women in the workforce as discussed in Chapter 3 of this study. From 1948 onwards, the passing of apartheid laws was to have a profound on the nursing profession.

7.3 Apartheid and nurses of the civil service, legislation and their professional associations

From 1949 the apartheid government's objective was to racially separate the branches of SANA and eradicate the voting rights of black nurses. Clearly nurses were the also subject to attacks by the Afrikaner nationalists and their attempts to divide nurses along racial lines. The nationalists also wanted to professionalise nursing and train more white nurses. In 1953, the Afrikaans-

speaking Witwatersrand Private Duty Nurses' Discussion Group advocated for a colour bar. This group was the key pillar of the Afrikaanse Verpleegstersbond (Afrikaans Nurses League) which was founded in Johannesburg by the Secretary General of the Broederbond's Federasie van Afrikaanse Kultuurverenigings (FAK), namely LG Hartman van Niekerk.[42] In 1957, the Federation of South African Nurses and Midwives was formed at a national non-racial nurses' conference and SACTU set up a health workers union in Durban (Marks, 1990).

The Nursing Amendment Act (no 69) of 1957 was the decisive piece of legislation in the organisation of nurses in South Africa and formally segregated the nursing profession. The Nurses Council kept different registers for white, coloured and African nurses. The Board of the South African Nursing Association could only be elected and managed by white people. However, the 1957 Act did not usher in different standards, uniforms nor insignia for black nurses but there was unequal education (the kind of training provided was altered along racial lines in order to comply with the Bantu Education Bill), unequal admission to training facilities, biased pay and nurses worked in congested black hospitals with auxiliary nurses being employed to care for the black urban workforce. The legislation provoked fervent disagreement to it among black nurses. In addition to this, due to the new restrictions imposed on Africans moving between urban and rural areas, apartheid state restrictions coerced African nurses' compliance in that in order to register with the Nursing Council, the African nurses had to supply their new identity numbers, which in turn meant applying for a pass. In response to this, the progressive nurses linked up with the Federation of South African Women and the ANC's Women's League to oppose the legislation, much to SANA's dislike.

Paradoxically nursing for black and African women in particular grew as a result of white racism. The Afrikaner nationalist state politicised an effectively conservative African nurse via its own discriminatory deeds. It is argued that the legislation radicalised African nurses to be captured by 'leftist' and 'communist' elements, which is what the Afrikaner nationalists had most feared.

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[42] Van Niekerk had previously enadeavoured to organise women for the Afrikaner nationalist cause by weakening worker organisation. He stood for the general secretary post of the GWU even though he had never been a garment worker. It is alleged that Van Niekerk joined the FAK, where he stirred things up by directing groups of nurses to turn against their own organisation, according to a UP official (Marks, 1990).

A further irony was that due to the scarcity of white nurses; 15 years after the passage of the 1957 Act, African nurses were employed in white hospitals and nursing homes in the private sector which irritated the nationalist provincial authorities. Therefore, the workplace needs of the hospital prevailed over that of nationalism as more African nurses were employed in white hospitals due to staff shortages. This also meant that the status of nursing rose among the African community (Marks, 1994). Subsequent apartheid legislation in 1978 and 1982 created separate organisations for nurses in the Bantustans which had their own departments of health and welfare, as discussed in Chapter 5 on the public sector of this study. To align the nursing profession with these political developments, the SANC enacted the Nursing Act 50 of 1978 which pronounced SANA to be a professional nursing association for nurses practicing within the republic, thus ruling out those in the homelands. The exclusion from SANA of nurses practicing under homeland administrations led to the formation of ten nursing professional associations. The 'non-white' nurses employed by provincial administrations, including those in the Cape, Natal and Transvaal remained under the SANA. Most homelands established regulatory bodies as well but some remained under SANA. SANA policies barred black nurses from occupying official positions within the organisation. The SANC turned a blind eye to the discriminatory and oppressive working conditions of black nurses (Van Rensburg & Van Rensburg, 2013).

The number of African registered nurses increased nearly six times between 1960 and 1990, with their proportion of the workforce rising from barely one-fifth in 1960 to 42.7 percent of the nursing workforce by 1990 (DENOSA, 1997). Between 1933 and 2006, the country's population increased fivefold, but the number of registered nurses and midwives in service rose more than 10 times (Searle 1965; SANC, 2017).

It was illegal for nurses to strike between the years 1978 (when the Nursing Act No. 50 ruled strikes illegal) and 1992 (when the Act was amended). One of the most famous strikes by nurses in this period took place in November 1985 at Baragwanath Hospital, where 2 000 nurses went on strike (Southall, 2016). In this first major strike, after the 1978 Act made striking illegal, 900 student and learner nurses joined 800 daily paid workers at the hospital and protested against appalling wages and conditions.

To summarise at this point, this brief exposition revealed that the histories of professions in South Africa were intricately associated with the politics of race and nursing was no exception. African women in the nursing profession experienced discrimination along class, gender and racial lines. Indeed, the trajectory of professionalisation of nurses significantly diverged between white and African nurses and the racial disparities were more vivid in the daily nursing tasks such as the 'lower' forms of labour like cleaning and scrubbing which was always delegated to African nurses (Van Rensburg & Van Rensburg, 2013). There was a stigma assigned to these domestic chores and with racial legislation that raised the location of white nurses within the health-care hierarchy and this fixed the situation of African nurses as they were worse off socio-economically. The direct biased and racially restrictive policies and practices transformed nursing for Africans politically (Van Rensburg & Van Rensburg, 2013). The political turmoil of the 1980s led to the resignation of many nurses from the professional organisations to connect with 'general' labour unions that contested the apartheid government on health-related grounds (Van Rensburg & Van Rensburg, 2013).

7.4 The nurses of the public sector and trade unions and post-apartheid South Africa

7.4.1 Restructuring phase

In 1993, South African nurses unified to align the profession with political developments taking place (that is, the homelands were suspended and the SANA would have to unite with the other nursing organisations). There was a move towards forming one professional organisation based on democratic principles, led by nurses that represented both trade unionism and professionalism. This re-unification was also informed by the new constitution which provided for 'the establishment of one sovereign state, a common South African citizenship and a democratic system of government committed to achieving equality between men and women and people of all races' (SA Interim Constitution, 1993, cited in Van Rensburg & Van Rensburg, 2013). Democracy brought widespread political, social and legal transformation for the nursing profession.

Marks (1990) noted that professional and registered nurses were located in a social contradictory position as they were an intermediary and mediating group, that is between the doctors and the hospital management at the top, and the lower levels such as the student nurses and the auxiliary

nurses. There was a professional hierarchy between doctor and nurse and nurses and nurses, in other words and this persisted (Breier, Wildschut & Mgqolzana, 2009). There was also a clear racial hierarchy in nursing with White nurses at the top and African nurses underneath them.

7.4.2 Post-apartheid South Africa, legislation, SANC, primary healthcare and nurses

The Nursing Act No. 33 of 2005 required all nurses to register with South African Nursing Council (SANC), which kept two distinct registers, namely a register and the other was a roll. Nurses who had completed four years of training have to be registered on the SANC register to qualify. Nurses were not obliged to disclose their race when registering with SANC and few choose to do so. In the 'Draft Regulations Regarding the Scope of Practice of Nurses and Midwives' (SANC, 2017) the following were categories of nurses: professional nurse, professional midwife, staff nurse, auxiliary nurse and auxiliary midwife. Nursing continued to thus be based on an intricate hierarchical structure with its related terminology and this was related to legislation overseeing the profession and its educational programmes.

An important change that took place in the healthcare landscape in post-apartheid South Africa was that the focus of healthcare changed from hospital-centred care to a primary healthcare approach. In order to provide reasonable, readily available and suitable basic healthcare to the bulk of the population, health services had been decentralised to district and local levels. The nursing community represented the biggest section of healthcare workers and was indispensable to nurse-based primary healthcare provision in South Africa (Conco, Mulaudzi, Seekoe & Netshikweta, 2013).

Table 6 gives information on the number of nurses registered with SANC, from 1996 to 2017.

Table 6: Number of nurses in South Africa (1996-2017) (public and private sectors) (N)

Year	SANC
1996	172 520
1997	174 550
1998	173 703
1999	172 893
2000	171 645

2001	172 338
2002	172 869
2003	177 721
2004	184 459
2005	191 269
2006	196 914
2007	203 948
2008	212 806
2009	221 817
2010	231 086
2011	238 196
2012	248 736
2013	260 698
2014	270 437
2015	278 617
2016	287 458
2017	287 077

Source: SANC , 2017

According to Table 6, the number of nurses registered and in the public and private sectors had increased over the past 21 years, that is, from 1996 to 2017, by 114 557 nurses (that is from 172 520 nurses in 1996 to 287 077 nurses in 2017). Regionally, Gauteng had the highest number of nurses, followed by KwaZulu-Natal and the Western Cape. Breier et al. (2009) stated that according to the SANC data, approximately 83 percent of public sector nurses (of all categories) are African. SANC set and maintained standards of the profession.

Figure 11 below plots the increases and decreases in SANC registration over the same period of time.

Figure 11: Increase and decrease in SANC registration, 1996-2017 (N)
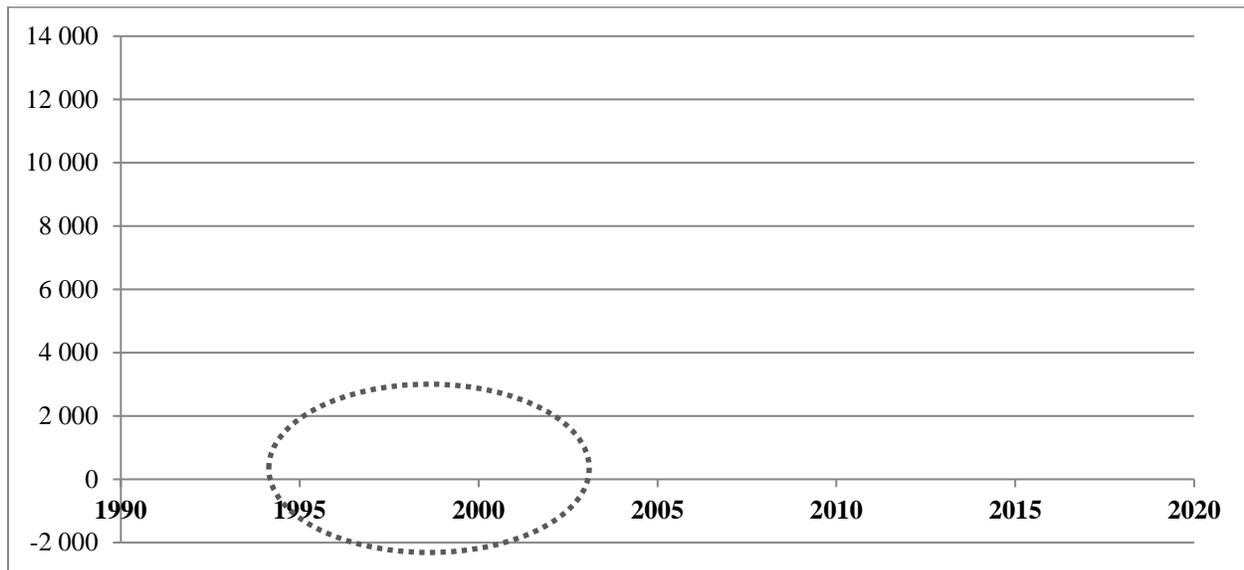
Source: SANC, 2017 (my own calculations)

According to Figure 11, from 1997 to 2000, the number of registered nurses on the SANC register decreased from 174 550 in 1997 to 171 645 in 2000. Then, from 2001 to 2007, the number of nurses registered with SANC increased steadily, from 172 338 to 203 948 respectively and at average of 4 615 nurses registering with SANC year-on-year. Indeed, these fluctuations in registration with SANC could be directly linked to the massive changes that were taking place in the training and employment trends for nurses between 1997 and 2007 when the health system was trying to minimise the inequalities in healthcare access that had been formed in the apartheid era and as the move from a hospital-based to primary healthcare system took place. The district-based primary healthcare (PHC) system was the foundation of the post-apartheid health system (Breier et al., 2009). Thereafter the number of nurses registered with SANC increased from 212 806 in 2008 to 287 077 in 2017.

7.4.3 Qualifications, professionalism and training of nurses

Nurses must have received a minimum of four years of training to be licensed on the SANC register. This group consisted of nurses who had succeeded in the four-year programme in a university or a public nursing college, the outcome of which was a nursing degree or diploma respectively. The nurse may have met the requirements via being part of a bridging programme,

which was a two-year course intended to improve the qualifications of nurses who had been part of a training programme for two years and were employed as 'enrolled' nurses. Registration on the SANC register permitted one to be identified as a registered nurse (RN) or professional nurse (PN). Often these terms were used interchangeably yet the term 'professional nurse' could be used only for those who had completed the four-year programme as it involved training in community nursing, midwifery and psychiatric nursing as well as general nursing. A nurse who had been part of a bridging programme was competent to practice general nursing only. It was these nurses who were called registered nurses (not professional nurses). In the clinical milieu, PNs and RNs were called 'sisters'. On the issue of professionalism, nurses were considered as professional workers as their main aim was to help the person to whom they had a fiduciary obligation to and not to benefit economically nor financially (Van Rensburg & Van Rensburg, 2013).

SANC had two further categories of nurses on its roll of nurses, collectively known as 'sub-professional' nurses or enrolled nurses (ENs) and enrolled nursing auxiliaries (ENAs). ENs had achieved a two-year certificate programme of which the prerequisite entry qualification had been a Grade 10 previously, but was now a matric qualification, the National Senior Certificate. For nurses in training, specific terms were used. 'Student nurses' were those who were part of a four-year programmes at universities or colleges, 'pupil auxiliaries' were studying to be enrolled nursing auxiliaries and 'pupil nurses' were studying to be enrolled nurses. All these various categories of nurses were first described in the Nursing Act of 1978 as well as government policies in the 1970s and 1980s and were connected to the minimum conditions for registered, enrolled and auxiliary nurses. Thus, post-apartheid South Africa had three groups of nurses, namely professional (or registered) nurses with four years training, enrolled nurses with two years; and nursing assistants/auxiliaries with one year's training.

Towards the end of the 1990s the unfolding of political unification and the shutting down of nursing colleges led to changes in where nurses were being trained. Indeed, considerably fewer nurses were being educated in State facilities and the private sector started training more nurses than the public sector was. This shift was also a result of the cuts in provincial health budgets which was responsible for the decline in the public hospital training of new nurses. In post-apartheid South Africa, small privately run colleges had increased and they were headed by

principals of the public colleges that were closed down by government restructuring (Breier et al., 2007). These colleges produced the majority of the enrolled nurses and enrolled nursing auxiliaries but many private training schools did not meet the requirements to offer a four year degree or diploma. An interesting trend in the matriculation results in post-apartheid South Africa was that very few people met the requirements for the nursing bachelor's degree (Breier et al., 2007). For those who do meet the requirements for the degree, in 1997, 2 682 Professional Nurses were produced through the four year college and university degree and in 2007, this fell to 2 342 professional nurses who had graduated. There was no significant growth in the number of professional nurses during this period.

There are currently not enough qualified professional nurses but there was an excess of auxiliary nurses, according to the Society of Private Nurse Practitioners of South Africa (Becker, 2016). To increase the number of professional nurses, the 'Strategic Plan for Nursing Education, Training and Practice' was passed in 2013. This meant that in 2016, private training facilities had to stop all programmes and not admit any new students.[43] Private nursing education institutions were still to be certified and the new curricula was still to be authorised. The SANC had to carry out these approvals and then with the government, it still had to conclude and circulate the revised scopes of practice.

To compound issues, professional nurse training entailed a one year practical experience in the public sector but there was a critical shortage of posts in the public sector for the students to complete their studies (Becker, 2016).

Thus, nursing education in South Africa was carried out in markedly complex education and training spaces comprising universities and technikons (now universities of technology), nursing schools attached to public hospitals, public stand-alone nursing colleges, private colleges administered by the foremost hospital groups, private colleges linked to old-age homes and private colleges that trained for profit. Nursing students had to acquire 1 000 hours of clinical experience per annum which was a prerequisite for all the levels.

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[43] In 2019, this spread to the public sector.

7.4.4 Employment of nurses in the public sector

Even though the number of nurses being trained rose steeply between 1997 and 2007 – there were double the number of nurses in 2007 than there were in 1997 – the number of nurses employed in the public sector dropped as more nurses moved into employment in the private sector. Many nurses departed from the public sector or left the profession altogether. Both the HIV/Aids pandemic and the related growth of tuberculosis were exerting immense stress on the public sector health workforce. Between 1998 and 2004, the then President Mbeki's government's Aids policies prevented people from accessing antiretroviral treatment. During his time in office, President Mbeki said, 'HIV does not cause Aids.' Harvard researchers revealed that over 300 000 South African died due to the delay in the roll-out of ARV[44] treatment (Child & Mabuza, 2016). This dire situation was further aggravated as the share of the population underwritten by private health insurance dropped to below 15 percent and many more people became dependent on public health facilities.

Where nurses worked, the ratios were better but there were still only 5.14 nurses per 1 000 people in 2016, which was far below global averages (Becker, 2016). There were also more nurses in urban areas than there were in rural areas but there was no clarity as to what the appropriate ratio between professional and sub-professional nurses should be. Academic researchers had identified a desired PN:EN/ENA ratio of 1:3 and in 2007 the ratio was 1.04:1. The ideal was to have more professional nurses who had the four year comprehensive training and community health specialisation in order to support the primary healthcare system and to facilitate the administration of anti-retrovirals (Breier et al., 2009).

Added to this, the government had frozen posts and many nurses left South Africa to work in Saudi Arabia, UAE and UK to earn foreign income. Unfortunately, the Department of Health kept vacant posts open while many qualified healthcare workers were not being employed. The shortages and the challenges were not going to be resolved any time soon and there will be a serious scarcity of nurses in the near future (Becker, 2016).

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[44] President Mbeki severely limited the use of Nevirapine, which prevented mothers passing on the virus to their babies (Child & Mabuza, 2016).

7.4.5 Salaries and working conditions of nurses in the public sector

Nurses' remuneration was considered as inadequate and many nurses worked long hours, often in shoddy conditions, predominantly in the public sector and rural areas. Nurses who obtained a degree are paid at higher rates and specialists such as theatre-trained and critical-care nurses can anticipate higher salaries. A professional nurse can expect to earn about R18 000 per month, working on a seven-day 12-hour shift basis according to the Society of Private Nurse Practitioners of South Africa. Many nurses had to 'moonlight' to cope financially (that is they hold two jobs, working both in public and private sector). However, South African nurses are better off when compared to other developing countries. The public healthcare system spent two-thirds of the R150 billion on remunerating its employees and the rest on the procuring of goods and services (Becker, 2016).

7.4.6 Private medical insurance and National Health Insurance

Healthcare under apartheid was very different to that of education as while the apartheid state offered subsidised healthcare for poor white families and some African families, a significant private sector in healthcare continued. The state's share of entire healthcare expenditure was always much less than its share of educational expenditure. Private medical care caused blatant inequalities within the white population as well as between race groups (Seekings & Nattrass, 2005). This legacy persists and today as the vast majority of South African patients cannot afford care provided by the private sector and so depend on public healthcare as their only option. Nurses formed the backbone of the primary health-care system (Van Rensburg & Van Rensburg, 2013). The pressure on healthcare was aggravated by South Africa's expanding and ageing populations as well as by the HIV/Aids epidemic with its related diseases which had resulted in a growing need for health services. South Africa was classified as a middle-income country with a population of 57.7 million people.

A rather entrenched public health system coincided with a considerable private health sector. The private health sector had a history of more than 100 years of private insurance centred on mutual insurers termed medical schemes or medical aid societies. The current *General Household Survey* reported that only 17 in 100 South Africans have medical insurance (Statistics South Africa, 2017). Between 2002 and 2017, the proportion of individuals who were a member of a

medical aid scheme rose slightly from 15.9 percent to 16.9 percent. During this time, the number of individuals who were covered by a medical aid scheme increased from 7.3 million to 9.5 million people. As many as 45 million, or 82 out of every 100 South Africans were not covered by a private medical aid so they were mostly reliant on public healthcare.

As referred to already, healthcare was a top issue for the state's public-sector spending. To be precise, for every rand that the South African government spent in 2014/15, 11 cents was dedicated to healthcare adding up to R157 billion. Healthcare was the fourth biggest slice of government expenditure, surpassed by education (19 cents), social protection (13 cents), and executive and legislative organs (13 cents). The bulk or 86 percent of the health budget was consumed by provincial government, which was responsible for overseeing the nation's public healthcare system which was composed of 422 hospitals and 3 841 clinics and health centres. Statistic South Africa's (2017) revised information in the 'Financial statistics of provincial government' report established that the healthcare bill for provincial government was R150 billion for 2015/16. This meant that R3 332 was spent per person for the 45 million who were not covered by a private medical aid.

There were great differences in health expenditure, the supply of professionals and access to care that persisted between the public and private health sectors in the context of ever-increasing healthcare costs.

Thus from 1994 onwards, attention and effort had been applied to changing the South African healthcare system by putting into practice programmes that improve the health of the population but also increased opportunities to accessing healthcare services. Thus as universal access to healthcare was a socio-economic right it had become a crucial public policy matter, known as National Health Insurance (NHI). This policy was fully supported by the Alliance partners and according to the 'Report of the Alliance Summit' held at Gallagher Estate in May 2008, it was stated that:

> *"There is a sound economic rationale for introducing the NHI to ensure universal access to quality healthcare. Resources within the private and public sectors must be pooled to progressively realise the right of all to access quality healthcare services. The market-driven private medical scheme industry cannot guarantee healthcare for all.) The*

introduction of the NHI is but a step towards the broader transformation of our health system towards the full socialisation of healthcare and medicine. The under-funded and overworked public sector must be strengthened to care for the majority of our citizens especially those who cannot afford to pay for quality health services. The ANC Polokwane conference resolution identified health as the key priority for the next five years." (COSATU, 2008)

As already mentioned, the context for the NHI proposal was the mounting healthcare costs discrepancies that persisted between the public and private health sectors. The objectives of national health systems were to progress and support people's health, to guard them against the financial expenses of illness by lowering or eradicating out-of-pocket spending, and to accomplish some type of universal coverage.

Universal coverage was defined as, 'access to key, affordable preventive, curative and rehabilitative health interventions for all' (Shisana, Rehle, Louw, Zungu-Dirwayi, Dana & Rispel, 2006:814). The objective was to foster a combination of pre-payment methods, such as tax-based financing of healthcare, national or social health insurance over a period of time (Shisana et al., 2006).

As COSATU (2018) noted in the 'Consolidated resolutions adopted by the National Congress' document:

"The country has entered the second phase (2017 – 2022) in the implementation of the NHI. [The] Government has tabled key bills (NHI and Medical Schemes Amendment Bills) which among others, enable the creation of the NHI Fund and put some transitional measures aligning the existing system of medical aid schemes with the phasing-in of the NHI."

Indeed, in 2018, the government repeated its obligation to NHI with an additional R4.2 billion being assigned to the programme. The NHI is intended to reform how healthcare in South Africa was financed in order to increase access to it. A NHI fund had been created as well as a 'Health Planning and Systems Enablement' programme (Chowles, 2018).

7.4.7 Strikes by healthcare workers in the public sector and Occupational Specific Dispensation

If nurses go on strike this was noticeable due to the nature of their work. As indicated in Chapter 5 of this study on the public sector, the strikes by nurses were related to political issues at the time in 2007 and 2010 and to their grievances about their income as their salaries were low. DENOSA had not initiated industrial action and when it engaged in strikes it followed and did not take the lead. DENOSA supported the 2007 and 2010 strikes but did so under the auspices of COSATU (Southall, 2016).

Inadequate salaries have long been acknowledged as the topmost reason for dissatisfaction among nurses and so in September 2007 the government introduced the Occupation Specific Dispensation (OSD), with various trade unions, that considerably increased the salaries of public service nurses, which was a historical moment in post-apartheid South Africa. It was also assumed that these important amendments would also promote the status of nursing as well as attract nurses back into the public sector from the private sector, for example (Department of Health, 2004, cited in Motsosi & Rispel, 2007).

The OSD was a financial enticement that assisted in the ushering in of new salary levels for certain occupations in the public sector (PHSDSBC, 2007:2, cited in Motsosi and Rispel, 2007). The OSD policy strives to draw in and keep employees, thus upgrading service delivery in the public sector. The OSD policy outlined the salary structure, regularity of pay progression, grade progression openings, career pathing, acknowledgement of proper experience and essential levels of performance, among others (DPSA, 2007:1; PHSDSBC, 2007:1, cited in Motsosi and Rispel, 2007).

The OSD was first carried out in the nursing sector, as poor salaries which caused major dissatisfaction among the nurses of the public sector led to the government clinching this historic agreement. There was powerful urging by organised labour, particularly DENOSA for better rates of pay and the OSD deal followed the long-drawn-out public servants' strike of 2007 (Motsosi & Rispel, 2007) and for all categories of nurses it came into effect in July 2007. It was pertinent to nurses working at government departments of health, education or correctional services. The chief parts of the policy covered the definitions of each occupation's scope and

grading structures, work levels and job descriptions; salary structures addressing the actual prerequisites of the occupations, pay progression system to serve career pathing aspirations; dual career path permitting professional nurses to advance to higher levels and earn better salaries when going into specialised clinical fields; the linking of scarce skills allowances payable to professional nurses working in specialised fields; salary recognition to facilitate the employment of employees from outside the public service on higher notches/levels while recognising their relevant experience. Following the OSD bargaining council agreement, the DPSA was the guardian of the OSD policy and developed implementation guidelines (Motsosi & Rispel, 2007). It was expected that due to the OSD agreement that the salaries of nursing assistants in the public sector were increased by 24 percent, enrolled nurses by 20 percent, professional nurses by 24 percent and professional nurse specialists as much as 88 percent (Breier et al., 2009).

There were many trade unions that nurses could belong to, such as the South African Democratic Nursing Union (SADNU), Health and other Personnel Trade Union of South Africa (HOSPERSA) and NEHAWU. As this study focuses on DENOSA, it is covered in detail next.

7.4.8 The Democratic Nursing Association of South Africa

Historically, the SANC and the South African Nurses Association (SANA) were statutory bodies which all nurses had to become members of. During the transition to democracy nurses from the homelands, part of ten separate organisations, were urged to leave SANA and organise themselves into separate professional bodies but most opted for something else. In 1993, South African nurses joined forces to organise and constitute a collective that was dedicated to transforming the profession to align with the political developments. Moves were made to build one professional organisation that would be grounded on democratic principles – voluntary in make-up, led and managed by nurses, and able to embody both trade unionism and professionalism. At a constitutional conference in 1996, with delegates representing diverse South African nursing groups, a sizeable number of nurses voted for their united entity to be called DENOSA which was to be guided by a new constitution. DENOSA was created via political agreement after the switch to democracy and was authorised by its membership to speak for them and unite the nursing profession.

Tembeka Gwagwa was the co-founding member of DENOSA. Gwagwa directed the facilitation process that drove the merger of nurses in 1992 by the suspension of nurses' associations in the former homelands and she performed a critical function in ensuring that the organisation served members as professionals and workers simultaneously. DENOSA was affiliated to both the International Council of Nurses and to COSATU.

DENOSA's constitution states:

> *"[Our] philosophy is to promote equality for all and acknowledge our divergent cultural identities. We will seek to bring down all gender bias, class barriers and disparities that have characterised our society in general and our healthcare system in particular. As nurses we are mindful that the struggle of the working class is neither an isolated one nor elitist. It is international, humane and revolutionary. For this reason we dedicate ourselves to work with all organisations that share our vision at home, Africa and internationally."*
> (DENOSA, 2007)

DENOSA is a voluntary, independent and non-discriminatory nurse's organisation, dynamic, proactive and transparent, believing in democracy, excellence and professionalism, non-racialism and non-sexism, humility, collectivism, solidarity and unity serve as its core values. It has both union and professional components. The aim of DENOSA was to 'unite, empower, educate and support nurses as well as to influence policy at various settings including local, regional and international forums' (DENOSA, 2007).

DENOSA asserted that it concentrated on both trade union and professional improvement, offering training to nurses. DENOSA maintained that its roots were in unionism and that representing the workplace interests of members was its objective. DENOSA had recognised the global developments among nursing unions had been to support the professional development of their members which was their main focus. At the DENOSA Congress in 2007, a decision was made to re-introduce professional development activities as part of the DENOSA offering. It was also recognised that inferior working conditions, long and difficult working hours, poor salaries and restricted professional development opportunities for nurses had to be attended to. DENOSA affirmed that it focused on workplace struggles and positioned them within the wider class

struggle. DENOSA recognised that many of its members faced many challenges such as poor working conditions and concerns about safety and security in hospitals (Conco et al., 2013).

The DENOSA Strategy of 2011-2015 articulated a mission statement that pronounced, 'Nurses united in pursuing service excellence' (DENOSA, 2011). The internal mission was to support, represent and develop members as the backbone of South African healthcare and the external mission was to set forth, 'an empowered nursing cadre, serving, caring and advocating for society.' The organisational values included 'excellence and professionalism, accountability, transparency, collectivism, leadership development (including empowerment), organisational growth, diversity, integrity and loyalty, as well as democracy and visibility' (DENOSA, 2011). DENOSA had always made an effort to balance professionalism with trade unionism, even though at some stage there was an outcry from nurses that the organisation was concentrating more on the union rather than the professional wing (DENOSA, 2011).

DENOSA made it clear that ongoing education was a vital part of nursing. Via its institute for professional development, which was launched in 2009, DENOSA pledged that the advancement of nurses and the nursing profession continued to be an essential aspect of the organisation. DENOSA produced position papers on the vital issues of healthcare.

What is meant for DENOSA to have both a professional and trade union wing was that the trade union component advanced the social welfare character of the organisation. It enlisted and unified all nurses into one organisation so that members' individual and collective interests through collective bargaining and other appropriate means and forms of protest may be furthered. However, as salary negotiations were carried out at the level of professionals who were not general workers, as recognised by DENOSA, a fixed fee or amount for salary increases was not negotiated as there were diverse professional and salary scales that had to be taken into consideration. This was different to other organisations, DENOSA argued, where all were thought of as workers. DENOSA was conscious of bargaining for improved conditions of employment for its members (DENOSA, 2013). At one point, DENOSA was threatened with exclusion from negotiations in the public sector health bargaining council as it was the only trade union with a membership of less than 100 000 members (Southall, 2016), yet DENOSA was the largest union in the country for nurses with over 84 000 members (its membership increased and

decreased from time to time which suggested some form of stagnation in its membership) (Southall, 2016). The number of nurses in training or registered kept on increasing. The bulk (60 percent) of DENOSA's membership was in the lower employment categories (students, enrolled nursing auxiliaries and enrolled nurses) and in the public sector. DENOSA had not really developed its industrial muscle (Southall, 2016) apart from the major strikes in the public sector in the post-apartheid era. DENOSA remained committed to the Alliance with the ANC as an affiliate of COSATU.

DENOSA was committed to NHI and at DENOSA's Mpumalanga 8th Provincial Congress it was resolved that:

> *"NHI is no longer an option for South Africans, but rather a need. The declining state of healthcare in the country and the province in particular are evidence of the desperate need for universal healthcare coverage the National Health Insurance in our lifetime.*

> *"Programmes must be in place to ensure that NHI is more visible on the ground through the building of public hospitals as well as more investment into medical equipment and medication. The MEC of Health in Mpumalanga must lead the campaign of making sure that NHI is implemented as soon as possible."* (DENOSA, 2018)

Indeed, in 2018, the government repeated its obligation to NHI with an additional R4.2 billion being assigned to the programme. DENOSA was vigilant about the eroding of professionalism among its members. In 2017, DENOSA Gauteng remarked that:

> *"Because our cries for hiring of nurses and support staff have not been heeded, we will embark on a province-wide campaign where we encourage nurses to refrain from doing work that is not within their scope of practice. They must stick to what they were trained on. Nurses have become everything in facilities. They have become clerks in the absence of clerical staff, cleaners, porters at the expense of providing comprehensive quality patient care."* (DENOSA, 2017)

Nurses often had to do menial work in their everyday work which contributed to a lowering of the status of the profession. Added to this, the low salaries and the poor working conditions were also a factor in the declining status of nursing. This is what contributed to the proletarianisation

of the profession and what the professional unions like DENOSA guarded against. Instead of striking, DENOSA preferred raising the issue of poor salaries through research and lobbying campaigns.

7.5 Official statistics and quantitative analysis of the employment, highest educational level and trade union membership of African nurses in the public sector

To provide a description of the number of African nurses in the labour market, the study relies on information from the Statistics South Africa's OHS, LFS and QLFS. In all tables and figures that appear subsequently, the data were filtered through the 'type of business' variable in order to extract data for African nurses in the public sector only.

7.5.1 Employment of African nurses in the public sector

Figure 12 provides an aggregate picture of the employment of African nurses in the public sector, from 1995 to 2018. The term 'nurses' included: nursing associate professionals, nurses, nurses (not elsewhere classified or nursing assistants), nursing and midwifery professionals, nursing services managers and professional nurses, and midwifery associate professionals.

The tables that followed this graph provided a more detailed breakdown of the figures and their variation over the numerous data sets. A cross-tabulation of three variables was conducted within each data set, namely, 'population group' (for African), the 'type of business' (to isolate African nurses employed in the public sector) and 'occupation' for all the categories of nurse as mentioned above. The outcome of the data analysis were summarised and presented in Figure 12 in the form of actual number of African nurses in the public sector. The data were weighted to the South African population using the Statistics South Africa weight. As the OHS data sets were not comparable to the LFS and QLFS data sets (as noted in the methodology Chapter 4 but it was reiterated here that the LFS and the QLFS data sets were comparable as important changes in the LFS data were implemented in 2005 to 2007 to make the data comparable to the QLFS data which started in 2008) the trends is employment of African nurses only were discussed.

Figure 12: Aggregate data of African nurses employed in the public sector, 1995-2018
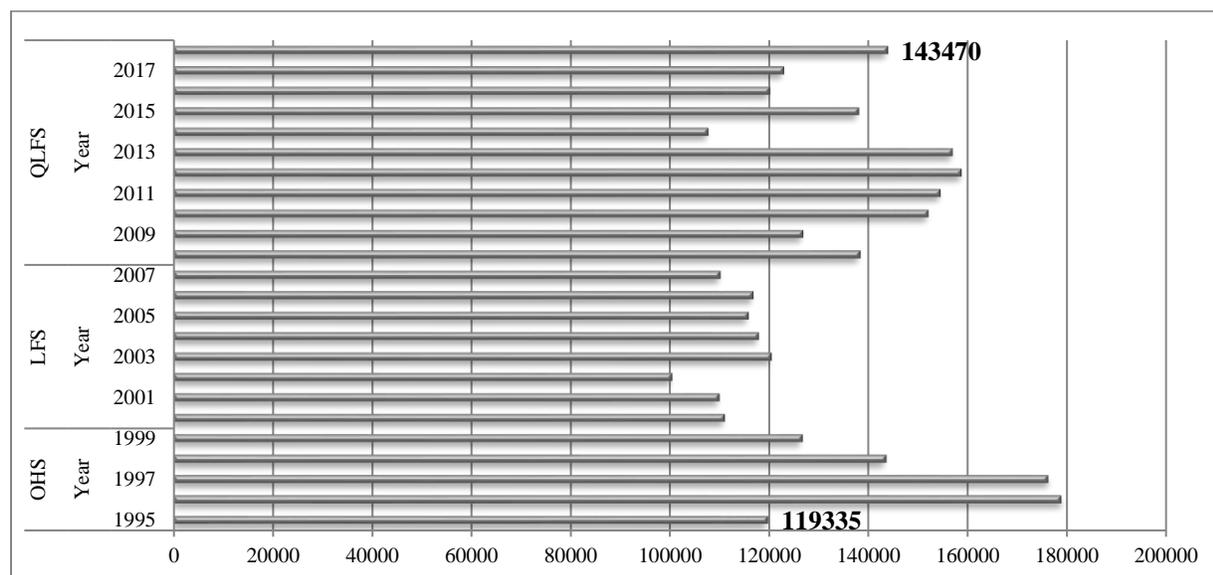
As Figure 12 shows, the number of African nurses in the public sector between 1995 (119 335 African nurses) and 2018 (143 470 African nurses) had on the whole increased.

Table 7 and Figure 13 look at the employment of African teachers in the public sector within the various statistics South Africa's various survey periods, namely the OHS.

Table 7: African nurses employed in the public sector, 1995-1999 (N)

Data set	Year	Number employed
OHS	1995	119 335
	1996	178 920
	1997	176 228
	1998	143 121
	1999	126 319

Figure 13: Variation in employment of African nurses in the public sector, 1995-1999 (N)
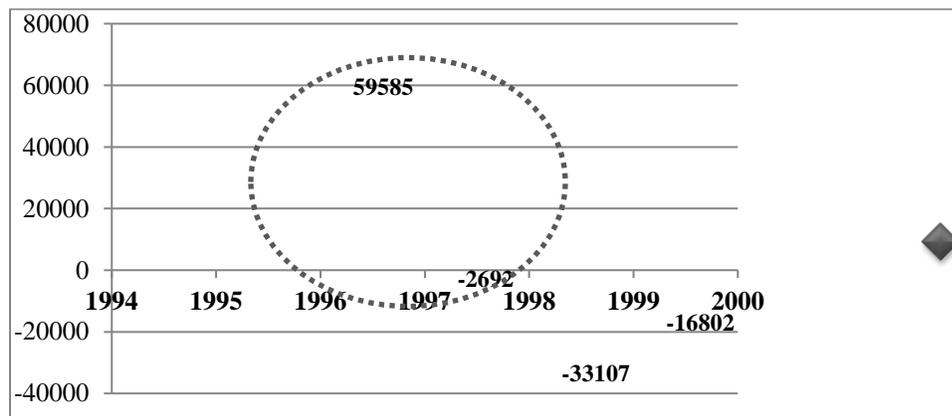
As Table 7 and Figure 13 both show, there was great variation on the whole within the four years where the largest increase in employment was between 1995 and 1996 with 59 585 more African nurses employed in the public sector in post-apartheid South Africa. This increase was possibly due to the finalisation of all the ten department of health in the homelands being incorporated into one single department of health in South Africa. Although there was a drop in employment by 35 799 African nurses in the public sector thereafter (in 1998) by 1999 there were 126 319 African nurses employed in the public sector. Compared to 1995, there were 6 984 more African nurses in the public sector by 1999 than there had been in 1995.

Table 8 and Figure 14 examined the trends in employment of African nurses in the public sector from 2000 to 2018, by drawing on the LFS and the QLFS data sets.

Table 8: African nurses employed in the public sector, 2000-2018 (N)

Data set	Year	Number employed
LFS	2000	110 717
	2001	109 629
	2002	100 122
	2003	120 080
	2004	117 510
	2005	115 425
	2006	116 409
	2007	109 781
QLFS	2008	137 929
	2009	126 412
	2010	151 694
	2011	154 214
	2012	158 541
	2013	156 661
	2014	107 362
	2015	137 574
	2016	119 777
	2017	122 557
	2018	143 470

Source: Statistics South Africa LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000), QLFS Quarter 4 (2008, 2009, 2010, 2011, 2012), Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017), Quarter 2 (2018) (Researcher's own calculations)

According to Table 8[45], the LFS data indicated that in 2007, there were 110 717 African nurses employed and by 2007, there were just 936 less African nurses employed in the public sector compared to employment figures in 2000. According to the QLFS data, the number of African nurses employed in the public sector also varied from 2008 to 2018. The largest dip in employment of African nurses was in 2014 when it dropped by 49 299 employees and then this was followed by the largest increase in employment in 2015 of 30 212 employees. By 2018,

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[45] Important changes in the LFS data were implemented in 2005 to 2007 to make the data comparable to the QLFS data which started in 2008.

there were 143 470 African nurses employed in the public sector and compared to 2008, there are 33 299 more employees in 2018 than there were in 2000.

Figure 14 looks at the variation in the employment of African nurses in the public sector from 2000 to 2018.

Figure 14: Variation in employment of African nurses in the public sector, 2000-2018
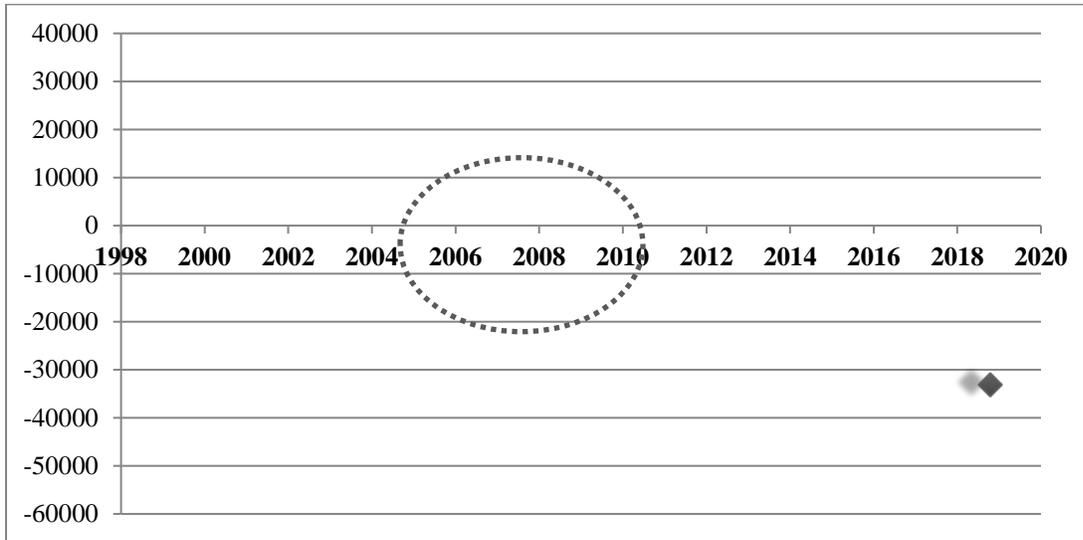
According to Figure 14, and according to LFS data, in 2003 there was an upsurge in the employment of African nurses in the public sector and compared to 2002, there were 10 451 more African nurses in the public sector. Between 2003 and 2007, the number of African nurses employed in the public sector system dropped by 9 659 African nurses. From 2007 to 2008, the number of African nurses employed in the public sector increased by 21 520 African nurses. According to the QLFS data, from 2008 to 2009, the number of African nurses employed in the public sector dropped by 16 631 African nurses, most likely as a result of the public sector strike in 2007.

However, between 2009 and 2013, the number of African nurses increased by 18 732 African nurses over this five-year period. This increase was most likely due to the OSD for nurses which

was finally implemented in June 2009 as well as the employment of the sub-professionals such as auxiliary nurses as they were being trained by the private colleges as a result of the restructuring in the public sector. However, by 2014, the number of African nurses employed in the public sector decreased by 30 567 African nurses which was the greatest decrease in employment of African nurses in the public sector over the time period under review. Between 2014 and 2018, employment of African nurses had increased and then it dropped so that by 2018, there were more African nurses employed in the public sector (143 470 African nurses) than there were in 2008 (137 929 African nurses).

7.5.2 Highest educational level of African nurses in the public sector

The quantitative analysis of the statistics for the highest educational level for the number of African nurses employed in the public sector from 2000 to 2018 relied on data sets from LFS (2000-2007) and the QLFS (2001-2018). A cross-tabulation of four variables was conducted within each data set, namely, the 'population group' (for African), 'type of business' (for the public sector), 'occupation' (for all the categories of nurse as mentioned above) and 'highest educational level' for the educational qualification. The data were weighted to the South African population using the Statistics South Africa weight. The data were summarised in Figure 15 only. As discussed above, the LFS and QLFS data sets were comparable.

However, it must be noted that one of the areas that the changes took place in was the questionnaire Statistics South Africa used and some of the questions and answer categories affected concerned the question on education. The question for the LFS series was 'What is the highest level of education that … has completed?' and there were 22 options to choose from, ranging from 'No Schooling' to 'Postgraduate degree or diploma.' The revision made in 2007 (to make the LFS and QLFS data comparable) concerned the question about education. The question was revised to read 'What is the highest level of education that … has successfully completed?' There are also 25 answer categories to choose from, ranging from 'No Schooling' to 'Higher degree (Master, Doctorate)' (Statistics South Africa, 2009).

Many analysts such as Burger and Yu (2006), Casale, Muller and Posel (2005) and Wittenberg (2004) (all cited in Yu, 2007), had examined the changes in the LFS and QLFS data, such as the sampling frame, the questionnaire design (which is described as inconsistent), the changes in the

methodology to obtain labour market status as well as the variation in the trends in many variables, such as educational attainment, labour force participation rates, unemployment rates, earnings and the like. It had been noted by others therefore that there was variation in variables like educational achievement between historical revisions to the LFS based on the overlap between the last LFS and the first QLFS. The educational attainment variable was one of the affected variables and this was the reason behind the variation in the data presented below. The quantitative analysis of the data was grouped in three time periods: 2000 to 2004, 2005 to 2007 and 2008 to 2018 in order to assess the trends in the highest educational levels of African nurses.

Figure 15: African nurses in the public sector: highest educational level, 2000-2018 (%)
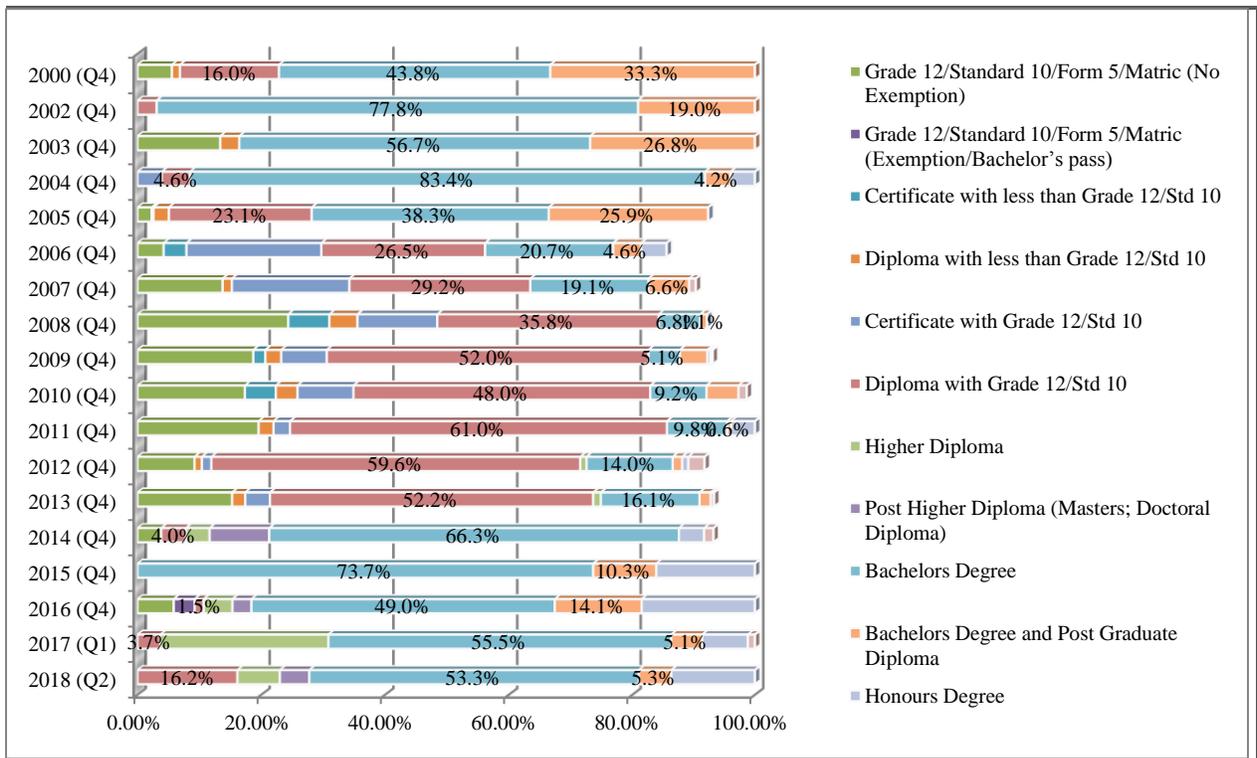
The Bachelor's Degree qualification was used to indicate the extent to which the variation in the LFS data sets reflected the variation in the data sets that concerned the highest educational level variable. Figure 15 shows that between 2000 and 2004, the number of African nurses in the public sector who had a Bachelor's Degree qualification ranged from 43.8 percent in 2000,

77.8 percent in 2002, 56.7 percent in 2003, 83.4 percent in 2004 and then back to 38.3 percent in 2005.

Figure 15 also illustrates that within the 2006 to 2013 period, the number of African nurses in the public sector who had Bachelors' degrees looked quite different to the figures in the previous period just described above as there was some fluctuation in the figures. In 2006 the African nurses who possessed a bachelor's degree was 20.7 percent, in 2007 it was 19.1 percent, in 2008 it was 6.8 percent, in 2009 it was 5.1 percent, in 2010, it was 9.2 percent, in 2011 it was 9.8 percent, in 2012 it was 14.0 percent and in 2013 it was 16.1 percent. What this suggests is that the data on educational attainment had stabilised and arguably these were closer to reality in terms of the African nurses who held this high qualification, who were indeed a minority group within the nursing population as there were far fewer professional nurses and midwives in the occupational group data. It was also plausible that it was these highly qualified staff that left the public sector to take up employment in the private sector or they left the country to take up employment in another country and so this is why the figures in this period were lower.

What the figures demonstrate is that there were more enrolled nurses in the nursing population and the data for highest educational level for 2006 to 2013 supported this. The highest educational attainment data were clustered around 'Diploma with Grade 12/Std 10' and this was the enrolled nurse qualification which was the diploma was offered by universities of technology (it was a three-year course). In 2006, it was 26.5 percent, in 2007, it was 29.2 percent, in 2008 it was 35.8 percent, in 2009 it was 52 percent, in 2010, it was 48 percent, in 2011 it was 61 percent, in 2012 it was 59.6 percent and in 2013 it was 52.2 percent.

However, the data shifted for highest educational attainment again from 2014 to 2018 and was more firmly now in the direction of the Bachelor's degree; in 2014, 66.3 percent of African nurses had a Bachelor's degree, in 2015, it was 73.7 percent, in 2016, it was 49 percent, in 2017, it was 55.5 percent in 2018 it was 53.3 percent. The educational attainment data within this time period corresponded to the employment data for nurses within this time period as between 2014 and 2018, the employment of African nurses had increased too.

The data suggested that the trend for African nurses working in the public sector was that they held a Bachelor's Degree which corresponded with their occupational category, that of

professional nurses. This was a most positive development in the public sector and it was as a result of both the educational transformations that had taken place in post-apartheid South Africa and the employment equity policies of the post-apartheid government which were implemented and where Africans were employed in public sector institutions.

A DENOSA official confirmed this trend:

> *"Globally the challenge that nursing faces is the focus to professionalise the profession with the minimum entry being the Bachelor's Degree."* (Interview with DENOSA official, Johannesburg, April 2018).

It was remarkable that there continued to be a growth in the production of qualifications at the higher end of the educational spectrum as so many nursing colleges had closed down and that the responsibility of the public sector in the training of nurses had contracted (Breier et al., 2009). The DENOSA official felt that the fact that as Gauteng used to have eleven nursing colleges and now only had three due to the closures, that:

> *"The issue of nursing is not being taken seriously and as 46 percent of the health workforce is nurses, they need to be given attention."* (Interview with DENOSA official, Johannesburg, April 2018).

It must be recalled that there was great discrimination in the educational attainment and employment of black and white nurses in South Africa historically in that:

> *"A diploma for the training of black nurses and a degree for white people only. Even though the examination was the same if you were doing the diploma, as a black [person] you could only say that you were a staff nurse but you could not call yourself a professional nurse."* (Interview with DENOSA official, Johannesburg, April 2018).

The data on the highest educational level of nurses confirmed that the major successes of the post-apartheid era had been the shift to the training of African nurses at university level and formally the removal of racially discriminatory obstacles in training. This arguably equipped nurses to grapple with the challenges of South Africa's high disease burden and challenges in the public healthcare system, which was essential as:

"A nurse had to be trained to respond to all types of challenges and competent in community care, midwifery, antenatal care and psychiatry – a comprehensive qualification. As nurses work with a multi-disciplinary team of doctors and physiotherapists, nurses need the same level of knowledge so that they can diagnose correctly." (Interview with DENOSA official, Johannesburg, April 2018)

Nurses were empowered with their comprehensive qualification and then chose to specialise in neo-natal intensive care or midwifery. Nevertheless, there was a shortage of qualified midwives in the country and this was exacerbated the brain drain which impacted on the public healthcare system. A further challenge was that the Department of Higher Education and Training still had to declare colleges as institutions of higher learning so that a sufficient number of nurses could be enrolled. However, the upgrading in the training of nurses in South Africa was also a matter of life and death. Apart from the fact that South Africa, like other South African Development Community countries experienced high cases of trauma and midwifery cases, a nurse who was competent made a positive contribution to the improvements in the provision of healthcare as:

"Prior to 2009, only doctors could administer anti-retrovirals (ARVs). Now that nurses administer the ARVs, due to the changes in the scope of practice, this had a positive impact on life expectancy – it improved from 51.2 years to 59 years old."
(Interview with DENOSA official, Johannesburg, April 2018).

As already indicated, nurses were the backbone of the public healthcare system and worked to deliver essential services to the population such as life-saving medication for HIV-positive patients.

When analysing the LFS and QLFS, it was not necessary to include age as a variable as the SANC collected this information from its registered members (as discussed, in post-apartheid South Africa those nurses registered with SANC did not have to disclose their race, so this is why it was imperative to draw on LFS and QLFS data about African nurses). Figures 16, 17 and 18 provide a breakdown of the age distribution of registered nurses and midwives.

Figure 16: Age distribution: Registered Nurses/midwives, 2017 (%)
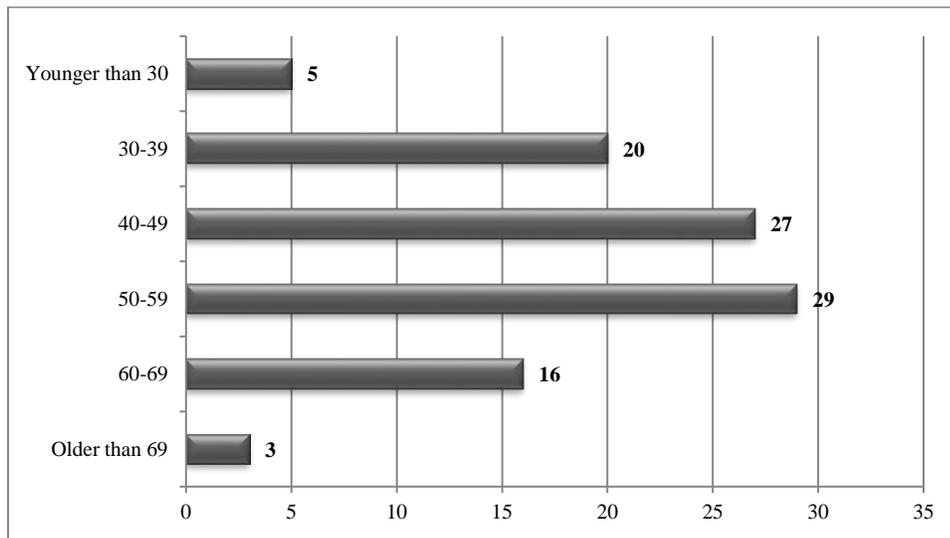
Source: SANC, 2017

According to Figure 16, although almost one-third (29 percent) of the senior nurses that is registered nurses and midwives, who were responsible for the supervision of enrolled nurses and auxiliary nurses and undertook typical nursing responsibilities and were SANC members, were between the ages of 50 to 59 years, which indicated an ageing labour force among this section of the professional nurse category. Those in the 30 to 49 years of age category represented a combined 47 percent of all registered nurses and midwives. These nurses also typically held a postgraduate qualification in nursing or midwifery in addition their degree or diploma.

Figure 17: Age Distribution: Enrolled Nurses, 2017 (%)
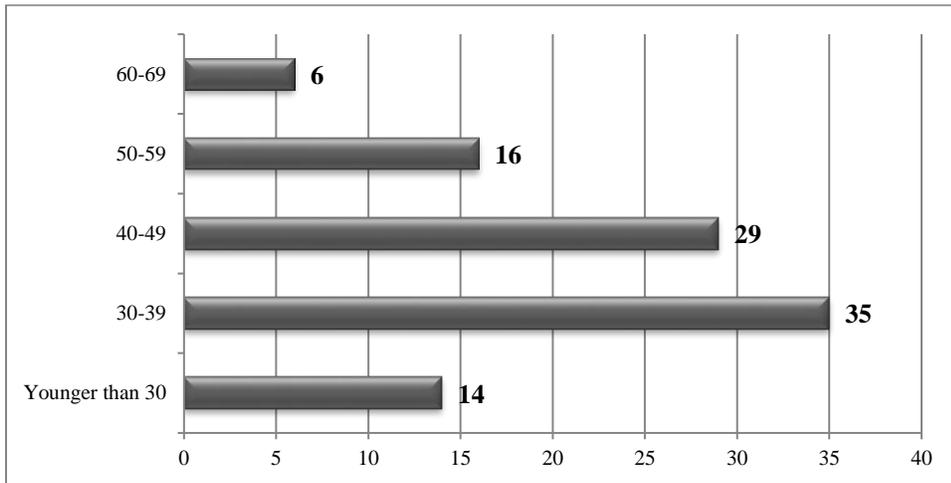
According to Figure 17, over one-third (35 percent) of enrolled nurses, who performed limited nursing care and registered with SANC were between the ages of 30 to 39 years, followed by a third (29 percent) who were between the ages 40 to 49 years. The enrolled nurse was the 'sub-professional' nurse who had achieved a two-year certificate programme. These nurses were younger and conceivably would work to upgrade their educational credentials.

Figure 18: Age Distribution: Enrolled Nursing Auxiliaries, 2017 (%)
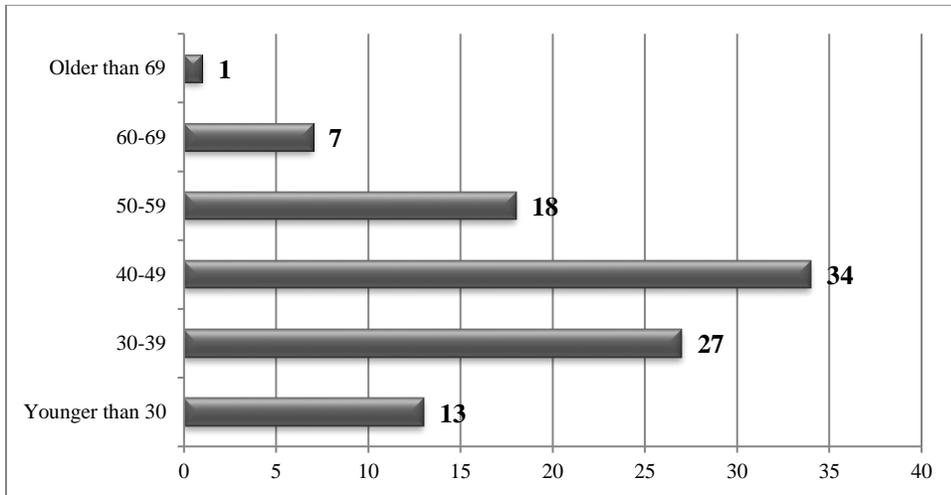
According to Figure 18, over one-third (34 percent) of enrolled nursing auxiliaries, who performed basic procedures and cared for patients in general, and registered with SANC were aged between the ages of 40 to 49 years, with just over a quarter (27 percent) were aged between the ages of 30 to 39 years. The nursing auxiliaries were also the 'sub-professional' nurse who had achieved a two-year certificate programme of which the prerequisite entry qualification had been a grade 10 (but the prerequisite had been upgraded to the matric qualification of the National Senior Certificate). These nurses were older which suggested that they had not worked to upgrade their educational qualifications. However, according to the SANC, in the nursing industry there was an overall increase of registered nurses in South Africa. According to the PSCBC in 2017, nurses working for the state earned between R150 800 and R431 200 per annum and in 2018 it ranged from R160 600 to R459 200 per annum.

7.5.3 Trade unionisation trends of African nurses in post-apartheid South Africa

This section contains a cross-tabulation of four variables conducted within each data set, namely, the race of the nurse, the sector the nurse was employed in, the occupation of the nurse and whether the nurse belonged to a trade union. The data are presented in figures 19 and 20 as proportions of the total of Africans. The data are weighted to the South African population using the Statistics South Africa weight.

Figure 19: African nurses in the public sector and trade union membership, 1994-2018 (%)
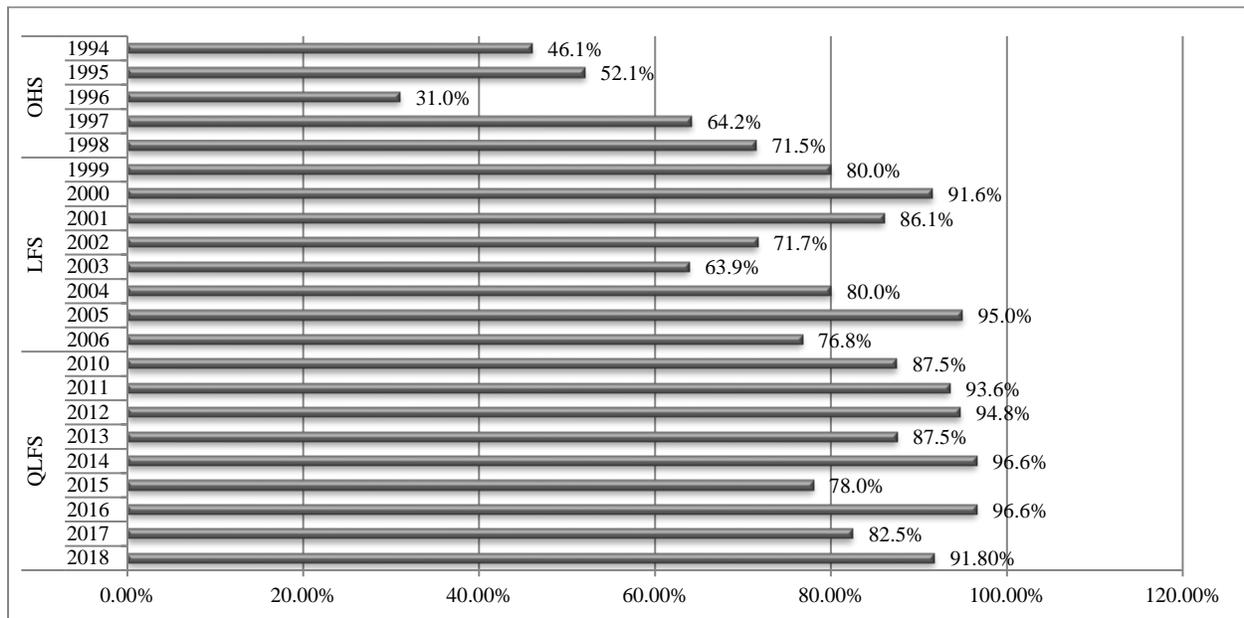
Source: Statistics South Africa LFS September (2007, 2006, 2005, 2004, 2003, 2002, 2001 and 2000), QLFS Quarter 4 (2008, 2009, 2010, 2011, 2012), Quarter 3 (2013), Quarter 4 (2014a, 2015 and 2016), Quarter 1 (2017), Quarter 2 (2018) (there are no data for 2008 and 2009) (Researcher's own calculations)

Figure 19 above illustrates how many African nurses employed in the public sector were trade union members, from 1994 to 2018. Clearly public sector trade union membership for nurses had increased dramatically from 1994, where it had been 46.1 percent for African nurses in 1994, to 91.8 percent in 2018 for African nurses.

Figure 20: Variation in trade union membership of African nurses in the public sector, 2000-2018 (%)

Figure 20 above shows the variation in trade union membership among African nurses of the public sector from 1994 to 2018. Between 1994 to 1999, trade union membership for African nurses dropped in 1996 by 21 percent but then it rapidly rose in 1997 by 12.1 percent so that by the end of 1999, trade union membership had increased by 33.9 percent overall. The variation in trade union membership for African nurses was not surprising as within this time period, the different nursing associations were merging and DENOSA was only launched in 1996. There was a clear correspondence between the changes in both the labour landscape and in trade union membership.

In the next period, that is 2000 to 2008, there was great variation as trade union membership increased and dipped with the greatest loss of trade union membership occurring between 2000 and 2003 where it decreased by 16.1 percent. Trade union membership picked up and increased by 31 percent in 2004 and 2005 but it decreased again in 2006. In 2007 and 2010 trade union membership improved again for African nurses in the public sector and there were the two major public sector strikes in these years. From 2011 to 2018, trade union membership for African nurses in the public sector trade union membership increased in 2011, 2012, 2014, 2016 and 2018 and dropped in 2013, 2015 and 2017. However, the majority of African nurses in the public sector belonged to a trade union and so trade union density was high.

To summarise, the official statistics clearly showed that the number of African nurses employed in the public sector had increased from 1994 to 2018; that the highest educational qualification held by African nurses was a four year or Bachelor's degree and that there was a high trade union density for African nurses employed in the public sector.

The next section provides a summary of the data emanating from the qualitative interviews carried out with nine African nurses who are employed in the public sector.

7.6 Qualitative data of the nine African nurses employed in the public sector

In this section, the qualitative results of the nine semi-structured interviews with African nurses working in the government hospitals and clinics in Johannesburg in June and July of 2018 at the time of this study are presented. All of the nurses were DENOSA members and this was a criteria used in selecting the nurses to be interviewed. The analysis includes a demographic profile of the African nurses, a lifestyle profile (the type of dwelling the nurse lived in, the number of people who lived in the household and the number of people who worked, the number of dependents the nurse had, if household members received a social grant, if the nurse had insurance for various items, what the nurse earned each month and their satisfaction with their earnings, what items the nurse spent on each month, what the nurse had bought in the past year and how the nurse funded the purchase); their DENOSA membership details; their work and employment conditions, including their views on strikes by nurses and their attitudes towards DENOSA and its two wings, professionalism and trade unionism. Lastly their views on the Alliance, the ANC and COSATU are presented. In particular, the nurse's political attitude to the Alliance, the ANC and COSATU was presented. As argued in Chapter 5, in the public sector, the professional environment embraced not just the socio-economic conditions but also the political conditions that affected the practice of the profession, including its status and image. The nurses were asked to comment on the Alliance that COSATU is in, what they think the ANC has done for the country and if they support the ANC politically or not and why.

It is important to provide some background on where the African nurses who were participants in the study work. The nurses interviewed worked for public hospitals in Johannesburg. The one hospital that nurses worked at had 1088 beds and it took patients in from across Gauteng and from other provinces. The hospital's professional and support staff were around 4 000 people, it

was a teaching hospital for one of the universities in Johannesburg and so where research and the training of doctors, nurses and the allied professions took place. The hospital was situated in a former 'whites-only' suburbs of Johannesburg. The other hospital that the nurses worked at was situated in Johannesburg and it was a public sector specialised psychiatric hospital. The hospital claimed that it delivered dedicated inpatient and outpatient services to adults and children with critical mental illness. There are 141 beds and nine wards. The hospital was originally a large house in the former white-only suburbs of Johannesburg. The property was sold to the government in 1942 and it was turned into a military headquarters and thereafter a plastic surgery unit was installed. The property was converted into a mental health hospital subsequently. The hospital specialised in eating disorders and it had an adolescent unit for drug abuse and eating disorder cases. The land that the hospital was situated on was one of the most exclusive suburbs in Johannesburg and homes that surround it were priced at R20 million and upwards.

7.6.1 Profiles of the nine African nurses working in the public sector

This section profiles the nine African nurses working at the various government hospitals as detailed above. They were all DENOSA members at the time of the study. In all cases, pseudonyms were used. The analysis of nurses that follows took into account the nurses' family background, that is if the nurse had a family home somewhere else, where this was and if there were any nurses in their families; what the nurse earned per month, the type of dwelling the nurse lived in, a description of the items in the household of the nurse, and the number of household members and their working status; the number of dependents who relied on their salaries for support and what the nurses had spent their salaries on purchasing in the last year and lastly, the nurses' highest qualification. The nurses' assessments of the public healthcare system and of DENOSA are also examined. This is followed by an exploration of the nurses' positions on the Alliance and COSATU and the nurses' views on the ANC in particular are explored. These questions were asked in order to probe what COSATU members thought about how the ANC has used its position as the government to achieve social transformation but also how the interventions made by the state were received and contemplated on by ordinary workers of COSATU, such as the nurses of DENOSA. As in the case of teachers, as Wright and Singelmann (1982) argued that nearly half of all class locations within the class structure had a 'contradictory

character' in that their class content was influenced by more than one basic class this study was guided by this notion of the contradictory class location in the investigation of the class location of African nurses who were members of DENOSA which is affiliated to COSATU and how this intersected with their racial, gender and political identities.

7.6.1.1 Vuyo

Vuyo, a male, 55 years of age, was divorced and held a Bachelor of Technology in Nursing qualification from the Tshwane University of Technology. His father was a miner but he was passionate about education and so taught his children to read and write. Jabu's siblings had completed their secondary and tertiary education. He worked as an occupational health and safety nurse in the hospital on a permanent basis. He had been working at the hospital since 1997. He joined DENOSA in 2008. He owned his own house with a bond from the bank and he had a family home in Limpopo. He earned R21 000 gross per month and was not satisfied with what he earned. He used his salary to buy food and groceries for the household, live entertainment, clothing, electricity and water, petrol, school fees, healthcare and he saves money every month. He had not spent money on other items in the past year and he does not find it hard to cope financially. He had a medical aid, a provident fund and he received a housing allowance. He lived on his own currently. His two children used to live with him, but they lived in Limpopo with his ex-wife and he supported the children as they were in primary school. He had household insurance. In his house, he had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, two cellphones, a radio set, a TV set, a DVD player, a refrigerator, an electric stove, a microwave oven, a washing machine and a motor vehicle. Vuyo had a high standard of living even though he supported two households.

Vuyo had a tertiary qualification and was a nurse which was an occupation that corresponded to a middle-class social status. The significance of Vuyo's other material conditions, or economic capital (he owned his own home with a bond from the bank) when connected to the social relations of his life, such as being an African nurse highlighted important differences. Vuyo came from a working-class background (his father was a miner).

When asked if he considered himself to be a professional first or a trade unionist first, Vuyo said that:

"I consider myself a professional nurse first. The two are linked. In the 1990s I was a professional nurse already and to get a nurse unionised was a struggle and people lost jobs but we made breakthroughs. DENOSA was SANA. Bread and butter issues affect us too so the CPIX is very important to be a member of a union. You have to be a professional first before you can be a unionist. You cannot address bread and butter issues on your own."

Even though Vuyo considered himself to be a professional first, as African male nurse he pointed out that he had experienced practices of racism as 'people lost jobs' and that is why joined DENOSA or SANA at the time that was the only organisation available for black nurses. As a male African nurse, Vuyo's constructed racialised and professional subjective identities were inter-related to the broader inequalities of the racial and class segregation among the nursing labour force in hospitals and clinics that professional nurses like Vuyo experienced. This was further connected to economic factors, the bread and butter issues that were important to Vuyo as he had two households to support. Vuyo was in a contradictory class location, that is he shared class interests with the middle class (with his work and education levels) and with the working class (with his material restraints and his family background). Vuyo's contradictory class location was influenced by more than one basic class.

Vuyo hardly came home from work exhausted; he never had to do hard physical work; he sometimes found his work stressful, but he never had to work in dangerous conditions. He felt strongly about health and safety issues in his workplace. As he was an Occupational Health and Safety nurse, as he said that:

"Safety is our responsibility we need to get our employees to wear PPEs and it the mandate of our department to ensure that staff members are protected from exposure like chemicals which cause asthma. There is occupational asthma from latex allergies. We establish safety reps in each department and we do environmental checks and report environmental hazards."

Vuyo reported that he was, however, fairly satisfied in his job. He joined DENOSA more than ten years ago. He joined DENOSA for the purposes of indemnity which was crucial to have for his job. DENOSA provided this cover and if one worked in the public sector, this was a

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requirement. He was not forced to join DENOSA but there was a closed shop agreement and so joining DENOSA made sense. He was happy initially with DENOSA and there were some advantages of membership, Vuyo said:

> *"I love DENOSA and I became a participant in many activities and I have a passion for leadership but at the local level like the clinic but not in the higher structures. I found myself to be more of a manager. I am now part of management but I am more on the side of labour and not management so there are tensions."*

That Vuyo had moved into a managerial position in his workplace further accentuated his professional and middle-class status with assumed different classed interests from the working class. However, Vuyo preserved a sense of his working-class origins as he was 'on the side of labour' when it came to certain work-related matters.

Vuyo was quite critical of DENOSA now as he felt that:

> *"DENOSA is not addressing labour issues. The structures are toothless."*

Vuyo's working-class background made him more aware that DENOSA failed to address certain issues even though he was in a management position which further illustrated Vuyo's contradictory class location.

When asked if he thought that he had enough resources to do his job, Vuyo replied that:

> *"The resources are severely challenged we are under resourced. We need to test patients for hearing loss, vision and lung function but we have got no equipment."*

Vuyo's concern with professionalism was demonstrated here yet again. He had given his word that he would take charge of administering the necessary care and perform this according to the requirements of the nursing professional bodies and the law but he was unable to discharge his responsibilities as there was no equipment where he worked.

When questioned if there had been strikes in his workplace since he had worked there and why nurses went on strike, Vuyo said:

"There was a strike last month when there were negotiations there was picketing and it continues now. We picketed at 12 and there was a confrontation with security as it was a medical waste picket and management called security and there was a police clash. There was also an issue with the minister of health – we do not want another Esidemeni [see discussion below]. The trash was dangerous but grievances need to be addressed properly so issues were valid but this was no way to proceed."

At Vuyo's workplace, nurses, porters and cleaners went on a strike in 2018 over the issue of their performance bonuses which had not been paid for two years (2016 and 2017) even though overtime had already been performed. Those that went on strike at the academic teaching hospital that Vuyo worked at blockaded the entrances and because they overturned bins, rubbish was strewn over the floors of the foyer. Among the litter was medical waste. The strike also disrupted the provision of services to the public sector healthcare users. The right to strike was theoretically restricted by section 36 of the Constitution and section 65 of the Labour Relations Act for workers that performed essential services. When healthcare workers went on strike, this generated moral and ethical uncertainties as well as disapproval of the striking health workers among many sections of South African society. In this strike, the South African Human Rights Commission (the SAHRC is the national institution tasked with the upkeep of South Africa's constitutional democracy) was called into the hospital. Often the healthcare workers who are on strike are vilified yet it was reported that the Gauteng Provincial Department of Health had taken months to resolve the issue of unpaid bonuses. The Minister of Health at the time, Dr Aaron Motsoaledi, laid the blame for the debacle on the MEC of Health for the Gauteng Province, Dr Gwen Ramokgopa who had replaced the former Gauteng Province MEC for Health, Qedani Mahlangu, who was implicated in the 'Esidemeni' tragedy which had become known as post-apartheid South Africa's worst human rights scandal. Over 2015 and 2016, approximately 1 700 vulnerable and mentally ill people were transferred from Life Esidemeni. It was made up of various privately run mental healthcare facilities in Gauteng. However the patients were transferred to numerous unlicensed care homes run by people with no qualifications to care for the patients nor the facilities to lodge mentally ill people. The health authorities claimed that it was an attempt to deinstitutionalise patients and salvage funds. However, 144 people died as a result of this, from causes related to abuse, starvation and dehydration. A significant number of

the patients were moved without their medication, files or identity cards, without informing their families.

With Esidemeni in mind, Vuyo was clearly appalled by what transpired in the strike as he said:

> *"Professional nurses do not go on strike or pickets. We have selected services that impact on the lives of patients. We never participate in strikes due to ethics."*

The decisions taken by the health officials had fatal consequences for the most vulnerable communities in South Africa that nurses like Vuyo were charged with caring for in the public health system. Nurses struggled with the same health officials for the payment of their overtime and for what is rightfully theirs. Vuyo's reading of these incidents and struggles was mediated through his subjective experiences of race and class. For Vuyo when nurses went on strike, they put the lives of those they cared for on the line and they abandoned their ethical obligations in the process. In the democratic transition in South Africa, class and race inequalities blended and a vastly differentiated system of health persisted. The users of the public sector health system came from the most vulnerable and impoverished communities, which were vastly African. Vuyo's views of the strikes that the nurses embarked on and Esidemeni were interpreted through his race identity as linked to his concerns for the vulnerable community, his sentiments of social justice and racial solidarity. Yet, by not being paid for work already performed, nurses were further subjected to classed practices as the non-payment of overtime (which was part of their salaries) impacted on them financially and emotionally and further strained their already meagre earnings. In this regard, Vuyo's subjective and continued engagement with his classes (he was both in his class of origin and in the middle class because of his occupation, the professional nurse) meant that while he did not leave one class for another, he was in two classes at the same time. He understood the rationale for the strike but he did not agree with the practices of other nurses (possibly those below him on the occupational ladder).

Vuyo specifically linked the issue of the working class as an issue in the support of political parties:

> *"I am a voter since 1994 and I am disgruntled. There is no need for voting. I will go back to voting when a new political party is formed and put into power then I will vote for that*

political party. But not the ruling party. This party will address nurses' interests only but it will have workers interests at heart and the country at heart but it will take workers' interests seriously."

Vuyo's view of voting and political parties shed light on the links between his political identity, race identity and class identity. He had participated in the first democratic elections in post-apartheid South Africa in 1994 but had become disillusioned with politics and the ANC ('the ruling party') subsequently. As demonstrated in other cases, race and class were not independent factors in post-apartheid South Africa where the ANC was victorious in terms of their developmental agenda for the African public sector employees like Vuyo which clearly influenced his political loyalties. Vuyo acquired the cultural capital of a tertiary education that formed part of his subjective identity of the professional/ managerial class but this had not made his ties to his working-class background insignificant as he wanted his needs as a nurse and workers' needs seriously addressed by a political party. The unevenness of local-level delivery and socio-economic transformation also led to the potential for increased movement away from 'protest combined with continuous ANC electoral support' (Booysen, 2011) and this was clearly demonstrated in Vuyo's case.

Vuyo was knowledgeable about the history of liberation movements in Africa and what happened to their support once they were in power:

> *"The ANC is going down the drain and is following the route that all liberation movements have followed in the continent. I was happy that the ANC liberated us but the ANC is arrogant and has lost the support of the people. It is declining. If democracy is to function we cannot have a one party state. Things are not the same and the voters can see that. Too much power corrupts. The change of parties will be good. After 20 years of the ANC there has not been much difference."*

As argued by Baines (1998), identification with the nation was not the only form of cultural identity and it was co-existent with other social identities. Vuyo's racial, class and political identities were evidenced in his political discourse usage of the phrase, 'I was happy that the ANC liberated us but the ANC is arrogant and has lost the support of the people'. This demonstrated how the ANC used its time in the state to direct its nationalist project, the NDR,

which operated materially and ideologically to intervene in the lives of ordinary South Africans. Even though the ANC had lost his support, Vuyo's comments illustrated that the ANC's nationalist appeal was far from being weakened, even in the context of worsening societal conditions, such as the appalling state of the public sector that showed the connections. Top leadership was strong in ANC mobilisation, but weak in substantive delivery. Vuyo thought the chances for a definitive turnaround were slim even though the ANC's welfarist government policies and projects had endowed them with the status of 'caregiver' and 'liberator'. There were serious credibility deficits within the ANC for Vuyo.

When asked what the ANC had done since it had been in power, Vuyo said:

> *"They have not done much and why attribute this to the ANC only? What about other parties? It is up to us to do it ourselves we have got a lot of swept issues under the carpet. We have pockets of racism. We need to live together as one community and we will win. As far as inequality has not changed the rich are richer and the poor are poorer. There is a wage and income gap. The executives of companies earn obscene salaries. The same applies to the government. The minister earns a lot more than us public sector workers. So racism is not addressed properly. The one race has extended the olive branch but the other race has taken the olive branch. What will the government do for me? The bread and butter issues matter. All the political parties are to blame."*

Vuyo's phrase, "we need to live together as one community" was a national question sentiment which reflected his political identity. Vuyo did not deny the potency of the national question nor that it was resolved or unresolved. Vuyo had, however, not replaced a race position to the national question (although he was concerned with the "pockets of racism" and that 'the one race has extended the olive branch but the other race has taken the olive branch' which prevented racial unity) with one that was classed (as he was concerned about the widening chasm between the rich and the poor which he connected to increasing income disparities). In post-apartheid South Africa inequality was not just racial but it was class based and each advanced in the context of the other. Vuyo's response demonstrated that there were dimensions to social inequality and they were numerous, intersecting and dense. Vuyo's lived experiences are an

intersecting combination of these social and economic inequalities where power relations are not tidily packaged (Sang, 2018).

7.6.1.2 Annie

Annie, a female, aged 40 years of age was married. She holds a Nursing Diploma which she completed at a nursing college. There were nurses among her extended family members. She worked as a Registered Nurse in the Neonatal Intensive Care Unit (NICU) at a public sector hospital and has worked there since 2004. She joined DENOSA in 1999. She lived with her husband who owned a house with a bond from the bank and she had a family home in Limpopo. She earned R19 000 gross per month and she was dissatisfied with what she earned. As Annie said:

> *"I am not happy with my salary at all. The salary is too low. I cannot study for four years and earn peanuts. Last week in fact there was a strike and it was over performance bonuses which had not been paid as well as the payment of overtime. Why are the not paying us? They are dragging their feet."*

Annie used her salary to buy food and groceries for the household, to buy electricity and water, for petrol, for school fees and she funded her own studies. She bought a car in the last year and she took out a loan for this. She found it hard to cope financially. She has a medical aid, a provident fund and she receives a housing subsidy. Herself included, there were three people who lived in Annie's household, two people worked and the third was a scholar. A child and one of her parents were her dependents and she received a child grant. She did not have a short term insurance policy. In her house, she had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, a home security system, two cellphones, a TV set, a DVD player, a refrigerator, a deep freezer, an electric stove, a microwave oven, a washing machine, Pay TV, a vacuum cleaner, a motor vehicle and a computer.

Annie had a tertiary qualification and was registered a nurse which is an occupation that corresponded to a middle-class social status which permitted to her to cross over into the middle class. After many years of working experience in a specialised unit of the public healthcare system with vulnerable patients, the neo-natal intensive care babies, while Annie considered

herself as a professional first as she puts her work with her patients first, she was demotivated. Annie always came home from work exhausted, she always had to do hard physical work, she always found her work stressful and she was completely dissatisfied with her job. This was further exacerbated by economic factors and the bread and butter issues that were equally important to Annie, such as the non-payment of her performance bonus and her overtime pay. Annie had to support her child and her parent and even the child grant she was received was not helping to make ends meet. To summarise, Annie was in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Annie's contradictory class location was influenced by more than one basic class.

When asked why she joined DENOSA, Annie said:

> "I joined DENOSA as I was a student and it was required as I needed indemnity. So you need to belong to DENOSA to work. I trained as an auxiliary nurse I came to Johannesburg and got this job. If you are dissatisfied at the workplace, they can assist you and guide you. If there a statement written for a disciplinary hearing you get help from them on labour issues. They have got good structure at the regional and provincial level and grievances are addressed so if you are not satisfied you can take it to the region."

The broader racial and gender inequalities that were still present in the post-apartheid public sector healthcare system in which African female nurses suffered multiple disadvantages such as Annie, highlighted how this linked to her structured gendered and racialised subjective identities. Annie relied on the trade union for assistance in helping her represent others in grievance procedures (Annie was a part time shop steward) and for giving her information, which helped to augment her capacity as a union leader at her workplace, which in turn reduced the occurrence of subsequent disciplinary matters that she attended to. There were thus advantages to being a trade union member of a well-resourced and professional trade union, as Annie stated:

> "There are full-time shop stewards, so there is no way that your matter will remain unresolved and national will help."

Annie's subjective experiences were a reflection of the marked social experiences that African nurses endured in the public healthcare system as there were multiple and intersecting levels of oppression but also strategies of empowerment to counter this (being able to turn to fulltime shop stewards for help) which was mirrored in the composition of the trade union as it had two wings (professional and trade union).

When asked about the disadvantages of belonging to DENOSA, Annie was critical of its proximity to the Alliance and the ANC, as she pointed out:

> *"DENOSA needs to stand on its own and not be in the pocket of the boss as then you cannot negotiate for the workers – you are negotiating with the ANC. We are an affiliate of the ANC – this does not make sense. How do you speak to me and for the workers? You have got to get the balance right and it is a problem. DENOSA needs to leave COSATU if they are interested in the workers. The ANC is their boss and they tell them what to do."*

Annie referred to the ideological tensions present in the COSATU affiliates, including its public sector affiliates and this was indicative of Annie's political identity. As a shop steward active in shop floor issues Annie was a new 'organic workerist' as she preferred that DENOSA pay closer attention to the challenges that nurses at her workplace faced and so shop-floor issues ('workerism') but she felt that DENOSA was paying more attention to the politics of the ANC (due to COSATU, which DENOSA was an affiliate of, adhering to the NDR). Annie recognised how the politics of NDR influenced DENOSA as it has edged closer to the COSATU position of not critiquing the ANC and the NDR (as if they did it would make DENOSA guilty of promoting a 'narrow' form of unionism). This organic workerism was not an ideologically driven socialist workerism either as it was informed by a disillusionment of the Alliance and that the ANC's NDR was no longer hegemonic for COSATU members like Annie. Apart from the fact that this might be evidence of a new form of workerism appearing, the context for this is the shift from participatory to representative democracy within COSATU trade unions, the challenges this posed for making the officials and leaders accountable to members (Buhlungu, 2010) and the hierarchical changes in unions that widened the gap between the leaders and members.

Annie was very clear about the nature of the relationship between COSATU and the Alliance partners, when she said that:

"It is all about ANC deployment. You just do not oppose what the ANC says. You cannot bite the hand that feeds you especially if you have been promised a position. We need to stop deployment. Unions should be independent like SAFTU is. Once you are in an Alliance with the ruling party, you compromise the workers' interests. Workers and employers do not speak the same language, COSATU is in the middle and they want to keep the relationship with the employer."

Annie's political identity as an organic workerist demonstrated that in the post-apartheid state and as far as the ANC government was concerned, it may not be partial to a particular class or social group but it had transmitted substantial resources to sections of society that benefitted from its social democratic agenda such as the provision of the social grants. Yet the ANC mainly supported the well-being of big business and when trade unions fail to maintain their distance from this, there are consequences. COSATU trade unions were embroiled in the NDR of the ANC, as they set up trade union investment companies, become increasing professionalised internally and function as a launching pad to new careers which are well remunerated. The trend of upward social mobility among the union officials concerned Annie as the shop floor suffers as a result of poor service and a lack of commitment.

When asked if she had enough resources to do her job, Annie said that:

"There is a shortage of staff. Equipment is limited. People resign and are never replaced. Seventeen nurses have resigned in the last year. When you resign or go on pension, they do not replace you. We do use agency nurses and we need to book them daily. The temporary nurses come in daily as there are such shortages and we need to teach them the job. The sisters have to organise the staff, but they are not HR. We have to call 20 nurses to get them in and you are responsible for this you, but this is not your job. I was shocked when the Minister of Health said that everything is in order. He said that to protect his job. The sooner he accepts that there is a crisis it can be fixed. When they are admitting the patient, you are fixing the equipment. I need albumen it is expensive though and patients need it and leadership is failing us."

As an organic workerist, the success of the ANC's development programme were wearing thin for Annie as she experienced the real decline in the standards of service delivery in the public

healthcare system which undermined the government's commitment to patient-centred care. This is somewhat contradictory as at the same time Annie had directly benefitted from the ANC's nationalist policy of racial redress in employment in the public sector.

When asked if there had been strikes in her workplace since he had worked there and why nurses went on strike, Annie remarked that:

> *"There have been lots of strikes over performance bonuses – they were not paid. Also the paying of over time this had not happened. Why are they not paying? They are just dragging their feet. Why negotiate? This is why 17 nurses left or are serving their notices and many have gone to work at the Nelson Mandela Children's Hospital. There is enough staff and enough equipment. You need to look after staff and equipment as we go there for the patients and you are tired."*

Annie's classed subjectivities were found in her understanding of the strike by nurses in 2018 at the hospital she worked at and her mentioning the Nelson Mandela Children's Hospital (NMCH). Annie as an organic workerist was acutely aware of the bread and butter issues that affected nurses that were not met and this was the reason for the strike. The lack of equipment and resources concerned the middle-class part of Annie's contradictory class location as it undermined her professionalism and the ability to care for her patients whom she felt accountable to. Annie did not criticise the nurses who left the public sector healthcare system to join the NMCH as many ill babies from the public sector were admitted to the NMCH because they could not be cared for in the public healthcare system. It was a specialist pediatric hospital and was a few kilometres away from where Annie worked. It was a public/private partnership in that state patients are admitted and funded by the National Tertiary Services Grant. It opened its doors in 2017. It offered critical services such as neurosurgery and cardiology and was well equipped (it had the largest pediatric dialysis unit in the country). It is not just that nurses left the public sector for better payment or payment of their overtime in the private sector – they also left as they felt that they got a better opportunity to fulfil their professional obligations in a well-resourced environment.

Annie also thought that the ANC would not be successful in 2019 in its quest for the majority vote which would mean that they would have to form a coalition with the smaller parties:

"We will not have majority rules we need more coalitions. People like the EFF but don't like its leadership. The ANC is relaxed. I do not see majority rule in SA nationally."

Annie made it clear that despite the major difficulties faced by the ANC, people found it hard to switch their allegiances to other political parties like the EFF. The authority of the ANC's liberation credentials had worn thin for Annie. Not masking her discontent, she did not hesitate to disclose who she would be voting for in the 2019 elections:

"I will vote for the EFF in 2019. This is not about the EFF having the interest of the workers at heart. It is about voting out the ANC as they are too relaxed. The EFF have got an interest in workers and the workers are interested in their policies which can bring a difference so give them a chance."

Annie did see what the ANC has managed to achieve and where it had not:

"Yes the ANC has put females and Africans into the top positions. The ANC has done a lot but now corruption is killing the ANC. We will not tackle inequality soon. We need jobs to achieve it. We need education but how does one get to the University? Who will jobs be created for? We need quality education."

In relation to the composition of her gendered, classed and racialised subjective identities as an African female nurse in the public sector, Annie acknowledged that the ANC had been effective in its quest for the historic realisation of the NDR but that this had patently favoured elite African women as change had taken place at the apex of the post-apartheid social structure. This also highlighted that COSATU members like Annie were not mere remote class subjects and that their class location could not be disaggregated from the array of social and cultural contexts in which they were absorbed into in their daily lives. As an African female, Annie was not politically connected and there were no prospects for promotion into the top positions in post-apartheid society. Annie's political subjectivity and identification with the ANC's nationalism, the NDR, demonstrated that Annie understood that black people and Africans in particular were part of the nationally oppressed and that they were part of the ANC's plan to transform society along race and gender lines. Annie's understanding of the ANC's success in the post-apartheid era demonstrated that African women were not a homogeneous category. For women who

worked in the public sector and were trade union members, such as Annie, the dimensions of their exclusion and oppression within their historically subservient group, African women, in interaction with the broader economic and political dynamics, clearly functioned to keep African women who worked, were trade union members and were on the lower rungs of the social structure, marginalised in post-apartheid South Africa. In Annie's case, she was clearly in a contradictory class location.

As it also was African women's contacts and network (such as their political connections within their racial group, that is their social capital) that they deployed to be elevated into the top positions, Annie recognised that one of the ways to reduce her marginalisation and elevate her own status was to acquire cultural capital in the form of knowledge and so credentials via the educational system. However, this is an area in which the ANC had not successfully fulfilled the NDR as for African women like Annie who was politically aware of the dysfunctional education system, the ANC's assurances of a better life for all had not been comprehensively delivered and this functioned to reinforce the racial, gender and class inequalities of post-apartheid South Africa for the bulk of those who were disadvantaged.

7.6.1.3 Grace

Grace, a woman, is 57 years old and was married. She was a member of SANA first before it became DENOSA. She had a Nursing Diploma and she worked in the pediatric ward. She had experience in midwifery and worked at a public hospital in Cape Town in obstetrics and gynecology before she transferred to the hospital she currently worked at on a permanent basis, since 1995. Her mother-in-law was a PN and her husband was a medical doctor. She lived in her own house with a bond from a bank and she had a family home in Cape Town. She loved her work and she felt that one needed a lot of empathy to be a nurse as it was not just a job. She was passionate about her work and she loved to go the extra mile. She earned R16 250 gross per month and she used her salary to pay for food and groceries for the house, for electricity and water and for petrol. Her husband had bought an iron, fridge, microwave, TV, computer and printer/scanner in the last year. She had a short-term insurance policy. In her house, she had tap water, a flush toilet inside the house, hot running water, a TV set, a DVD player, a refrigerator, a

deep freezer, an electric stove, a microwave oven, a washing machine, a tumble dryer, Pay TV, a vacuum cleaner, a motor vehicle and a computer.

She had a medical aid, provident fund and received a housing subsidy. Including herself, four people lived in her household, three people worked in her household and one was a scholar. Grace supported two children and four grandchildren.

Grace had a tertiary qualification and had many years of experience as a nurse (who loved her job) and her occupation corresponded to a middle-class social status which permitted to her to cross over into the middle class. Grace was also married to a medical doctor and her mother-in-law was a Professional Nurse. However, Grace found that her salary did not stretch far enough for her to afford the luxuries, as she said:

> *"We women like nice things – we have clothing accounts and children to see to."*

Grace did find it hard to cope financially as she supported two children and four grandchildren. This placed Grace's foot simultaneously in the working class. To sum, Grace was in an emerging middle-class social class position, or contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Grace's contradictory class location was influenced by more than one basic class.

Grace always came home from work exhausted but she never found her work stressful. When she was asked if she had enough resources to do her job, Grace said that:

> *"The hospital is short of resources and of staff at all times."*

These chronic shortages really concerned Grace as she pointed out that in the many years that she had worked as a nurse in the public healthcare system, she had experienced a deterioration in the standards of service delivery which for her severely diminished the government's commitment to patient-centred care and she was highly critical of the ANC and its policies.

When asked if there was a strike in her workplace and why nurses went on strike, Grace stated that:

"When we talk, we expect a reaction. So there is a need to work with organised labour. Labour needs to be neutral and not side with management and that goes for DENOSA, NEHAWU, Hospersa, PSA and NUPSAWU. So the agreement was implemented without a mandate on the ground. We have also been fighting for the performance bonus. Five years back they said that they could not pay it at the rate but we do not know what happened to it? Also the way the performance bonus is worked out is unfair as you have to be rated but this system introduces favouritism. Why do we go the extra mile if we do not get paid our performance bonuses? Doctors expect you to do this and so this is creating very unpleasant conditions – it is creating havoc among nurses and doctors."

Grace's classed, gendered racial and political subjectivities were found in her interpretation and understanding of the strike in 2018 at the hospital she worked and she was not critical of the fact that nurses has gone on strike. Acutely aware of the bread and butter matters, such as the non-payment of her performance bonus, that impacted on African women nurses like Grace and hence the reason for the strike underscored Grace's political identity as an organic workerist. This new worker identity demonstrated that in the post-apartheid state the COSATU trade unions such as DENOSA (although other trade unions were involved in the strike) were enmeshed in the NDR of the ANC and as the have failed to maintain their distance from the ANC, the shop floor issues were neglected and that this had severe consequences for the professionalism of nurses. This was further highlighted in her response to the question about whether she considered herself a professional first or a trade unionist first. Grace said:

"I joined DENOSA due to the professionalism and the development of nurses. I did not join DENOSA for politics."

Furthermore, under different political landscapes and through her own life course, aspects of Grace's class location and its intersection with her constructed sense of self had developed in relation to both her experiences and to her structural locations. Grace's view on the strike by nurses, which is a political act, did not conflict with her views of professionalism, which was a further dimension of the organic workerist position. The performance bonus was a contested matter among nurses as Grace pointed out and that the way it was operationalised had introduced bias (so it was a subjective process). This highlighted how Grace's structured gendered and

racialised subjective identities were linked to the broader racial and gender inequalities that were patently evident in the present public sector healthcare system in which African female nurses suffered multiple disadvantages. If the African female nurse were not among the group of favoured ones who received a good performance rating, they were not eligible for the performance bonus. It was not the trade union that Grace felt that she could turn to for assistance as they too were not neutral (they sided with management) and the performance bonus agreement was implemented without a mandate from the shop floor. Grace's understanding was that shop floor democracy had weakened in her trade union.

Grace was very clear about who she would vote for in the 2019 national elections:

> "I will vote for the DA. We are one in God and we all share the same blood. Give them a chance to lead. We need change in SA irrespective of colour, race and gender. The DA is very disciplined they are not corrupt and they are fighting corruption. I have been active in the ANC but then I became an independent candidate in the 2011 elections. I am now under the DA in Ward 67 and I am chairperson of the DA branch and the Executive Provincial network for women called Dawn."

One of the female nurses who had referred me to Grace called her 'Mama Winnie'. Grace's comments here clearly reflected one of the ANC's main nationalist influences that being the Christian liberal democrat tradition that emanated from its founder members. African women nationalists had permeated the ideology of motherhood with that of women as insurrectionaries and these women labeled themselves as the 'mothers of revolution.' These women mobilised to become the radical defenders of their communities and in Grace's case her community was where she worked and her community was who she served in her political work in Dawn (even though this was not an ANC network). In African nationalism, the 'mother of the nation' notion changed over the different historical contexts. A different African discourse on feminism appeared in the early 1980s in apartheid South Africa in which black women insisted on the right to shape the terms of feminism to meet their own needs and circumstances (McClintock, 1991). In 1987, Sister Bernard Ncube, who was an anti-apartheid activist, a teacher by profession, theologist and president of the non-racial Federation of Transvaal Women (Fedtraw), which was affiliated to the United Democratic Front, used her faith to defend her political activism and she

highlighted the human rights violence of the apartheid state. Sister Ncube was instrumental as a leading figure in the Christian feminist movement and merged Christianity, feminism and nationalism. The Christian feminist movement worked for the political, economic and social equality of men and women in every sphere of life. This belief was evident in Grace's understanding of politics as at one stage she pointed out that she was active in the ANC that had stressed the values of racial and gender equality. The 'mother of the revolution' image present in African nationalism was invoked by Grace as women like her (and Sister Ncube) viewed the radical work undertaken for the people of South Africa as the work of God as the belief was that people of all genders, races, ethnicities and classes, should be free in their own country. What this also showed is that the coincidence of nationalists and Christians within the ANC were all crucial ingredients for promoting non-racial politics (De Jager, 2009) and part of the worker identities of COSATU female members like Grace.

When asked what more the ANC could do, Grace was very disparaging and remarked that:

> "The ANC is un-governing. Our country looks like Sodom and Gomorrah. They are the so-called ANC. We are not free and we work with fear. When we walk we will be raped and killed. We need action. Enough is enough. There is too much violence against women and children. We are still suffering. We do not see the freedom. We are still fighting from 1976. They lost their way because of greed. A R1200 housing subsidy is what you get now but the old government gave people houses. I will not vote for the ANC. The party that I will vote for does have my interests at heart. We voters vote with our hearts and not with our minds. There are now credible opposition parties now like the DA and the EFF and they are effective. We want politicians who are transparent as the ANC is not transparent. The people who are in parliament need their salaries cut. The health system is bloated, too."

Grace was clear that the ANC had lost its bearings on the course it had followed for the development of post-apartheid South Africa. Grace was worried about the high levels of gender-based violence and violence against children. Grace noted that although there had been the development of a black elite and middle class, there were substantial socio-economic discrepancies between classes and races. Only elites prospered but for the bulk of South Africans there were many dysfunctions in their lives. For Grace, the ANC had failed to fulfil expectations

and this was only effectively addressed by political protest in the form of voting for another political party for her. In the 2016 municipal elections, the ANC won only 53.9 percent of votes nationally and for the first time since 1994, support for the ANC dipped below the 60 percent it had achieved in previous elections. In some cities that had been dominated by the ANC, such as Nelson Mandela Bay in Port Elizabeth, Eastern Cape and Tshwane where the capital city Pretoria was, the ANC's political opposition, the Democratic Alliance (DA) won many municipal council seats. The DA was an economically right-of-centre party. The ANC had to enter into coalitions with the DA and also the Economic Freedom Fighters (EFF), which was a splinter faction of the ANC Youth League, in some of the major metropolitan areas. The lack of support for the ANC, in other words, was in urban areas. Paret (2016) found that in an exit survey of voters in communities in the Gauteng Province, respondents indicated that while the ANC retained its power as they saw it as the party of national liberation and it had strengthened this by the dispensing of material resources, that voters for opposition parties suggested that they wanted to punish the ANC for its shoddy performance or apply some pressure on the ANC to improve on its performance.

Tshoaedi (2012) argues that support for the ANC leadership, drawn from evidence from the 2008 'Taking Democracy Seriously' survey showed, that among women COSATU members, support for the ANC was low (42.4 per cent) (that is, when answering the question of whether they would vote for the ANC in the 2008 elections) when compared to COSATU male members. This was due to the fact that female COSATU members felt that the ANC's service delivery record was poor as it had not adequately addressed issues of education, poverty and housing within working-class communities. The lack of support among COSATU women for the ANC at election time was also linked to the fact that COSATU at the time had chosen to support President Zuma when he was put on trial for alleged rape (Thsoaedi, 2012) which politically very few COSATU women supported. However, sexual harassment within COSATU had also been considered as more personal and non-political, to be dealt with independently of the federation.

This was expressed by Grace in her high levels of frustration with the ANC and its failure to deliver on the NDR as raised by her ('we have no freedom'). This was a message of protest from Grace to the ANC (and she intended voting for the opposition parties too which was a further dimension of her frustration). Grace's racial and gender identities as African and female

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demonstrated how these factors shaped her marginal position in some spheres. They also informed her political views and they shaped her attitude to her work as well as she loved what she did. This was a clear part of her professional disposition as a nurse but she was also faced with staff shortages, a lack of resources and strikes about performance bonuses which accentuated her contradictory class location.

7.6.1.4 Neo

Neo, a male, aged 34 years of age was married traditionally. He had a Bachelor of Nursing Degree from the University of Johannesburg. He worked as a Clinical Facilitator and he started working at his current workplace in 2009. He joined DENOSA in 2005. He worked on a permanent basis. He was the first nurse in his family. He owned his house (he had paid off his bond) and he had a family home in Pretoria. He earned R25 000 gross per month and he spent his salary on food and groceries for the house, electricity and water, petrol and school fees. He had spent money on renovating his home in the last year and he used his savings to do so. He was not that happy with what he earned and he did find it hard to cope financially. He had a medical aid, a provident fund and he received a housing allowance. Including himself, there were three people who lived in his household, two of them worked and one was a young child. He had five people who were his dependents. One member of his household received an old age pension.

Neo did not have a short term insurance policy. In his house, he had tap water, a flush toilet inside the house, hot running water, two cellphones, a radio set, a TV set, a DVD player, a refrigerator, an electric stove and a computer.

Neo had a tertiary qualification and his occupation corresponded to a middle-class social status which permitted to him to cross over into the middle class. This was further confirmed when Neo considered himself to be a professional first, as he said that:

> *"I am a professional first. The profession is noble it is backed up by science and there is a career path."*

Neo's educational qualification and corresponding occupation equipped him with the credentials, such as improved social status and standing in his community ('the profession is noble'). Neo also used his savings to renovate his house. As one of Neo's household members received an old

age grant, he was not happy with what he earned and he had five dependents, this placed Neo's foot simultaneously in the working class. Neo was in a contradictory class location, that is he shared class interests with the middle class (with his work and education levels) and with the working class (with his material restraints and social relations). Neo's contradictory class location was influenced by more than one basic class.

For Neo, DENOSA was a professional organisation as it:

> *"Puts the profession first."*

However, Neo felt that DENOSA's trade union wing gave workers their rights and that the professional wing complements the trade union wing and that DENOSA is, as he thinks:

> *"We are one – we are two in one. Even before you go to meetings, we are reminded what DENOSA stands for. You revisit your professionalism when you are governed by SANC rules and regulations."*

Neo's subjective experiences of DENOSA are a reflection of the marked social experiences that African nurses endured as there were multiple and intersecting levels of oppression but also strategies of empowerment to counter this which the composition of the trade union and its two wings (professional and trade union) harmonised.

When asked about the challenges in the public healthcare system, Neo offered that:

> *"The burning issue is OSD in Gauteng. Why have they not paid us? The Department of Health are under financial constraint and do not have the budget. Yet 1.5 percent of the employee's salary is budgeted for it. Other people have been paid but the Department of Health is not forthcoming. Why is health not a priority? Look at Life Esidemeni. Why do they bail out SAA and Eskom? Why should we struggle for what we are entitled to? The government is not budgeting for performance bonuses there is no money says the government but there is government negligence. It makes no sense for people working on a daily basis. We are entitled to performance bonuses and to increments. Conditions affect us in the public service."*

Neo was as concerned about the Esidemeni tragedy and the decisions taken by the health officials which had fatal consequences for the most vulnerable communities in South Africa. As a clinical facilitator (which is a Professional Nurse occupational category) Neo endeavoured to provide quality care and guarantee constant care for his patients and he was responsible for ensuring that the nursing staff address the patient's care needs, which meant that he had to go the extra mile in a context where resources and nursing morale are in short supply. Neo stated that he always came home from work exhausted as he always had to do both hard psychological and physical work. Although he did not find his work stressful, he was dissatisfied with his job and this was compounded by the non-payment of the OSD.

The OSD was first implemented in the nursing sector, as poor salaries was the source of extreme among nurses which prompted a historical public sector strike in 2007 in post-apartheid South Africa. It led to nurses like Neo staying in the public healthcare system but it left him struggling to receive his rightful compensation. When asked if there had been strikes in his workplace and what the nurses were striking about, Neo confirmed that:

> *"There were demonstrations and picketing at lunch time. The pickets were daily from 12pm until 2pm. They were peaceful until disrupted by police. There were threats and intimidation from the police and lies on media about doctors being assaulted. There is none -payment of performance bonuses. The pickets were against the poor conditions of the hospital. There were also parallel processes running such as the public services wage deal (multi-term from the employer)."*

The strike at Neo's workplace was primarily over the non-payment of the performance bonuses to nurses. The Gauteng Department of Health claimed that it had run out of money to pay these bonuses. Neo was very angry about how the striking nurses were condemned by significant public officials when he said:

> *"We remain professionals irrespective even if we are provoked. The Minister called us hooligans. We are not, we are professionals. Due to our professionalism only half of us go on strike and the other half stay to look after patients. We are working and we are not off the job."*

This demonstrated that Neo thought that the nurses who engaged in the strike were guided by their professionalism and ethics of putting the patient first ('only half of us go on strike and the other half stay to look after the patients') that was deliberately overlooked. In 2010, DENOSA had to take the Department of Health in North West province to the Labour Court for contempt of a court order as they had failed to pay nurses the OSD. Court action and strikes by marginalised public sector employees in the healthcare system is what it took for the State to own up to its responsibilities. It is no wonder that Neo found the working conditions in the public sector far from adequate and that it placed additional stresses on the nurses. Neo's reading of the strike was that it was over the struggle of the payment of the OSD and this was mediated through his subjective experiences of race and class. For Neo when nurses went on strike, they did not put the lives of those they cared for on the line and they had not abandoned their ethical obligations in the process.

In the period after the 2004 elections, the ANC National Executive declared that SOEs were positioned to play a key role in job creation and skills development (Southall & Tangri, 2008) as part of its BEE programme in concert with the NDP. Thus, this part of the public service was subjected to a major process of transformation and the SOEs were placed under predominantly black managerial control especially those aligned with the ANC.

The ANC initially tried to pursue outright privatisation but the SOEs followed a rigorous process of directing procurement to emerging black companies. The restructuring or commercialisation of state firms took place such as the sale of minority shareholdings to large corporations occurred or privatisation was limited to the discarding of noncore assets.

However, these SOEs struggled to either pay for their running costs or pay the salaries of their employees. This is because they had become the site for corrupt business practices and what is known as 'state capture' which is how private individuals and companies have appropriated organs of state and have seized control of public resources. As a result the SOEs have been hollowed out but the government continues to give billions of rands of fiscal support to both SAA and Eskom. Neo's interpretation of the non-payment of the OSD and the SOE crises was fashioned through his classed, racial and political subjectivities. The non-payment of the performance bonus strained Neo financially, led him to experiencing new inequalities as a highly

skilled public sector employee short-changed by post-apartheid South Africa while the state bailed out corrupt SOEs, South Africans experienced power cuts (termed 'load shedding') as Eskom was unable to provide a continuous supply of electricity and South Africa's economy had entered into a recession. Arguably Neo was concerned about the way he was being robbed of a standard of living that he had imagined he would reach once the ANC government was in power, which was quite a common feeling among other trade union members (Beresford, 2012). Neo's views on the strikes once again demonstrated that in post-apartheid South Africa that class and race inequalities blended and a vastly differentiated system of health persisted and that for COSATU members like Neo, their experiences of exploitation and struggle were rooted in a raced and classed context.

Neo saw the working class as an element in the low support for the ANC by this base:

> "Support is dwindling. I do see dissatisfaction among the workers and some have left but some have stayed. There are issues to fix and they must be fixed. With Ramaphosa returning this is reigniting hope and some have returned to the ANC and are hopeful that the ANC will be victorious."

Although support had dropped among its traditional support base, the trade union members, it was still the ANC that would deliver if it was given the space to accomplish this. Neo recognised the NDR and its 'two stage' theory of transformation of South African society in the post-apartheid era. The ANC's nationalism was established among COSATU members like Neo.

Neo was more supportive of the ANC and that it had to be given more time:

> "I do think that the ANC needs to be given a chance to build further and what they are doing needs to be better implemented. So we need the ANC and we need balance in society and only the ANC is able to do as it is within their capability to do this. Yet younger people do not have the same expectations of the ANC. The older people vote and understand it."

It is clear that the younger generations did not readily relate to the ANC's liberation ethos but that it was only the ANC (more so than any other political party) that had delivered a better life for all according to Neo. Neo recognised that the ANC's nationalist project is incomplete and so liberation is too (Booysen, 2011). Yet, the ANC retains its direct engagement with the people

and this demonstrates that for COSATU members like Neo, the ANC had a high amount of hegemonic presence in COSATU trade unions.

When asked what more the ANC could do for South Africa, Neo said:

> *"The pressing issue is land expropriation without compensation so that people will be able to feed themselves. It is a step in the right direction on behalf of the ANC. Job creation in the private sector needs to come to the table to address unemployment and to diminish inequality."*

The ANC's NDR included land expropriation and Section 25 of the Constitution that allowed for land expropriation without compensation was being amended to fulfil the ANC's policy of land reform. This was done to attend to the injustice of land dispossession among the African majority as housing and land ownership patterns were greatly unequal in post-apartheid South Africa. The ANC had used its state control to create jobs and careers and this had enhanced the image of the ANC as a good governing party among COSATU members like Neo.

7.6.1.5 Tumi

Tumi, a male, aged 34 years of age was married. He had a two-year Nursing Diploma from a Nursing College in Rosebank. He joined DENOSA in 2007. He worked as an assistant nurse, on a permanent basis and started working at his workplace in 2008. He was the only nurse in his family. He thought that nobody wanted to be a nurse and that the community did not appreciate them. He felt that one had to have passion to be a nurse. He owned his own house with a bond from the bank and he had a family home in Mpumalanga. He earned R15 000 gross per month and he used his salary to buy food and groceries for the house, petrol and school fees and transport for his children. He had bought a car in the past year and he obtained a loan for it. He had a medical aid, a provident fund and he received a housing allowance. Including himself, there were four people living in his household, two people worked and the other two were scholars. He said that in his family, when a person started working it was traditional that they become the breadwinner for a lot of people, which he called 'black tax'. He had seven dependents and he did have a short-term insurance policy for his bond.

In his house, Tumi had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, two cellphones, a radio set, a TV set, an air conditioner, a DVD player, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, a tumble dryer, Pay TV, a vacuum cleaner and a motor vehicle.

Tumi had a tertiary qualification and his occupation corresponded to a middle-class social status which permitted to him to cross over into the middle class. Tumi did find it hard to cope financially, he had to pay 'black tax' and he had seven dependents which placed Tumi's foot simultaneously in the working class. Tumi was in a contradictory class location, that is he shared class interests with the middle class (with his work and education levels) and with the working class (with his material restraints and social relations). Tumi's contradictory class location was influenced by more than one basic class.

Tumi always came home from work exhausted. He always has to do hard physical work as there were about six to eight theatre cases per shift. Tumi found his work stressful as he worked in the pediatric ward and the parents did not understand the visiting hours. Tumi sometimes had to work in dangerous conditions as the parents of the children were violent and rude and some of the teenagers under his care were on 'nyaope' (this is low-grade heroin cut with either rat poison or chlorine, sometimes mixed with marijuana, is highly addictive and is consumed by teenagers from lower socio-economic circumstances). Despite all of this, Tumi was fairly satisfied with his job.

When he was training to be a nurse, Tumi was a member of HOSPERSA but once he qualified, he decided to join DENOSA, as they:

> "Pay more attention to nursing issues. DENOSA is a professional organisation with a trade union wing."

Tumi recognised the same structural problems with the Department of Health and the MEC of Health, Dr Gwen Ramokgopa had inherited the legacy of the tragic Esidemeni saga which she had to deal with when he said:

> "The Department of Health is in a crisis. It needs to be put under administration in Gauteng. It is a mess. The current MEC of Health inherited a mess. She has been calling

meetings with the shop stewards and the unions and she is promising that she is working on it and that she is trying to put the department into order. This is the era of Esidemeni. With the previous MEC there was a ticking time bomb."

The Esidemeni tragedy had taken priority in the beleaguered Gauteng Department of Health as the families of the 134 patients consented to arbitration so that the Gauteng Department of Health could avoid litigation and to promote healing. The hearings took place over 44 days in 2017 and testimonies were received from families, NGO owners and experts and the outcome was that the families of each victim were to be compensated.

Yet Tumi had the same reading of the reason for why nurses at the hospital went on strike, that is the issue of the OSD and the delay in payment of their performance bonuses when he offered that:

> *"The issues are human resources, equipment and promises that we will be paid bonuses from two to three years ago. We are governed by SANC and its regulations and so we remain professionals first irrespective of being provoked as the Minister calls us murderers and hooligans but we are not – we are professionals."*

Tumi used his classed, racial and political subjectivities to interpret the strike and the comments made by the Minister of Health, Dr Aaron Motsoaledi. The OSD was implemented by the State to retain the professionals in the public healthcare system and to assist in the delivery of the national development strategy of uplifting the poorest sections of society. Tumi considered himself to be a professional guided by the SANC regulations and adhered to these in the strike in 2018. In his view, it was professionally and racially insulting for African nurses to be labelled 'hooligans 'or 'murderers' as this did not fit with the image of the professional nurse. The use of the 'hooligan' and the 'murderer' labels used by the Minister of Health was in relation to the rubbish that was strewn over the floors of the hospital by the striking workers. In Christian discourse, apes (simians) were constructed as 'devilish figures and representatives of lustful and sinful behaviour' (Hund & Mills, 2016). The pseudoscientific belief of Scientific Racism was that black people were inferior as they had the same brain size as apes. 'Monkey' was one of the racist terms used by white people for black people on the African continent and globally, to dehumanise black people. South Africa was no exception to this despicable practice where the

use of simianisation in relation to black people was a racial slur and considered as hate speech by the Equality Court of South Africa in 2016. The application of this unambiguous racist slur by the Minister of Health (an African and a member of the political elite but formerly a member of the racially oppressed racial group under the apartheid government) effectively equated the behaviour of striking African nurses to animalistic behaviour and is an instance of a racist term crossing the class boundaries, producing a striking combination of classism and racism in post-apartheid South Africa. Dr Motsoaledi reduced all the striking nurses to a homogeneous social status, that of the uncouth animalistic hooligan, that was beneath his social class. This prompted a fast response from the DENOSA Gauteng chairperson, Simphiwe Gadawho, who remarked that, 'as DENOSA, we think that Motsoaledi has reached his expiry date. He must step down. He's run out of ideas. He's been preaching a lot of things like National Health Insurance and we've seen none happen. His attack on workers calling them animals is regrettable' (SABC News, 2018).

Tumi recognised that the OSD was a tool for social mobility that could be used by nurses to improve their social status and so this was a classed practice for the middle class occupation of the semi-professional category, nurses. Its value was that it functioned as launch pad for more lucrative employment (in the private healthcare system) as explained by Tumi:

> *"The OSD makes the nurse to be in a better position. It is focused on speciality areas such as pediatrics. It is for rewarding experience and loyalty. The downside is that you get qualified and then you leave for the private sector."*

Tumi chose to broaden out the reasons for the strike to include the issue of the working conditions that nurses in the public sector have to endure and he chose to focus on these issues. Tumi elaborated on these working conditions in his ward when he said that:

> *"The demonstrations we had here at the hospital are directly related to the working conditions we work under. The picket is how it started. We will go on as our challenges are not addressed. You have to use one machine for 31 patients. These working conditions are unbearable. We are short-staffed, yet management expects us to perform a miracle. You will get blamed when things go wrong. The beds are not useable. The diet is not related to pediatrics they should be fed a special diet, but they are classed with adults. How can you*

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give beef stew to a six-month-old baby to eat? The babies lie in beds for adults and those beds' wheels are broken. If there was a fire, I would have to pick that bed up and carry it out of the ward as you cannot wheel the bed out. We are expected to do miracles with no moral support. We admit burn patients into the ward, but we are not designed for that. We are supposed to be surgical but practically we are not as we do not have a proper dressing room and no proper bathing rooms. We cannot use the normal bath as we will expose our patients to infections. We are short of dressings. We are expected to render total nursing care with unhappiness and financial stressed. People who work at KFC are better equipped than we are."

The fact that burn patients are admitted into the ward that was not designed for this was a direct violation of health and safety standards. Apart from the shortage of dressings for these burn victims, there was no proper infection control exercised when these patients' wounds were cleansed in the same baths that are used by the other patients. Tumi was frustrated by the restrictions he faced in the execution of his clinical duties and he strongly felt that the more urgent issue in the environment included the right working conditions that would empower nurses to perform safe clinical practices with adequate and correct professional resources in order to do so. Tumi eloquently elaborated how it was the conditions of the system of public healthcare that were coarse and vulgar (in that the public sector hospital was like a greasy fast-food chicken store, 'Kentucky Fried Chicken') and not the professional nurses who worked hard despite the lack of compensation. This tested nurses' professional limits but nurses did not abandon their ethics.

When asked about the challenges in the public healthcare system, Tumi remarked that:

"There are also a lot of foreign nationals that use the public health system in the urban areas yet citizens in the rural areas are turned away. The foreign nationals do not pay and they have incomplete addresses. The government is settling the bills and patients without proper paperwork are being admitted. The foreign nationals live nearby the hospital and their children are treated in this hospital."

In 2018, the Minister of Health, Dr Aaron Motsoaledi, while condemning striking nurses also suggested that immigrants (foreign nationals) were responsible for the congestion of public

hospitals. The stereotype of the immigrant as the transmitter of diseases was a common representation and anti-immigrant, xenophobic and Afrophobic rhetoric had become widespread in post-apartheid South Africa. The former Gauteng Health MEC Qedani Mahlangu shared similar views. The ANC-led government and some sections of the DA (the opposition political party) had both blame foreign nationals for the difficulties that South Africans face (Heleta, 2019).

In January of 2019, the National Health Department issued a circular that directed clinics and hospitals to start charging foreign nationals for using public health services. The Gauteng Department of Health approved these instructions and requested that its clinics and hospitals charge full fees to all non-South Africans other than documented refugees for emergency treatment, maternity care and 'basic health services'. The Gauteng Department of Health and the Gauteng Health MEC, Dr Gwen Ramokgopa subsequently withdrew its circular to its public facilities. In public hospitals, users could be asked to complete a form stating how much they earned as services in the public sector were billed for on a sliding scale or a means test-based. The circular violated the National Health Act of 2003 and in certain sections of the legislation there were no restrictions to access to these services regardless of nationality or immigration status (Stevenson, 2019). Users of the public healthcare system just had to produce proof of their identity in order to access the services (identity document, passport or an affidavit) and there was a patient fee schedule which stipulates what services were charged for.

Tumi echoed this political discourse of the foreigner in his assessment of the challenges in the public healthcare system as he works at a hospital that foreign nationals used. No other nurse interviewed raised this as an issue and so this particular comment by Tumi was stark but this underlined the point that within the African public sector nurse category, there were subgroups that held distinctive experiences and views. It was only the micro analysis of nurses' subjective and different experiences of work through the 'intra-categorical' approach that revealed this detailed information. What Tumi's comment showed was that there were connections between the macro, meso and micro levels. At the macro level, the ideology and discourse of the ANC's nationalism, the nation, the citizen and who belonged in South Africa and the NDR, the processes of immigration, citizenship and legality, the National Department of Health's circular's restrictions on immigrants accessing public healthcare facilities and services, shaped

the meso level, that is the adoption of this by the Gauteng Department of Health and its circular to its public facilities to implement the policy, which in turn shaped Tumi's subjective experiences of citizenship and inclusiveness and the foreign national accessing services in the public sector hospital he worked at. Processes of discrimination and exclusion were entrenched in institutions, like government departments and labour markets, political discourse, workplace culture but also in trade unions, with intersectional identities and many experiences of inequality.

When asked about what he thought of the relationship between COSATU and its Alliance partners, Tumi offered:

> *"COSATU is not a split of the hungry stomach. It is a split of the powerful people in their positions of influence. If you expel me, I can form my own federation. That is the politics of the stomach. Currently it is not a healthy relationship it is a relationship of positions not putting workers first. As a federation COSATU they are running for positions so you cannot address workers issues. You are not able to oppose the decisions. So the federation must be independent they must be alone. The majority of voters is working class. The bottom line is the workers. They are the ones who are at the forefront. The federation must be able to be in the Alliance but be accountable – they must not be in a race for positions. The federation is not in the politics of the ANC."*

Tumi's worker identity was that of an organic workerist too as he pointed out that the problem with COSATU was the lack of independence from the politics of the ruling party and it alliance partner, the ANC. Tumi's "politics of the stomach" meant that he understood that the contest within the ANC and equally within COSATU took place among the leadership and it is not one that is about a battle of ideas. COSATU was not focused on advancing the idea in the NDR that the workers will lead the transformation and so their radical ideologies (socialist ideologies) were rhetorical. The battle was about positions of leadership. There are, as Mashele (2018) argues, 'one group of "comrades" seeking to replace those who are eating.' This phrase has been used to describe African conceptions of power in post-colonial situations as elite politicians stockpile and voraciously consume resources through the pillaging of natural resources, setting up private armies and privatising the state.

Tumi specifically linked the working class as a factor in the support of political parties, as he said:

> *"The champion of democracy for Mandela is the ANC. The ANC is not listening or doing what you want them to do. If the ANC does not listen to the voters it can kiss the trophy goodbye. Workers are not happy and they must wake up and smell the coffee at the polls. There are new political parties and with every election it is making things chaotic. In 2019 it will not be business as usual there will be a government of national unity."*

Tumi's comments about the ANC's liberation honours and its celebrated history was attached to icons like Nelson Mandela. The ANC as a result was not voted out of power even though there was corruption, maladministration and incompetence. Some twenty-five years after the introduction of the NDR, the goal of socialism, had not theoretically been dumped but it had been eternally suspended. The NDR maintained its prestige among COSATU members like Tumi. The ANC had retained its 'revolution-speak' and the continuous repeated its radical identification which assisted in the object of holding onto its capitalist and nationalist elements in cooperation with its socialist ones and the SACP.

Tumi did think that the ANC had been successful in combatting the racial divides since it had been in power:

> *"They have done a lot we are from a terrible past and we have voting rights whereas we were disenfranchised. We must not just talk as black and white; we must craft policies together. The ANC has tried but we do need to work together and see beyond the racial divide."*

Tumi clearly assessed the success of the ANC against the yardstick of abolishing apartheid, racism and discrimination. Tumi understood that it was the ANC that was a force for good in his life. This highlighted that the ANC's discourse of the NDR as being accomplished by the liberation forces that the ANC was connected to was deeply held by people on the ground like Tumi, who is a COSATU trade union member. Tumi's evaluation of how the ANC functioned on the issue of race in post-apartheid South Africa was made against the historical and cultural framework of the ANC as the party of national liberation. Firstly, Tumi's articulation of non-

racialism the concept was that it was an essential component of the ANC's unifying and nation-building project. Although the ANC was composed along multiracial (separate but equal) lines rather than on a non-racial basis, the ANC's concept of non-racialism was fostered in concert with policies that addressed the National Question and strategies like the NDR as well as the class analysis of apartheid. The ANC policy of nationalism entailed that changes in South Africa could only take place through concentrating on race so that the biased economic and social vestiges of apartheid could be overcome to attain non-racialism. Non-racialism was the ANC's goal of rising above visible and assigned racial differences and this makes non-racialism an ideal norm.

Tumi's views on non-racialism were meaningful as he hoped for better relations between races but it also demonstrated that for COSATU members, their views of non-racialism were connected to the ANC's NDR and nationalism. The struggle for liberation was also about national democracy in that the previous oppressive white settlers would take up citizenship and not continue as a separate nation in post-apartheid South Africa, as they had done under apartheid.

Tumi's views also showed that for COSATU members, race was salient in his support for the ANC and this exhibited two key features – it was both ideological and it was material. Tumi had experienced measured progress in his life and this in turn justified the ANC's liberation discourses of being the only legitimate defender of liberated South Africans for him. These discourses and the historical imagining of the ANC were still powerful in the appraisal of the ANC in government by COSATU members like Tumi. This indicated that there was no post-nationalist era in South African politics nor did it indicate that the ANC's nationalist pull was depleted within COSATU and among its members. Tumi saw the ANC has having limited time left:

> "The ANC can do it but there are old people in the parliament – can they do it? Young people must lead we need fresh faces not the old people who were in exile. We need people with the qualifications and not cadre redeployment. The era of entitlement is over. The future is in the hands of the youth."

Tumi was uncertain about cadre commitment as it had also been carried out in the public service where he was employed there were many appointees in the public healthcare system that did not have the necessary qualifications. It had devastating effects such as the Esidemeni case and the MEC for Health in Gauteng demonstrated. The ANC's practice of cadre deployment had reached its threshold for Tumi.

7.6.1.6 Nomsa

Nomsa, a female, 44 years of age iss single. She holds a four-year Nursing Diploma, had a certificate as a laboratory assistant, had a Diploma in Marketing and Sales and a Diploma in Administration and Management. She joined DENOSA in 2010. She was the Manager of the Outpatient Psychiatric Department on a permanent basis. Her mother's brother and sister were nurses. She had paid off her house and had a family home in KwaZulu-Natal. She earned R18 000 gross per month and used her salary to buy food and groceries for the house, petrol and school fees. She had bought a car in the past year and could do so because of an insurance payout. Eight people lived in her household, including herself. Only one person worked and the other seven were comprised of her retired mother, her own children and her brother's children and they were all scholars. Her mother received an old age pension.

In her house, Nomsa had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, two cellphones, a radio set, a TV set, a DVD player, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, a dishwashing machine, Pay TV, a computer and a motor vehicle. She did not have a short-term insurance policy and her car had a Tracker system.

Nomsa had many tertiary qualifications, her occupation corresponded to a middle-class social status and in Nomsa's family background there were nurses. When he was asked if she considered herself to be a professional first or a trade unionist first, Nomsa said:

> *"I am professional first in the work that I do. To preserve life if I am going to be a trade unionist first I will not put my patients' life first."*

Nomsa also supervised the department and she was the co-ordinator for an Electrical Convulsive Therapy project. Nomsa found it hard to cope financially as she was the only one carrying the

costs and trying to make ends meet in her household. Nomsa had eight dependents, so this placed Nomsa's other foot in the working class. Nomsa was in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Nomsa's contradictory class location was influenced by more than one basic class.

Nomsa was not compensated for the extra work that she took on and so felt dissatisfied with her job. Nomsa always came home from work exhausted, she always did hard physical work and she sometimes found her work stressful. When asked if she has enough resources to do her job, Nomsa said that:

> *"It is a challenge as the medical resources are lacking. I am supervising the manic and psychotic patients' department with a team of 3 nurses and 2 doctors and we can call for help outside if it is an emergency. On Tuesday and Wednesday mornings it is very busy in the clinic and we run around with the mentally ill patients and the relapsing patients who need stabilising. The manic patients do present a risk to us. There are very few psychiatric hospitals. In the casualty there are very limited beds. We have so much drug abuse that we are dealing with, for example nyaope, and we do not have the resources to deal with it. We are an open bed hospital with no closed wards. So it is hard to contain the nyaope patients. In the adolescent wards it is not safe for us. The premises we are on is not meant to be a hospital and the infrastructure needs to be upgraded. This was a military residence for many years and so the facilities are not suitable."*

The current tertiary inpatient care system was based on de-institutionalised care and an increase in community-based psychosocial rehabilitation (Petersen and Lund, 2011). However, due to the shortage of psychiatric beds, which led to de-hospitalisation, the patent lack of resources that should have facilitated community-based psychosocial rehabilitative services led to the situation of 'we run around with the mentally ill patients and the relapsing patients who need stabilising' according to Nomsa. As a result, extraordinary responsibility was placed on Nomsa and it was pushing the overburdened primary healthcare system to its limits.

When asked about her views on the relationship between COSATU and the Alliance partners, Nomsa said:

"The trade union leaders are trying to be recognised within the Alliance and they are neglecting the membership. So the trade union is just a stepping stone."

Nomsa was confident that the ANC would receive support in 2019, as:

"ANC has support. People will say lots about it but they will vote for it even if they complain about it. The ANC has political rivals – the EFF and workers (not the high class). There has been some traditional worker base of support for the ANC which has gone to the EFF. The Zuma supporters do hope that he starts his own political party. However, for your needs as a worker to be met, you do need to be political. The ANC has got good laws and the labour law is strong. However not all workers are politically involved."

Nomsa was expressive in her views about the ANC and this formed an important part of her political identity. COSATU was central to the ANC's election campaigns and Nomsa recognised this. The political identity had not merely vanished since the ANC had embraced economic policies that COSATU had contested. Instead this political identity was a significant reason why there was sustained loyalty to the ANC, as Beresford (2012) found in his study of NUM members. The ANC was dominant electorally in national elections since 1994 (not in local elections). Nationally only a third of the vote is there for the taking by rival political parties and in this case, Nomsa was of the view that the EFF as the strongest contender for the workers' vote, where it had moved away from the ANC. McKinley (2012) argued that alliance members, like COSATU members had taken on the role of internal opposition to the ANC but that this had functioned to contain the criticism instead of it being harnessed by rival political forces. Where the criticism internally was severe, as already covered, NUMSA was expelled from COSATU. To date, the EFF had only achieved less than a 10 percent share of the national vote and had not won in local elections but it had entered into coalitions with the other opposition party, the DA. The EFF had endeavoured to court the organised working class but it had not built serious connections with movements of the working class such as the unemployed peoples' movements, rural movements, land and food movements. The EFF was predisposed to fractions of the new African middle class, such as the professional and public sector employees, such as African teachers and nurses and entrepreneurial small business owners, to name a few (Satgar, 2019a).

Some COSATU leaders had acknowledged President Zuma as the champion of workers' when workers felt discouraged by the Mbeki regime (this is covered in more detail in Chapter 8 of this study). However, workers favouring Zuma was an effort on the part of workers to regain the nationalist movement to direct it to meet the issues of workers (McKinley, 2012).

Nomsa did think that the ANC had achieved some important things since it had been in power but had more work to do in other areas:

> "The ANC has achieved gender equality and there are women in parliament and they support women and children. The ANC is not multi-racial in their composition – it must be 50/50 of everyone. We must grow our children so that this rubs off on everyone in the decades to come."

Nomsa's sentiments above spoke to her political identity and further demonstrated the potency of the ANC's nationalism. Nomsa justified her continued partial loyalty by alluding to how the ANC has triumphed over adversities, oppression and degradation, like gender discrimination. The main content of the NDR was the liberation of Africans in particular and black people in general from political and economic oppression. To do this, South African's quality of life, particularly the poor, the majority of whom were African and female, had to be improved.

She ascribed this to ANC and this demonstrated how the ANC'a nationalism was profoundly ensconced in her political imagination. The ANC's (1998) the strategic objective of the NDR was 'the creation of a united, non-racial, non-sexist and democratic society' and the multi-class society was the object of the transition to democracy and this was clearly reflected in Nomsa's political identity.

7.6.1.7 Zanele

Zanele, a female, aged 54 years of age is single. She has a Bachelor of Nursing degree and worked as an Advanced General Nurse and an Advanced Midwife. She was the first nurse in her family. She was a member of SANA before it merged with DENOSA. As she said:

> "I found out about DENOSA at the nursing school of science. I was part of the organisation before DENOSA – SANA."

Zanele started working at her current place of employment in 2008 and before that she worked as a nurse in Saudi Arabia for eleven years. She owned her own house and had a family home in Soweto. She earns R36 167 gross per month and used her salary to buy food and groceries for the household and for public transport. She managed to save money every month. She bought couches in the past year and used her savings and stokvel to fund the purchase. She had a medical aid, a provident fund and she received a housing allowance. Including herself, two people lived in her household and she was the only one who worked as her daughter had a degree from the University of the Witwatersrand but had been looking for a job since 2013. Zanele had seven dependents.

In her house, Zanele had tap water, a flush toilet inside the house, hot running water, a built in kitchen sink, a TV set, a DVD player, a refrigerator, an electric stove, a microwave oven, a deep freezer, a washing machine, Pay TV, a home theatre system, computer and a motor vehicle. She did not have a short-term insurance policy and her car had a Tracker system. Zanele had a high standard of living.

Zanele had many tertiary qualifications, her occupation corresponded to a middle-class social status, she worked as a nurse prior to 1994 and she had vast international experience. Zanele considered herself to be a professional first. All of these permitted Zanele to cross over into the middle class. Zanele found it hard to cope financially and she had seven dependents. This placed Zanele's other foot in the working class. Zanele was in a contradictory class location, that is she shared class interests with the middle class (with her work and education levels) and with the working class (with her material restraints and social relations). Zanele's contradictory class location was influenced by more than one basic class.

Zanele's classed and gendered subjectivities were found in her understanding of her work. She felt that she did a lot of emotional labour, that is, Zanele's work necessitated her having to deal with other peoples' feelings which in the course of performing this she had to make adjustments to her own emotions and maintain her professionalism. All of this was invisible and not remunerated. Indicative of the emotional labour that Zanele performed was that she was often followed to the bathroom by the patients and they looked for her when she was on tea. As a result, Zanele always came home from work exhausted, she always had to do hard psychological

work and she always found her work stressful. Zanele really loved her work but she felt that she was not appreciated. This intra-categorical blend of social divergences and processes of power and domination, bred many types of oppression that for Zanele were present in her daily experiences as an African female nurse. These were sanctioned by the by the Minister of Health, who himself did not respect nurses, Zanele opined. This is why nurses did not have a good reputation and were treated the way Zanele was.

Zanele found that the problems were compounded by the lack of resources she had to do her work, as she said:

> *"There is a lack of staff and the equipment. When the inspectors come, they hide the broken equipment like the broken chairs. There is no toilet paper, soap, linen, paper for the copier, ink for the printer and no supplements for the mother."*

It was clear that from the lack of toilet paper and soap in the toilets in the maternal clinic that led to poor hygiene and increased the risk of infections to the lack of supplements for expectant and nursing mothers where South Africa already had multiple burdens such as high maternal and child mortality, that services in public health hospital were inadequate. The basic standards of care were not being met. These inadequacies were produced by the division in the healthcare system between the public and private health sector exacerbating racial and socio-economic inequalities.

When asked if there had been strikes in her workplace and what the nurses were striking about, Zanele said:

> *"There were pickets at lunchtime last week but I was off sick. Those there felt that the unions had let them down. All the unions had signed an agreement think it was 12% but they did not get a mandate and they signed on 7%. That is not democracy they just signed the agreement and put the members into a situation."*

Even though Zanele was off ill her view of the strike by nurses in 2018 in her workplace was also interpreted through her classed and political subjectivities. Zanele was profoundly aware of the bread and butter issues that affected nurses that were not met and this was the reason for the strike. The lack of agreement was implemented without a mandate from the shop floor and

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Zanele's understanding is that shop floor democracy had weakened in her trade union but in the other trade unions too and she too was a new workerist and concerned about the weakening of democracy in DENOSA. Zanele's view of COSATU related to both her previous experiences of COSATU as a working-class federation, championing workers' issues and shop floor democracy and to its current structural location, a partner in the Alliance, subservient to the ANC and the SACP.

Zanele connected the issue of the middle class as a factor in the support of political parties, by pointing out that:

> "The middle-class will support the DA. Some do not vote. Some will not vote for the ANC. The EFF has picked up that middle-class part of COSATU and the general public. COSATU members do not support the ANC."

Zanele confirmed the Satgar (2019b) argument that the EFF had picked up the support of the middle-class African teachers and nurses (who were COSATU members) and that the opposition parties had weakened the ANC especially at election time. The support for the ANC had dropped from 70 percent in the 2004 national elections to 62 percent in the 2014 national elections. At the same time, the DA share improved and the gap decreased in some provinces like Gauteng where both the DA and EFF secured more votes. Zanele's comments confirmed that in post-apartheid South Africa that electoral politics had become progressively competitive (Paret, 2016). Zanele was completely disillusioned with the ANC and explained why she did not support them:

> "I am not voting for the ANC they have disappointed us. They have a buddy system among the elite."

The ANC had been damaged by internal factions competing for power and position. Zanele noted how power had become concentrated in the hands of the elite who may be the political or the business or both. Since 1994, national liberation had progressively been expressed as a project around black cultural and economic regeneration, mirrored in the African Renaissance and BEE. The ideological underpinning for this was a rejuvenated sense of Africanism. Yet, Zanele felt less confident that the ANC and the state could enable or positively influence her own

life as a nurse in the public sector. However, Zanele drew on the NDR's repertoire of national oppression in her response to her support of the ANC:

> *"I am not a card carrying member of the ANC but I must say that the ANC gave me the opportunity to work. The ANC made me realise who I am. They gave me respect. They gave me dignity."*

Despite Zanele's recognition of the ANC's 'class project', African nurses like Zanele still recognised that it was the ANC that had contested the apartheid government and helped Africans to reclaim their rights, freedoms and personal dignity in the new post-apartheid nation-state. The ANC had enabled people like her to lead a better life. Zanele's support for the ANC was deeply symbolic and ideological and this in turn is reinforced by the ANC's nationalist liberation discourses – that is the ANC-led Alliance was the only sincere political guardian of liberated South Africans. Zanele's recognition of what the ANC had done for her as a COSATU member reflected her political identity and it highlighted the potency of the ANC's nationalism within COSATU and its members. Zanele also justified her endorsement of the ANC by pointing out how the ANC had helped her overcome national oppression and degradation. Zanele's political subjectivity and identification with the ANC's nationalism, the NDR demonstrated that Zanele understood that black people and Africans in particular were part of the nationally oppressed and that they were part of the ANC's plan to transform society in the post-apartheid era.

7.6.1.8 Khumo

Khumo, a man and 33 years of age was married. He had a Nursing Diploma and a degree in management. He was a registered nurse and has worked since 2013 on a permanent basis in his current workplace. He joined DENOSA in 2007. He was the first nurse in his family. He had his own house with a bond and he had a family home in the North West province. He earned R28 000 gross per month and used his salary to pay his bond, buy household items, petrol and school fees. Khumo had a medical aid, a provident fund and received a housing allowance. Including himself, there were two people living in his household and both worked. He had two adult and one child as dependents.

In his house, Khumo had tap water, a flush toilet inside the house, hot running water, a built-in kitchen sink, two cellphones, a TV set, a refrigerator, an electric stove, a microwave oven, a washing machine and a motor vehicle. He had a short-term insurance policy. Khumo had a high standard of living.

Khumo had many tertiary qualifications, his occupation corresponded to a middle-class social status and he owned his house with a bond from the bank. Khumo also believed that he was serving the community as a nurse and that it was his calling. Khumo considered himself to be a public servant. All of these permitted Khumo to cross over into the middle class. When he was asked if he considered himself to be a professional first or a trade unionist first, Khumo said:

> *"I am a professional first. However, I identify with the transformation and we can look into other spheres and we can reach a certain objective of being a trade unionist."*

Khumo was not at all happy with what he earned and he had three dependents and he was the first nurse in his family. Khumo was in a contradictory class location in that he shared class interests with the middle class (with his work and education levels) and with the working class (with his material restraints and social relations). Khumo's contradictory class location was influenced by more than one basic class.

Khumo too pointed to the problem of resources to do his job, as he said that:

> *"The challenges are the resources. The public sector is transitional in a way in that things are changing and evolving. The population that we are serving it has changed and grown drastically over the past twenty years but the resources provided in the public sector have not grown."*

Khumo always came home from work exhausted although he did not have to do hard physical work, he sometimes found his work stressful. South Africa has an estimated population of 54 956 900 people and the bulk accessed health services through government-run public clinics and hospitals. The health workforce performed a vital role in this as it enhanced the aims of the health system goals and achieved the government's policy of promoting access to health. As already indicated, there was an imbalance in the healthcare system as the private sector catered for 16 percent of the population while the public sector catered for 84 percent. South Africa had

23 universities, eight schools of health sciences and nine provincial nursing colleges with many private nursing schools. Yet there was only an output of 1 200 to 1 300 medical graduates annually which was utterly inadequate for a country with a population size of around 55 million people (Mahlathi and Dlamini, 2015).

Khumo's use of the word 'transitional' pointed to the fact that in South Africa, there was a lack of detailed health information needed for health service planning. Infectious diseases in South Africa such as the HIV/AIDS pandemic outweighed the non-communicable diseases as causes of morbidity and mortality. As health was acknowledged as the stimulus for economic and social development and the South African Health and Welfare Department had set definite equity goals, the lack of appropriate planning and resource allocation to address the equity disparities impacted on the poorest section of South Africa's population (Mahlathi & Dlamini, 2015).

Khumo had the following view about the relationship between COSATU and its Alliance partners:

> *"A trade union organisation that is affiliated to a political party – you will find that there are differences not just at the trade union level but also at the political level as political views differ – especially two views – should COSATU move from the tripartite Alliance or should it remain in the tripartite Alliance?"*

However, Khumo also thought that the social composition of COSATU had changed due to its relationship with its Alliance partners:

> *"COSATU has been a working-class federation but it is changing and shifting from being a working-class organisation. The transformation is definitely there and it is taking place. There are raised levels of education among members and members are enrolling in courses. They are trying to be an informed membership and they are informed about their needs."*

Khumo's classed and political subjectivities of the class changes that had taken place in COSATU were evident. COSATU members had benefitted from the ANC's policies of racial transformation and upliftment for members of society. A significant portion of COSATU membership had been on the receiving end of obtaining privileges from the state, such as Khumo

and they had already somewhat benefitted from the social and economic transformation in the post-apartheid which was not due to socialist policies. The ideology of the NDR and the policies of racial transformation had led to upward class mobility even for public sector employees like Khumo as this had implications for the composition of COSATU itself as it was no longer an exclusive working-class federation.

When asked what more the ANC could do, Khumo said:

> *"Those born after '94 don't tell them about the ANC and where it comes from and don't tell them about the political struggle. They don't want to know about the political party that liberated them. Only those that were part of the political struggle are loyal to the ANC and they will not abandon them. They say I am a graduate who is unemployed. I want employment. If Mmusi promises that I will get employment I will listen. If you look at the struggle of 2018 it is now more economical than it is political. I am not happy with my salary it cannot meet all the needs that I have. So the approach towards fighting this has to be different. My biggest wish is to see the government educating and liberating the economy. I want most graduates to get jobs or be employed."*

The public welfare policy of the post-apartheid era had been deracialised. All capable adults of working age had the ability to attain income security through employment in the deracialised labour-market especially if they were in possession of higher levels of education and skills. As African nurses employed in the public sector were part of those classes that had experienced sustained and speedy upward mobility into the higher classes, these policies advanced the racialised middle class (Van Niekerk & Fine, 2019). This was directly linked to the being a wage earner and in post-apartheid South Africa this was more contingent on education and skill. Yet inequality was clearly replicated through the apparatuses and institutions of the state and was where the state was its weakest, for example in service delivery and the public healthcare system. Khumo was also critical of the current processes of patronage that only those who were politically connected advanced. When asked what the ANC had done since they had been in power, Khumo said:

> *"The current struggle cannot be compared to the previous struggle. There is political liberation. We need to move forward now. There is progress but it is not to our*

satisfaction. We still believe that more can be done. Resources need to be redistributed equally. There are two things to look into: as the working class, we have got needs and not all our needs are covered. Yet there are people who are not employed at all – the unemployed. Yet the working-class needs are not the same as those that are unemployed. We do see the ANC not servicing the unemployed. For those that are employed we do not see the ANC servicing us to our satisfaction. This cuts across society – with the students and 'fees must fall', these guys were saying that if we can get education we don't have to sit at home. There are different views though. Some think that the ANC can help us achieve things. This view cuts across the classes as well."

Khumo's interpretation of the success record of the ANC could be linked to the ANC's discourse of the NDR its phases and the ANC being the liberating force. It was clear that Khumo as a COSATU member expected the ANC to still exhibit sustained moral and ethical guidance on issues and that the ANC's nationalist appeal was determined in many spheres, most notably race and gender politics and could still accomplish much more the economic sphere. African nurses like Khumo were in a contradictory class location and his attitudes towards socio-economic transformation as accomplished by the ANC were as complex. The contradictions of the ANC's post-apartheid programme of development had involved significant social democratic schemes that generated concrete benefits to COSATU members especially those in the public sector trade unions but many other sections of the population had not benefitted and they were dependent on those that earn salaries, which was reflected in the class location of Khumo.

7.6.1.9 Naledi

Naledi, a female and 29 years of age was single. She had a Bachelor of Nursing degree from Medunsa and she was working on her Masters'degree which she paid for herself. She worked as a Clinical Facilitator and had worked at her workplace since 2012 on a permanent basis. She had her own house with a bond and had a family home in Mpumalanga. She joined DENOSA in 2007. She earned R23 000 gross per month and used her salary to buy food and groceries for the household, pay her bond, buy household items, petrol, school fees, healthcare and she did manage to save some money each month. She had extended her house in the past year and took out a loan to do so. She had a medical aid, a provident fund and received a housing allowance.

Including herself, two people lived in her household and she worked and the other was a scholar. She had one child dependent.

In her house, Naledi had tap water, a flush toilet inside the house, hot running water, and a built-in kitchen sink, two cellphones, a refrigerator, an electric stove, a microwave oven, Pay TV, a motor vehicle and a computer. She had a short-term insurance policy. Naledi had a relatively high standard of living.

Naledi had a tertiary qualification, her occupation corresponded to a middle-class social status, she owned her own house with a bond from the bank, she extended her house in the past year and she managed to save money each month. All of these permitted Naledi to cross over into the middle class. Naledi stressed that she found it hard to cope financially and as she had one dependent; she had her other foot in the working class. Naledi shared class interests with the middle class (her educational levels and the work she did) and with the working class (the material constraints and social relations) and so Naledi was in a contradictory class location and her contradictory class location was influenced by more than one basic class.

Naledi pointed out the problems with the supply of nurses, the challenges in the public health sector and the image of nurses:

> *"The ANC did great work in the public healthcare system they did improve baby friendly hospitals but when it comes to service delivery in tertiary institutions we do not have professional staff who can render care, we do not have equipment and infrastructure and resources to do our work. There is such a shortage of registered nurses. The nurse must wait 10 years to develop or study further and the salary is not there. So they leave and go to the private sector for a better salary or they go overseas where they do not taxed and receive a good salary. Nobody wants to be a nurse any longer."*

The nursing practice environment generally was beset with resource, administrative and adequate care challenges and these were most pronounced in the public healthcare system. There was a protracted lack of medical staff in the public health sector in South Africa. Nurses constituted the largest group of health service providers, their task in fostering health and delivering essential health services was undeniable. As pointed out by all the nurses interviewed, including Naledi,

the nursing profession in the public healthcare system was consistently short of staff and there was a growing 'lack of care' culture. Naledi said that she always came home from work exhausted and she sometimes found her work stressful. As Naledi pointed out, there was a dwindling attraction in the profession and she felt that the nursing profession had to be invigorated by the health policy-makers and practitioners. Much needed reforms in nursing education were also due. Aware of the numerous and intersecting inequities of the structural and organisational obstacles that were produced and sustained by and in the public sector healthcare system and among its staff, Naledi said that although she loved her job, the conditions made her want to run away.

Naledi was of the view that those who voted for the ANC did so from a more traditional base:

> "The 2019 elections, the elderly ladies will vote for the ANC as they actually vote… the new millennium generation – no – I see the party going down."

Naledi's response here indicated her political identity in recognising the nationalist discourse of the ANC and that it has liberated those older than her as they were part of the anti-apartheid struggle. It had functioned to fortify the struggle. In the post-apartheid era, this discourse was perceived of as reactionary among the 'new millennium generation'.

Naledi was open about who she would vote for in the 2019 elections:

> "I will vote for the DA. The ANC must fall. The EFF must wait a little."

This clearly demonstrated that Naledi had faith in democracy and so would vote for the opposition, notwithstanding the disillusionments with the ANC of the past twenty-five years. Naledi did not tolerate bellicose rhetoric and assurances of revolution that were remote from her material realities, as she stated that, 'the EFF must wait a little.'

7.7   Conclusion to the African nurses of the public sector

This chapter provided an overview of the nursing profession in South Africa and the various associations for nurses. Historically black nurses struggled for approval and recognition in a white-dominated profession under apartheid.

The quantitative data presented in this chapter provided a broad profile of the nursing profession in post-apartheid South Africa. Poor salaries and challenging working conditions in the public sector were raised recognised as a major cause of dissatisfaction once the extensive movement of Africans into public service had taken place. In September 2007 the government concluded a historic agreement, namely the OSD, with various trade unions including DENOSA that raised the salaries of public service nurses substantially and it was hoped that these changes would raise the status of nursing and even attract more nurses back into the public sector. The quantitative data on employment, education and trade union membership was a useful starting point for understanding the changes that had taken place in the public sector in post-apartheid South Africa for the analysis of the qualitative data obtained from nine African nurses working in government hospitals in Johannesburg.

For a profile of the nursing workforce, bearing in mind that its development had been intimately enmeshed with the "racial, class and gender divisions of a divided society" (Marks, 1994:14), the study relied on the qualitative data gathered from the nine African nurses to understand their subjectivities and experiences of their work, their trade union membership, their federation, COSATU and the ANC. From the quantitative and qualitative data collected on nurses, it can be concluded that the trend among African nurses working in the public sector is that more now had a bachelor's degree that this had been a most positive development in the public sector. It was a result of both the educational transformations that had taken place in post-apartheid South Africa and the employment equity policies of the post-apartheid government.

The qualitative data gathered showed that for the African nurse in the public sector, educational qualification corresponded closely to the salary earned. The higher the educational qualification (that is the university degrees and university of technology or technikon degrees) earned the highest salaries (from R21 000 to R36 167), irrespective of age of the nurse or how length of service. Although a higher educational qualification corresponded closely to the salary earned by nurses, the bulk of the nurses interviewed found it hard to cope financially.

The qualitative analysis provided evidence that the nurses with the higher salaries and the higher qualifications were dissatisfied with their salaries as professionals in the public service. Seven of the nine nurses found it hard to cope financially. The salaries of public sector nurses were

extensively raised after the conclusion of the OSD and these changes raised the status of nursing and some nurses came back to nurse in South Africa. Indeed, there was one nurse in this study who came back from Saudi Arabia after working there for 11 years. The nurses at the lowest end of the salary scale and at the lowest end of the qualifications scale found it hard to cope financially. Most of the nurses spent money on their bond per month, school fees for children and money on food and groceries for the household. The nurses had water and electricity connections in their homes but did not have many luxury items in their homes. The nurses either lived in their own house with a bond from the bank or they had a paid off house. All nurses had a provident fund and a medical aid and most had a housing subsidy or allowance.

Marks (1994) noted that nurses were already in a 'social contradictory position' as they were an intermediary and mediating group, with senior nurses and doctors at the top and the lower level nurses beneath them due to the relations of power and domination in the hospital and the professional hierarchy between doctor and nurse. There were constant pressures between the nurses struggling for professional prestige and having to contend with the downgrading of their work conditions in post-apartheid South Africa. The precariousness of their professional status and the fact that they remained narrowly focused on raising their incomes and improving their working conditions suggested that a new tradition had emerged in COSATU trade unions in post-apartheid South Africa – the organic workerists. It was particularly the poor working conditions that the public sector nurses had to endure that signaled the 'proletarianisation' of the profession concerned them and so this signaled that they were not working class. Their occupational status and higher educational qualifications elevated them into the middle class and so the analysis conducted confirmed that the African nurses had the features of Wright's (1978a, 1985) notion of contradictory class location.

The lack of resources in the public hospitals was a major issue for the nurses and it was a daily challenge that they had to deal with in their work, requiring them to make plans when this is what they should not have to do. This was a clear area of stress for the nurses. In the democratic era, professionals were being produced and had globally competitive knowledge and skills yet working to further the national development enterprise and social transformation with very little support to do so. Nurses were required to manage the demands of the population that had extraordinary levels of diseases linked to poverty and underdevelopment, high incidence of

injuries and HIV/AIDS and chronic conditions. Conditions were predominantly poor in the public sector, with nurses working there served 85 percent of the population who were uninsured and fully dependent on public services.

As the supply of nurses and other health professionals within the public health system declined as the government increased access to public healthcare, the pressure on nurses in the system increased and nurses took on other tasks not core to nursing. While low salaries were an issue, it was the poor work conditions that had a negative impact of nurse morale. The lack of respect from the minister, the doctors, and abuse from the patients were major factors too as raised by the nurses. The 'two-class' character of the health system endured and it was characterised by a weak and overburdened public healthcare system that offered inferior services as more patients accessed it who had to be cared for by the public sector nurses.

Some of the nurses work at a public hospital in Gauteng and just before the fieldwork was conducted, a strike broke out at the hospital and it took place over the space of a few days. The nurses acknowledged this strike when asked whether there had been industrial action at their workplace and if they had participated in it. These nurses clearly knew of the reasons for the strike (or the picket that was peaceful until the police intervened – the picket turned into a major event that caught the attention of the media), that it was over salaries, performance bonuses and working conditions. Part of DENOSA's reservation of professionals taking part in strike action was reflected in the nurses' responses. Some nurses felt that going on strike was contrary to nursing ethics and was damaging to the status of the profession. Whether or not nurses should participate in industrial action was one of the ongoing debates in the profession, both locally and internationally, and the issue was closely associated with the question of whether nurses were professionals or workers or both.

All the nurses identified as professionals first due to their nature of their work, the disciplinary procedures and the professional bodies that they had to belong to. The nurses perceived that the status and image of nursing had been undermined by the poor working conditions in the public sector. The nurses detailed the major challenges with resources in the public sector, from staff, to equipment to carry out their work, to medicines, to just basic supplies such as toilet paper. These were nurses working in critical parts of the healthcare system that provided nursing care to the

most vulnerable sections of the population that is babies. These nurses worked in the ICU neo-natal ward, the pediatric ward and the baby clinic. Worryingly for those nurses working in psychiatric hospitals is that they had to cope with extra risk as their patients were manic or were drug addicts, yet the actual infrastructure was unsuitable to the type of patients they had to care for. The nurses felt let down by the system. Clearly not all nurses were satisfied with their current salaries, but many related this dissatisfaction to the conditions they had to work under in the public sector.

A number of key issues had surfaced about salaries and working conditions of the public sector nurses. The first major issue related to the shortage of nurses, equipment, medicines, supplies and the like as experienced by the nurses which was an attribute in their perceptions of their levels of satisfaction (or lack thereof) concerning their salaries. The salaries of public sector nurses were determined by government's budget and were a fixed human resource cost. It was the lack of resources and support structures for nurses that undermined the standards, status and image of the profession that really troubled these nurses. Clearly these conditions were a key issue for the nurses' sense of professionalism. In response, there was no sense that the nurses had dropped their standards of nursing.

The next major issue related to DENOSA. The first major reason for joining DENOSA was that nursing students needed indemnity when they signed on for training and this is what DENOSA membership offered to them as they were present in the nursing colleges. Connected to this the nurses needed to belong to a trade union in order to work in the public sector and for the nurses in this study, there was a closed shop agreement for DENOSA in the workplace. The next major reason was that being a member of the trade union offered protection to the nurse in labour related matters such as representing them in grievance procedures and disciplinary matters. Therefore in a time where the image and status of nursing was low, it was the predominantly professional organisation that the nurses belonged to that safeguarded against the further weakening of the profession. Nursing was once considered to be an elite profession for women and nurses were at the centre of healthcare in South Africa. For the vast healthcare burdens to be successfully resolved, the profession has to be defended, and in this sense, DENOSA as the professional organisation fulfilled this role. A profession was such by virtue of the fact of its disciplinary procedures, the body of knowledge associated with it, its professional body and also

by how the profession was organised (Breier et al., 2009). DENOSA contended that it concentrated on both trade union and professional improvement, yet the nurses were critical of DENOSA (and COSATU) for neglecting workers issues as it focused more on political issues and as factional battles inside COSATU became dominant.

This added a further dimension to the detection of the beginnings of a new workerist tradition identified in this section of DENOSA's membership in Gauteng in the post-apartheid era, the organic workerists. These organic workerist nurses were concerned about the weakening of internal democracy in their trade union and the lack of focus on the daily issues that affected nurses that were neglected as DENOSA moved in the direction of being more of a political union. The organic workerism not imposed by DENOSA or COSATU leadership, as workerism had been imposed by white FOSATU officials on ordinary trade union members in the past. In contrast, the organic workerists were trade union members who were independently minded. This indicated that there were ideological differences between ordinary trade union members and leaders that may feed tensions within COSATU affiliates. Traditionally COSATU affiliates have provided (working-class) support for the ANC and were the foot soldiers for the ANC close to election time. When asked what the ANC had done since they had been in power, most nurses pointed to the transformation of society in post-apartheid South Africa, along racial and gender lines, the restoration of dignity for South Africa's historically disadvantaged and that the only political party that could continue on this positive path was the ANC. The nine African nurse's views on their labour federation, COSATU and its relationship with the Alliance partner varied but many firmly believed that their interests as nurses had been neglected as COSATU focused on political issues. As noted, some nurses were most concerned about DENOSA's relationship with the Alliance and the ANC and how this impacted on its independence and its ability to represent the interests of workers without being compromised by the politics of the Alliance.

The nurses pointed to many issues that challenged the ANC. For the nurses of the public sector, government mismanagement, the lack of resources and the running out of money undermined the gains made under the ANC. These nurses did not withdraw from official political participation as they openly stated that they would vote for other political parties in the 2019 elections. The nurses recognised that the ANC held great political capital and it still represented the force of the liberation struggle. The support for the ANC had been enhanced and produced through the

constant material interventions into workers' daily lives. Among nurses who were COSATU members, the ANC's nationalist appeal was far from being weakened and some of them were politically loyal. The nurses' conceptualisation of the ANC's NDR in post-apartheid South Africa was that there were many issues that the ANC's nationalist project had to accomplish along the lines of race, gender and class and these were the many factors on which the party was assessed.

To the nurses who were trade union members, issue of race and gender were important factors in their lives. That they raised these other identities as members of a trade union confirmed that an intra-categorical approach (McCall, 2005) was needed in the analysis of the different experiences among the African nurses that a sole focus on class would not have easily accomplished. African nurses were in a contradictory class location and the intersectional analysis provided for a more dynamic understanding of their subjectivities, which were also racialised and gendered and that these intersected with their experiences of their employment in the public sector hospitals, their views and experiences of DENOSA, their views of the Alliance and of the ANC. The intersectional analysis was exceptionally useful in this study of African nurses who were trade union members and demonstrated that class could not be placed at the centre of the analysis when it came to the understanding of trade union members. This study practically contextualised their intersectional identities and their experiences of inequality by focusing on a restricted set of inequalities that were prominent at a particular time and place that this study took place (Tapia, 2019).

Lastly, the analysis of the qualitative data showed that the effectiveness of the ANC's nationalist pull was not just based on its ability to deliver on socio-economic transformation. The African nurses' racialised, classed, gendered and political identities were deeply affected by the legacy of apartheid. The ANC's inclusive nationalist politics, founded on racial inclusion and broad-based social transformation, was raised by many African nurses. Some of the nurses were critical of the ANC's attempt to resuscitate its nationalist appeal through a more racialised politics for example by appealing to black voters and the ANC's racially prejudiced and elitist state patronage practices.

Chapter 8: COSATU, the Alliance and the NDR

8.1 Introduction

Chapters 6 and 7 provided an analysis of the class positions and intersections with other identities of teachers and nurses who were members of COSATU affiliated unions. It also looked at how they understood the ANC's ideological positions in relation to the politics of COSATU. The core aim of this chapter is to provide evidence of the adherence to the NDR by COSATU. This chapter also provides the macro context of the relationship between COSATU and the ANC which were issues that emerged at the micro level among the ordinary members of COSATU, the African teachers and nurses of the public sector, as outlined in chapters 6 and 7.

The clearest indicator of the prioritising of the ANC's nationalism in COSATU was the development of the crisis and the deepened tensions among the Alliance partners in their support for the ANC and within COSATU itself from 1994 onwards. COSATU, SADTU and DENOSA documents were grouped within the various presidential terms in post-apartheid South Africa as encapsulated in Table 9 below. President Nelson Mandela was at the core of a 'rainbow' nationalism. President Thabo Mbeki used 'rainbow' nationalism for profound globalisation, BEE and the indigenising of neo liberalism or African neo-liberalism. President Jacob Zuma steered a period of resource nationalism that was allied to a corrupt transactional politics (Satgar, 2019a).

Table 9 serves as a tool for organising the contents of the various documentary sources that are presented in the chapter.

Table 9: Presidential terms of office in post-apartheid South Africa, 1994-2019

President Mandela's racially inclusive nationalism and reconciliation: building the nation and unity (1994-1999)	President Mbeki's African nationalism: strengthening the nation and unity through racial redress (1999-2008)
President Zuma (2008-2017): the nation and resource nationalism	President Ramaphosa: the lead up to the 2019 elections (2018-2019)

The content of key COSATU, SADTU and DENOSA policies are quoted from so as to provide evidence as the crisis revolved around the issues of the criticism of or defence of market de-regulation or 'neoliberalism' (the discarding of the RDP and the adoption of GEAR was used as indicators for this), the desire to fulfil the objectives of the NDR (racial redress, poverty, inequality and service delivery is used as indicators for this), and the paradoxical ideologies of socialism and nationalism (there were specific clauses in some of the COSATU documents that raised this dilemma so there was no need to develop indicators for this). The ANC and predominantly business elites also formed an economic pact and BBBEE was the outcome of this. Many unions affiliated to COSATU adopted labour capitalism in the post-apartheid era (Iheduru, 2001) which was a segment of the BEE policy so commentary and views on trade union investment companies were focused on in the analysis.

The COSATU documents consulted for analysis in this section were as follows:

- September Commission Report (1997)
- Transforming Ourselves to Transform Society a Report of the Organisational Review Commission to the 1st Central Committee (2001)
- Resolutions of the COSATU 8th National Congress (2003a)
- Organisational Renewal to Deepen Service to Our Members! Report to the Central Committee (2003b)
- COSATU CEC Political Discussion Paper, 24-26 May 2004 (2004)
- COSATU Secretariat Report to the Ninth National Congress to be held on 18-21 September 2006, Gallagher Estate, Midrand (2006a)

- COSATU Submission on the National Gambling Amendment Bill. Submitted to the Portfolio Committee on Trade and Industry (2007)
- Report of the Alliance Summit' held at Gallagher Estate 9-10 May 2008 (2008)
- Political Report to the Tenth COSATU National Congress. Theme: 'Consolidating Working-class Power in Defence of Decent Work and for Socialism' (2009)
- The 11th COSATU Congress Secretarial Report (2012)
- Statement by the Congress of South African Trade Unions, response to damaging distortions and attacks (2014)
- Organisational Report to the 12th National Congress, 23-26 November 2015 (First Draft) Unity and Cohesion of COSATU to advance the National Democratic Revolution (NDR) for Socialism (2015a)
- Draft Discussion document on the Unity and Cohesion of COSATU towards COSATU Special National Congress, to be held from 13-14 July 2015, Gallagher Estate, at Midrand, Johannesburg (2015b)
- 13th National Congress Consolidated Resolutions Adopted by the National Congress And Resolutions Deferred to the CEC 13th National Congress (2018a)

The SADTU documents consulted and analysed for this chapter included:

- SADTU welcomes ANC victory and thanks teachers for the part they played (2009a)
- SADTU membership increase puts SADTU membership increase puts paid to Madisha's claims (2009b)
- SADTU welcomes the new ministers (2018)

In addition to these documentary sources, qualitative data that comes from interviews with key COSATU, SADTU and DENOSA officials, from the 2014/2015 study of the 'Taking democracy seriously survey' and archived in the repository of data were retrieved, scanned and analysed to supplement the documentary analysis. Finally, to assist with the analysis of the documentary evidence selected for review from the COSATU, SADTU and DENOSA documentary sources as outlined above, existing literature that analysed of key political events and activities, studies of COSATU membership and trade unions was enlisted in the interpretation of the documentary evidence.

8.2 The period of President Mandela's racially inclusive nationalism and reconciliation: bBuilding the nation and national unity (1994-1999)

As discussed in previous chapters, after 1994, COSATU was poised to play a significant role in the post-apartheid era in terms of its support for the ANC and the government as part of the Alliance. By placing its faith in the ANC in the 1994 elections COSATU supported a government that pledged that it would place the needs of the working class at the heart of its development policy. Some COSATU officials went on to occupy the top echelons in the post-apartheid political structure. Some became ANC members of parliament, cabinet ministers, provincial premiers and government leaders and it was anticipated that in these strategic positions that they would exert their power on the ANC and government policy (Masiya, 2014).

As chapters 6 and 7 on the teachers and nurses of the public sector showed, COSATU was successful in a number of ways in the endeavour to influence government policy, such as public sector employment and wage adjustments, among others, in striving for social justice for workers in post-apartheid South Africa (Masiya, 2014). COSATU's influencing of South Africa's constitutional democracy was evident in the concessions won for labour such as the right to fair labour practices, the right to form, join and participate in union activities, the right to strike and the right to collective bargaining. COSATU contributed to the drafting of the <u>Labour Relations Act of 1995</u> which recognised all workers that had been historically excluded such as public service workers. To facilitate COSATU's participation in public policy processes, a tripartite statutory body was established in 1995, called NEDLAC, to foster dialogue between labour, business, community and government.

One of the most prominent COSATU documents drawn on in this section is 'The Report of the September Commission on the Future of the Unions', released by COSATU in September 1997. In 1996, COSATU commissioned a report on the future of trade unionism in South Africa known as the 'September Commission', after the commission's chairperson, Connie September, COSATU's Vice-President at the time. The September Commission report of 1997 constituted an important intervention as it was the first systematic analysis of the changing political and economic environment that faced trade unionism under the new generation of post-apartheid leaders. In addition to these, COSATU acknowledged the many challenges that it faced

organisationally and worried that it did not have the ability to carry out all that it set out to do. The challenges included high unemployment rates, retrenchment of workers due to privatisation and changes to labour law (*The Shop Steward*, September 2000). COSATU stated that it needed a better strategic focus while embarking on an organisational regeneration process and that their organisational review was centred on the need to improve service to our members (COSATU, 2001).

The September Commission report also emphasised the need for incorporating those trade unions that organised the more skilled and white-collar workers into the federation's fold. This was a global trend as identified by COSATU (1997), as stated in the document:

> "*The imperative of transforming the public sector makes the idea of organising more skilled or strategically-located workers attractive…. but because this was the global trend, 'white-collar unionism is growing in significance around the world."*

The white-collar workers were seen as, among others, as those in the public sector and were heterogeneous along the lines of skill and occupation, as COSATU (1997) stated:

> "*The public service is dominated by white-collar workers, ranging from lower-level administrative and clerical staff, to more highly skilled white-collar workers, i.e. professionals (teachers, nurses, doctors, engineers, etc.)"*

COSATU (1997) was acutely aware of the implications of organising white-collar workers, as it would require different approaches compared to those used for blue-collar workers and the traditional working class:

> "*Many layers of white-collar workers have very different interests, and require different kinds of service and collective bargaining to our traditional members. For example, they may be more concerned with their individual career paths and promotion, benefits, skills criteria for qualifying for their occupation (for example, artisans, nurses, doctors). If COSATU affiliates want to organise these layers of workers, they will have to devote resources, time and energy to developing new skills and new organising and bargaining strategies. They may also have to develop benefit funds, or new approaches to negotiating benefits. Organising skilled or white-collar workers also means unions need to employ*

such workers as officials and organisers, because they have the necessary skills,
knowledge of the work, and understanding of grievances. This could have implications for
the pay structure of most COSATU unions and the working-class culture of the federation
and changing the working-class culture of COSATU."

However, COSATU's (1997) tradition was that of worker unity and that this resource could be mobilised to incorporate the white-collar trade unions into the federation, as:

"COSATU and its affiliates have been built with a culture of collective solidarity, mass
militancy and radical politics. This culture can easily accommodate lower levels of white-
collar workers."

Yet, COSATU (1997) had its work set out, as it noted a different ethos among the white-collar workers:

"Higher levels of white-collar workers often have a more individualistic culture or
professional ethos, have a career interest in not confronting their employers, and are more
'moderate' and therefore less willing to take action against employer and state. These
characteristics had implications for affiliates which try to incorporate them, or a
federation which seeks to affiliate them. COSATU would have to reflect carefully on its
existing culture, and on ways to accommodate the aspirations and interests of new layers
of workers."

As the white-collar trade unions, notably DENOSA and SADTU, were only formed after the founding of COSATU in 1985, it was acknowledged that the inclusion of the white-collar workers into COSATU would have an impact on its composition and its identity as a working-class federation.

The September Commission of 1997 revealed the federation's standpoint on economic policy and that it was about 'reclaiming redistribution.' This involved three primary goals, namely expanding productive activity, meeting the needs of all citizens and achieving economic democracy which entailed a redistribution of power. To do this, the capacity of the state had to be built up and mostly importantly this involved the socialisation of the state sector so as to

assemble an interventionist 'developmental state' that could tackle poverty and the redistribution of wealth, power and opportunity.

It was the September Commission of 1997 which advised that COSATU should pursue the development of a social sector of the economy solely or partly owned by organisations in civil society like trade union or community trusts. To accomplish this, workers' retirement funds, which were the largest basis of social ownership, would be obliged to invest 20 percent of their assets by feeding funds into the industries and growth would take place in that more jobs would be created. The September Commission of 1997 noted that it would be necessary for trade unions and pension fund policy holders to take up representation on trustee boards in order to sway investment policy. As far as its union investment companies were concerned, COSATU stated that it could make decisions about whether they should continue and if so should their aim be about not making as much profit as possible but fulfilling the aims of job creation, democratic governance, community welfare and the advancement of the social sector, social ownership and worker and citizen empowerment (COSATU, 1997). The September Commission (COSATU, 1997) stated unequivocally that the trade union investment companies should not be about the quest for just profit-making but about achieving wider, socially oriented goals:

> *"The workers may have a right to consultation or participation, or a right to a share in company profits, or to representation on the board of directors, notwithstanding the fact that they do not own shares in the company."*

This meant that COSATU thought that workers had 'stakeholder rights' and the consolidation of these would signify a 'transformation of property rights, in contrast to the redistribution of assets which entails transferring property rights from capital to labour' and that this would enable a more inclusive economy for all, or a 'partial socialisation of capital' in which the requirements of workers, communities and society would be granted together with the rights of shareholders (COSATU, 1997). As far as BEE was concerned, COSATU viewed it as a consequence of the execution of 'colour-blind' policies, introduced by the state and by collective action biased towards employees and communities. Yet the September Commission report indicated that COSATU remained concerned that line between unions and investment companies would become blurred as the potential for officials to gain financially from fees and cheap shares

increased. It recommended that the goals of union investment vehicles be 'radically broadened' beyond considerations of profitability and more closely aligned with the strategic perspective of the union movement (COSATU, 1997). Therefore, warning signs of the impact of the ANC's nationalism on the worker-centred politics of COSATU were raised early on, as in practice, evidence of sections of COSATU dedicated itself to deracialising capitalism and not transforming it in the interests of the working class.

There were major issues operating to shape the transformation of COSATU trade unions which featured prominently within this period namely organising the white-collar workers of the state within COSATU. In relation to the trade union investment companies, these were initially justified as a way to fund pension schemes for union members, as the historically white unions of South Africa had funded their pensions. Also within this period, the market-friendly, economically orthodox GEAR policy was passed in 1996 without referring it first to the Alliance partners. COSATU was not too critical of it although it did have misgivings about it. COSATU affirmed its dedication to its independence and vowed to embark on mass action where necessary but there was no interrogation of the legitimacy of the ANC (Pillay, 2013). Thus, COSATU elected to carry out its working-class politics within the SACP and backed the ANC during national elections. The ANC was strong electorally and another path was too uncertain for COSATU as the ANC had been successful at the polls in most parts of South Africa. This had given the ANC additional political push it needed to create a united Alliance during the first two years of post-apartheid South Africa.

Under Nelson Mandela's leadership, his five-year presidency was characterised by an assurance of racial reconciliation and social consensus. The Promotion of National Unity and Reconciliation Act of 1995 was passed to enable the truth and reconciliation process that was subsequently set up to create a comprehensive register of human rights contraventions and their sources in apartheid South Africa.

COSATU vehemently contested GEAR's primary principles of deregulation, privatisation and restructuring that had been proposed as a means to enable an increase in employment but had the opposite outcomes (Masiya, 2014). It did not take long for certain sections of the Alliance partners to question the means by which GEAR had been implemented and how markedly

different it was to the economic proposals included in the RDP. The debate had taken place mainly outside of the public domain and while it had been restricted for some time, COSATU finally responded by disseminating a lengthy discussion paper titled 'A Draft Programme for the Alliance' in 1996. COSATU argued that the Alliance had to revert to the RDP and tangible steps for its implementation had to be worked out. COSATU did condemn the GEAR policy but COSATU remained committed to the idea that its socialist position was 'consistent' with the 'common commitment' of the ANC and the SACP to an 'ongoing National Democratic Revolution.' GEAR (and other areas) characterised the central ideological differences between the Alliance partners but all non-compliant Alliance partners, such as COSATU were directed to work together and resolve differences within the Alliance.

From 1998, the 'Mbeki-led' ANC leadership within both the ANC was established (at the ANC's 50th National Conference in 1997, Thabo Mbeki was made the President of the ANC) and this had implications and in the lead up to the 1999 elections, Mbeki worked to secure obedience to his command but he did not initially experience significant intra-alliance obstruction which signaled that there was an intolerance for political opposition.

8.3   President Mbeki's Africanism: Strengthening the nation and unity through racial redress (1999-2008)

An analysis of key COSATU documents during this period revealed more evidence of the support provided by COSATU for the battles that had emerged among the ANC factions for domination of access to resources which was linked to a shift in the ANC's nationalism during this period. Additionally, during President Mbeki's time in office, the ANC shifted in the direction of a more Africanist approach to nation building as part of its NDR as the literature review in Chapter 3 on African nationalism indicated. The Africanist approach to nation building meant that while a shift took place from reconciliation, which was the era of President Mandela, to that of advancing redress, the understanding of the African nation was open.

From 1994 to 2004, the ANC-led government had regularly stressed the urgency of addressing the persistent racially divided make-up of South African society. President Mbeki articulated this in his 'two nations' speech to Parliament in 1998 where the closer connections between inequality and race were stressed (Seekings & Nattrass, 2005). The 'two nations' narrative

emerged which subsequently emerged directed many policies particularly under the President Mbeki government as deracialisation became a dominant theme in public policy.

After the RDP was replaced and as GEAR was rolled out, COSATU fought against it and the most notable of actions included the Jobs and Poverty Campaign in 2009, which was a campaign to tackle the loss of jobs and the high levels of poverty, the setting up of the Anti-Privatisation Forum (AFP) in 2000 which was established to engage in anti-privatisation struggles, made up of political activists, students, unionists and community organisations/residents who opposed the impact that the government's neoliberal inspired privatisation had on communities and to keep open the space for practical anti-capitalist hostility and opposition within the ANC and its Alliance partners that had been closed (McKinley, 2012); and strikes in the private and public sector.

In 2002, President Mbeki criticised the 'ultra-leftists' in COSATU and the SACP suggesting that they should leave the Alliance or not voice their concerns publically if they were unhappy about matters. This was clearly a phase in which the relations among the Alliance partners almost reached breaking point but significantly for COSATU the point where political differences took priority over worker issues. As COSATU (2015a) later reflected on this period by indicating:

> *"We have always regarded the introduction of the Growth, Employment and Redistribution (GEAR) as the new economic strategy of government as representing the trophy of the 1996 class project. This was the moment they succeeded to reverse the RDP and the Freedom Charter and replace it with a neoliberal programme that in the main sought to assert the role of the markets over the state and the people. We fought bitter battles to resist this. Very soon the battle transgressed from just a narrow economic programme into a political project that it has always been. This was underlined by the use of state institutions for factional battles in the ANC. Paranoia engulfed the country leading to others such as Cyril Ramaphosa, Mathew Phosa and Tokyo Sexwale being accused of plotting to overthrow the democratically elected government."*

As a COSATU official explained the ideological tensions among the Alliance partners:

"The ANC is known as a broad-church and it has never been a socialist organisation, COSATU's mandate is to fight for the… workers or of the working class if you want to put it in a group... and even the ANC recognise that COSATU should still fight for the workers even though some of the people in the ANC are themselves employers." (Interview with COSATU official, National Office, March 2015)

The former head of the NUM who had critiqued GEAR was elected as the ANC's deputy president in 2007 (Kgalema Montlanthe) and dispatched to work to reduce the tensions concerning macro-economic policy among the alliance partners. This clearly signaled that there would be not break from the Alliance as the socialist and working-class forces would be best served by the NDR which provided the basis for the relationship between the SACP, the ANC and COSATU (McKinley, 2012).

COSATU (2004) again expressed greater concern about its new white-collar professional affiliates and the potential impact that these affiliates would have on the working-class identity of the federation, when it stated that:

"The transitional problems faced by newer affiliates of COSATU, in particular SASBO and to a much lesser extent DENOSA, pose new challenges to the unity of the Federation. The CEC had discussed this from time to time and has so far managed it reasonably well by ensuring that the unity of workers is not undermined by the short-term political challenges we face."

At COSATU's Eight National Congress in 2003 the federation embraced the 'Toward 2015' Plan. COSATU lamented the fact that the ANC was overlooking the working class and that only capital's interests were being served in the democratic era. As a DENOSA official noted that this is when:

"At the end of the day our own ANC have moved away from the poor of the poorest."
(Interview with DENOSA Office bearer, Eastern Cape, 2015)

The context for this growing despair was that even though mass privatisation was suspended and social grants were improved, unemployment and the informalisation of work continued. At the same time COSATU was challenged in this period in relation to the number of informal workers

and the unemployed (Pillay, 2013). COSATU chose to stay in the Alliance (as it would divide the federation if it did not) and a decision to sanction strategies that protected workers' rights as entrenched in labour legislation was made.

Politically a better strategy and a key message of the 2015 Plan was the decision by COSATU to 'swell the ranks of the ANC' with working-class members in the hope of convincing the ANC to adopt a more pro poor and working-class approach. Pillay (2011) argued that this was a conscious attempt by COSATU to not build a counter-hegemonic project but that what was being planned was a change in ANC leadership. COSATU entered into the 'coalition of the wounded' which was comprised of those who felt the impact of President Mbeki's anger, were associated with corruption or were omitted from profiting from patronage politics (Pillay, 2013).

Even though COSATU and the SACP were of the view that the deputy president of the ANC, Jacob Zuma would be more attentive to working-class interests than President Mbeki had been so far (as Mbeki's faction backed the neoliberal '1996 class project'), by 2003, COSATU (2003a) was growing concerned about the impact of the ANC's NDR and its contradictions as it opined that:

> *"This process of class formation has produced internal contradictions within the multi-class Alliance led by the ANC. Opening of opportunities has been associated with growth of the middle class. Some elements now argue that BEE – and the National Democratic Revolution – requires only development of a black capitalist class. For these strata, the national democratic revolution means a non-racial democracy where the educated and well off can take high positions in business and government, guided by the motto of 'each for themselves, and the market takes the weakest.' Meanwhile, the job-loss bloodbath, casualisation and informalisation have the potential to weaken the power of the working class as a whole... In these circumstances, the direction of the National Democratic Revolution, and with it each component of the Alliance, remains contested."*

COSATU also raised the concern that if it critiqued the NDR, that the counter to this would be a 'tendency' within the ANC that all too readily accused COSATU of promoting a 'narrow' form of unionism where 'workers are only interested in shop floor issues' (COSATU, 2003b:7). To address this, COSATU recommended that a programme of political action be embarked on to

salvage working-class influence over the ANC. The first strategy necessitated deploying the tool of mass mobilisation via approaches such as stayaways which had been used annually since 2000 to express COSATU's dissatisfaction with privatisation. The second political strategy involved an attempt to contest the hegemony of the 'right wing' within the ANC.

A DENOSA official confirmed the power of the conservatives over the ANC and the loss of working-class influence by noting that:

> *"We used to support each other because we are striving for the same goal of advancing the workers."* (Interview with DENOSA Office bearers, Eastern Cape, March 2015)

COSATU (2003a) was aware that they were losing working-class authority and leadership of the NDR and that without being independent of the ANC, that the workerist element of worker control and workers interests were sidelined.

> *Our work starts with the belief that the unity of the working class and its allies, expressed politically through the Alliance, is critical to ensuring a more favourable outcome. But we need a more strategic approach, which lets us gradually build the effectiveness of the Alliance while restoring the hegemony of the working class in the democratic movement.*

The Alliance remained ANC dominated due to its leadership role in the NDR. COSATU did not pursue the contestation for political power and was reliant on the goodwill of the ANC, even though there was no co-determination in policy making among the partners. COSATU bemoaned the fact that, 'in the current ANC National Executive Committee there is not a single serving trade unionist or an activist of the mass formations' (COSATU, 2003b:17). COSATU (2003b) was not pleased about being the conduit for the working-class vote for the ANC when it claimed that:

> *"Once elections are over, we go back into the painful reality of being sidelined for another five years. All too often, COSATU's letters do not even get the courtesy of a response, and we are routinely told that 'government must govern, there is no dual power, there is no co-determination, and COSATU must not treat the Alliance as a bargaining chamber."*

On the issue of BEE, COSATU pointed out that despite the political and social successes, there was insufficient progress made to transform the economy. COSATU cynically noted that white business was working to recruit segments of the black leadership, which included political and trade union leadership in order to moderate the socialist desire to discipline capital. COSATU signaled that the state-backed BEE and the nascent black bourgeoisie were given attention while labour was negatively affected by a growing segmentation along the lines of a formal workforce that was unionised and a non-unionised segment of workers who were in atypical forms of employment such as causal work or faced precarious employment conditions. The unemployed were composed of the long term unemployed, those workers laid off and the youth who possessed a matric qualification but could not find a job and it was growing. Yet, COSATU (2006a) could not abandon BEE as it had its investment company and noted that:

> *"As with all union investment companies, the question remains whether and how Kopano can contribute to transformation of the economy. To whose benefit is the South African National Democratic Revolution – the black bourgeoisie and their white allies, or the working class and the poor?' The changing character of classes in South Africa raises broad political challenges to the National Democratic Revolution and working-class leadership. Class interests in the broad front led by the ANC are beginning to take shape, in particular through state support for BEE."*

This was more of a rhetorical concern as in practice, most union investment vehicles had prioritised profitability and not the transformation of the economy. By the early 2000s, the trade union investment companies had accumulated substantial financial assets, mostly in financial services, information technology and especially in media and casinos (Southall and Tangri 2006; Seekings and Nattrass, 2016). Union investment in the gaming industry contradicted even COSATU's own policy, as in its 2007 submission to the National Gambling Amendment Bill, COSATU (2007) stated that:

> *"We are opposed to any form of legalisation of gambling. We view gambling as a self-destructive vice that does a lot of harm to society. It gives false hope and promises to people that they can escape the misery of poverty, instead often plunging them into debt and deeper poverty. Instead of directing resources to productive investment, gambling*

takes away from the poor to the rich. It promotes greed. John Maynard Keynes once said that the only people who win from gambling in the long run are those who operate the gambling."

There was a growing disjuncture around the critical discourse of trade union investment companies and the practicalities of these companies as it made certain union officials very wealthy. While COSATU declared that it did not share the ANC's view of the importance of the theoretically nationalistic role of a patriotic black bourgeoisie that was individualistic in nature (even though former COSATU individuals had become wealthy), COSATU (2003a) was still committed to the growth of types of collective ownership through BEE, when it advocated for:

> *"To promote the active participation of labour and the community constituency in the development and implementation of transformation mechanisms such as BEE charters, and to demand the inclusion of labour in the BEE Advisory Commission."*

This was because COSATU (2003a) still subscribed to a significant part of the NDR as the ANC did, which was the absolute obligation to challenge white control of the economy in the quest for the racial transformation of the economy:

> *"Fundamentally, economic power remains firmly in the hands of white capital centred in mining and finance capital… without confronting the power of the white capital, we are all doomed."*

This indicated COSATU's adherence to the NDR and the ANC's success at hegemonising ideology in COSATU via the NDR, which it had been tasked to carry out. COSATU (2003a) remained devoted to the idea of a non-racial society as did the ANC:

> *"[COSATU] is at the centre of alternative cultural productions that highlight the experience of our people and which instill values based on the objectives of non-racial and working-class traditions."*

Yet COSATU's stance was that the empowerment of workers and citizens was not tantamount to BBBEE, as the ANC claimed. COSATU (2003a) stated that it was theoretically still faithful to more socially distributive forms of wealth and power and an inclusive economy, by stating that:

"Measures to ensure that investment are directed into productive activity, by capital in general, retirement funds (including the implementation of the COSATU policy on retirement funds), the public sector as well as strengthening of the social sector."

Therefore, COSATU welcomed the suggestion of an Expanded Public Works Programmes which was raised at the Growth and Development Summit that took place in 2003. This was targeted at delivering poverty and income assistance through temporary work for the unemployed. In addition to this and the need to consolidate, advance worker's rights and the need to fight HIV and AIDS, COSATU also praised 'state interventions to restructure the economy… (as the) state must play a leading role in transforming the economy toward more equitable and job-creating growth.' As COSATU had participated in Growth and Development Summit in 2003, they felt more optimistic that there was, 'the clearest practical indicators of the government's return to more progressive policies' and that there was a significant shift to the left as the ANC's manifestos in 1999 and 2000 when it had emphasised employment creation and equity (COSATU, 2006a).

As already indicated, parts of the ANC's left was angered by President Mbeki's 'neoliberal' policy and other parts of the ANC felt that they had not benefitted from Mbeki's BEE programme. This, together with his critique of SACP and COSATU leaders, had angered all these different groups. President Mbeki's opponents called this the '1996 class project' which referred to changes made by the ANC with regard to the liberal macro-economic policy in the form of the Growth Employment and Redistribution (GEAR) programme in the mid-1990s, the subjugation of the worker-oriented axis in the Alliance to the nationalists and Mbeki's BEE programme not being accessible to all who felt that they should be benefitting from it. Thus the forthcoming 52nd ANC national conference would present the opportunity for the working class to assert its leadership of the NDR. This was a chance for the working class to assert its role as, 'the leading motive force of the national democratic revolution' (Nzimande, 2008).

COSATU (2006a) concurred by urging that:

"The SACP needs to initiate the unity of the left movements that believe in socialism as part of a process of building a popular movement towards socialism, including convening the Conference of the Left."

This led COSATU at its Ninth National Congress, which took place in September 2006, to reinforce the importance of worker-centred politics when COSATU (2006a) stated that there was a need to:

> *"Advance working-class hegemony within the ANC. That while the historical constituency of the ANC remains the black working class and poor majority, the national leadership of the ANC is increasingly becoming capitalist and middle-strata in composition and character. Furthermore the organisation is also dominated by cadres drawn from the state and there are far too few cadres from outside of the state. Working-class leadership has been weakened within the national leadership structures of the ANC."*

COSATU (2006a) was conscious that ANC had moved further away from the workers and reminded the ANC of its working-class partner, when it noted that the ANC is:

> *"However a contested terrain that is lobbied by different strata in our society. This had caused conflict within the ANC and the Alliance and a shift from the ANC's earlier working-class bias as adopted in its Morogoro Congress of 1969."*

Two years earlier, COSATU (and the SACP) had supported an ANC victory in the 2004 national elections and that in COSATU's 'CEC political discussion paper 24-26 May 2004' there was confidence that there had been a change in the ANC and the government in the direction of a working-class politics that could be carried out within the Alliance (COSATU, 2004). Based on this, COSATU (2006a) resolved in 2006 to support the ANC going forward:

> *"We note that currently the ANC is dominated by the interests of capital rather than the working class. COSATU at its first CEC in 2007 should develop a set of policy objectives against which to measure the extent to which the ANC is able to shift to represent the interest of the working class."*

Therefore it was observed that as the 'organised formation of the working class' COSATU had to work to foster a more working-class bias in the ANC and that ANC policy orientation and leadership had to reflect a working-class bias. The Ninth National Congress of COSATU (2006a) in 2006 resolved that:

"Working-class cadres must ensure that activities of the ANC structures (including meeting agendas) are dominated by working-class issues and concerns such as the pursuit of all the Freedom Charter demands, and not dominated by narrow BEE interests, tenders, factionalism. Working-class cadres must expose the post-1996 class project, its limitations and its crisis. This must not be done in a factionalist manner, but in a manner that encourages debate and discussion within the ANC structures. Working-class cadres must contest for leading positions of the ANC to ensure that business personalities do not dominate the ANC."

COSATU (2006a) had taken it a step further by intervening, for the first time, in the issue of ANC leadership, when it stated that it wanted:

"To initiate a debate within the Alliance in the build-up to the 2007 ANC conference and SACP 11th Congress around the restructuring of the Alliance to make it an effective tool for social transformation. This debate should include the following: combating centralisation and patronage; confronting and debating ideological differences within the Alliance; confronting and debating growing class contradictions within the ANC, including the current accumulation path, which is creating a black bourgeoisie, and the need to maintain a pro-working-class, pro-poor agenda and leadership within the ANC and the Alliance; strengthening the independent programmes of the Alliance partners, e.g. debates about the SACP putting forward candidates should not be seen in opposition to the Alliance strategy."

COSATU's (2006a) declaration of its displeasure with President Mbeki's accusation of COSATU undermining the Alliance was directed at the leadership of the ANC, when COSATU stated that:

"A leadership debate underway in our country has polarised the Alliance formations, and COSATU, as a component of the working class, has a class interest in who leads the ANC and what policy direction the ANC and the state develop and pursue. It has become a habit to elevate individuals over principle, undermining the revolutionary morality that has guided the liberation movement."

Yet, COSATU (2006a) felt that there was no option but to support the ANC as it:

"Remains the only political party capable of fighting for a non-racial, non-sexist and free democratic society in South Africa."

It was patronage politics, another form of power, which was important in decisions not to mobilise against President Mbeki in 2007, fearing that he would retain power and then cut access (McKinley, 2012). A COSATU official explained the duty COSATU had as:

"The members of COSATU want to be militant around the agenda of transformation, including taking up on the ANC on these issues. But at the same time the members of COSATU are overwhelmingly the ANC supporters." (Interview with COSATU Official, January 2015)

The above indicates that COSATU's adherence to worker-centred policies endured but that they supported an ANC that carried on putting into effect its pro-market economic strategies, which meant that socialism had to be deferred. Economic policy making in the post-apartheid era has been the trickiest issue for the Alliance partners with the shift to further market deregulation by the ANC and the adoption of BEE policies by the Alliance partners. This really demonstrated how the ANC hegemonised ideology in COSATU by means of the NDR.

Evidently COSATU (2006a) believed that it could push for redistributive policies inside the Alliance (Buhlungu, 2006), as it stated that:

"The NDR seeks to resolve national, class and gender contradictions in our society and lay the basis for socialism, which means it must affect property relations. Because of the multi-class character of the NDR, various class forces continue to contest its essence. Since the ascendancy of the ANC into power, the primary contradiction has begun to elevate itself, with a life-and-death fight now underway for the control of the ANC between the working class and the comprador, parasitic, aspirant black capitalist class. The comprador element has gained access and influence through the office of the Presidency in policy formulation to disarm and re-direct the NDR from its socialist orientation. The post-1996 class project is in deep crisis and the solution can only be provided by a working-class leadership of the

NDR. The solution requires a complete break with the policies promoted or advanced by
this class project."

However, the subordination of COSATU to the ANC since 1996 (the class project) clearly represented the predominance of the NDR discourse within the Alliance but that the working class was not ever going to be in a leadership position. COSATU observed that the government's strategy of transformation, which involved the deracialisation of the previously white dominated formal economy worked to simultaneously obstruct economic growth that would favour the working class. It had led, instead, to the visible emergence of a black middle class within the public and private sectors as well as noticeable empowerment of a black political and economic elite which has been constructed around the ANC's takeover of the state and its promotion of the BEE strategy. COSATU (2006a) also noted the growing tensions within the Alliance and the ruptures among its Alliance partners as a result of the ANC's NDR and nationalism when it noted:

"We need to address two tendencies to misinterpret our efforts and our victory. First, some
commentators argue that the vote for the ANC was a resounding endorsement of neoliberal
policies. They argue that it gives the ANC a strong hand to deal with "its left wing" and
COSATU, so as to push through conservative policies, including privatisation, weaker
labour laws and budget cuts. This is part of an effort by some to split COSATU and the
SACP off from the ANC. This approach has two motives. Some observers hope to remove
the left from the ANC, leaving it at the mercy of big business and the right wing. They see
the ANC as a conservative party with historic left-wing baggage. Secondly, there is clear
agenda to split the Alliance in the middle. We are told that the existing opposition parties
can never succeed in building an alternative to the ANC. These commentators while being
correct about the opposition then proceed to argue that a new left from within the Alliance
stands the best chance of eroding the ANC support. Both groups suffer from wishful
thinking, predicting a split as if it were inevitable. They refuse to admit that the working
class is the primary motive force and forms the overwhelming majority of the ANC
constituency. They are blind to the fact that the ANC still represents the largest
concentration of progressive thinkers in South Africa. The Alliance shares the same
constituency that can never walk away from itself."

As noted above, COSATU had been aggrieved by their marginalisation within the Alliance due to the 'left strategy' which was devised in conjunction with the SACP to capture the ANC from within. COSATU chose to swell the ranks of the ANC so that it would introduce a 'working-class bias' into the ANC. The formal objective was to shift government strategy in a pro-poor and pro-working-class direction. The ANC adopted a tough 'new' attitude in public sector wage talks with unions in the wage negotiation period and would not bend to the demands of the unions for an inflation-related increase and then the ANC government unilaterally implemented its public sector wage offer. This further challenged COSATU's belief in collective wage bargaining. COSATU hoped that the government would allow for further negotiations but it vowed to initiate strikes in response to this.

At the ANC's significant 52nd National Conference, held at Polokwane in December 2007, Zuma was elected as the president of the ANC over the incumbent Mbeki. Zuma's election was the result of the popular insurgence within the ANC in an Alliance with COSATU and the SACP. Mbeki was recalled as State President in October 2008 and Zuma was installed into the position in May 2009. The Polokwane conference was a contributory factor for the first breakaway from the ANC in its history. Mosiua Lekota led the formation of the Congress of the People (COPE) which was constituted by former ANC members and set up to contest the national elections. It seemed as if there was a return to the ideals of the NDR focusing on the betterment of the lives of the disadvantaged in South Africa at the Conference.

Practically this signified that COSATU was further caught up in the ANC politics as it had backed the then Deputy President Zuma in the lead up to the ANC's Polokwane Conference in 2007. COSATU even participated in inflammatory attacks on the judiciary in support of Zuma. The selection of excerpts from particular COSATU documents and interviews with COSATU officials demonstrated that COSATU had moved in the direction of political unionism as it was drawn into the intolerant and factionalist nationalist/Marxist-Leninist politics of the SACP (and the ANCYL) (Pillay, 2013). The Mbeki period was significant as the connections between COSATU, the SACP and the government became incredibly tense as the working-class bodies thought that their interests were being neglected, as socialism had to be pursued, but this just further inspired COSATU and the SACP to adhere to the ANC's NDR and prepare their own organisational machines to support the ANC's electoral campaign. COSATU leaders even

endorsed the ANC's election Manifesto which they argued re-asserted the RDP as the basis for government policy. While it was openly acknowledged that the ANC had pursued an elite-led, liberal democratic and deracialised capitalism which had led to vast ideological opposition, political debate and disagreement within its own ranks and those of its alliance partners, COSATU consented to implement the NDR. This strongly demonstrated that the ANC had hegemomised ideology in COSATU by means of the NDR and that in this phase it meant that socialism had to be postponed.

8.4   President Zuma (2008-2017): The nation and resource nationalism

It was confirmed that the COSATU leadership was vital, with others, in canvassing support for Zuma in the months before Polokwane, stating that this was in the best interests and a victory of the workers and the poor. COSATU members joined ANC branches in a co-ordinated way and used a 'slate' – or a predetermined set of names for black votes – in order to oust Mbeki as party leader. When Zuma became the ANC's president, former unionists and SACP leaders (such as Gwede Mantashe) were deployed into top leadership positions within the ANC (for example, the deputy president and general secretary positions). COSATU (2015a) remarked that:

> *"The 8th National Congress of COSATU will go down in the annals of history one of the most important congress ever held by the Federation. At that 2003 congress we adopted the 2015 Plan and in the next 9th National Congress held in 2006 adopted a militant platform. We knew that this has to be our response to the threat to mortgage our movement. These battles were taken to new heights within the ANC itself when for the first time since the 1969 historic Morogoro conference, ANC members openly questioned and defied the leadership driving this 1996 class project. Eventually a full-scale revolt transpired in the 52nd national conference of the ANC. A new leadership and new policies that reaffirmed the ANC as the pro-worker and pro-poor liberation movement emerged."*

The ANC's Polokwane resolutions were interpreted as that the state would take on a more caring, interventionist and developmental role and so expectations had been raised, especially among COSATU. The Alliance partners anticipated that there would be an opportunity for them to exercise their influence and power even though they had promoted Zuma into the position of president and the ANC was the centre of power.

At its 9th National Congress in 2006, COSATU stepped into new terrain by adopting the resolution that it should identify its preferred candidate on the ANC. The Congress called for an 'Alliance Electoral Pact' to outline a new approach to the Alliance and take stock in June 2008 of whether there had been a determinable move to the left. A Central Executive Committee was organised to deliberate on the political discussion papers that had been drawn up for the ANC Conference including but not limited to 'Strategy and Tactics and Economic Transformation'. The Central Committee had agreed on the list of preferred candidates. The choice to draw up this list of preferred candidates had also corresponded with a section of the ANC that had become dissatisfied with the overall direction of the movement and so pushed for change (COSATU, 2015a). Reflecting on this, COSATU (2015a) noted that:

> *"This momentum proved to be so decisive and many attribute the eventual triumph in Polokwane to have been occasioned among others by the bold step and unusual step to debate and announce preferred leaders of another organisation in a COSATU constitutional meeting. The list of names adopted by the Central Committee COSATU was in tandem with the list of the forces campaign for comrade Jacob Zuma led NEC. COSATU had to work with these forces to ensure the decisive victory of the Zuma led list in the leadership contest."*

Evidence of the splits within the Alliance and among its partners was very clear when COSATU (2015a) stated that there were a number of hostile responses to this step taken by COSATU by the rightwing in the ANC, the moderates in ANC and the SACP who did not support the COSATU decision to name preferred candidates openly. This further highlighted that COSATU had moved further towards political unionism and has prioritised the factional politics of the ANC over worker issues. The mediation by COSATU was also about a camp challenging another camp in the ANC. In other words, part of COSATU (2015a) had become firmly part of an organised faction in the ANC that was embroiled in a struggle against another organised faction, when it was stated that:

> *"In the process we got tainted by whatever criticism against what became known as a 'Zuma camp'. We could no longer play a neutral role to unify the two camps that existed. The environment allowed little space for neutrality. It came down to either to be working*

for change in the ANC or defending the status quo. This somehow put pressure on our own internal unity and cohesion. A few comrades irrespective of their union's position on the matter were loyal to particular personalities and were broadly sympathetic to the political direction pursued by the dominant camp in the ANC. This small group has not been comfortable with the general direction the Federation, and had on many occasions expressed discomfort with the role COSATU played in the post-2004 period. Undoubtedly, this group was not a homogenous group as it brought together comrades with different class and other interests. This group was unified by the desire to bring change in the ANC leadership and internal political environment even though there is no unifying vision of what this means. This grouping kept on wrongly arguing that COSATU was engaging more on the political front at the expense of workplace struggles. After Mbeki's recall some of his supporters, led by Lekota and Shilowa, saw that the ANC was no longer a route to power, and decided to form a new party, which, in cahoots with other opposition parties, would fight for their class project outside, and indeed against, the ANC and the Alliance."
(COSATU, 2015a)

The struggle revealed not just the ANC factions but also those within COSATU (Southall & Webster, 2010). Indeed, support for Zuma had come from different groups, including parts of COSATU but it was not ideologically driven and nor did it offer a reasonable alternative to the government's economic programme.

As a COSATU official explained that the unions were supportive of Zuma had come from 'different parts' of the Alliance when it was stated that:

"With the Alliance there's a broad church made out of different class interest that comes around together around this notion of the national democratic revolution which is to build a non-racist, non-sexist democratic South Africa that undoes the legacies and history of apartheid, but most also deal with some of the socio-economic effects of it and transforming the economy so that there is a more equitable society. So that's always going to be a contest as different parts of the Alliance or different groupings in the Alliance are stronger at different points … Zuma's supporters had the unions and the working class behind them and they won the day." (Interview with COSATU Official, January 2015)

However, it was correct that that the social-democratic demands of the NDR (as contained in the Freedom Charter) were not materialising and that some felt that the compromises introduced by the ANC's adoption of market de-regulation or 'neoliberal' policies had introduced a major source of tension into the relationship among the Alliance partners. COSATU was convinced that a coalition of conservative forces had been formed and they were intent on following a capitalist class plan. COSATU accused this faction of wanting to eradicate the 'progressive' ruling party and enforce the international capital and its local allies programme and benefit from the '1996 Class Project' which pushed the neoliberal, pro-business and pro-rich GEAR policies. This section was the recipient of the narrow BEE policy that provided shares in big companies to a small number of Africans. COSATU had suffered as a result of the cutting of the workforce through retrenchment, privatisation and outsourcing. This was not confined to the private sector only. COSATU (2015a) noted that from 1994-2001 the public service lost over 100 000 positions, due to outsourcing and privatisation, particularly in hospitals and a marked deterioration of the state of public hospitals, many of which were unhygienic and dangerous. There had been a decrease in the nurse-to-population ratio, from 149 public sector professional (that is, registered) nurses per 100 000 population in 1998 to 110 per 100 000 population in 2007 (Coovadia, Jewkes, Barron, Sanders and McIntyre, 2009) for a number of reasons, including a decrease in the amount of nurses graduating as nursing colleges had closed in the late 1990s, the move from the public to private sectors as well as the work overseas, attrition due to retirement and voluntary service packages as well as HIV/Aids, which unfortunately affects 16 percent of the nursing profession (Coovadia et al, 2009).

COSATU was hit by public sector cuts and this affected its membership in these areas too but in terms of its composition, COSATU increasingly represented a more skilled, more educated and more secure worker, many of whom were directly employed by the state.

As a DENOSA official confirmed this shift in COSATU's composition when it was remarked that:

> *"Taking the history of the federation from its inception where there were industrial unions that were there in its founding stages with little participation from the public sector or state employed members we think that over the past decade the membership of these unions*

have grown in large numbers and have begun to occupy the centre stage in the trade union movement." (Interview with SADTU office bearers, Eastern Cape, March 2015)

In the 'Report of the Alliance Summit' that took place in May 2008, the ANC, the SACP, COSATU and the South African National Civic Organisation (SANCO), reaffirmed the ANC-led Alliance as the strategic political centre. Significantly, OSATU (2008) noted that:

"Trade unions themselves in their whole history are subject to contestations by various class forces in society and that these ideological contestations have taken different forms in different historical periods. COSATU is no exception. Trade unions are not class political parties; they are class organisations that should always locate their struggles within the context of broader class struggles in society. COSATU has consistently maintains this strategic posture. COSATU is the organised detachment of the working class that is politically capable of defending the Polokwane gains. The working class is the chief motive force in Alliance with other popular forces that have objective interests in the deepening of the NDR such as the rural poor and the broad petty bourgeois strata."

This also signified was that there was renewed confidence among COSATU that the new ANC leadership would deliver on its promises. The report from the 2008 Alliance summit showed that COSATU was optimistic about its relationship with the ANC under President Zuma and that trust has been placed in the ANC. This was referred to as the 'honeymoon phase' (Pillay, 2011) and it lasted from 2007 to 2009.

COSATU (and SACP) had infiltrated the branches of the ANC as far back as 2005 (Southall & Webster, 2010). There was also an internal capture of the ANC as branches has been swelled by more professionals, including the lower professionals, notably the teachers and the nurses who had become unionised, employed by the post-apartheid state and significantly COSATU members (Southall & Webster, 2010). The growth of public sector members in COSATU was very significant as they assisted in the internal capture of the ANC. This helped to stabilise COSATU structures which in turn provided the critical and orderly backing for a Zuma slate of candidates and for President Zuma (Southall & Webster, 2010). As these changes had taken place, it was hoped that President Zuma would now deliver on his promises, as COSATU (2008) stated:

"In the current conjecture the NDR requires the creation of developmental interventionist state that among others seeks to roll back the market, discipline, regulate and expropriate capital to advance our democratic developmental objectives. The commitment in the new government to build a developmental state, to break-away from the inherited apartheid development path and to meet socioeconomic challenges and priorities identified in Polokwane, to advance the building of an interventionist, activist, socialist-oriented developmental state whose role in the economy is aimed at implementing the provisions of the freedom charter without distortion while at the same time combating right-wing revisionist tendencies to the Freedom Charter."

Furthermore, it was held that COSATU had the opportunity once again to revive a new class-based socialist political agenda that would attract all the different sections of the South African Left and make connections with the developing mass movement of organisations who were all wrestling with the ANC's neoliberal policies. The NDR's code also made clear that the ANC's broad objective was to permeate all state centres of power and the economy, civil society and society. The ANC declared at its 2007 Polokwane Conference that it would work to accomplish its ideological hegemony and control throughout the government and society, which was referred to as 'the battle of ideas' (Beresford, 2012). Again, this clearly indicated the continuing hegemonising of the NDR within COSATU and within the Alliance more generally (Southall & Webster, 2010).

Willie Madisha, president of COSATU and of SADTU as well as SACP central committee member was expelled after a decision was taken at COSATU's central executive committee meeting early in 2008. It was alleged that his expulsion was really due to his support of former President Mbeki (as he had supported President Mbeki's failed bid in December 2007 for a third term as ANC leader while COSATU and the SACP had backed Zuma). It was assumed Willie Madisha was the victim of the differences between factions of the ANC and the Alliance partners over their support President Mbeki or for Jacob Zuma.

As a COSATU official offered this as the reason for the continued support of the ANC from COSATU:

"COSATU will not allow anything that will be in opposition to the ANC because COSATU still believes that a strong ANC is a vehicle to achieve the objectives of the working class as an Alliance partner and a ruling party. (Interview with COSATU official, National Office, March 2015)."

SADTU (2009b) also clearly demonstrated how the ANC's factional battles were playing themselves out in the affiliates of COSATU. SADTU stated, in response to a claim that the former COSATU president and SADTU president, Willie Madisha, was encouraging teachers to leave SADTU and join his new independent union:

"The media is being taken for a ride by Madisha and his masters in COPE. Madisha himself is a businessman. He is no longer a teacher having been dismissed by the Limpopo Department of Education for absconding from his post. Clearly Madisha's efforts are backed by COPE, hardly independent of party politics."

The Congress of the People (COPE) was the political party set up after the departure of some of the ANC's prominent officials and former ministers in President Mbeki's government. Willie Madisha went on to become the deputy president of COPE. COSATU had taken on the role of the kingmaker and COSATU's Central Executive Committee's statement titled, 'The Meaning of Polokwane', asserted, among others, that COSATU would support the new leadership of the ANC and work for a clearer elaboration of a progressive developmental state that has a bias towards the working class and a less neutral relationship with capital. These positions were supplemented by the Declaration of the Alliance Summit of May 2008 where it was stated that the 'Alliance would work together to formulate policy and monitor its implementation through joint ANC/Alliance policy committees and other mechanisms' (Southall & Webster, 2010:157). It was COSATU's public sector affiliates that were to take on the key role as very significantly and COSATU (2008) mandated public sector unions to:

"Including those organising in parastatals and municipalities to work together in developing a common perspective and programme defining their role in building the developmental state." (COSATU, 2008)

COSATU realised the political significance of its dominant public sector membership base by stating that:

> "The majority of the members in the union now is mainly from the public service, linked to the public services at a national, local government level. The manufacturing unions have more militant membership historically. But the public service unions are also starting to develop some of those cultures and there's been quite hard bargaining and strong protest actions linked to the demand of workers that put forward. So there has been a change in the dominance of manufacturing in the unions where it's a lot more balanced now and that balance is reflected in the leadership of COSATU and in the way that COSATU takes up the issues." (Interview with COSATU Official, January 2015)

The continued process of the redeployment of trade unionists into parliament and the government meant that COSATU became even more subject to the discipline of the ANC. COSATU clearly acknowledged that the NDR carried with it the dangers of clientism which meant that it had become reliant on the benefaction of the ruling party as it now derived its organisational strength and political influence within the Alliance from its public sector membership. COSATU had now become the radical protector of white-collar workers' rights in the public sector and was disapproving of the effort by the state to remove some of the benefits won by public sector workers. COSATU opted to stay within the ANC as it was the best place to defend its right to larger influence and power from within it. These statements also patently exposed that COSATU related positively to the state, even though it was proclaimed that the '1996 Class Project' was defeated. Nevertheless, COSATU had already become a significant player in the class compromise that had aided a 'narrow BEE' victory at the ANC's Polokwane conference. The optimism associated with the demise of former president Thabo Mbeki in 2008 and the installation of Zuma served to obscure these contradictions and realities.

COSATU's 10th National Congress in 2009 took place four months after President Zuma's election. COSATU (2009) was still optimistic about the gains to be made under the Zuma administration when it declared that:

> "We will not speak about the political investment we have made since we stood up against the encroaching dictatorship and Zanufication of the ANC in the late 1990s and until the

triumph of 2007 in Polokwane, where our ideological foes met their Waterloo. When the
historians write honestly about the contributions the workers movement made in this
period we are certain they will speak in glowing terms about COSATU." (COSATU, 2009)

What the pro-Zuma mobilisation had also revealed were the new constituencies and new personalities not known to South Africans (Buhlungu & Ellis, 2012). President Zuma's victory speech stressed the paramount significance of an ethic of unity within the ANC which was imperative for the NDR to succeed. President Zuma had acknowledged that there was an assortment of views within the party but the obedience of the individual to the party was paramount. Ideas could be discussed and opposing opinions could be had but that changed once the party took a view on the matter. When this occurred, the good 'cadre' fell into line. 'Unity' was regarded as respectful acquiescence with the prevailing consensus. The good cadre should thus give up 'personal considerations' just as President Mbeki had done (Brown, 2016).

President Zuma's election was meaningful for the supporters of his campaign as his arrival solidified some affiliates such as SADTU's loyalty to the Tripartite Alliance (Southall, 2016). The changes that took place within COSATU were significant too as it contained many new members and new leaders who had new ideas about unity, loyalty and the political tradition of support for the ANC, which were not exactly the same as those who had toiled to build and cement the Alliance. In 2009, the then general secretary of SADTU, Thulas Nxesi, welcomed the ANC's overwhelming majority achieved by the ANC in the 2009 elections. SADTU (2009b) praised the ANC electoral victory as proof that:

"Together we have prevented the neoliberal agenda to divide and weaken the ANC.
Together we have strengthened the pro-poor and pro-working-class bias of the ANC."

In 2009, DENOSA approved of the political positions taken by the movement at Polokwane and stated that, "DENOSA congratulates and welcomes the new cabinet appointed by President Zuma" (*The Shop Steward*, August 2009:8).

COSATU wanted to increase its influence within government and likewise SADTU within COSATU (Southall, 2016). COSATU (2009) still felt obliged to profess its disdain of BEE and even its own federation's support of and entanglement in it, when it remarked that:

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"We did not properly analyse the power of capital. We accepted that deracialisation of the economy will unavoidably be one of the products of the NDR. What we did not anticipate is that this would unleash unbelievable levels of crass materialism and careerism that have combined to kill some of the best and finest traditions of our movement such as solidarity and selflessness. As we have said so often, leaders are not standing at the back of the queue for the masses to feed themselves first, they push themselves to the front and actually take the food out the mouth of the poor as Gautrain and Telkom shares debacle showed."

Yet, COSATU's trade union investment companies and its dominant public sector membership gave it some clout and the proximity of the federation to the ANC leadership helped secure privileges, financial benefits and political advancement for COSATU. This was not evenly experienced which signified that COSATU too was divided by its own factions. Some factions in COSATU (2015a) noted that other factions had become preoccupied with Alliance politics (Masiya, 2014), as it was noted that:

"A consideration driving the political thinking of the Federation is the palace politics that have characterised the Alliance in the recent past. Political intrigue has taken the place of genuine engagement around strategic issues facing the movement and our society."

There would subsequently be major disagreement about the performance and expected direction of the federation itself, its affiliates and their membership. NUMSA accused COSATU of abandoning the implementation of the Freedom Charter and that it was unwilling or inconsistently pursuing a radical (that is, socialist) democratic programme around the ideals of the Freedom Charter (Masiya, 2014). This faction of COSATU (2009) identified that it was ideological weaknesses among the Alliance partners that was an important challenge to the federation. It was argued that attention had to be paid to it and to addressing the growing polarisation between the factions:

"The main weakness remains that of ideological clarity. The ANC faces a challenge of clarifying the specific role of the working class in its mission for social change, COSATU faces a challenge of continuously clarifying the role of the working class in the NDR, and the SACP faces a challenge of providing theoretical and ideological leadership as we emerge from the dark age of the 1996 class project. Failure to undertake these

clarifications will open up yet another neoliberal incursion into our ranks, in the name of
the NDR."

As a SADTU official confirmed the growing factionalism within COSATU:

"We are of the view that the rupture is between those who want to preserve the status quos
and do not want radical change except they want radical change only in rhetoric or when
they are addressing the masses but in terms of policy formulation there is nothing that
indicates that there is really a commitment or political will for a radical change in the
country. For the future of the Alliance, one would say it's clear that with the current levels
of attack spearheaded mainly by the leadership of the vanguard party attacking those
unions that are still premising their engagements on the Freedom Charter, like the general
secretary of the federation and NUMSA, they are seeing clearly that there are deviations in
what was agreed upon. Now there doesn't seem to be willingness on the part of the
leadership especially of the ANC to sit down and listen. There is the stance of arrogance
and wanting to dismiss from the Alliance if need be all those who still stand by the
principles that were agreed upon in the Alliance like the implementation of the Freedom
Charter." (Interview with SADTU Office bearer, Eastern Cape, March 2015)

In 2010, the then General Secretary of COSATU, Zwelinzima Vavi, charged two ANC Ministers
of corruption and that President Zuma for neglecting to act on the allegations. Leading COSATU
members had reached the conclusion that the Zuma administration was marching down the same
old path that they had been down under President Mbeki. The ANC pursued disciplinary
charges against Vavi. A number of discussion documents between the ANC, COSATU and the
SACP were disseminated in the run-up to the ANC's general council meeting in Durban in 2010.
COSATU also issued two extensive discussion documents, namely, 'The Alliance at a
Crossroads: The battle against a predatory elite and political paralysis' and 'Are the Polokwane
Economic Policy Resolutions being implemented by government?' in 2010. This signaled that
under President Zuma the NDR had become a project of state capture and personal enrichment
for certain loyal sections.

In September 2010, President Zuma pursued a strategy of compromise with the Alliance partners
when plans for the New Growth Path (NGP) were announced (the NGP was an economic policy

agenda which would guide the country's jobs plan). At this point, COSATU remained confident that the ANC-in-government would accomplish job creation and this served to placate the concerns COSATU had about state corruption.

When COSATU's 11th National Congress took place in September 2012, the Congress decided that all political resolutions were to be submitted to the Central Executive Committee (CEC) with respect to COSATU's part in the Alliance, the relationship with the ANC and the SACP, its views on political transformation and the fight against corruption.

A DENOSA official connected this move by COSATU to the divisions in COSATU which was linked to the dominant faction within the ANC and noted that:

> "The source of these division in COSATU it is mainly made by the ruling party because COSATU was very much vocal before and now when they want to try and put fire on COSATU so that they are not vocal." (Interview with DENOSA Office bearers, Eastern Cape, March 2015)

The decision to submit its political resolutions to the Central Executive Committee was taken in light of the release of the 'Political Report to the COSATU 11th National Congress' in 2012, where the General Secretary of COSATU (2012), who authored the report, argued that there was:

> "A crisis of poverty, inequality, and unemployment which is reproduced by the structural features of our economy. This systemic crisis has been analysed repeatedly by ourselves, as being a function not only of inherited economic relations, but also worsened by inappropriate neoliberal policies, as well as policies focused on promoting elite economic empowerment. The August 2010 COSATU CEC Discussion document on 'Alliance at a crossroads – battle against a predatory elite and political paralysis', correctly painted a very gloomy picture of a fraught political environment, in which the predatory elite, and the emergence of other negative tendencies was paralysing both government and the Alliance from taking forward the Polokwane mandate."

This clearly showed up that splits within the hegemonic pro-Zuma group in the Alliance and within COSATU itself that had emerged from 2010. Indeed, this was also evidence that COSATU had again become estranged from the ANC government and from the SACP but also

how the NDR project had taken on too many contradictory forms under the respective presidents. The General Secretary of COSATU (2012) conceded that:

> "The 2010 CEC discussion paper in assessing where the country is post-Polokwane arrives at a number of conclusions: Firstly that, despite some important gains, we are far from achieving the bold vision set out by ANC Conference delegates. Indeed, we run the risk of moving even further away from that vision. Secondly that, if we don't act decisively, we are heading rapidly in the direction of a full-blown predator state, in which a powerful corrupt elite increasingly controls the state as a vehicle for accumulation. Thirdly, the Alliance is facing political paralysis, which needs to be unblocked."

A SADTU official confirmed that the factions within COSATU over the corruption that now served as a serious factor as:

> "It's clear that there has been some engagement that pushed the leadership of the trade . union to a certain corner that has an impact then to the federation." (Interview with SADTU Office bearer, Eastern Cape, March 2015).

A faction of COSATU unambiguously declared that a corrupt elite increasingly controlled the state as a vehicle for accumulation which patently did not favour the working class never mind the rest of society. Under President Zuma, the NDR had cynically legitimated state capture as Sitas (2010) argued that what had emerged since the 2007 Polokwane conference was the '2010 Class Project', which was a political power-bloc linked around those that had triumphed at Polokwane in which political gain was transformed into economic gain, albeit as we all know for a very small group. What had clearly gained victory at the ANC's Polokwane conference was a totally different faction that went on to assert itself as the hegemonic force within the ANC and after the removal of President Mbeki and the 2009 elections in particular, the political state of affairs provided the gap for these African nationalists connected to the nascent black bourgeoisie to capture the leadership of the ANC and COSATU (Pillay, 2008).

This power-bloc that desired to put COSATU (and SACP) as well as the other factions within the ANC in their place, excluded the left-leaning leaders and upheld a non-class bias in the politics of the ANC (Sitas, 2012). The General Secretary of COSATU, Vavi insisted that 2010 faction

was a small group struggling for 'positions for personal accumulation and their agenda of crass materialism' and were engaged to take over the Alliance by (once again, as President Mbeki had done previously) alleging that a communist takeover of the ANC was about to occur and used anti-COSATU (and anti-SACP) rhetoric to make its point. This part of the ANC wanted to curtail the growing influence of the group that had brought Zuma to power. Yet again, the tensions over the leadership and direction of the ANC were clearly reflected in COSATU as a SADTU office bearer noted:

> *"When you have strong trade unions hence the move or concerted effort is to make sure that they paralyse the federation so that when they are on the side enjoying there's no union that is strong enough to cause whether they are in government or in the leadership of a leading party that COSATU has been in Alliance with all these years including the leaders in the South African Communist Party. It's not about ideology it's about comrades wanting to advance personal ambitions and they are using the rhetoric of the language that they know will appeal to workers when they use the language of the revolution that would appeal to the ears and hearts of members while deep down they know they are not talking about those things all they are talking about is the need to advance their personal interest and their careers as individuals."* (Interview with SADTU office bearer, Eastern Cape, March 2015)

The relationships within the Alliance were complex with many union leaders wearing two hats and undertaking dual leadership roles. The Alliance partners were independent but the Alliance itself was a hyper-malleable arrangement based on deep historical ties and solidarities among members and leaders (Buhlungu & Ellis, 2012; Buhlungu & Psoulis, 2000). At the same time, there was incessant fluidity in the Alliance and the balance of power was constantly changing. Polokwane 2007 seemed to be the lone case of when the balance of power was tilted in favour of the left and socialist forces within the Alliance (Buhlungu & Ellis, 2012) but this was not to be as it was the 'other Zuma faction' that ultimately emerged as the victors.

The government under President Zuma launched the National Growth Path (NGP) economic policy in 2010. The aim of this policy was to boost economic growth to between six percent and seven percent per annum to create five million jobs by 2020 and reduce the unemployment rate

to 15 percent (Mayisa, 2014). COSATU now formally countered that it had not been consulted and argued that the NGP could not transform the economy and was a continuation of neoliberal policies. COSATU took the view that the NGP was not a break from the neoliberal policies and that the state had to invest in sectors where jobs could be created such as the SOEs (Pillay, 2011).

COSATU launched the Living Wage Campaign as a result (COSATU, 2010) to advance the claim that too many workers received poverty wages. COSATU also convened a Civil Society Conference in October 2010 with the aim of rebuilding a strong mass movement, working with people and the government to tackle problems facing working families and so this indicated a move away from political unionism to social movement unionism (Pillay, 2011, 2013). Within this period, COSATU challenged the e-toll gate system in Gauteng (this was a user-pay principle for motorists to use the highways) and labour brokering (this is when workers were hired by companies through a third party who was the employer and usually they did not pay decent wages nor benefits) (and more broadly the government's lack of addressing the problem of labour informalisation). COSATU's affiliates also embarked on a one-day stayaway in 2012 to make known their grievances around these issues.

Yet, there was an opportunity for COSATU to be involved in policy processes and determine policy content after the Polokwane conference. COSATU leaders were added to ANC's parliamentary list during Zuma's second term such as Thulas Nxesi and Fezeka Loliwe (SADTU), Senzeni Zokwana (NUM), Fikile Majola, Joe Mpisi, Thozama Mantashe and Pulani Mogotsi (all from NEHAWU).

The ANC's factional battles played out among the top leadership in COSATU. The president of COSATU, Sidumo Dlamini, wanted COSATU to support the re-election of President Zuma and Vavi did not. In August 2013, Vavi was suspended from office over the sexual harassment of a COSATU staff member. He effectively contested the procedural aspects of the suspension in the High Court in 2014 (Satgar & Southall, 2015) and returned to work but COSATU was already deeply divided. The passing of the Employment Tax Incentive Act 23 of 2013 also known as the youth wage subsidy occurred without being endorsed in NEDLAC. The outcome was a further deepening of the division in opinion among Alliance members. There was clear disapproval of

this legislation from COSATU but not from the President of COSATU. The President also openly slated those who criticised the ANC. The methods used by the Zuma supporters to remove an unaccountable faction and to unify the party embedded factionalism within the Alliance and within COSATU and established a divisive leadership approach to leadership races. Factionalism was now prevalent in all three of the Alliance organisations.

In a speech delivered at SADTU's National Congress in 2014, Sidumo Dlamini said:

> *"We thank the entire membership of SADTU for leading from the front in working with other unions and the Alliance formations doing mobilisation work during elections leading to the ANC-led Alliance winning with a more than 62% convincing majority. Thank you for implementing a COSATU resolution against those who went public against it even from within our ranks. Were it not for the energy, bravery and resources provided by SADTU with other COSATU unions our people may have stayed in their houses demobilised by the media which was working with the opposition parties to de campaign the ANC."*
> (COSATU, 2014)

The COSATU affiliates had clearly taken up opposing positions on various matters and so factions within COSATU continued to evolve from the situation in 2011 when the Central Committee meeting of COSATU had decided that draft resolutions on political issues were to be deferred and consigned to a lower structure, the CEC, to circumvent an ugly showdown face-off between the factions. As a DENOSA official stated this most eloquently:

> *"Now at COSATU let me put it in that way we are not pulling the same way that we used to pull."* (Interview with DENOSA Office bearers, Eastern Cape, March 2015).

A COSATU official was far more frank about the factionalism within COSATU:

> *"I think personally, the Alliance has been captured by the factions but I think it continues, I mean it's still there just that the Alliance of the 2000's, 2014, 2015 and these are not similar to the Alliance of 1946, 1955."* (Interview with COSATU official, National Office, March 2015)

In August 2012, miners at a platinum mine at Marikana who had been on strike over their wages, were shot at by police in the North West Province and 34 were killed. Despite this, President Zuma was re-elected to the presidency of the ruling party in December 2012 in Mangaung. The COSATU faction supporting President Zuma's second term felt it necessary to issue ultimatums against Deputy President Kgalema Motlanthe, a former NUM General Secretary, who was contesting the ANC presidency, rather than address the killing of the Marikana workers. Jara (2017) contended that due to the bureaucratisation of the trade union (and the SACP), COSATU has abandoned its principle and working-class struggle. Furthermore, he asserted that from 1990s, the SACP managed to dominate COSATU and then continued to make it subservient to the ANC. This was extended at the ANC's Mangaung national conference in 2012 as some COSATU leaders were elected to the ANC national executive committee (NEC) whereas before trade union leaders were drafted through seats in parliament, where there was more of a chance to be accountable to their constituency. As the social and economic problems in South Africa had grown and there were many political crises, there had to be tighter political control of COSATU through the ANC NEC. COSATU thus surrendered working-class independence for an accommodation with capital and this was catastrophic for workers as now COSATU were accountable to the ANC (Jara, 2017). As a DENOSA official contended:

> *"If you are aligned to a political party and things are not advancing, the workers will come We are not in ANC we are just poorly looking after workers so they are going to push us. They are independent unions so really we are becoming weak we are not trusting each any more."* (Interview with DENOSA Office bearers, Eastern Cape, March 2015).

However, the organisational strength of COSATU was an issue too. COSATU continued to represent permanent and fulltime workers and had not made links with the unemployed and workers in atypical employment relations. New trade unions emerged and some were breakaway groups from a dominant trade union within a sector when they spotted a representation gap. New trade unions emerged in mining, manufacturing, healthcare, teaching and transport (Bischoff, 2015) and worker rebellions were the underlying reasons for the split of SAMWU (the municipal workers' union), The Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union (CEPPWAWU) (the chemical and allied workers union), in the Eastern Cape for the SADTU

split, for the SATAWU (the transport workers' union) split and many new trade unions emerged in the public sector such as the South African Public Service Union (Jara, 2017).

Some members of SATAWU left and joined the National Transport Movement (NTM) when the president of SATAWU resigned and workers believed that their interests would be better represented (Bischoff, 2015). SAMWU split into two, with The Democratic Municipal and Allied Workers' of South Africa (Demawusa) formed by breakaway members of SAMWU in 2015 and The Municipal and Allied Trade Union of South Africa (MATUSA) formed just before that.

Despite the internal strife and criticisms, COSATU's formal response to the New Growth Path framework was released and it stated that COSATU continued to support the ANC on the basis of its history and track record of struggle against apartheid oppression and exploitation and the ANC's manifestos being biased towards workers and the poor (COSATU, 2014). Intense divisions with COSATU were dramatically revealed over the question of further support for the ANC which at the time was President Zuma just before the ANC's 2012 National Congress in Mangaung. COSATU supported the ANC as opposed to other political parties as they had failed to present anything better than the ANC. According to Chun and Williams (2013) this was evidence of the predominance of political unionism and the continued predominance of the ANC's hegemony of the NDR in COSATU.

At the end of 2014, NUMSA was expelled from COSATU as it was alleged that the expulsion stemmed from its decision not to support the ANC in the general elections in 2014 which violated COSATU's constitution. In COSATU's 'Draft Discussion document on the Unity and Cohesion of COSATU' tabled at COSATU's Special National Congress, which took place in July 2015, the differences in ideology, that is, the workerist and populist debate that persisted among the affiliates, was raised to justify the expulsion, when COSATU (2015a) stated:

> *"Some of the differences were between the unions who were aligned with the principles of the Freedom Charter and affiliated to the UDF and those from the federation of South African Trade Unions (FOSATU), who remained largely 'workerist', arguing for autonomy from political interests. Over a period of time factions have become a permanent feature of the organisation and factions have developed a life of their and pull the*

organisation into different directions to a point of rendering the organisation stagnant and directionless when leaders cannot be decisive because they pay more allegiance to their factions than to the organisation they lead."

In identifying what challenges faced the Federation and the ideological tensions between socialism and the ANC's nationalism, COSATU (2015a) acknowledged that:

"The recent history of the federation will show that the period between 2007 and 2015, will go down in the history of COSATU as the period in which COSATU policies and its principles were tested to the limit. It is the period in which the federation had to choose between collective leadership and individualism, between defending its constitution and allowing defiance of its constitution and policies, between standing firm on uniting the Alliance to maximise the unity of the people's camp or allowing undermining of the liberation movement, between defending its character as a trade union federation or allow being turned into a political formation to replace both the ANC and the SACP to pursue the NDR and the Struggle for socialism respectively."

The involvement in the ANC's factional politics and divisive leadership battles had been engrained in COSATU (2015a) as well, as the following demonstrated:

"COSATU was however, not immune from the political contestation characterising the ANC-led democratic movement before Polokwane. This manifested itself in the hot contestation for leadership and the direction of the Federation. Negative campaigning, including the use of tribalism, character assassinations and selective use of the mass media to destroy particular leaders or contest Federation position; was the hallmark of electioneering. To the public, COSATU appeared like a movement at war with itself."

Expelling NUMSA evidently helped smooth over these tensions as COSATU (2015a) stated:

"The Federation survived that test and emerged united behind a common programme and leadership, to the utter horror of the skeptics and dooms-day philosophers. We owe it to the maturity of delegates and the strength of our organisation that we survived the test."

Baskin (2019) argued that one aspect of NUMSA's expulsion was that it made COSATU mainly a federation of public sector workers but it stifled the critical voices within COSATU concerning the Alliance. The ANC's factional politics were best reflected in SADTU where in reaction to the expulsion of NUMSA it was stated:

> *"...because people all they are doing is insulting NUMSA for raising those issues without looking at the content of what NUMSA is raising. There has not been an open debate in the structures of SADTU to say this is what members are saying and leaders at the executive level speak and attack NUMSA even though they are speaking on behalf of the members of the organisation in articulating whatever they're articulating which obviously is the view of the SACP. They are always attacking NUMSA so that they discredit NUMSA in what they are raising which would be able to take us forward for all of us to unite and pursue that kind of a direction."* (Interview with SADTU Office bearer, Eastern Cape, March 2015).

COSATU itself was seemingly unworried, with the expulsion of NUMSA but there was concern among its affiliates about the effects of NUMSA's expulsion as the emergence of rival trade unions would impact on membership and on working-class interests. Instead COSATU focused on the Alliance and the top echelons of the partners and their leadership battles and maintained that it was a militant, radical, transformative and independent trade union federation which was primarily in a strategic revolutionary Alliance with the ANC, SACP and SANCO. COSATU stated that it rejected the principle of an independent federation as this meaning had been hollowed out. It was rejected as it was used to over-emphasise COSATU's independence from the ANC and SACP which over time amounted to systematic separation from its Alliance partners. The levels of trust internally in COSATU were low too as those who participated in the ANC and SACP constitutional structures, and so were not critical of corruption, were regarded as sellouts especially when decisions were taken that were not in conformity with COSATU's policy (COSATU, 2015a).

A DENOSA official explained this further:

> *"COSATU is definitely on the crossroads and they don't see eye to eye with the SACP and they don't see eye to eye with our own ANC… corruption has taken over… COSATU*

cannot pronounce without fear or favour on these particular corruption because people are going to be targeted.” (Interview with DENOSA Office bearers, Eastern Cape, March 2015).

COSATU clearly conceded that tensions within the federation and within the Alliance had increased after the ascension to power of the Zuma camp within the ANC (Pillay, 2015). For the bald-faced ANC supporters inside COSATU, it was not that the problems South Africa faced such as growing political corruption, leadership failings, incompetence and policies that were responsible for the failure to address the triple problems of poverty, inequality and unemployment. These had not been attended to within the ‘militant, racial, transformative and movement’ following the NDR as it had changed under President Zuma into a state capture project. COSATU’s participation in the ruling party and forums brought some benefits but turned attention away from building the union movement (Pillay, 2015) and advancing workers’ interests.

COSATU pointed out that it remained critical of the government’s adherence to a neoliberal framework and its 1996 Class project and indeed COSATU (2015a) campaigned against labour broking and the e-tolling of highways, among others,

> *“(In the) period between 2005 and 2015, the federation continued with its campaigns and a focus on building the Alliance. These included the Jobs and Poverty Campaign, fight against corruption, contesting the neo-liberal policies and the mass based character of the ANC, demanding that the ANC –led Alliance be reconfigured in a manner that makes it to be a strategic centre of power based on our proposal for an the Alliance Pact.”*

In this period, COSATU did not depart from the NDR by making unreasonable ‘socialist’ demands on the government (Pillay, 2015), nor did it take on capital in the state. It seemed that COSATU continued to justify the class exploitation of its membership under the banner of the ANC’s nationalism, the NDR project. COSATU moved to resolve to deepen the NDR and the federation adopted the 2015 plan that would guide its work towards its 30th anniversary. COSATU (2015) declared that the NDR had not exhausted its potential and that it was critical of those who alleged that the ANC, a middle-class led national movement, had fallen victim to the same tendency as others and that it had betrayed the working class (and peasantry).

COSATU confirmed that it adhered to the dominant discourse in the democratic movement, which was the ANC-led mass movement and the NDR. COSATU found that the concept of the NDR was still relevant for African peoples' desires for self-determination and to participate in the affairs of the country as the NDR represented the desire to build a more egalitarian non-racial, non-sexist society and democratic society as the fundamental national, class and gender contradictions remained deeply engrained in post-apartheid South Africa (COSATU, 2015a).

COSATU (2015a) still held firmly that the NDR, with all its vagueness and the source of tension between itself and the ANC and SACP, was the basis upon which to build socialism, as the non-socialist ANC had just been distanced from the ultra-left ANC:

> *"For socialists within the Congress movement, the NDR is not a detour but the most direct route to socialism. That means, it must build the momentum and capacity for socialism as captured by the SACP slogan: Socialism is the Future – Build it Now! In simple terms, this mean waging a struggle to de-commodify basic needs, build a strong development and democratic state; open new sites of collective accumulation including cooperatives, and the strategic deployment of social capital in the form of retirement funds. If we set up the argument in this way then the connection between a socialist struggle and a national democratic struggle in the concrete conditions of SA is also better clarified. The NDR is not so much about laying the basis for a subsequent struggle for socialism – it IS the basis on which a socialist struggle needs to be waged here and now in SA. Hence the SACP slogans – 'advance, deepen and defend the NDR' (which is what we were doing, for instance, at Polokwane)."*

Yet, the continued entanglements in ANC politics continued to produce conflicts within COSATU (2015a) especially among its leadership:

> *"This also raised a question of the extent to which COSATU cadres link their trade unionism with political activism where they reside. It also brought to fore the weaknesses in COSATU's internal processes of identifying leaders. This particular weakness continues to manifest itself particularly in the unity and cohesion of the Federation."*

Since the ANC has charged itself with the historical challenge of 'transforming' (or radical economic transformation) South African society by means of the NDR, it labelled the strategies of the opposition, whether they were political parties or civil society organisations that were critical of the NDR or its tactics, as being anti-transformation and thus illegitimate. Under President Zuma, the NDR was legitimised for state capture purposes as it was placed outside the boundaries of acceptable political debate. COSATU firmly adhered to this and used the same rhetoric to stress its loyalty to and support of the cohesion of the federation.

The conflict within COSATU was about who supported the leadership of the ANC and this battle was confirmed by the DENOSA official:

> *"There are personal clashes within COSATU and it is not ideological. There are no alternatives offered. There is a breakdown in the relations between the leaders and this impacts on the working class. The labour movement suffers in this and the mending of relations needs to take place. There is also a need to re-prioritise working-class issues."* (Interview with DENOSA official, Johannesburg, 2018).

COSATU's public sector affiliates were still key and it gave COSATU some hope that it could influence ANC politics within the Alliance. SADTU was central to this, in that, as COSATU (2015a) noted:

> *"The new NEC is the most representative of many layers of the ANC even though there is still a gap of social movement representation. Cabinet members and those with business links have dominated the NEC in recent past. Post elections, with the appointment to the executive of the single person that came from civil society in the form of NEHAWU President, that question arises about representativeness of the NEC. This we raise as a practical issue not because we do not appreciate a large number of former unionist and others who support a left agenda in the executive and the NEC. In a way the NEC has sought to address this by co-opting the SADTU Vice President, Salome Sithole into the NEC. We need to continue lobbying for more unionists to be co-opted to ensure the balance is improved."* (COSATU, 2015a).

COSATU focused on lobbying the ANC for inclusion of some leaders of its affiliates in the ANC's NEC, such as SADTU. In 2015, Minister of Basic Education, Angie Motshekga had to set up a ministerial task team which was led by Professor John Volmink, into the widespread 'selling' by SADTU of teaching positions for cash. The Minister was of the opinion that the unions, 'appear to control government for selfish reasons which don't benefit learners or the country' (Department of Basic Education, Volmink Report, 2016). The Volmink Report found that in the North West province, for example, SADTU operated as a 'conveyer belt' for educators to be compensated with rewarding government jobs in administration and elsewhere as well as the Cabinet. According to the HOD, 'SADTU determines well ahead of time which candidates for appointment at office and school level are preferred, and uses its influence in many ways to increase its grip on educational processes in this Province' (Department of Basic Education,Volmink Report, 2016:82). The Volmink Task Team report recommended that, 'both school-based and office-based educators cease to be office bearers of political parties and, to avoid the undesirability of conflict of interest, educators in management posts (including school principals) should not occupy leadership positions in Teachers' Unions' (Department of Basic Education, Volmink Report, 2016: 138). SADTU had not moved to deal with any of these troubling practices, such as 'cadre deployment by unions, which had weakened the education system.

This really highlighted the close links between SADTU and the ANC as the trade union had also become a, 'grooming ground for ANC leaders who have gone on to become ministers, MECs and senior government officials. Many of its members are active ANC branch leaders, and the union provides foot soldiers in election campaigns' (Masondo, 2016).

There was in the post-apartheid era and particularly under President Zuma's administration, a clear nexus between political office, trade union membership and personal gains at a high level[46] and this took place in the private sector and in the public sector as well as in the SOEs[47].

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[46] The current general secretary of SADTU, Maluleke Mugwena, was elected at the SACP 14th National Congress for the 2017 – 2022 political term as a Central Committee Member.

[47] NUMs' past general secretary, Frans Baleni, NUMSA's past president, Cedric Gina, and COSATU's past general secretary, Zwelinzima Vavi, were non-executive directors at the Development Bank of Southern Africa (DBSA), the South African Broadcasting Corporation (SABC) and the Industrial Development Corporation (IDC), respectively, and were remunerated for each meeting that they attended.

As a SADTU official confirmed this practice:

"Seemingly there is this interaction between the leaders of the trade union and former leaders who are in government who have a great impact in how most decisions are taken. We find today there is that kind of an influence where there's to be leaders especially in the public sector are more aligned to government officials or ministers." (Interview with SADTU Office bearer, Eastern Cape, March 2015)

The 'politics of the belly' had spilled over into the federation and this has intensified under President Zuma's leadership, where the contest at the top of COSATU (2015a) was about leadership positions as it was noted that:

"Over the years there has emerged within the components of the liberation movement a grouping which uses the policy and political space provided by our organisations to advance their own selfish interests. The class character of this grouping can be summarised as comprador bourgeoisie (the comprador bourgeoisie seeks to replace the domestic white capitalist class, or to squeeze itself in the Alliance of white monopoly capital and imperialism, and thereby become part of the exploiters) which is made up of two segments: a) that segment of the bourgeoisie that is allied to monopoly capital and imperialism and b) that segment that accumulates on the basis of "corruption". For the first segment, its mode of accumulation is based on dealings that ensure that the interests of monopoly capital are protected and extended. There are contradictions between these two segments of the comprador bourgeoisie. The main cause of the contradictions between the 'corrupt' comprador and the 'non-corrupt' comprador lies in the struggle for space at the dinner table of the ruling class and imperialism. This inter-comprador contradiction inevitably spills over into the movement and now extended to the trade union movement and presents itself as factional fights and bickering over positions of leadership."

As a COSATU official confirmed the struggle over leadership positions by offering that:

"They were comrades who were just committed to the struggle for national liberation against oppression, exploitation and they did not expect any kind of compensation. Today the comrades, people are in the struggle because of what's in it for them for instance if we

move out of the Alliance, people go to the ANC because there is a chance for being elected into a position where you are in line for getting tenders or distributing tenders because if you are the one making the final decision on who the tender goes to. There is always kickbacks, there is always something in for you there. So it's no longer of being a selfless struggle for national liberation as it used to be. The types of Luthuli, the types of Tambo, the type of Joe Slovo is not there anymore. Nobody can deny that. (Interview with COSATU official, National Office, March 2015)."

Vavi (2015) notes that the consequence of the NDR's notion of 'deracialising' capitalism had the result of integrating black people into the structures of ownership but not changing the structure itself. It was 'Africanist' in its expression and indicative of the shift in the ANC's nationalism in the post-apartheid era but there was no attempt to change the capitalist logic of accumulation.

There was a further acknowledgement of this shift in the ANC's nationalism and how unions affiliated to COSATU (2015a) were more firmly caught up in the factional fights but the federation could not deny that similar practices occurred in its own ranks because of the trade union investment companies and BEE:

"A similar tendency has found its way and connections in the labour movement. This manifests itself in factional fights for leadership positions used to build relations with captains of industry and pursue a BEE-type business unionism on the basis of workers' collective power. Part of this link with control over worker funds, totaling multi-millions in subscriptions and agency shop fees, pension and provident funds, medical aid schemes, sick pay funds, union investment companies, etc., as well as service providers such as financial services administrators and providers, banks, property developers and administrators, all other services that have to do with money in unions, and the corrupt use of procurement of other goods and services as it happens between certain corrupt elements in the public and private sector. All these are used as a resource base to dispense patronage and advance personal interests, particularly private appropriation and opulent lifestyles while exploiting the language of the masses to fight the movement, It is when the core trade union work of providing service to members gets treated as a second priority in favour of activities which creates possibilities of accumulation such as leaders and organisers making deals with

employers for future promotion at work which comes with better perks at the expense of advancing workers' demands." (COSATU, 2015a).

COSATU (2015a) acknowledged that the source of tension and factionalism within COSATU had been BEE that had made individuals very wealthy as stated:

> *"It is no accident that almost all the dissident leaders, including former trade unionists, are wealthy businesspeople. They used leadership positions in the ANC, and in some cases SACP and COSATU, to accumulate wealth and dispense patronage."* (COSATU, 2015a)

Indeed, the practice of establishing union investment companies had itself become a serious source of corruption and factional contestation in the trade unions. In a number of cases, this had led to a situation of union leaders repressing democratic structures and expelling members and officials challenged corruption (Ashman, 2015). CEPPWAWU had not held a National Congress for years which violated its constitution and it was extremely divided by the struggle for control of its union investment company plus a corrupt and incompetent General Secretary (Baskin, 2019). Pillay (2015) argued that COSATU found itself caught between a robust social movement unionism and a tamer political unionism with signs of business unionism with the rise of union investment companies. BEE and the trade union investment companies had a dramatic impact in that the ordinary COSATU worker did not have any control over the billions of Rands invested on their behalf. In a SACP (2015) discussion document titled, 'Meeting the Challenges Facing the Trade Union Movement' presented at the 12th Plenary Session of the Central Committee, held in May 2015, it was stated that:

> *"The major unions all have nominal control over multibillion rand retirement funds. These, in turn, have been leveraged to set up union investment arms. One of the key reasons for setting up these investment arms was to improve members' lives and those of their dependents through benefits such as bursaries, pension funds and funeral schemes. Sadly, they have often become entry points through which the capitalist class has inserted its DNA into the head offices of many unions. Much of the recent turmoil in COSATU affiliates is to be located in competing factions seeking to control these resources."*

As COSATU (2015a) itself acknowledged these forces at play within the federation:

> *"COSATU is not immune to being influenced and coerced by the environmental factors within which it is operating. COSATU leaders are not immune from being coerced into adopting capitalist values. COSATU is not immune from the contestations and challenges obtaining in its Alliance partners and the liberation movement post-independence period."*

A *Mail & Guardian* survey discovered that unions affiliated to COSATU owned collective investments amounting to R20 billion and some were in top South African companies. In some instances, affiliates invested in companies where they organised workers. Major problems had surfaced in some of the trade union investment companies, such as corruption, fraud and money laundering which led to some trade union leaders such as the general secretary and the president being dismissed and bad investment decisions that resulted in millions of Rands been lost. Yet some trade union investment companies had done extremely well and made individuals wealthy along with their members benefitting for example, the Mineworkers Investment Company (MIC) which is the NUM's investment arm, was one of COSATU's best performing trade union investment company and its net asset value kept growing. It had set up the JB Marks Education Trust Fund in 1997 which enabled members and their dependents to access to further education for their personal development. The public sector trade union investments companies had performed well too such as POPCRU's investment arm and SADTU Investment Holdings (Sihold) which had invested extensively in the media industry. The SACTWU Investments Group and Hosken Consolidated Investments Limited (HCI) was a JSE-listed black empowerment investment holding company. SACTWU also managed a substantial bursary fund which was established in 1975 and was awarded to members, their spouses and their dependents for tertiary studies (see Letsoalo, Hunter and Mataboge, 2015 for more information).

In the cases of corruption in the investment companies this had weakened if not discredited the Alliance. In addition to this, COSATU's expulsion of its largest affiliate, NUMSA, and the formation of another federation, the SAFTU, all added to COSATU's continued membership losses[48] along with the fact that since 2013, due to the factional tensions and infighting, COSATU was in a state of decline. Other affiliates left COSATU after the expulsion of NUMSA and membership loss followed due to the formation of splinter unions. FAWU left to affiliate

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[48] The latest figures state that COSATU's membership now stands at 1.6 million members (Mahlakoana, 2018).

with SAFTU and CEPPWAWU did not file audited financial statements and the registrar took legal action in 2015 to de-register the union (Bell, 2018). Baskin (2019) argued that the affiliates that splintered and the smaller breakaway unions that appeared in nearly all the industrial and public sectors was a product of 'union entrepreneurship' as they were in the position to capitalise on the fragilities of COSATU's unions.

According to the general secretary of COSATU at the time, Bheki Ntshalintshali, 'COSATU is obsessed with the ANC succession race but it has the much more urgent task of putting its own house in order' (Whittles, 2017). The ANC's NDR which was hegemonic within COSATU meant that socialism had to be deferred as a COSATU official confirmed when it was offered that:

> "...socialism remains an objective for the labour movement I am sure. I believe that there are those leaders who still believe that they will fight and achieve socialism through relying on an ally. The ANC made it clear I mean even Mandela said this thing that ANC is not a socialist organisation and you can't delude yourself. U Mbeki was even more clearer than that, that socialist need to continue fighting their fight but they must be clear that the ANC is not their vehicle because ANC is not only concerned about one ideology The ANC is broad change, it has all these strains and it just depends on the moment which strain is taking the upper hand and at the nationalist are kind of in charge of the ANC." (COSATU official, National Office, March 2015)

The result of this was a further weakening of COSATU's structures, as a DENOSA official remarked that the internal problems that the federation faces are not being adequately attended to, in that:

> "There is no solidarity. What is dividing us as the public sector unions is that the public sector unions are one side, the others on the other side others on the other side. So we are really divided. We hold onto each other. Those are those who are weak because we are different in COSATU. There are those who are politically viable who used to help each other. I definitely don't think COSATU will ever be the same again. If you were talking as a COSATU or affiliate we used to be very proud because really we used to be known about

our very strength but now we are very weak." (Interview with DENOSA Office bearers, Eastern Cape, March 2015)

A SADTU official described the cracks within the federation and the impact that it had:

"Clearly the Alliance for quite some time now over the decade has found itself under serious strain to an extent that having led the revolutionary struggle united us. Differences have emerged ever since the leading party in the Alliance which is the ANC has taken over the reins of government. Now what is causing the strain mainly revolves around the policy evolution and policy direction that the government has taken which is different from what has cemented the unity of the Alliance over the decades." (Interview with SADTU Ooffice bearer, Eastern Cape, March 2015)

It was clear that President Zuma's presidency would not deliver on its promises. Within COSATU, the tensions had already reached new heights around the issue of support for President Zuma in the lead up to the ANC's 2012 congress. Those who supported President Zuma, under Sidumo Dlamini, who followed the SACP on this matter and those who did not were under Zwelinzima Vavi who took an independent position on the matter. Thus, President Zuma had constructed an alliance of individuals and groups within the ANC, COSATU and the SACP, who were of the opinion that they had been either insulted or overlooked during President Mbeki's leadership of the ANC. The outcome of this was unions affiliated to COSATU became thoroughly embroiled in the factional fights and increasing polarisation between the factions within the federation. COSATU worked to remove President Zuma from power. Some now understood that COSATU and the SACP supported another ANC-elite faction (that is the Cyril Ramaphosa faction) with its connection to capitalism with the intention to remove yet another president from power (Van Niekerk & Fine, 2019). What this clearly demonstrated though was that this was not about COSATU deciding that ousting President Zuma would be in the best interests of the working class. This decision was taken as there were connections between COSATU's leadership and the factional divisions within the ANC, with the ANC's NDR hegemonic within COSATU (Baskin, 2019).

Within the ANC-led Alliance, once NUMSA and other affiliates left COSATU, COSATU's ability on the whole to influence South African politics was even further diminished, as there

were many divisions between leadership but also between the leadership and ordinary membership. The impact of trade union investment companies and BEE policies moved the federation and the trade unions firmly in the direction of business unionism which severely diminished their ability to increase worker control. COSATU adhered to the ANC's national project, the NDR, a transformation programme which aimed to change the state and society as a whole, with the ANC in control of the project and the discourse of the NDR hegemonic in COSATU. The ANC did not allow for critical debate regarding the NDR as it came to legitimate state capture under President Zuma. Those who did not support it were given no justifiable right to challenge it as this would have been in contravention of the ANC's defined morality, which meant that the criticisers were portrayed as being opposed to a better society, counter transformation and at worst, anti-South African (De Jager, 2009). Most importantly, under President Zuma, COSATU became further disillusioned as the ANC did not turn its attention to the working class and poverty, inequality and unemployment increased. This left many more worse off and it did not mark a change from the previous regime.

8.5   President Ramaphosa and the lead up to the 2019 elections (2018-2019)

On 18 December 2017, Cyril Ramaphosa was elected president of the ANC at the party's 54th Elective Conference. When President Zuma resigned in February 2018, Cyril Ramaphosa was elected unopposed as president of South Africa by the National Assembly on 15 February 2018[49]. At COSATU's 13th National Congress, which took place in September 2018, the consolidated Resolutions was adopted by the National Congress and in the resolutions, deferred to the CEC, it was noted by COSATU (2018a) that:

> *"The current trajectory of the NDR hegemonised by the class forces driving the Neoliberal*
> *perspective and narrow nationalistic interests has perpetuated the subjugation of the*
> *people in general and working class in particular. The National Democratic Revolution*
> *which requires inter-class Alliances is still the most scientific and the shortest route to*
> *socialism. The working class, under the leadership of the federation, should continue to*
> *work hard in order to assert its hegemony in the National Democratic Revolution. The*

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[49] Cyril Ramaphosa was appointed Deputy President by Jacob Zuma on 25 May 2014 and remained in this post until he became the president of South Africa.

Narrow Nationalist and petty bourgeoisie perspective of the NDR must be rejected as it continues to be a stumbling block in the progressive trajectory of the NDR."

Makatse (2020) argued that by this stage, the political and ideological stagnation of the ANC was as a result of the inadequacy of the NDR which had not addressed the economic inequalities. That is the meaning of the NDR changed under different presidents. Although this suggested that the NDR had run its course, COSATU clearly did not ascribe to this view publically. COSATU (2018a) reiterated its position to support the ANC in the 2019 national general elections but resolved to:

"If it all fails, the federation shall work hard to ensure the SACP's electoral victory beyond 2019. The subjective weaknesses of the ANC-led Alliance, which have been aggravated by open factional battles in the ANC, degenerate and alien organisational practices unevenly afflict the Alliance formations, and the effects of the recent period of paralysis and divisions experienced by COSATU, have eroded confidence and caused disillusionment among sections of the broad masses of our people. A radical reconfiguration of the Alliance is the only way out the neoliberal stranglehold inside the movement. COSATU insists on an Alliance of equals where the Alliance jointly decides on the direction of and collectively drives the NDR both inside and outside the state."

For supporting the ANC in the 2019 elections, COSATU expected policy concessions in exchange. COSATU regularly insisted that its support for the ANC was conditional on the governing party adopting union-friendly policies. Having rhetorically stated its position, COSATU always endorsed the ANCs attainment of a comfortable majority. A compromise had governed relations between the ANC and COSATU since 1994. Its terms were that COSATU would, despite making its views known, permit the ANC to set economic policy as long as the ANC allowed it a veto over labour law changes. COSATU would also continue campaigning for the ANC as long as the bargain reached was still in place. The spin-offs were that some COSATU leaders ended in up in parliament and government on the ANC ticket and some became immensely wealthy in private business. COSATU was no longer the organisational hub it was when it first mobilised its base for the ANC vote and its membership had dropped to 1.6 million members from a high of two million members at one time. COSATU had expelled its

biggest union, NUMSA, which had over 300 000 members and this prompted other splits and the formation of a rival Federation of SA Trade Unions (SAFTU) which cost COSATU members. There had been a relentless loss of jobs in industries which used to be COSATU's stronghold. COSATU had become considerably weakened as the gap between leaders and members widened and its ability to mobilise members declined. The weakening of COSATU reflected the country's economic growth path: the gap between insiders who can enjoy the economy's benefit and outsiders who could not and would never. COSATU union leaders became absorbed into the insiders and left their members outside (Friedman, 2018). As a DENOSA official cautioned:

> *"In the next term (the 2019 elections) the ANC led government better be biased towards the workers."* (Interview with DENOSA Office bearers, Eastern Cape, March 2015).

Indeed, the Alliance was once again under strain, as was noted:

> *"The Alliance is taking serious strain. At the congress in 2017, COSATU broke ranks and said to the president of the ANC that he is not helpful to the country. This is a symptom of the strain but they backed the same faction in 2007."* (Interview with DENOSA official, Johannesburg, 2018)

COSATU's public sector trade union remained as important as ever. President Ramaphosa praised SADTU at its KwaZulu-Natal Congress by saying:

> *"Working with you, we introduced a pro-poor funding model. We look to your members to drive the implementation of the NDP vision to diversify our economy and grow it through improved education and skills development. Our faith remains unshakable in SADTU to play a decisive role in returning the ANC to its founding values of service and selflessness. And when we celebrate the achievements of the democratic developmental state, it is an opportunity to celebrate the vital role that COSATU affiliates like SADTU have consistently played in expanding the frontiers of freedom and human fulfilment."* (The Presidency, 2017)

SADTU (2018) was as supportive of the ANC as ever as was noted in its statement on the State of the Nation Address by President Ramaphosa:

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"We echo the president's call on public servants to become agents of change. This is in line with SADTU's 2014 Congress theme which calls on the Union to restore the character of SADTU as a 'Union of Revolutionary Professionals, Agents for Change and Champions of People's Education'."

There was some optimism within COSATU, from its other significant public sector affiliate, DENOSA, about the future of the Alliance:

"Before Ramaphosa the Alliance was strained but now there is a change and it is in the direction of rebuilding the Alliance and so we are optimistic about the Alliance. There is no desire to break the Alliance – the desire is to build the Alliance." (Interview with DENOSA official, Johannesburg, 2018)

While there has been clear leadership change with the ANC under President Ramaphosa, there was still no consideration of building a counter-hegemonic movement that was external to the Alliance among COSATU affiliates at the top leadership levels.

Once again, COSATU campaigned for a strong mandate for President Cyril Ramaphosa in the 2019 elections and they pledged to contest any attempt by factions within the ruling party to remove him from power after the 2019 elections. In December 2017, President Ramaphosa had secured a narrow victory for leader of the ANC but this meant that his grip was weak over the ANC. In addition to this, the faction that lost to him was connected to former President Jacob Zuma and secretary-general of the ANC, Ace Magashule. This faction apparently plans to have President Ramaphosa moved out of office before his next term ends but COSATU has vowed to oppose this as well. COSATU's members were actively encouraged to vote for the ANC and so were a significant support base for President Ramaphosa. However, President Ramaphosa has struggled to push through the necessary reforms for economic growth. COSATU paid careful attention to the attempts made by Ministers in President Ramaphosa's cabinet to address the crises in some of the SOEs, such as ESKOM, SAA and the Passenger Rail Agency of South Africa (PRASA). However, the Finance Minister Tito Mboweni pronounced in the 2020 Budget Review that the public sector wage bill would be cut by R160.2-billion over the next three years, putting the labour federations, including COSATU and its public sector trade unions, SADTU and DENOSA, into direct conflict with the state (Merten, 2020). What this means for the ANC's NDR in this period remains to be seen.

8.6   Conclusion

The overview provided of key COSATU, DENOSA and SADTU documents, from 1994 to 2018, revealed that COSATU as part of the Alliance with the ANC and the SACP was firmly committed to the pursuit of the strategy of the NDR. COSATU and its Alliance partners had a common goal of the building of a broad nationalist front.in the post-apartheid era. Nationalism for black workers had been uneven as the review of the two non-racial traditions of populism and workerism in the African trade unions illustrated. COSATU traditionally represented a blend of democratically organised workers who participated in workplace politics and who were also involved in community and political issues as they formed key alliances with these organisations (Pillay, 2011).

With the ANC in power, COSATU and SACP were drawn firmly into the triple Alliance which pursued the NDR. Excerpts from the documents demonstrated that COSATU struggled at points with the NDR as the federation became embroiled in patronage politics. The NDR kept sections of COSATU loyal to the ANC, especially under presidents Mandela, Mbeki and Zuma as it served as the authentic ideological discourse that joined the working class to the nationalist project (Van Niekerk & Fine, 2019). At times, this was patently clear in the documents.

The ideology of the struggle against apartheid and national oppression was one of the most powerful ways in which the unity of the ANC and the Alliance was expressed, was defended by the Alliance partners and upheld by COSATU. The ANC was dominant in its pursuit of the leadership of the Alliance and significantly it worked to assert its nationalist hegemony over the Alliance partners and over COSATU in particular.

The ANC committed itself to non-racialism but also to deracialising South African society in the post-apartheid era. This was the ANC's 'inclusive nationalism' and it involved the undertaking to transform the political economy of institutions so that they would function for the 'people' or the nation, which meant all those in South Africa. There was a recognition of the cultural diversity of the South African population and so there was an emphasis on the multi-culturalism of South African society.

The National Question was the focus of debates in the Alliance as evidence from the COSATU documents showed. The debate involved the issue of who was an African. When Deputy President Thabo Mbeki delivered the 'I am an African' speech in 1996 he highlighted the Africanism of the united South African nation. This was an Africanism that was inclusive as opposed to one that was racially defined and COSATU trade unionists chose to support the ANC's NDR as they were optimistic that it would produce the kinds of changes that would benefit the poorest sections of society via a social contract. Yet, under President Mandela (1994-1999) and President Mbeki (1999-2008) government policies were created that advantaged the increase of the black bourgeoisie, the middle class and even the growing numbers of semi-professionals which COSATU affiliates had recruited into its ranks. These classes were objectively more important in a deracialised society in the attempt to thwart the legacy of racial subjugation and the consequence of this was that the militant COSATU trade unions

subordinated working-class interests to this more general struggle and as a result, this is how the ANC's nationalism was hegemonic in COSATU, who participated in the struggle for racial redress.

After the democratic transition, COSATU's political power grew due to its involvement in the Tripartite Alliance with the governing ANC and the SACP and via the participation of union members, shop stewards and officials in ANC and SACP structures. Trade unions increased their institutional power because of favourable labour legislation and in bargaining councils as well. COSATU and its affiliates became organisationally strong in the public sector with incredible membership growth, full-time officials, a parliamentary office and a research wing. COSATU had opposed certain policies, planned stay-away strikes against the ANC government, backed the public sector strikes and contested attempts by the ANC to adopt a more market friendly economic policy. In this way, COSATU was somewhat independent from the ANC. The ANC government developed some pro-poor policies and installed new clinics and schools in areas where these were needed and RDP houses were erected. The system of social spending was deracialised and expenditure on public education and healthcare for the majority of the population increased. These accomplishments were touted as reversing the historical legacy of racial prejudice and the fulfilment of racial redress by the ANC. COSATU achieved these particular sets of benefits without having to compromise except be a little less belligerent about the government's macroeconomic policies (Seekings & Nattrass, 2005).

As the poor and disadvantaged, the majority of the South African population, lived in poverty and many remained unemployed, COSATU kept the issues of democratic rights, unemployment, poverty and social equality on the agenda but its continued participation in the Alliance radically limited the space for worker action. Transformation only signified racial changes instead of extensive class transformation that advantaged the working class (Pillay, 2013). It was quite evident that within the Alliance, COSATU did not expect that workers would determine their political destiny of transforming the South African economy along socialist lines. This did not necessarily mean that socialism had failed. The former FOSATU unions that were critical of union alliances with nationalist parties as they believed that a politically independent workers' movement could not emerge that would fight for socialism and national liberation if it was allied to the national liberation movement, were vindicated.

The documentary analysis showed that certainly socialist ideas were still supported within COSATU and more broadly in South Africa but there was a growing mismatch between these socialist ideas as peddled by COSATU and the material realities of the ANC's economic policy that benefitted COSATU's membership materially and COSATU's affiliates' coffers substantially. COSATU's membership in post-apartheid South Africa had changed but so had its commitment to capitalising on the opportunity to build and change society along the lines of socialism, or the second phase of the NDR, which gradually faded. Indeed, the documentary evidence showed that COSATU endorsed the reality that redistribution that would take place on the basis of racial disadvantage.

Furthermore, COSATU did not take up the battle for hegemony that could break the Alliance and COSATU leaders and officials consciously chose to prioritise the politics of the ANC. The reason for this was still best captured by Buhlungu and Psoulis (1999) who argued that the 'enduring solidarities' meant that there was continuity in the patterns of solidarity, collective mobilisation and action during the years of the fight for liberation and that this would continue afterwards, that is, in the post-apartheid era between the Alliance partners. This was still a factor within the Alliance and in COSATU at the time of this study.

However, as the ANC's political centre began to gradually fragment, which the COSATU documents patently highlighted, this was further exacerbated when a closer scrutiny of the social foundation of the NDR took place. Initial ANC notions like non-racialism were more critically examined by COSATU in the context of the growing alienation and immiseration of the black working class. This raised the question of the inability of the ANC's NDR to deliver on its promise to end 'national oppression' as there was a lingering and intensifying inequality which was largely racialised for the majority of the population. The ANC assured the poorer sections of the population that they had benefitted from social policy as they were the recipients of a social wage which was comprised of social welfare, public education, public healthcare and other services which compensated for the rather low or the lack of wages earned in the labour market.

Although COSATU was concerned about the continuing racial inequities in the ownership structure of the economy and raised these issues in relation to the BEE policies, the federation did not challenge BEE. This is because the racialised discourse of two nations and racial

identities (the NDR) was used as ideological armour to cover up the real reason for the persistent inequality and the top leadership of COSATU adhered to this.

For COSATU, the ANC's non-racialism of the NDR and then the shift to Africanism did not conflict with the policies of racial redress. The review of documents also revealed how COSATU became increasingly entangled in patronage politics. Some COSATU trade unions operated as launching pads for political careers, access to tenders and business deals and the acquisition of companies due to the trade union investment companies. COSATU had adopted the ANC's pledge to end national oppression on the basis of the deracialisation of the system of South African capitalism and so BEE achieved this desired deracialisation of capital for a few and for some members of COSATU through trade union investment companies. Even though specific trade union investment companies were not named in the COSATU documents, the policy of trade union investment companies exposed that COSATU had become caught up in the politics of patronage. Trade union investment companies assisted some COSATU leaders to rapidly advance if they had not already taken up political or corporate positions. Coverage for this was provided by the ANC's image of deracialising capitalism which COSATU abided by. COSATU retained its loyalty to the ANC and its trade union investment companies pursued an arrangement with old money capitalism and elite new players under the BEE agenda (Van Niekerk & Fine, 2019). At that stage, COSATU also took a decision to cut links with organisations that critically assessed the Alliance and with those who asserted that within the Alliance, COSATU had not done enough to advance the interests of the working class which was further evidence of COSATU's entanglement in patronage politics.

Chapter 9: Findings Discussion and Conclusion

9.1   Introduction

A discussion of the findings in chapters 5, 6, 7 and 8 are now provided and the analytical focus integrates the empirical, conceptual, and theoretical parts of the results from these chapters. The overall contribution that the study makes to the understanding of the significance of the public sector trade unions in COSATU, particularly the teachers and nurses, who are members of SADTU and DENOSA, their contradictory class location, its intersections with their race and gender identities, how this connected to their political traditions as trade union members and the implications of this for the ANC's hegemonic nationalism within COSATU and its composition, is provided too.

This chapter commences by briefly re-considering the study's key concepts and the research methods used. The chapter moves onto a summary and discussion of the research findings and provides answers to the research questions. The significance and implications of the findings and the study are discussed, and the chapter makes suggestions for future research that could be conducted on themes and issues not covered in this study.

The principal research question that drives the study is 'given the increased dominance of public sector union in COSATU, how do the changing intersections between class, race and gender connect to their political traditions as members of DENOSA and SADTU?' To adequately address the core question, this study looked for information on three issues. The first issue was information on the increase in public sector trade union membership in COSATU. The study gathered statistical information about the occupation, education and qualifications, trade unionship and income levels of the African teachers and nurses of the public sector. The second issue of this study was to use this information gathered in addition to the qualitative data gathered from the African teachers and nurses, to assess the class location of these semi-professional trade union members, using Wright's (1978s, 1983, 1985) concept of contradictory class location, its intersection with their race and gender identities and how this impacts on their political traditions as trade union members. The third issue that this study paid attention to was

the ANC's nationalism, the NDR and its hegemony within COSATU by analysing information from COSATU and SADTU documents that contained information about the NDR, socialism and nationalism, the Alliance partners, political tensions and factionalism.

9.2 Concepts in context

The core concepts that the study worked from were defined in Chapter 2. The main focus of this study was COSATU's membership composition through an interrogation of the African teachers and nurses' contradictory class location, its intersections with their gendered and racial identities and subjectivities and the connections to their political traditions as trade union members. This study also paid attention to the impact of the ANC's NDR within COSATU.

To understand COSATU's membership composition in post-apartheid South Africa, this study looked at the class location of these COSATU members who are employed by the state, working in government schools and hospitals. These teachers and nurses are in semi-professional occupations due to their higher levels of education and qualifications, they earn salaries and are employed with benefits such as pensions and medical aids. Teaching and nursing are considered as semi-professional occupations as the qualifications obtained can, in some cases, just be a diploma as opposed to a degree. In the analysis of the class location of the teachers and nurses, the status of the occupation was an important consideration but so too were the background of the teacher and nurse and the number of dependents they had. These teachers and nurses of the public sector are in a contradictory class location as they are in more than one class, they are in the working class and in the middle class. Wright's (1978a, 1983, 1985) notion of the contradictory class location is confirmed in this regard. The quantitative data on income and education provided for a structured account of class. The qualitative data gathered on the teachers and nurses showed how they interpreted their class location but it revealed how the contradictions of their class location intersected with their race and gender identities.

Attention was paid attention to the all the distinct experiences of the subgroups such as men and women, teachers and nurses, within the same category, that is COSATU public sector trade union members. In articulating their experiences of working in the public sector schools and hospitals, the teachers and nurses interpreted the contradictions of their class location through their racial and gendered experiences, all of which are salient factors in their daily struggles.

This study also focused on the impact of the ANC's NDR within COSATU in the post-apartheid era in South Africa. The NDR was understood as the ANC's national project and programme which was aimed at changing the state and society as a whole, with the ANC in control of the project. African nationalism was understood as inclusive nationalism where there was an emphasis on equality and equity and the eradication of discrimination and obstacles grounded in race or ethnicity or other social divisions in order to unify all the local groups and to counter discrimination. There has been a shift to Africanism by the ANC within the post-apartheid era. COSATU's ideological orientation was linked to traditions within black African trade unions that had been prevalent and this was the charterist tradition, that is, the tradition of the 'national democratic tradition' plus the workerist tradition, which was understood as the safeguarding working-class independence.

The SADTU and DENOSA public sector trade union members interviewed referred to the ideological tensions present in COSATU and their concerns were linked to the issue of trade union independence from the nationalist politics of the ANC. The COSATU public sector trade union members felt that as a result of COSATU's focus on political issues that involved their own affiliates, namely DENOSA and SADTU, that shop floor issues had been neglected. These COSATU public sector trade union members could be considered as organic workerists as they wanted their trade unions, DENOSA in particular and SADTU to some degree, to pay closer attention to their issues as nurses and teachers and their workplace conditions and challenges. They developed this worker identity independent of trade union leaders and officials, the latter whom adhered to the NDR as this provided a career trajectory for them. The DENOSA members were critical of how the politics of NDR had influenced their own trade union and that DENOSA had moved closer to the COSATU position of not critiquing the ANC and the NDR in the post-apartheid era. However, politically the African teachers and nurses were not anti-nationalist nor were they anti-capitalist. The African nurses and the teachers were of the view that the challenges in the post-apartheid era had not been resolved through a focus on race alone. They valued an independent trade union that had its own political vision and that emphasised the importance of democratic, worker-controlled unions which offered leadership in matters related to the working conditions of the public sector and advanced their interests as teachers and nurses in the public sector. This is why the notion of organic workerism was offered as a conceptual

understanding of the new political tradition in these COSATU public sector trade unions, especially DENOSA and to some extent in SADTU, in Gauteng in post-apartheid South Africa.

9.3   Summative presentation of integrated findings

The purpose of this section is to present a summative discussion of the core research findings and relevant literature in the interpretation and analysis of the findings is used. In chapters 5, 6, 7 and 8, the empirical findings were outlined in detail. In this chapter the main findings were presented and were discussed according to two major themes, one them being between socialism and nationalism in COSATU and the other being the contradictory class location of COSATU public sector members. Within sections 9.31 and 9.3.2 a concise response to the research question is also offered.

9.3.1 Between socialism and nationalism in COSATU in post-apartheid South Africa

In Chapter 3 of this study, the review showed that Afrikaner nationalists succeeded in getting Afrikaner workers and trade union members, particularly the women GWU members, to support the nationalist cause even though they were members of trade unions where Afrikaner nationalism was not hegemonic. The image of the *volksmoeder* appealed to the women leadership of the GWU as for them, their social standing within the Afrikaner community was precarious. While the Afrikaner nationalists used gender to 'discipline' and confine the Afrikaner women who worked, they in turn, deployed the positive gender features of the *volksmoeder* image, such as resourcefulness, morality and pride, to improve their lives as factory workers inside the GWU as well as their social standing within the white Afrikaner community. The Afrikaner nationalist movement was ultimately successful in drawing its imaginary community across the margins of gender and class and this showed how class and race intersected with gender among white trade union members in this period.

As also covered in Chapter 3, the ideas of femininity and its intersections with class and race were different for African workers, women, trade union members and African nationalism. The NDR was the political project to liberate black people overall and Africans specifically from national oppression and to put a democratic, non-racial, non-sexist and prosperous South Africa into place. Apartheid's vestiges included extreme class, race and gender inequalities that obliged

a democratic government to apply its power to restructure the state, economy and society for the good of the people. Accordingly, African women nationalists (in contrast to their Afrikaans counterparts) infused the ideology of motherhood with that of women as insurrectionaries and activists as these women saw themselves as the 'mothers of revolution' and the image of the militant, revolutionary and political mother was inserted into formal ANC rhetoric (McClintock, 1991) in an overtly political manner. However, the evidence also showed how it was the women COSATU members where support for the ANC notably declined in the 2008 'Taking Democracy Seriously' survey. This indicated that not only were the intersections between race, gender and class were applicable to COSATU members in post-apartheid South Africa that these intersections also changed. The variance was due to the way that contradictory class locations intersected with gender and the ideological views of COSATU members.

The post-apartheid state was no different to the other post-colonial states in Africa in comprehending the challenges that a strong labour movement such as COSATU presented to the creation of a conducive environment for reconstruction, transformation and development. As the ANC's notion of nationalism in post-apartheid South African was best conceptualised of one that was syncretistic but inclusive by Cope (2007) it was clear that it was the product of varying and conflicting assimilations of diverse theories of nationalism, the National Question and the NDR, the recognition of the numerical dominance of indigenous Africans as the most subjugated members of South Africa plus the rainbow nation approach which stressed the many identities that made up South Africa's diverse population. There was therefore a shift in the ANC's NDR, or programme of nationalism, guided South Africa's transformation in the post-apartheid era.

The post-apartheid state worked to develop a new indigenous entrepreneurial class through Affirmative Action and BEE. The ANC (1997a:4) openly acknowledged that the African middle class and black African business represented 'the national and class forces that stand to gain from the success of the NDR'. The black African middle strata were raised to the status of representing the only driving force of the NDR. Importantly under the presidency of Thabo Mbeki, the NDR was reconceptualised in order to create a new black bourgeoisie. In this period, the ANC vigorously worked to revive the workable applicability of NDR theory as the macro-framework for promoting certain policies and its justification for all the related and conflicting 'developmental' policies and activities. The critical purpose of the NDR was that it afforded a

defence for the existence and expansion of a 'patriotic' black bourgeoisie which represented the leading driving force of radical transformation (together with the close collaboration of white capital). Even though President Mbeki was ousted and COSATU supported President Zuma, it was this version of the ANC's NDR that became hegemonic in COSATU. The NDR itself had an inbuilt vagueness as it justified the ANC's view of itself as endorsing a developmental state in collaboration with an up-and-coming black (predominantly African) 'patriotic bourgeoisie.'

The NDR was used as the bedrock of South Africa's transitional political economy and was employed for securing the SACP and COSATU's allegiance with the ANC. The NDR was the authoritative African nationalist discourse and it structured the discussion among the Alliance partners about South Africa's strategy. The specific programme of class accumulation and privilege had to be 'seen' and believed to be integral to the historic mandate of the ANC, which was the economic liberation of the workers and poor. The NDR provided for the authentication of the black bourgeoisie as the source for amassing wealth and its responsibility for transferring wealth to the black working class (as well as the urban and rural poor). To the benefit of COSATU members, Affirmative Action policies, especially in the public sector were implemented to ensure that it was rapidly transformed demographically. BEE policies provided for the setting up of trade union investment companies. The NDR provided the framework within which COSATU's affiliates contested and accept the direction, content and implications of the ANC's policies such as BEE and crucially it facilitated the smoothing over of the persistent disagreements between the Alliance partners.

COSATU struggled with the NDR and its vagueness concerning the black capitalist class and this became the source of frictions between the ANC and its Alliance partners at times. Vavi (2015: xi-xii) argued that COSATU 'finds itself having to deal with daily, high levels of unemployment, poverty and the ongoing class struggles internal to COSATU.' COSATU's membership often engaged in militant mass action against the 'neoliberalism' of the post-apartheid state to defend jobs. COSATU remained critical of other aspects of macroeconomic policy such as the effects of neoliberal economic restructuring, privatisation which included public private partnerships in the SOEs and outsourcing as a way to progress BEE. Yet, COSATU was its weakest in shaping these policies. Although the move to GEAR signaled to those on the left within and beyond the ANC-dominated Alliance that there was a 'class project'

(Hart, 2013), it confirmed that the duty of the National Question as normalising and deracialising South Africa's political economy (Cronin and Mashilo, 2017) was the correct focus. It was this that propped up the endorsement of racial redistribution by COSATU and not its rejection by the federation.

Alliance leaders resolved that the radical NDR would be carried out to settle national, land and class questions in South Africa as Africanist tendencies had strengthened within the ANC (Vavi, 2015) and this was reflected within COSATU. Many Alliance leaders were unhappy when they were challenged by working-class leadership. Under presidents Mbeki and Zuma, the ANC closed off the possibility for debate about the NDR and the ANC leadership accused any who were critical of it, as being part of the 'ultra left.' These sections were accused of furthering their own agenda despite the fact that policies had been agreed to (Southall & Webster, 2010) or were, in the case of COSATU, part of a narrow, self-interested defensive type of unionism. The ANC's NDR was hegemonic within COSATU in this respect. COSATU did not contest this and this was linked to the ANC's NDR which involved the maintenance of unity, or 'enduring solidarities' (Buhlungu and Psoulis, 1999) among Alliance partners around many issues, such as market de-regulation and the building of a black capitalist bourgeoisie that was also strengthened by the increase of a black middle class. COSATU resolved that the Alliance was their only protection and that the working class had to be involved in restructuring and support the ANC. This was profound as many formerly tough-minded working-class leaders and progressive thinkers abandoned their basic principles and for Bond (2000) this was the ANC's success of marrying neoliberalism with African nationalism. The ANC's NDR was also a nationalism that pursued a resilient and viable form of capitalism and economic transformation which was related to deracialising capital and included the policies of Affirmative Action, BEE with the attendant practices of trade union investment companies and comrade capitalists.

The ANC, black capitalists and the COSATU trade unions negotiated the BEE policies. The interventionist and pro-capitalist post-apartheid state firmly established the black bourgeoisie and increased the black middle class as BEE was supported within the labour movement and by the SACP. Some COSATU affiliates responded positively to free market policies by setting up trade union investment companies. The establishment of trade union investment companies implied that the affiliates were not that critical of free market policies nor were they seeking an

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amendment of capitalist relations of production. In some cases, the trade union investment companies benefitted COSATU affiliates and its membership and in other cases, practices of corruption and fraud destabilised the affiliates, divided them and this fed into the growth of fragmentation among organised labour in the post-apartheid era which served as the source of factionalism within COSATU itself. Nevertheless, this revealed that the NDR's ideology and parts of its practice, such as the creation of the labour capitalists and the trade union investment companies functioned to maintain the dominance of the national liberation's nationalist ideology and it secured the consent of COSATU and its trade unions in order to contain the challenge from organised labour. On paper the SACP and COSATU represented the socialist axis of the NDR but they worked to maintain their unity so that the unity of the ANC-led Alliance was preserved. As the deracialisation of the labour market and society proceeded as per the ANC's NDR's plan of action, these processes diminished the possibility of radical or socialist notions that elements of COSATU had once ideologically been motivated by.

Indeed, the ANC's nationalism had eclipsed independent working-class politics and socialism was deferred, even though this was raised by COSATU in its political resolutions. COSATU continued to stress that trade unions had to be worker-controlled and that the trade unions had to move to take on a political role independent of all parties. At the same time, this fixation on political independence exposed a profound weakness within COSATU itself. COSATU, in the post-apartheid era continued to overlook the prospects of build working-class strength from within the Alliance, even when presented with opportunities to do so. There were indicators of the weakening of the ANC's hegemony in the factions that emerged within the ANC as the NDR programme unfolded. The revised ANC's NDR did not substantially tackle the legacies of economic exclusion, long term unemployment and racialised inequality although it extended its welfare programme of social grants. Despite this, COSATU opted to provide continuous support to the ANC at election time. The examination of key COSATU documents and the data collected from key COSATU officials provided evidence of the role that COSATU and its affiliates willingly played in processes that positioned ANC party politics above union interests. This shifted slightly between the Marikana tragedy in 2012 and the lead up to the 2014 national elections, when NUMSA was expelled for not supporting the ANC at election time.

COSATU union leadership chose to become kingmakers inside the Alliance by participating in the political affairs of the factions of the ANC. Erwin (2017) argued that the Alliance really endured at the uppermost structures of the Alliance partners. At some points some ANC MPs had a labour union, urban or public sector working-class background and labour remained strongly represented within the ANC leadership. Yet labour only maintained its influence in key government departments in this regard. All of this really accentuated how the discourse, politics and policies of the ANC's NDR had markedly shaped trade unionism in post-apartheid South Africa and COSATU in particular and highlighted that COSATU trade unions were far more complicated and contested in terms of their political traditions in post-apartheid South Africa.

9.3.2 COSATU public sector trade union members: Class and class location, race, gender and their intersections

As already noted, certain policies unlocked new economic opportunities for black Africans, through strategies such as Affirmative Action and BEE and this involved the enlargement of the black entrepreneurial and business-owning classes. The black middle class in the post-apartheid era also benefitted from the social policies of restructuring whether they were state employees or employed in the private sector. Affirmative Action policies promoted the fast-changing racial configuration of higher-earning occupations and the black middle class grew as a result. A significant portion of COSATU membership was on the receiving end of state privileges such as African teachers and nurses of the public sector. These COSATU union members benefitted from the government's process of eradicating racial discrimination from public policy in relation to labour market and welfare policies. Deracialisation was significant for African workers that had received these benefits (as much as what white workers had achieved in the past as the formerly disadvantaged obtained entry into the same economic power locations that the privileged class white people possessed). The implications of this is while COSATU's membership fell among those who were unskilled, more Africans ascended into professional, semi-professional and white-collar occupations and were recruited by COSATU's public sector affiliates. COSATU's key class power was now the African public sector members and their affiliates. The upwardly mobile African teachers and nurses benefitted from the struggles waged by COSATU to earn perks such as jobs in the public sector and to improve their status in the post-apartheid South African society. It was most evident that this was achieved because

COSATU stuck to its prime role of consolidating and deepening the NDR. They have become the centre of COSATU's power in post-apartheid South Africa, are not swayed by ideologies that critique class inequality and a socialist future for them was not really necessary as they already somewhat benefitted from social and economic transformation in the post-apartheid era. Similar changes took place in the private sector affiliates like SACTWU which moved away from unskilled labour to represent more skilled labour. COSATU had not worked to lift up these vulnerable sections of South African society.

For Africans, access to the labour market plus human and social capital advantages such as higher level of education, skill and networks greatly enhanced their prospects of being engaged in particularly well-paid employment. Inequality along class lines increased, unemployment grew and South Africa's economy was grounded on exclusion. The African public sector members of unions affiliated to COSATU continued to be the beneficiaries as long as they stayed loyal to the ruling party and were bound to its African nationalism of the NDR that fortified their privilege.

COSATU had become dominated by the public sector trade unions and the larger and professionalised trade unions such as SADTU and DENOSA. Linked to the deracialisation of the labour market for the African public sector employees and the attendant government policies, these influenced the processes of the transformation of class in post-apartheid South Africa. COSATU was now a federation predominantly composed of these privileged workers, as the labour aristocracy thesis asserts, such as the teachers and nurses of the public sector. COSATU embraced the semi-professionals and took them into the fold.

Politically as these COSATU public sector affiliates grew in size, they became more integral to the resolution of the National Question and to fulfilling the ANC's nationalist agenda. It was among these public sector trade union members that the policies of racial elevation, as implemented by the ANC and endorsed by COSATU, had succeeded in generating a section of advantaged and socially ascendant trade union members within the ranks of COSATU. Some of the teachers and nurses under apartheid took part in and shaped the nationalism of the ANC and this featured in the interviews conducted with them. The ANC was remembered by some of the

African teachers and nurses of the public sector as a national liberation movement and some acknowledged how they had benefitted from its strategies.

In addition to this, many African teachers and nurses assessed the success of the ANC against the yardstick of abolishing apartheid, racism and discrimination and some understood that the ANC was a good force in their lives. The ANC's NDR connected with and were deeply held by COSATU members as their evaluation of how the ANC functioned on the issue of race in post-apartheid South Africa, for example, was made against the historical and cultural framework of the ANC as the party of national liberation. Many of the African teachers and nurses drew on the importance of non-racialism. However, the COSATU members understood that in terms of the ANC's policy of nationalism, that changes in South Africa could only take place through concentrating on race so that the biased economic and social vestiges of apartheid could be overcome to attain non-racialism. Non-racialism was the ANC's goal of rising above visible and assigned racial differences and non-racialism was the ideal norm.

The deracialisation of the labour market for the African public sector employees and attendant government policies influenced the processes of the transformation of class in post-apartheid South Africa. However, the selection for employment in the public sector was not only dependent on the basis of their race but also on the basis of their educational achievements. The public sector in post-apartheid South Africa had been the site for social mobility. In post-apartheid South Africa, many more semi-professionals such as teachers and nurses possessed better knowledge and skills and had taken up work in the public sector as part of the effort to contribute to the national development project and to social transformation. The ANC had increased access to educational opportunities for the historically disadvantaged and education had become deracialised. The quantitative analysis had presented useful trends on employment income, educational qualifications and trade union membership among the African teachers and nurses of the public sector. There was also a focus on the educational achievements of the African teachers and nurses as this had been another major feature of the post-apartheid society due to the democratisation of the educational system in post-apartheid South Africa.

The guide prepared for the qualitative data gathering exercise and interviews with nurses and teachers contained many questions about their employment and working conditions. This study

did not overlook household issues as many of the employed in South Africa lived in households that were made up of the unemployed, those who received social grants and those who experienced instability in employment (such as temporary workers, those who are in precarious employment and even those in permanent employment but may experience other forms of labour market insecurity) and so there were levels of dependency on a stable income earner within the household (see Bischoff and Tame, 2017). Crucial to this study was the background of the African teacher and nurses which also had to be taken into consideration too as many came from working-class backgrounds.

Wright's (1978a, 1983, 1985) conception of the contradictory class location was helpful to the qualitative study of African nurses and teachers. This study focused on work related matters but also on the household that the African teacher and nurse was a part of. Questions about the household the teacher and nurse were located in was explored in the qualitative section of the study of African teachers and nurses and added to the complexity of their class locations. The African teachers and nurses were salaried employees, they did not own the means of production, they were in semi-professional occupations, where the quality of work that they performed was critical and they held tertiary level educational qualifications. These were important dimensions of their class location. The study also collected data on the income earned by the African nurses and teachers, how they spent their income and who they supported financially. Their income was used to support many dependents and, in some cases, their own income was supplemented by social grants. These were also crucial features of their class location.

This study showed that the African teachers and nurses were concerned about the status of their profession and this was placed in the context of the challenging working conditions that they work under in the public sector schools and hospitals. Some considered teachers and nurses as part of the elite or the labour aristocracy as they earned a salary and had benefits and the status of their occupation was high. In post-apartheid society and particularly in the public sector schools and the teachers worked in, their working conditions were challenging working and teachers and nurses often took on other work that was not core to their occupation. Some of them understood that there was a deterioration in their statuses as teachers and nurses of the public sector.

This micro-level study of African teachers and nurses of the public sector revealed that their class location was more complex than either working class or the middle class. When combining their employment with relatively high salaries and the security of trade union membership with the deteriorating status of the occupation, their high number of dependents and their working-class backgrounds, this helped in understanding that the African teachers and nurses of the public sector were located in a contradictory class location. Therefore, Wright's (1978a, 1983, 1985) conception of the contradictory class location was very useful to this study and it guided the analysis of the class location of African teachers and nurses of the public sector, the methodological framework generally and specifically the methods used to investigate class location of African teachers and nurses.

Yet, an exclusive class analysis of African teachers and nurses of the public sector would be inadequate as class had both material and cultural parts to it. Post-apartheid South Africa had acquired racialised structures and relations of repression and the challenge was to select an analytical tool that would enable an understanding of how race, class and gender identities of the African teachers and nurses, COSATU members, connected in post-apartheid South Africa in order to gain a deeper understanding of their labour politics. This study offered that the micro analysis conducted had also detected the connections between the contradictory class location of these COSATU members and their gendered and racial identities and subjectivities that impacted on their ideological and political views in post-apartheid South Africa. To be specific, the African teachers and nurses interpreted their contradictory class locations' intersections with their identities as African (race) and in some cases, women (gender) in their interpretation of their working experiences, their views of trade unions, the Alliance and the ANC. This study also found that there was some variability and disparity within the African teachers and nurses employed in the public sector, as for example, African female teachers were subjected to bullying and intimidation in the workplace more so than African males were. This demonstrated that the persistence of racialised, gendered and class inequalities were tangibly intertwined and constructed by each other but were also connected to their political and subjective interpretations of their labour political identities. Some of the public sector trade union members disapproved of COSATU's continuous reinforcement of its alignment to the ruling party and for others this was not problematic. Some were scathing of the ANC Ministers that attacked them, as the case of the striking African nurses in 2018 at a public sector hospital demonstrated. The African teachers

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and nurses remained concerned about their incomes and working conditions and this indicated that the focus on wage and working conditions had been neglected for too long. Once these contradictions and intersections were taken into consideration, this greatly aided the understanding of COSATU, its membership composition and its political traditions in post-apartheid South Africa which provided for a more nuanced understanding of COSATU and the conceptualisation of labour politics of its members in post-apartheid South Africa.

Therefore, this study of the COSATU public sector trade union members in post-apartheid South Africa was greatly aided by intersectionality which was used as a method of analysis and this was recommended for labour studies in post-apartheid South Africa. The intersectionality approach allowed for a non-reductionist approach to the connections between race, class and gender and the connections to the political traditions of COSATU members. Intersectionality was used as a methodological outlook and it offered a strong structure for the analysis of the data on the African teachers and nurses of the public sector. This study demonstrated that intersectionality was an incredibly productive way of analysing and articulating the manner in which COSATU members' lives were shaped by class, gender, race and nationalism. This study paid attention to both their *experience* of the intersections of race, class, gender and nationalism and to the micro level deliberation of their identities as COSATU members, how they experienced work or unionisation in a qualitatively distinctive ways but how these were connected to wider racial, class, and gender structures of inequality. These in turn affected their daily lives as African teachers and nurses employed in the public sector.

On the one hand, for the African nurses in particular, and to some extent for the teachers, their trade unions had focused heavily on the ANC's political matters. Some DENOSA members felt that their trade union had largely neglected shop floor issues and their trade unions were weakened in this respect for adhering to the NDR. These public sector trade union members were worried that their bread and butter issues, or their class interests, were not being attended to. On the other hand, the African nurses and teachers recognised that COSATU had a broad social agenda and that it had played a critical role in social justice issues. Although COSATU trade unions members stressed that improving their pay and working conditions were important to them so were issues of racial equality and wider social issues which were sites of struggle for them as well. This study showed that the ANC's nationalist liberation discourses prevailed in the

post-apartheid era and within the public sector COSATU affiliates where some COSATU members' political affinities with the ANC were strong.

The emergence of organic workerism is indication too of a labour movement that remains dynamic (Kenny, 2020) and not that existing unions in COSATU have conceded to nationalist politics.

The perseverance of nationalist sentiments among the grassroots (such as trade union members) was a very significant component that formed part of the support base for the ANC. The discourse of the ANC's NDR meant that African people were no longer prevented from acquiring wealth and education and becoming upwardly mobile. Indeed, the NDR discourse validated their presence. The ANC had worked hard to assert national and racial identity in fulfilling the first stage of the NDR and there was an obligatory pre-eminence of racial over class subjectivity. The state has advanced African interests (due to the policies of redistribution on the basis of racial disadvantage) and this was reflected in the nationalist politics of the African teachers and nurses in COSATU's public sector affiliates. The ordinary COSATU members of the public sector affiliates were more critical of the NDR but they did not shun liberation politics altogether as they were socially mobile and the ANC's nationalist thinking had taken took root among them. In COSATU's public sector affiliates, an organic workerist identity or new worker political tradition had emerged. The organic workerists in the COSATU public sector trade unions were the beneficiaries of the post-apartheid state and the ANC government but were disparaging of their trade unions, DENOSA and SADTU and the federation, COSATU for failing to maintain their distance from the factional politics of the ANC in the post-apartheid era. They were critical of the major tensions within and among COSATU's affiliates that had developed and how it had become divided along the lines of support for the ANC which introduced major internal struggles among the COSATU affiliates. They were also critical of the various union structures and their leadership which had worked to preserve their unity by following the NDR but in doing so, this had disastrous consequences for the public sector trade unions members, where they worked and the conditions they worked under. This was indicative of an organic workerist identity among the public sector trade union members of DENOSA in particular and to some extent in SADTU in Gauteng in post-apartheid South Africa.

9.4 Directions for future research and recommendations

This study only focused on the employed and those who were unionised among the labour force. This study did not take place among those parts of the labour force that were in temporary, fixed term, part time or in casualised employment or among those who were not trade union members. The class location of those whose security of tenure was anything but secure could also be explored via the idea of the contradictory class location to see if it intersected with their other identities such as race and gender and their interpretation of their working experiences, their views of trade unions, the Alliance and the ANC.

This study could contribute to a more nuanced understanding of trade unions and the conceptualisation of labour politics of other segments of the labour force. Future studies could look at African teachers and nurses employed in the private sector, that is in the private clinics and independent schools and test if Wright's (1978a, 1985) concept of contradictory class location applied among them too.

This study was cognisant of the weakness of seeing class only in relation to trade union members, and not among non-unionised workers. Class is not just about where people were located but it was also about their other workplace experiences such as race and gender oppression. A more appropriate qualitative method that allowed for the much richer information for the connections between race, class, gender and others could also be selected as the evidence gathered from the SADTU members in this study showed the limitations of the self-completion questionnaire but where interviews with the nurses of the public sector were far more informative. The advantage of the face-to-face interview with the nurses led to the detection of the new worker identity which is why this study argued had started to emerge in DENOSA in the Gauteng region and to a lesser extent in SADTU in the Gauteng region.

This study could only practically contextualise the intersectional identities and experiences of social inequality as raised by the African teachers and nurses by a focus on a restricted set of inequalities that were prominent at a particular time and place that this study took place (Tapia, 2019). Nevertheless, the African teachers and nurses raised issues of gender, race, class and intersectionality was purposefully used to understand the connections to their labour politics, which were critical of the ANC's NDR but this did not indicate that there were post-nationalist

sentiments among these COSATU members. The finding of this study challenged the Sharpe (2013, 2014) view that the public sector trade unions in COSATU were middle class and that this is what best characterised COSATU's membership.

In the literature review section, a more detailed account that outlines, compares, and contrasts the conception of ideology with those of rival accounts could have been provided, as well as literature on the complex and contradictory articulation of the ideational and material dimensions of ideology.

While teachers objected to the Department of Education's concern about students' wellbeing, nurses seemed to be far more concerned that shortages can affect patients' well-being. Of course, this difference may reflect the use of interviews for nurses and the use of self-completed questionnaires for teachers, a difference that demands further exploration.

Finally, the findings of this study also indicated that COSATU was more nationalistic than what the researcher had initially thought and this, as outlined above, is something labour scholars had to address more sincerely. This also suggested that future analyses of the connections between the COSATU trade unions, the ANC and political subjectivities could not be confined to focusing on the political tensions between leaders of the Alliance nor even the conflict among the different affiliates. The empirical evidence of the contradictory class location of COSATU members, race and intersections with gender revealed that employing the lens of intersectionality assisted in understanding the complexity of the contradictions and tensions among COSATU's membership and their political traditions in post-apartheid South Africa.

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Interviews conducted: Taking Democracy Seriously Project

COSATU Official, National office, Johannesburg, January 2015

COSATU official, National Office, Johannesburg, March 2015

DENOSA Office bearers, Eastern Cape, March 2015

SADTU Office bearer, Eastern Cape, March 2015

List of interviews conducted for thesis

PHSDSBC state representative, Centurion, 2 April 2018

DENOSA official, Johannesburg, 10 April 2018

Vuyo, DENOSA member, Johannesburg, 29 May 2018

Annie, DENOSA member, Johannesburg,7 June 2018

Grace, DENOSA member, Johannesburg, 8 June 2018

Neo, DENOSA member, Johannesburg, 8 June 2018

Tumi, DENOSA member, Johannesburg, 9 June 2018

Nomsa, DENOSA member, Johannesburg, 12 June 2018

Zanele, DENOSA member, Johannesburg, 13 June 2018

Khumo, DENOSA member, Johannesburg, 21 June 2018

Jabu, SADTU member, Johannesburg, 22 June 2018

Naledi, DENOSA member, Johannesburg, 2 July 2018

List of respondents who completed self-completed questionnaires for thesis

Khanyi, SADTU member, Johannesburg, 2 August 2018

Gladys, SADTU member, Johannesburg, 3 August 2018

Sam, SADTU member, Johannesburg, 3 August 2018

Lindelwa, SADTU member, Johannesburg, 3 August 2018

Nandi, SADTU member, Johannesburg, 4 August 2018

Tsepo, SADTU member, Johannesburg, 4 August 2018

Thobeka, SADTU member, Johannesburg, 5 August 2018

Anele, SADTU member, Johannesburg, 5 August 2018

Appendix A: Sample interview schedule for trade union officials

COSATU, DENOSA AND SADTU officials

1. What is the state of internal trade union democracy – of the trade union affiliates and of COSATU/DENOSA/SADTU local and regional structures?

2. Do you participate in participate in collective bargaining for wages and working conditions of either (Education Labour Relations Council or the Public Health and Social Development Sector Bargaining Council?)

3. Is there a crisis in collective bargaining (think about the strikes in the public sector)?

4. Looking at strikes in the public service now. In 2007 there was a strike in the public sector over wage increases and again in 2010. What is your opinion on public sector workers, like teachers and nurses, going on strike?

5. In your opinion, what changes, if at all, need to be made to employment relations and human resource policies that will work more effectively for all public service employees?

6. Do you think that COSATU/DENOSA/SADTU membership has changed over the past decade? (think of the rise of the public sector unions in COSATU. How has this impacted on COSATU as a 'working-class' movement?)

7. What are the current dynamics around the Alliance? Is the Alliancereally under strain? What is the future of the Alliance? Is there a possibility that the Alliancemay end?

8. It What is the source of the political divisions within COSATU? Is it about ideology or about interpersonal clashes?

9. What is the impact of COSATU battles on the solidarity of the labour movement in South Africa?

Appendix B: Sample interview schedule for interviews with bargaining council officials

Education Labour Relations Council

Public Health and Social Development Sectoral Bargaining Council

Public Sector Public Service Coordinating Bargaining Council

1.   What are the key issues in public service labour relations generally?

2.   What are the key issues in public service labour relations for the educators/nurses?

3.   What are the collective bargaining outcomes in the public service generally from 1994 to present? (wage agreements, negotiations and strike action, the growth of public sector trade unions, service delivery?)

4.   What are the collective bargaining outcomes in the public service for educators /nurses educators from 1994 to present? (wage agreements, negotiations and strike action, the growth of public sector trade unions, service delivery – education, the performance of SADTU/DENOSA?)

5.   What are the collective bargaining outcomes in the public service for educators/ nurses from 1994 to present? (wage agreements, negotiations and strike action, the growth of public sector trade unions, service delivery – health, the performance of DENOSA?)

6.   Give a brief outline of the structure, challenges and obstacles facing the Education Labour Relations Council/Public Health and Social Development Sectoral Bargaining Council/Public Sector Public Service Coordinating Bargaining Council?

7.   What is the state of the public sector bargaining council system? Does it face threats? How can these be overcome? What is needed to be done to promote an effective bargaining council

8.   How does the public service aid in democratising the South African workplace and in advancing economic development, social justice and labour peace?

Appendix C: Sample interview schedule for interviews with DENOSA members

1. In what year did you join DENOSA?

2. Age of respondent:

	Years

3. Highest level of education you have completed?

None, some primary or completed primary		Diploma after matric/FET diploma	
Some secondary without matric		University of Technology or Technikon degree	
Completed matric		University	
Other (specify)			

4. Please explain how you obtained your qualifications.

5. Were your parents or anyone in your family nurses or other professionals?

6. What is your current occupation (job title?)

7. When did you begin working for your current employer?

8. Is this job permanent or is it temporary, such as seasonal, casual, or contract work?

Permanent		Fixed-term contract	
Seasonal		Casual job	
Temporary		Don't know/no answer	

9. How much do you earn per month? (Earnings before tax and the figure should include all earnings, including overtime.)

10. Are you satisfied with what you earn or not?

Yes	
No	

11. What is your marital status?

Married		Divorced	
Single		Widow(er)	
Other			

12. Where do you usually live during the times that you work?

Single sex hostel		Shack	
RDP House		Rented room in a shack	
Rented family house		Backroom (in a yard)	
Rented flat		Own house with a bond from a bank	
Rented room in a house/flat		Other (specify)	

13. What is the name of the suburb you live in?

14. Do you also have a family home somewhere else?

Yes	
No	

15. If yes, where?

16. What is your monthly income and expenditure?

What do you:	Rands	What do you:	Rands
Earn per month (Gross monthly wage)	R	Spend per month on food/groceries for the household	R
Spend per month on bond/rent	R	Spend on hairdresser/barber	R
Spend on eating out	R	Spend per month on healthcare	R
Spend per month on clothes	R	Spend per month on electricity/water	R
Spend per month on furniture	R	Spend per month on household items	R
Spend per month on transport	R	Spend per month on repaying loans	R
Spend per month on paying school fees for children	R	Spend on live entertainment (sports, live shows)	R
Spend per month on savings	R		

17. Have you spent money on any of the following items in the past year? If you have, approximately what amount?

Item	Amount	Item	Amount
Buying a house	R	Renovating a house	R
Buying a car	R	Paying off a big debt	R
Household appliances (name them)	R	Other	R

18. How did you fund the purchase of the item(s) above?

Source(s)	
Normal wage/salary	
A loan	
Other (please state)	
Not applicable	

19. Do you find it hard to cope financially? (Such as paying monthly installments….)

Yes	
No	

20. Do you belong to a medical aid & are you a member of a pension/provident fund?

	Medical Aid	**Pension/provident fund**
Yes		
No		
Do not know		

21. Do you receive a housing subsidy/allowance?

Yes	
No	
Do not know	

22. In addition to you, how many people live in your household & how many of them work (formal or informal work) & how many are unemployed (that is they are able to work but cannot find work)?

Number of people (including yourself) live in household	**Number of people who work in household**	**Number of people who are unemployed in household**

23.   How many dependents do you have? Please specify the numbers for each category.

('Dependent' means anyone who regularly relies on part of your wage for support where you work and also your home of origin is [if applicable])

Dependents	Number	Dependents	Number
Children		Spouse(s)	
Parent(s)		Other relatives	
No dependents		Other (specify)	

24. Do any members of your household (that is of the home where you work) receive grants from the government?

Yes	
No	

25. If yes, which of the following grants are members of your household where you live where you work receiving?

Old-age pension	
Disability grant	
War veteran's grant	
Child grant	
Other (specify)	

26. Tick the following if it applies:

Tap water in house/on plot		DVD player/Blu Ray player	
Flush toilet inside the house		Refrigerator or combined fridge/freezer	
Hot running water		Electric stove	
Built in kitchen sink		Microwave oven	
Home security system		Deep freezer	
Cellphones in the household		Pay TV (M-Net, DSTV, TopTV)	
Radio set/s in the household		Computer (desktop or laptop)	
Washing machine		Tumble dryer	
Air conditioner		Dishwashing machine	
TV set/s		Home theatre system	
Swimming pool		Vacuum cleaner	
Landline		Motor vehicle	

27. Do you have a short term insurance policy to cover items such as household contents, valuables, motor vehicle, legal, home owners?

Yes	
No	
Do not know	

28. Now some questions about your working conditions.

	Always	Often	Some-times	Hardly ever	Never
Do you come home from work exhausted?					
Do you have to do hard physical work?					
Do you find your work stressful?					
Do you work in dangerous conditions?					

29. How satisfied are you in your (main) job?

Completely satisfied	
Fairly satisfied	
Neither satisfied nor dissatisfied	
Dissatisfied	
Completely dissatisfied	

30. Please tell me about your workload:

   a. How many hours do you work a week?

   b. Do you work overtime and if so how often?

   c. What is your relationship with the managers?

   d. What is your relationship with doctors?

   e. What is your relationship with your nursing colleagues?

   f. What is your relationship with your patients?

   g. How many people work in your department?

31. Please tell me about the resources you have to do your work?

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32. What are the challenges in the public healthcare system?

33. Are you safe in your workplace? (personal safety, risk of infection, risk of diseases, risk of injury)?

34. Why did you join DENOSA?

35. Why do you still belong to DENOSA? What are the advantages of belonging to DENOSA? Are there any issues that face you as a nurse that DENOSA has not addressed?

36. Were you a member of another union or worker organisation before DENOSA and if so which one?

37. Have there been strikes in your workplace since you have worked there?

38. Why did workers go on strike?

39. Did you personally participate in the last strike? OR Why did you not participate in the strike?

40. What do you think of the split in COSATU?

41. Would you consider yourself a professional first or a trade unionist first? Please explain your reasons.

42. What would you say are the levels of support for the ANC from its traditional worker base, other COSATU members?

43. What do you think will happen in the 2019 elections? How much support will the ANC receive? And who are political rivals and their level of support?

44. Does the political party you vote for have nurses in the public sector best interests at heart?

45. What has the ANC government done to build a non-racist, non-sexist, democratic society in a post-apartheid society? Do you think that the ANC government has succeeded in achieving this?

46. What more could the ANC government do to build a non-racist, non-sexist, democratic society in a post-apartheid society?

Appendix D: Sample self-completion questionnaire for SADTU members

1.   What is your gender?

Male		Female	

2.   In what year did you join SADTU?

3.   What is your age?

	Years

4.   Highest level of education you have completed?

None, some primary or completed primary	
Some secondary without matric	
Completed matric	
Diploma after matric/FET diploma	
University	
University of Technology or Technikon degree	
Other (specify)	

5.   When did you begin working for your current employer? [Year]

6.   Please indicate if you work for

Primary school	
High school	
Other	

7.   Is this job permanent or is it temporary, such as seasonal, casual, or contract work?

Permanent		Fixed-term contract	
Seasonal		Casual job	
Temporary		Don't know/ no answer	

8.   How much do you earn per month? [earnings before tax and the figure should include all earnings, including overtime.]

R

9.   Are you satisfied with what you earn or not?

Satisfied	
Dissatisfied	
Do not know	

10.   Apart from your salary are there other sources of income in your household?

Yes	
No	

11.   What is your marital status?

Married	
Single	
Divorced	
Widow(er)	
Other	

12.   Where do you usually live during the times that you work?

Single sex hostel	
RDP House	
Rented family house	
Rented flat	
Rented room in a house/flat	
Shack	

Rented room in a shack	
Backroom (in a yard)	
Own house with a bond from a bank	
Other (specify)	

13. Do you also have a family home somewhere else?

Yes	
No	

14. If Yes in Q14, where is your family home?

15. What do you spend your monthly income on?

What do you:	Rands
Spend per month on food/groceries for the household	R
Spend per month on bond/rent	R
Spend on hairdresser/barber	R
Spend on eating out	R
Spend on live entertainment (sports, live shows)	R
Spend per month on clothes	R

Spend per month on electricity/water	R
Spend per month on furniture	R
Spend per month on household items	R
Spend per month on transport	R
Spend per month on repaying loans	R
Spend per month on paying school fees for children	R
Spend per month on healthcare	R
Spend per month on savings	R

16.   Have you spent money on any of the following items in the past year? If you have, approximately what amount?

Item	Amount
Buying a house	R
Renovating a house	R
Buying a car	R
Household appliances (name them)	R
Paying off a big debt	R
Other (please list)	R

No – I have not spent money on anything in the past year	

17.   Do you find it hard to cope financially? (Such as paying monthly installments….)

Yes	
No	

18.   Do you belong to a medical aid & are you a member of a pension/provident fund?

	Medical Aid	Pension/provident fund
Yes		
No		
Do not know		

19.   Do you receive a housing subsidy/allowance?

Yes	
No	

Do not know	

20. In addition to you, how many people live in your household & how many of them work (formal or informal work) & how many are unemployed (that is they are able to work but cannot find work)?

Number of people (including yourself) live in household	Number of people who work in household	Number of people who are unemployed in household

21. How many dependents do you have? Please specify the numbers for each category.

('Dependent' means anyone who regularly relies on part of your wage for support where you work and also your home of origin is (if applicable)

Dependents	Number	Dependents	Number
Children		Spouse(s)	
Parent(s)		Other relatives	
No dependents		Other (specify)	

22. Do you have a short term insurance policy to cover items such as household contents, valuables, motor vehicle, legal, home owners?

Yes	
No	
Do not know	

23.   Do you have the following in your household (please tick all that apply)

Tap water in house/on plot		DVD player/Blu Ray player	
Flush toilet inside the house		Refrigerator or combined fridge/freezer	
Hot running water		Electric stove	
Built in kitchen sink		Microwave oven	
Home security system		Deep freezer	
Cellphones in the household		Washing machine	
Radio set/s in the household		Tumble dryer	
Air conditioner		Dishwashing machine	
TV set/s		Pay TV (M-Net, DSTV, TopTV)	
Swimming pool		Home theatre system	
Landline		Vacuum cleaner	
Motor vehicle		Computer (desktop or laptop)	

24. What is the name of the suburb in which you live?

25. Do you have enough resources to do your work?

Yes, I have enough resources to do my work	
No, I do not have enough resources to do my work	

26. Would you consider yourself a professional first or a trade unionist first?

A professional first	
A trade unionist first	

27. Have there been strikes in your workplace since you have worked there?

Yes, there have been strikes	
No strikes	

28. Are you an active member of a political organisation(s)?

Yes	
No	

29. Does the political party you intend voting for in the 2019 have your interests as a teacher at heart?

Yes	
No	
That is not important to me	

30. Should COSATU stay in the Alliance with the ANC and the SACP?

Yes, COSATU should stay in the Alliance with the ANC and SACP.	
No, COSATU should leave the Alliance with the ANC and SACP.	

31. What should COSATU do if it leaves the Alliance?

COSATU should not be aligned with any political party.	
COSATU would be better off forming its own party.	
Do not know.	

32. What would you say are the levels of support for the ANC from its traditional worker base, other COSATU members?

The levels of support for the ANC from COSATU members is high.	
The levels of support for the ANC from COSATU members is low.	
Do not know.	

33.   Do you agree/disagree with the following statement?

Workers cannot rely on political parties to protect their interests.

Strongly agree	
Agree	
Neutral/ do not know	
Disagree	
Strongly disagree	

34.   Do you agree/disagree with the following statement?

Workers will always need trade unions to protect their interests.

Strongly agree	
Agree	
Neutral/ do not know	
Disagree	
Strongly disagree	

35.   COSATU has entered into an alliance with the ANC and SACP to contest the 2014 election. What do you think of this arrangement?

It is the best way of safeguarding workers' interests in parliament	
Workers' interests in parliament should rather be represented by the SACP alone	

COSATU should not be aligned with any political party	
Another party could better serve workers' interests	
Workers should form their own political party	
Do not know	

36.   Do you think that this alliance should continue and contest the election after 2019 (in 2024)?

Yes.	
No. COSATU should not be aligned with any political party.	
No. COSATU would be better off forming its own party.	
I think that COSATU should maintain its alliance with the SACP only.	
I think that COSATU should maintain its alliance with the ANC only.	
Do not know.	

Open-ended questions:

37.   What are the advantages of belonging to SADTU? Are there any issues that face you as a teacher that SADTU has not addressed

38.   What are the challenges in the public education system?

39.   What do you think will happen in the 2019 elections? How much support will the ANC receive?

40.   What has the ANC government done to build a non-racist, non-sexist, democratic society in a post-apartheid society? Do you think that the ANC government has succeeded in achieving this?

Appendix E: Informed consent forms

Name: Christine Bischoff

Email: Christine.Bischoff1@gmail.com

Cell: 084 510 9882

Date:

Invitation to participation in study: The nexus between the rise of nationalism in COSATU, the public sector and the middle class in the post-apartheid ANC state in South Africa

I am a doctoral student at University of Pretoria, and I am conducting a series of interviews for my PhD research. The purpose of this study is to understand the connections between the rise of nationalism in COSATU, the public sector and the middle class in the post-apartheid ANC state in South Africa. This process will involve the gathering of information from a number of sources as well as conducting face-to-face interviews with selected individuals.

As part of this study, I would like to interview you as a nurse/teacher who is employed in the public sector in South Africa/a bargaining council official/a trade union official. In the process notes will be taken and the interview discussions will be recorded where possible as approved by you. All the information will be kept confidential. In writing up the information, I will use a pseudonym when I refer to specific interviewees and your identity will not be revealed in my research. The data will be stored in the Department of Sociology's research archive for 20 years. Only my supervisor and I will have access to the data. The outcomes of the research are to be written up in my PhD thesis. I may also want to publish the findings in a scholarly journal or as a book or book chapter in a field-specific publication. I plan to present my findings to participating organisations, as well as to my colleagues at the University of Pretoria and at academic conferences.

The details of my research supervisor are as follows, should you have any further queries:

Professor Andries Bezuidenhout

Department of Sociology

Faculty of Humanities

University of Pretoria

Pretoria 0002

Tel: +27 12 420 2330

Participant's Agreement: Participation

I am aware that my participation in this interview is voluntary. I understand the intent and purpose of this research. If, for any reason, at any time, I wish to stop the interview, I may do so without having to give an explanation. I understand that the data gathered in this study are confidential with respect to my personal identity. I understand that in the interview process, notes will be taken and the interview discussions will be recorded as approved by myself. I understand that if I have any questions about this study, I am free to contact the student researcher or the supervisor (contact information provided above and below). I have read the above form and I have been offered a copy of this consent form that I may keep for my own reference. I am aware the data will be used in a PhD dissertation that will be publicly available at the Main Library at the University of Pretoria, and that the information contained in it may be used in academic publications and presentations. I understand that the data will be securely stored in the Department of Sociology for fifteen years.

_____   _____

Participant's signature   Date

_____

Interviewer's signature

Participant's Agreement: Recording

I am aware that the interview will be recorded. I understand the intent and purpose of the recording for transcription purposes. If, for any reason, at any time, I wish to stop the recording, I may do so without having to give an explanation.

_____   _____

Participant's signature   Date

_____

Interviewer's signature

Appendix F: University of Pretoria Ethics Clearance

UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Humanities
Research Ethics Committee

20 March 2018

Dear Ms Bischoff

Project:	**The nexus between the rise of nationalism in COSATU, the public sector and the middle class in the post-apartheid ANC state in South Africa**
Researcher:	**CE Bischoff**
Supervisor:	**Prof A Bezuidenhout**
Department:	**Sociology**
Reference number:	**94542259 (GW20171041HS)**

Thank you for your response to the Committee's correspondence of 21 November 2017.

I have pleasure in informing you that the Research Ethics Committee formally approved the above study at an *ad hoc* meeting held on 20 March 2018. Data collection may therefore commence.

Please note that this approval is based on the assumption that the research will be carried out along the lines laid out in the proposal. Should your actual research depart significantly from the proposed research, it will be necessary to apply for a new research approval and ethical clearance.

We wish you success with the project.

Sincerely

Prof Maxi Schoeman
Deputy Dean: Postgraduate and Research Ethics
Faculty of Humanities
UNIVERSITY OF PRETORIA
e-mail: tracey.andrew@up.ac.za

cc: Prof A Bezuidenhout (Supervisor)
Prof D Bonnin (HoD)

Research Ethics Committee Members: Prof MME Schoeman (Deputy Dean); Prof KL Harris; Dr E Blakand; Dr K sooyand; Dr A-M de Beer; Ms A dos Santos; Dr R Fasselt; Ms KL Govinder, Dr L Johnson, S W Kellerman; Mr A Grootman, Dr C Puttergill; Dr D Reyburn; Dr M Soer, Prof E Taljard; Prof V Thebe; Ms B Tsebe, Ms D Molduz

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Jacqueline Kraamwinkel

PO Box 38824 Garsfontein 0060 | +27 72 709 4463 | jackykraamwinkel@gmail.com

06/08/2020

To whom it may concern

This is to certify that the thesis **CLASS, CONTRADICTIONS AND INTERSECTIONS: THE EMERGENCE OF ORGANIC WORKERISM IN SOUTH AFRICAN PUBLIC SECTOR UNIONS?** by **CHRISTINE BISCHOFF** is in the penultimate stage of the required language edit by a professional editor. For the purpose of electronic submission, this version has been released; the final version will be made available for the printing process.

Sincerely,

Jacky Kraamwinkel

BA (English and Psychology) – UJ
BA (Hons) English Literature – UJ
PEG membership no: KRA002