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Shop floor challenges, opportunities and strategies of shop steward in post-apartheid South Africa : a case study of the National Union of Metalworkers of South Africa (NUMSA).

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INTRODUCTION

1.1 Overview

It is quite exciting to note that the work and functions of shop stewards have been investigated from the nineteenth century in the British context from whence shop stewards in South Africa drew their inspiration from (Lane, 1974 and Hyman, 1975). In the South African context, related studies explicitly on shop stewards were done by Webster, (1985) and Pityana and Orkin, (1992). As the dates clearly shows, these studies were done during the apartheid era. However there were many changes that took place after democratisation like shift in union ideology, growth of hierarchical structures in unions, development of full time union officials, centralised bargaining as well as pro-labour Act(s).

Other studies that were done were mainly focussed on trade unions transformation, their role in workplace restructuring, trade union revitalisation as well as shift in ideology that had the likely effect of wiping out shop floor democracy (Buhlungu, 2010; Buhlungu and Webster, 2006; Masondo, 2005; Von Holdt, 2003; Vlok, 2000; Finnemore, 1999 and Catchpowle et al, 1998). It was therefore imperative that a study be conducted that targets shop stewards and their surroundings.

This study took place during a time when there was leadership renewal in the union. As a result I was able to observe the election process and procedure at one of the sites used as a case study. As I commenced the research there was also another phenomena, a country wide strike during the month of July. Though the responsible authorities denied me an opportunity to march with demonstrators, interviews that were held in the after math of the strike did shed light on the challenges shop stewards faced as a result of "unilateral decision making by the national leaders." This will be explored in chapter 4.

In this Section I will introduce the research study. The objectives and rationale for undertaking the study will be discussed, before an outline of the whole research will be given.

1.2 Background

The development of the shop steward movement in South Africa, like the growth of trade unions is closely linked to similar events that took place in United Kingdom, especially Britain. This is so because trade unions were brought into the country first by British craft workers who were shipped into South Africa to provide the necessary expertise when gold and diamonds were discovered in 1867 and 1985 respectively (Ncube, 1985; Horrell, 1961 and Davies, 1966). It is this same crop of craft workers that also popularised the institution of shop stewards. With the passage of time trade unionist in South Africa mastered the art of shop steward and further modified it to their advantage.

Since unionism was modelled along British lines, Webster, (1985) noted that developments in that country had similar effects on the growth of shop stewards in South Africa. Thus learning from developments in the shop steward movement in Britain, emerging industrial unions placed central emphasis on building a working class leadership on the shop floor in South Africa. Webster, (1985) further asserts that the shop floor unions that developed in the 1970s avoided political action outside the workplace. They instead built democratic shop floor structures around the principle of worker control, accountability and mandatory of worker representation.

Placing emphasis on the shop floor ensured that unionisation was now situated within the workplace. This subsequently changed workplace relations (Von Holdt, 1997). Shop stewards of the day were able to challenge the unilateral power of management. Shop stewards created a structure of workplace representation that ensured unions remained democratic and sensitive to the needs and interest of their members. They, (shop stewards) also ensured that power devolved within the system of industrial relations to the workplace and did not become a bureaucratic exercise between representatives of management and labour.

The first union to place emphasis on building shop stewards structures was Metal and Allied Workers Union (MAWU). MAWU shifted from a strategy of mass mobilisation to a concentration on building shop stewards structures (Webster, 1985:232). By 1980 shop stewards and their committees had become the pivot of the organisation. Webster, (1985) noted that even though shop stewards were introduced in the late 19th century; they operated weakly till the 1970s.

Shop stewards were at the centre of the union. They were the key link between shop floor, union officials and management. They were active in attending union meetings, recruiting

members, providing members with union policies, informing union about changes at factory, like appointments of a new supervisor. They also had to settle grievances that emerge in the day-to-day activities of workers, for example if the safety guards have been taken off, then it would be the task of the steward to challenge management to replace these safety guards (Webster, 2003). The shop stewards expected the union to accord them training, organisational assistance, information and legal advice.

Members in the foundry were responsible for electing shop stewards from every department (Webster, 1985 and Pityana and Orkin, 1992). The shop stewards' tasks were to represent the interest of the union members in their department, protect the rights of workers against management and if necessary challenge their decision. The steward`s role as member of shop steward committee was negotiating for the whole plant on issues like wages, working condition and where an agreement exist, the steward had to ensure that it was implemented correctly. Their power and positions were largely dependent on the continuing support of members. The steward would be relieved of duties if suspected that the member no longer represented the interests' of the workers.

Overall, unions succeeded in focusing their attention on workplace demands and improving material working conditions for their members, while at the same time taking the apartheid state (Baskin, 1994). Buhlungu, (2003) also noted the ability of unions to withstand apartheid state suppression enshrouded in strong shop floor structures, sound financial base as well as commitment to trade union education and training. By placing emphasis on the active role of shop stewards and shop steward committees, unions were shifting from a strategy of 'mass mobilisation' to a concentration of building shop steward structures based at the shop floor (Webster, 1985:232). Webster further noted that by the 1980s shop stewards and their committees had become the pivot of the (trade union) organization.

According to Vlok, (2000) unionism in South Africa during this period was described as social movement unionism which exhibited a close relationship between the union and the community and union involvement in broader political issues. The period from 1990 to 1994 witnessed serious community conflict, strikes, stay away and violence as workers continued to fight for democracy as well as more rights in the labour and political laws of the country. The period also produced first strategic shift in union thinking as shown by the idea of a social contract between capital and labour, with a general increase of worker participation in management decisions.

The move towards strategic and business unionism did not spare National Union of Metalworkers South Africa (NUMSA). NUMSA like its predecessor MAWU took a leading role in introducing new policies and negotiating programmes. Unfortunately most stewards as Catchpowle et al (1998) noted lacked the knowledge and expertise about the new programmes. This had a great compromise on worker control since shop stewards had to summon all their negotiating skills to convince the rank and file to go by union's vision and new goals. Von Holdt, (1997) commented that the transition within the union was not a smooth process since the period up to 1996 was characterised by as many strikes against the shop stewards and the union as against management. This was so due to the fact that shop stewards were not able to take on board new transformations that the union had proposed.

The shift in union ideology that saw union's participation in workplace restructuring, establishment of centralised bargaining bodies and the subsequent embrace of neo-liberal policies by the Africa National Congress (ANC) led government also had a bearing on the organisation of the shop floor. As Buhlungu, (2010) noted, most unions from the 1990 evolved and developed full time positions for union officials. This was also coupled by the development of a bureaucratic structure that had the effect of separating the shop floor from the national union. Based on these and other changes that took place within the union movement, I seek to examine the challenges and opportunities that shop stewards have encountered at the workplace in the course of carrying out their day to day activities in the work of various changes that unions adopted upon democratisation like the shift in union ideology and also the changes brought about with the government changing focus of its development ideology.

1.3 Objectives and Rationale

There is very little research that has been done to investigate challenges facing shop stewards in the South African context especially in the post-apartheid era from the year 2000 onwards. Studies that made reference to the functions of shop stewards made such reference in the context of issues that affected shop stewards within the trade union movement in general. This research will examine the day-to-day challenges faced by the shop stewards in the course of carrying out their duties in contemporary South Africa using the case study of NUMSA shop stewards.

Notable systematic studies to examine the role and functions of shop steward in the emerging unions were undertaken by Webster, (1985) who concluded that shop stewards in South Africa exhibited similar characteristics to those of their counterparts in Britain from whence they had significant links. The major difference that Webster, (1985) noted between British shop stewards and their counterpart in South Africa was that, their leadership and activities were not limited to the workplace. They also got involved in community issue in areas they resided, like fighting for decent accommodation and service provision.

Pityana and Orkin (1992) carried out another significant examination of the functions and roles of shop stewards, this time focusing on Congress of South Africa Trade Union (COSATU) shop stewards. Their study had the following significant findings: firstly most shop stewards were elected by their constituents either through show of hands or through a secret ballot. Constituents had the power to remove the stewards as long as they felt that the shop steward was no longer representing their interests. Most of these shop stewards were also long serving members of their organizations, with some having been at the same position for up to eight years.

The second observations pertain to the issue of education and salary. Pityana and Orkin, (1992) showed that most shop stewards were more educated than their constituents and equally better paid. However, the difference in pay was attributed to the four different industries that existed in the structure of South African economy. Most shop stewards were said to be married or living with a partner. The majority were said to be generally poor and exploited.

On the political arena the findings revealed that the stewards believed that their leaders should take up political positions though they admitted that their political knowledge was limited. They also saw no problem in supporting ANC, and believed that the tripartite alliance was a necessary machine in their fight for both political and economic rights, both at the workplace and in the community. While the media is said to be an ideological tool that is used by those in power to influence the perception of subordinates; the finding shows that COSATU shop stewards had peculiar sources of ideology, this was because many shop stewards were politicised by specific historical circumstance of struggle against apartheid.

Lastly the report unveiled the contradictory functions of the shop steward: on one hand there was the steward's paymaster while on the other the constituents, instrumental in the steward's ascendency to power, whose expectations were beyond the capacity of the steward to deliver.

With regard to the issue of worker control, Gostner, (1995) noted that the onus was upon the stewards to convince the constituency to go by union policies and vision. Gostner commended that the power of the shop steward rested on their power to convince rank and file to go by management and union decision. The desire by the steward to win the favour of rank and file to some extent compromised the issue of democracy since the focus of shop stewards was now on preserving their job. That they were able to convince the constituency to go against their will was one of the underlying reasons that resulted, as Von Holdt, (1997) in more strikes directed against shop stewards than against management.

Von Holdt, (1997) studied the relationship between NUMSA shop stewards at the local and regional level and the officials at head office in the wake of a new set of policies and negotiating programme that were developed in the 1990s as unions tended towards strategic unionism. His findings showered that most stewards lacked experience and knowhow with regard to the new policies. As a result they were not able to articulate the short term benefits of these proposed policies that the union had asked them to champion in their implementation at the plant and regional level. According to von Holdt, (1997:22) the union's new negotiating programme took 'a complex and technical form' that few shop stewards could apply collectively. The result was as Von Holdt, (1997) concluded: was conflict among shop stewards and even within individual shop stewards as they played the role of union agent in negotiating and as liberating agent. This contradiction between negotiation and sustained 'ungovernability' took the form of increasing conflict between shop stewards and the strike committee, and led to an antagonism between township residents and hostel dwellers.

A study by Catchpowle et al, (1998) investigated the changing roles of shop stewards in post apartheid South Africa. Their studies focused on shop steward's dilemmas in the light of ideology of free markets that the new government that took power in 1994 had tended towards alongside a corporatist structure of labour relations. Their findings showed the dilemma of stewards since the policies they detested under the apartheid management were replicated by the new black management under the new black government they voted into power. However, the participants in the study were mostly Members of Parliament, other

government officials and academics without questioning the stewards. Moreover their studies were done in the late 1990s.

It is in this context that I seek to examine the changes that took place when the country democratised in 1994 to this 2011 which had a bearing on the functions of NUMSA shop stewards in their day-today activities at the workplace. Of particular importance is a consideration of how the opportunities for labour that were ushered in with the introduction of the new Labour Relations Act of 1995 and a corresponding embrace of labour market policies by the country during the same period affected the shop floor. The shift in trade union ideology and its significance on the day-to-day role of shop steward at the workplace will also need to be examined.

The research seeks to answer the following questions:

- What are the everyday shop floor challenges that face NUMSA shop stewards?
- Which strategies are shop stewards employing to mitigate the impact of these challenges?
- How have these challenges and strategies affected the relationship between the shop stewards and the constituents, union and management?

1.4 Structure of the research report

This thesis is divided into six chapters. The first chapter traces and analysis the debates and issues around shop stewards in the South African context. The chapter commences with an outline of the history of trade union movement in the country during the apartheid era and after democratisation. The opportunities available for labour after democratisation like an enabling labour law are identified, together with constrains like the entrance of the country on the global arena. The developments surrounding the shop stewards in both pre and post apartheid era are identified. The potential opportunities that democratisation availed to shop stewards like increased room for upward mobility as well as the constraints like the removal of collective bargaining from the shop floor are identified and discussed. NUMSA's brief history and activities are described before a discussion of the two theoretical frameworks; the structure agency debate as well as the iron law of oligarchy.

Methodology used when undertaking this study is discussed in chapter two. It is shown in this chapter that qualitative research method was the basic method adopted. However I triangulated the method that is in-depth interview, documentary analysis and observation to ensure that correct data was collected. The data analysis and interpretation techniques are also explained together with the sampling method. Ethical issues as well as strength and limitations of the study are discussed in this chapter.

Chapter three profiles the shop steward, outlining their age, period of service, level of education and the impediment that prohibits women from fully participating as shop stewards which are inherent in patriarch and the structure of the sector under investigation. The various benefits, both monetary and none monetary that shop stewards are entitled to, are discussed in this chapter. The reasons why members accept nomination and election as shop stewards are also shown to have strong political and family influence (see appendix for shop steward nomination form.

The union's administrative structure is discussed in chapter four. All the four structures commencing with the workplace to the national structure are identified and a brief outline of the duties and powers of each committee in the hierarchy are explained. The influence of the shop steward in the hierarchy is shown, together with the various ways through which the structure 'colonises' the shop steward. It will be argued that the structures were meant to enhance the administration of the union. On the contrary the structures are inhibiting worker control and the democratic process since decisions are mostly done at the top where there are experts overriding the decisions of the constituent and their shop stewards at the bottom of the hierarchy.

The fifth chapter will characterise the shop steward as the man and woman in the middle. The pressures that members and management exert on the shop stewards are identified and discussed. I will argue that members expect shop stewards to be jack of all trades and exceedingly capable of making management succumb to their demands. Management on the other hand expect the shop steward to silence members and channel their efforts towards increasing the profitability of the firm. Management is shown to have developed crude means and tactics to silence the shop stewards if they are perceived to be a threat in championing worker's rights. The chapter ends with an analysis of the role of a shop steward as a social worker.

The last chapter will argue that the challenges facing shop stewards are inherent in the union's bureaucratic structure due to what Michels, (1959) saw as an inherent tendency in human beings to move towards oligarchy. Globalisation trends have also greatly altered work structures and due adjustments in terms of grade and salary have not been made. Management on the other had besides expecting shop stewards to align members towards meeting the goals of the firm is shown to be insincere as it continue to force worker to work in environments that can potentially harm their health without proper protective clothing. Lastly I reveal that shop stewards are not just recipients but active agents who shape and are shaped by the system as shown by short cuts they take in order to deal with the constrains if the structure.

Chapter 1

LITERATURE REVIEW

1.1 Introduction

In this chapter I will review what previous scholars and researchers have observed and written regarding the activities and challenges of shop stewards in South Africa. The literature will trace the origins of trade unionism in the country, paying attention to the challenges that black trade unions faced before democratisation. The opportunities for labour after democratisation and how they inhibit or enhance the work of shop stewards will be discussed. An overview of shop stewards and their status before the commencement of the study will be outlined. The chapter will end by a brief background of NUMSA as well as the theoretical frameworks used in this thesis. The structure agency debate, that will be used to explain the various constrains that shop stewards are subjected to due to the structure, that is the union and company rules and regulations, and the theory of oligarchy which will be used to explain the idea that as organisations develop bureaucratic structures, they tend toward the rule of the few. This therefore implies that shop floor democracy will diminish together with the concept of worker control.

1.2 The origins of unionism in South Africa

Trade unionism was imported into South Africa by British craft workers in last quarter of the nineteenth century. The first white craft unions in South Africa were concerned with securing recognition from employers and government, and to protect their trade from entry by blacks because of their colour and lack of skill (Horrell, 1961:1 and Davies, 1966:54). While the blacks lacked the skill and equally denied the opportunity to acquire the skill, Afrikaners were accorded membership of craft unions. For the Unitarists, two determining factors, namely ‘skill’ and ‘skin’ reinforced one another to provide justification for denying blacks the right to join white unions (Ncube, 1985:151). Thus in the South African context, racist and elitist behaviour of craft unions made racialism and socialism become mutually ideological constructs. The classes, which are labour on one hand and capital on the other extreme end that Marxists perceive as inherent in society didn’t exist in South Africa in its classical sense (Ncube, 1985). There was clear demarcation between worker struggles of white unions and black unions.

It was not until 1917 when black trade unions first emerged in the country. It was the Industrial and Commercial Workers Union (ICU) of 1919 that made meaningful attempts towards unionisation of black workers (Friedman, 1987:11; Davies, 1966:54; Baskin, 1991:7). Ncube (1985:152) state that the ICU was established as a direct response to the widespread frustrations affecting the black masses that were deprived of the right to vote and right to own land. Thus the ICU appealed to blacks from all walks of life and schools of thought and ultimately became an 'amorphous, messianic popular movement', which could not differentiate between economic and political issues because these were inextricably intertwined (Ncube, 1985:152). For Baskin, (1991) the importance of ICU was the establishment of a tradition of black workers resistance.

Notable developments from the 1930s to 1960s include the establishment of the workers committee for black employees. This was the only legitimate system of representation for the black workers till 1979 (Horrell, 1961 and Ncube, 1985). While unions were urging towards the classical Marxist ideology of capital and labour on extreme ends, the Industrial Conciliation Act of 1956 prohibited the registration of mixed unions, except with ministerial permission (Ncube, 1985 and Baskin, 1991). This shuttered all the hopes and gains of labour during the period.

Webster, (1985) observed that unions of the 1960s were hit in early decades by the Unlawful Organizations Act and General Laws Amendment Act. Ncube, (1985) and Baskin, (1991) noted that few unions (black) that survived the dark decade remained largely under the influence of Trade Union Council of South Africa (TUCSA), which was a multi-racial trade union till 1969, when the union bowed down to government pressure to expel black trade unions from its ranks, though the decision was reversed 4 years later.

While most trade unions leaders were in exile organized resistance was building from below. In the 1970s independent trade union organising efforts started simultaneously in Durban, Cape Town and Witwatersrand. Baskin, (1991:20) attributed the formation of these unions to different groups that included 'remnants' of banned (Black) trade unions, influence of (ANC), intellectuals and international organisations like International Confederation of Free Trade union, (ICFTU) who chipped in with funding to bolster the activities of the unions.

Following the spontaneous strikes that characterised the period from the 1970s, the Wiehahn Commission of inquiry was appointed in 1977 to among other things investigate the

inadequacies in the existing labour legislative structures and propose possible changes. The commission recommended the recognition of the right of African workers to form and belong to trade unions. Ncube, (1985) regarded the recommendations as a milestone in South Africa's Labour history. For the first time in the history of the country, black workers were included under the formal definition of employee and the black unions could apply to become legally registered.

Two federations that were formed in the aftermath of the Wiehahn recommendations included Federation of South Africa Trade Unions (FOSATU) that was founded in 1979 and later paved way for (COSATU) in 1985. National Council of Trade Unions (NACTU) came into life in 1986. COSATU set itself a dual economic and political role from the onset (Bendix, 2000).

1.3 Trade Unions in Post-apartheid South Africa

When the country democratised in 1994, there were three trade union federations namely, COSATU, Federation of Trade Unions South Africa (FEDUSA) and NACTU. In 2003, a new federation, Confederation of South African Worker's Union (CONSAWU) was formed to take the total number of federations to four. COSATU was established in November 1985 following the merger of industry-based unions from the FOSATU and community-centred unions affiliated to the United Democratic Front (UDF), as well as several other independent unions (Baskin, 1991). COSATU believes in non-racialism, worker control and international worker solidarity. It also subscribes to the principles of "one industry, one union" and "one country, one federation". COSATU is the country's largest federation. Currently the federation's membership stands at 2 070 739 (COSATU 7th Draft Secretarial report, 2011). COSATU is predominantly black, blue collar union (Webster and Buhlungu, 2004:231). The federation has an overt political orientation with its alliance with ANC and South Africa Communist Party (SACP). Buhlungu, (2003) states that traditionally, COSATU was characterised by a greater degree of decentralisation of power and vibrant grass roots structures such as shop steward committees, local council branches and regional structures.

COSATU's 19 affiliates have a combined total of 1 831 full time officials, with NUMSA accounting for 15.02% of the total (Webster and Buhlungu, 2004:232). COSATU unions have regular publications and updated websites. Within their affiliates they have specialised departments like Education and Research like National Labour and Economic Development

Institute (NALEDI) formed in 1992 which researches labour issues on behalf of the federation for the purpose of improving service delivery at the federation.

FEDUSA emerged in 1997 as a result of a merger between the Federation of South African Labour Union (FEDSAL) and the Federation of Organisations Representing Civil Employees (FORCE). It is composed of craft unions and staff associations which traditionally were predominantly white collar membership (Buhlungu, 2003:185). These craft unions regrouped under the federation out of fear of marginalisation in the post apartheid era. In spite of its attempts to distance itself from its white staff association image of the past, FEDUSA continued to draw its membership from the upper end of the labour market which is predominantly white, coloured and Indian (Webster and Buhlungu, 2004:232). Due to the nature of their membership, FEDUSA affiliates have weak grass root structures, in the process power tent to be concentrated in national structures, run by powerful full time officials.

The federation has a small head office, staffed by ten full time officials as of 2002. FEDUSA like NACTU does not have a dedicated research institute like NALEDI at COSATU. The two federations heavily rely on outsourcing their research needs to consultancy and labour service organizations. This compromises the ability of the federation to keep updated with issues that demands shift in policies (Webster and Buhlungu, 2004:233). FEDUSA pursues a policy of apolitical, non-aligned and is particularly critical of COSATU's tripartite alliance, ignoring the fact that most of its unions have a long and documented history of collaboration with the apartheid National Government.

NACTU, the smallest of the federations at the end of 20th century was formed in 1986 as a result of a merger between Council of Unions of South Africa (CUSA) and Azanian Confederation of Trade Unions (AZACTU) (Dowie et al, 1999). These were black unions that refused to join the politically aligned COSATU in 1985. The federation drew membership from two different traditions in the liberation movement: Pan-Africanism and Black Consciousness (Buhlungu, 2003:186 and Webster and Buhlungu, 2004:233). The federation insist on a black leadership of the union, a view that contrast with what it regards as 'colour blind non-racialism' of COSATU (Buhlungu, 2003). While Webster and Buhlungu, (2004) diplomatically point out that the federation has not found an effective voice in new South Africa, Macun, (2000) categorically stated that the union structures are weak

and that the organization is hierarchical and is run in a top down manner, which explains the reason why it can't find an effective voice..

CONSAWU, the youngest of all the federations was formed on 8 May 2003. According to the union's website, the federation was formed by unions that were not affiliated to any federation by the year 2001 (CONSAWU, 2011). These unions saw the need to pull their resources together in the wake of continuing casualisation, outsourcing, decreasing wages and salaries and growing unemployment, among other issues. The federation is not a member of the National Economic Development and Labour Council (NEDLAC), because it was denied an opportunity to join. The federation was established with 27 unions representing 290 000 workers in the public service, education, agriculture, fishing, retail, manufacturing, metal, building and construction, mining, transport, catering, health and welfare and security.

1.4 Overview of Shop Steward Movement

Like Trade unions, shop stewards first emerged in Britain in the nineteenth century and were imported in to the country by British craft workers who came into South Africa to provide the necessary skills that were needed in the mining of gold and diamonds that was discovered in 1867 and 1885 respectively. They were mainly representatives of craft union workers in the work place. Gradually, the role of shop stewards shifted to the shop floor where their role was to ensure observance of union standards in the factory. Hyman, (1975) stated that initially shop stewards were concentrated among manual workers in the private manufacturing sector. With the passage of time, shop stewards structures moved in to white collar occupations and other government service areas like local government and health services department in the 1970s.

Since the trade unions were modelled on British lines, Webster, (1985) noted that the changes in the role and significance of shop stewards in Britain in the 1970s had a corresponding impact in the operation of shop stewards in the land. Emphasis was placed on building a working class relationship based on shop floor, adopted in South Africa notably by MAWU in 1973. Webster, (1985) argued that MAWU shifted from a strategy of mass mobilisation to a concentration on building shop steward structures that had better chances of surviving state repression which was normally directed in the first instances at leaders.

Von Holdt (1997) shows that prior to MAWU, there were no clear lines of management. He goes further to state that any white worker could give instructions to any black worker. Black

workers were expected to make tea and go on errands and even wash cars. The foreman exercised hash discipline and work dismissals were arbitrary. It was through the challenge that had roots in the shop floor structures that the union was able to bargain fair and equal treatment between blacks and workers.

By the 1980s, shop stewards and their committees had become the pivot of the organization. Webster, (1985) goes further to explain that unions that first developed in 1973 avoided political action outside the workplace. Instead they built democratic shop floor structures around the principles of workers control, accountability and mandating of worker representatives (Webster, 2001). The influence of shop stewards increasingly grew such that by 1984, unions had an organizational presence in over 3400 workplaces with formal agreements in 450 factories (Lewis and Randall, 1985). The agreements included rights of shop stewards to attend meetings, workshops and to represent members in grievances and disciplinary matters.

The shop floor structure had changed the nature of workplace relations profoundly and challenged unilateral power by management. With the birth of COSATU in 1985, Baskin, (1991) argues that unions continued to place emphasise on building of democratic shop floor structures. It was believed that placing emphasise on shop floor structures was ideal for small and fledging unions who were likely to lose against the state in the event of confrontational war.

Those COSATU shop stewards were in the front line of the struggle between the working class and the capitalist class. Webster, (2001) argues that 'manufacture of compromise' was at the centre of the shop steward's role. Lane, (1974) describes stewards as 'men in the middle' or 'men with two masters' caught between the employers who pay their salary and on the other hand, representing the interest of constituents that elected them and whose interests and expectations often surpass their capacity to deliver. To strike a balance, they had to operate within the industrial relations system for them to be effective, a system that also had serious problems since it was enmeshed in what Von Holdt, (2003:27) labelled 'apartheid workplace' practices. The stewards are the key commanding structure of the unions, which has contact with members and employers. This makes their role to be an ambiguous one.

The stewards played a double role of managerial function of settling disputes and not merely "stirring trouble" (Pityana and Orkin, 1992:4). While maintaining sanity in the workplace

was to some extend in the interest of management, in the eyes of the shop steward creating, a conducive atmosphere for orderly industrial relations was an achievement. In this regard shop stewards have been characterised as "man in the middle" caught between their paymasters as well as members who entrusted them to fulfil their thoughts, perceptions and wishes with regard to how the stewards must perform their duties in their (constituent's) favour (lane, 1974).

Shop stewards were drawn from traditional working class and from predominantly unskilled and semi-skilled categories (55%). However public sector unions like National Health and Allied Workers Union (NEHAWU) draws their shop stewards from the middle strata. In terms of education, shop stewards tended to be better educated and paid than their constituencies. However, salary variance was a reflection of the rate of payment for four different job categories in South Africa. Strong political culture built inside labour movements together with the fact that shop stewards are bound by workers mandates (95%) keeps shop stewards in touch with their constituency. Most shop stewards were usually poor, frequently exploited, occasionally homeless and earning below subsistence levels (30%). Most shop stewards lived in townships, with wives, husbands and partners, representing permanent black workers in the urban areas. A significant minority were residence of mainly male single sex hostels and compounds, with some women living alone as lodgers in hired rooms and spaces (Pityana and Orkin, 1992).

Although the participation of women in the formal sector rose from 33% to 36% since 1970, Budlender, (1991) argues that women have moved into specific sectors and into specific jobs. In terms of union representation only 14% participated in the survey (Pityana and Orkin 1992). Moreover these were mostly from the textile, health and education unions. Women occupied few leadership positions in the unions that organize them. In sum, women shop stewards, like women in generally labour force were concentrated in the typically gender defined jobs like clothing, textile and catering. They were proportionally underrepresented in the leadership of these sectors and earned less than male shop stewards. The reason why women occupied few leadership positions could be that the leadership in the union was demanding. Most respondents admitted that union meetings diminished family and leisure time and entail self-sacrifice.

Most shop stewards were elected representatives of their constituents. They were subject to formal and regular elections by their constituents either through a show of hands (52%) or

through secret ballot (48%). These shop stewards were also drawn from more stable and long serving employees, with (49%) having worked for more than 8 years in same company. This implies close connections with fellow workers who experience lack of mobility as theirs (Pityana and Orkin 1992).

Since the shop stewards were the key link between management and workers, they had better education. However, high level interaction with management and provision of 'management-like–facilities' increased co-option (Buhlungu, 2003). The shop stewards were also susceptible to co-option since they knew the 'language of workers', placing them in a likely position to influence the workers to fulfil management expectations in terms of factory performance (Lane, 1974).

Shop stewards also participated in community activities through social or political groups showing a difference between shop stewards in South Africa and their counterparts in Britain. Their leadership activities (South Africa stewards) were not confined to the workplace but extend into the township struggles over housing and local politics. While British shop stewards were mainly concerned with workplace issues, South Africa shop stewards acted beyond the workplace. This shows that shop stewards were fully integrated members of society and that their trade unions responsibilities have to be carried out in the context of all these other activities.

Pityana and Orkin, (1992) also identified four distinctive institutional arenas that were the determinants of shop steward`s ideological and political make up. These were the workplace, household, politics and media. Shop stewards were not passive social contracts of social circumstances, rather, through dialectical relationship with contenting forces in each arena, they in turn shape and were shaped by these forces. Shop stewards commitments were thus informed by their consciousness of collectivism of labour market.

In apartheid South Africa the industrial relations framework was politicised by the state. This polarised the conflict in the labour arena, resulting in trade union and their unions developing close links with political parties engaged in the fight for both political and economic emancipation. Though their role had specific relevance to work place issues, stewards believed that their leaders should take part in political activities. By influencing the political arena, they felt attainment of independence would impact in every facet of their lives, be it economically, politically or socially.

1.5 Opportunities for Trade Unions after Democratisation in 1994

Since its formation in 1985, COSATU was instrumental in fighting for the unbanning of political parties of which it succeeded in the 1990s. The labour organisation also strategically campaigned for the ANC, its partner in the tripartite alliance during the first democratic and other elections culminating in the ascendance of the latter to power. The result of the alliance has seen COSATU and its affiliates supplying the greater part of its leadership into government in various capacities ranging from members of parliament, ministers, civil service and workers in the department of labour (Buhlungu, 2010 and Baskin, 2001).

The good rapport between the labour organisations and the political parties worked to the advantage of labour at large. The tripartite alliance partners consult from time to time on key issues. There is frequent consultation (both formally and informally) between various cabinet ministers (labour, Trade, Industry and Finance) and leaders of both COSATU and its affiliates. There are also similar interactions of this nature between labour and parliament standing committees. While this was an opportunity, the relationship between the alliance partners has often been strained. COSATU has often accused the ANC for not consulting other partners on key policy matters.

As a result of negotiations between businesses, the state and organized labour, NEDLAC was established in 1994. This body brought together the statutory National Manpower Commission (NMC) and the autonomous National Economic Forum (NEF), as a forum where representatives from state, business and labour could jointly seek consensus on broad labour and economic policies (Wood, 2001 and Baskin, 2000). One of the first tasks of NEDLAC was, in fact, serving as a negotiation forum for the 1995 Act. Within its structures, NEDLAC incorporates four specialised Chambers: Development; Trade and Industry; Financial and Monetary; and Labour Market to deal with specific aspects of policy. In short it enables union intervention in policies ranging from labour law to taxation, tariffs and even fuel prices (Wood, 2001). Of late NEDLAC, however, has become increasingly marginalized in the policy formulation process.

The Labour Relations Act (LRA) of 1995 that seeks to promote employee participation in decision making through workplace forums and employee consultation and joint decision making on certain issues was another milestone for labour. The Act provides for simple procedures for the resolution of labour disputes through statutory conciliation and arbitration,

and through independent alternative dispute resolution services. This was to be achieved through the creation of Commission for Conciliation, Mediation and Arbitration (CCMA) (Webster and Buhlungu, 2004:231). The Skills Development Act was also introduced to accelerate skills development and an Employment Equity Act of 1998 to provide equal opportunities for previously disadvantaged sectors of workforce like 'women' (Clarke, 2004:558).

The Basic Conditions of Employment Act (BCEA) of 1997 was enacted to determine minimum standards that apply to any contract of employment, except members of the National Defence Force, the National Intelligence Agency, the South African Secret Service and unpaid charity workers. The Act covers issues that range from basic working hours and types of leave that is available for all the workers.

This LRA of (1995), Section 14 (4) gave the trade union representative (the shop stewards) rights which include, the right to assist and represent the employee in grievances and disciplinary proceedings; right to monitor the employer compliance with the workplace related provisions of this Act, any law regulating terms and conditions of employment and any collective agreements binding on the employer; report any alleged contravention of the workplace related to the provisions of this Act, any law regulating terms and conditions of employment and any collective agreement binding in the employer to: the employer, the representative trade union and any responsible authority or agency and to perform any other function agreed to between the representative trade union and the employer. The steward is also entitled to take reasonable time off with pay during working hours. To perform the functions of a trade union representative and to be trained in any subject relevant to the performance of the functions of a trade union representative.

With the internationalisation of capital, unions in South Africa ventured on to the international arena by actively taking part in international trade union events. The staging of the ICFTU congress in South Africa in Durban in 2000 is a clear indication of the degree of involvement (Webster and Buhlungu, 2004:242). Regionally the federations have also taken the initiative in formulating the regional body; Southern African Coordinating Council (SATUCC). Like had been the case since the inceptions of trade unions in South Africa, unions at various levels have continued to be linked to be affiliated to international unions in their industrial fields abroad. Their affiliates are also linked to international unions which are in the same sector. For example, NUMSA is affiliated to the International Metalworkers

Federation (IMF) and the International Chemical, Energy and Mining Federation (ICEM). Linking with other unions worldwide will increase the synergy and help unions to improve global struggle for labour rights.

One of the unique characters that trade unions in South Africa exhibited regards involvement in issues of economic policy formulation. With COSATU taking the leading role with the full blessing of both FEDUSA and NACTU, the federations have developed and adopted a policy vision that breaks with crude neo-liberalism, the 'progressive-competitive' model. While critics figure out serious contradictions in the policy (Van De Walt, 2010), the important point is that the trade unions are not just on the forefront of criticising state policies but are taking the initiative to offer an alternative. These visions have been articulated in government policies like the Reconstruction and Development Programme (RDP) and NEDLAC's Labour Caucus on Social Equity and Job Creation proposal in 1996 (Van Der Walt, 2010:17).

1.6 The Challenges facing Trade Unions after Democratisation.

The global collapse of a Keynesian economic model in the last twenty to thirty years ushered in the global rise of neo-liberalism, which transformed on a global scale, the labour relations regime from a 'high road' labour relations that promoted strong trade unions, high consumption and full employment to a 'low road' labour relations that targets the enhancement and sustenance of the interests of the owners of capital- but attacks labour (Crotty, 2004:2).

The embrace of the neoliberal agenda that had roots in the country from the 1990s found its way into the ideology of the democratically elected government led by the ANC as reflected by the shift from the worker friendly RDP growth path to Growth, Employment and Redistribution (GEAR) in the late 1990s. The shift in ideology by the ANC reflected the calls by both the business world for a more open economy and the government's perception that an open market was the only way to attract investors, ignoring other factors that were significant (Chang, 2003). Catchpowle et al, (1998:271) stated that the government was under pressure to move from domestically based economy towards a labour market based orientation. The result was the creation of workplace policies associated with Taylorism and Thatcherism[1]. The result was also a sustained confrontation and compromise by labour to pave way for the

[1] Under Taylorism , management made all production decisions without input from workers. Workers were there to take orders and execute them without questioning management decision. Workers were expected to leave their heads at the gate.

demands of the state and capital. The impact of such a move on the day to day activities of shop stewards is a subject of investigation of this research.

Theron, (2005) reminded us that the transition of South Africa to a political democracy, in which organised labour played an important part, has coincided with the rapid integration of the country in to the global market. For industries to sustain the global market challenges, structural change took place at the work place. Besides the popular method of hostile takeovers through the use of 'junk bonds' (Lazonick and O'Sullivan, 2000) and Mergers and acquisitions, Froud et al, (2000) observed that even without transfer of corporate structures, restructuring can take place in the form of "rightsizing" via closures, outsourcing and management incentive schemes such as share offers ...'. According to Masondo, (2005:150) transformation of the workplace did not only involve adjustment of wages and benefits; 'it also involved adjustment in terms of managerial control, industrial relations, working conditions and training'.

For Buhlungu, (2003:192) the initial challenge that the labour market faced due to the integration of the economy into the labour market was 'tilting of balance of power in favour of capital'. Instead of taking the initiative, unions found themselves engaged in 'back-to-the-wall' defensive strategies. Globalization has facilitated capital mobility to countries where labour markets are perceived to be flexible. This left labour with a weaker bargaining position compared to capital. A classic example in South Africa was the relocation of a number of Taiwanese firms from Ciskei to Swaziland, where labour was perceived to be 'flexible'.

The opening up of the market to international competition adversely affected the economy of the country at large and subsequently the industry. The result was massive retrenchments. As a consequence, unions have been blamed for their inability to prevent retrenchments. As Mosoetsa, (2003) noted unions have also been accused of failing to negotiate for retrenchment packages effectively. The problem was also compounded by the fact that unions did not want to bring the 'bad news' of retrenchments to their members. Under such circumstances, organisers of the shop floor, the shop stewards would also found themselves jobless and on the streets.

This globalisation of the country saw the country taking on board new investment focus. Financialisation began to play an active role is shaping the behaviour and management of

non- financial corporation's (Burke and Epstein, (2001). New concept of 'shareholder value' found itself being emphasised in SA. This concept was characterised by the emphasis on the need to give shareholders higher returns (Lazonick and O'Sullivan, 2000). Lazonick and O'Sullivan further noted that the new concept saw corporations moving from the traditional 'retain and invest' approach to 'downsize and distribute'. As a result emphasises shifted from investing in physical asserts for the firm. The new focus called for restructuring within the firm to make the firm more profitable. Management could sell part of the firm if that is what was required to make the firm more profitable. The this move was also coupled by the move by corporates to source Chief Executive Officers (CEO) from outside its ranks. The hired CEO's mandate will be to take the corporation to the next level, failure of which he will be fired. The CEO would try to meet the demands of the shareholder at the expense of production and most significantly the workers. Large corporations also moved from manpower development, instead choosing to place emphasis on what Marx called the technology of displacement. Only a few workers became skilled and theses were highly rewarded leading to the widening of the remuneration gap between management and the workers.

Theron, (2005:296) used the term 'casualisation' to denote the new forms of work that came in the wake of embracing of labour market flexibility. Clarke, (2004:559) added the concept of 'independent contraction' that has similar implications with Theron's idea. Theron, (2005) argues that by casualisation, work forms had diverted from the standard employment relationship that was characterised by full time, continuous employment. The work place and the employer were distinguishable. With the embrace of neo-liberalism, workers are caught in a triangular relationship where it's difficult to identify the employer and the workplace. Moreover the workers in this scenario had to work under the specifications of a manager who was not their direct employer. Such externalisation, Theron, (2005) argues is done to avoid labour regulation, since the current labour legislation is not designed to deal with these new forms of work that flexibility ushered in.

Buhlungu and Webster, (2006), added that the shrinking of the core and extension of non-core and peripheral workers has fractured labour solidarity and weakened trade unions which are the primary vehicles for improving workplace, protecting worker's rights and integrating workers into the society, since workers in the non-core do not fall under the category of workers who can be protected by unions. Theron, (2005), commented that such workers

cannot enjoy other union privileges like upgrading their skills through skills development funds. They cannot be represented under BCEA either. Therefore they are likely to remain in this situation for the rest of their lives.

One of the major challenges which democratisation brought for trade unions in South Africa was upward mobility. The new government opened new avenues that saw many union members assuming new positions in the public sector. Buhlungu, (2010) and Dowie et al, (1999) commented that COSATU lost considerable expertise at the turn of democracy when most of its office bearers were elected to parliament and provincial governments. The challenge extended to the high turnover of shop stewards, as well as the need to manage shop steward succession and training more effectively. This was exacerbated by the marriage between COSATU and ANC, which has seen union officials assuming both a political and union portfolio. The scenario also makes allows the ANC to recruit at will all those union members into government with the necessary skill and potential. Shop stewards like any other union members have not been spare by these circumstances.

COSATU also adapted the strategy of 'going into management' to 'influence a culture of change from within' (Buhlungu, 2003:188). A related policy is that 'of walking through the open door' policy (COSATU, 2011). The result of such a stance was mass exodus of union leaders to take up positions anywhere necessary as long as the union leader had the pre-requisite qualification and had the union goal of causing change. There is no longer the issue of co-option of unionists by management since the union has mandated the member to strive for change. FEDUSA on the other hand encourages individuals to work harder and 'climb up' the corporate ladder (Vlok, 2000). As a consequence, unions are losing competent leaders to management and other arenas. After all, there seem to be no end in sight for the turnover of talent in the (COSATU) federation itself (Vlok, 2000). The extent to which the mobility affected the shop floor function and the overall implications to organisation on the shop floor will be examined.

Shift in union ideology was one of the challenges that labour faced at the dawn of democracy in 1994. Vlok, (2000) saw this tendency emerging at the beginning of the 1990s through worker participation programmes at various workplaces. This shift from the traditional social movement unionism to strategic and business unionism was evidenced by the presence of labour in consultative and participative pluralism at organisational level that is the pursuance of a common goal of organisational survival by groups with opposing interests. Collaboration

between labour, capital and the state meant employees legitimatised the desire by capital to make profit. Worker participation in restructuring compromised the traditional union stand point of abstentionism. In Britain, shop stewards have been accused together with full time union officials of going by management decision in times of shop floor restructuring (Lane, 1974 and Hyman, 1975).

The shift in the type of unionism was also coupled with the need to develop alternative frameworks like centralised bargaining, as opposed to plant level bargaining. Von Holdt, (1997) in his study of NUMSA in the 1990 observed that the union was unable to translate new set of policies and negotiating programme into dynamic unionism in the plant or region due to high official turnover and involvement in union activities outside the workplace. The major problem was that shop stewards were pre-occupied with political activities outside the workplace, and some of the most experienced and active worker leaders and officials were attracted by new job opportunities. The research seek to examine this scenario in the wake of continued participation by COSATU affiliated union in the campaign for the ANC and the continued upward mobility of stewards that Vlok, (2000) said there is no solution in sight at the moment.

Professionalization of the union was also a new development. Most union positions were converted into 'full time positions' (Buhlungu, 2010:118). Union members were accorded privileges such as motor vehicles and cell phones. Grading system was introduced since there was need for unions to move from operating as social movements but operate like conventional institutions. According to NUMSA, (2011) the grading system was in line with market rates and was also meant to retain qualified and experienced workers. Yet in the past the power of unions in the workplace was derived from a close relationship between union leaders, shop stewards and the rank and file. This relationship is being diluted by the emergency of an alternative set of relationship between unionists, leadership and the new political and economic elite. Union leaders and the new elite are displaying an increasing similarity not only in style of dress, language and common pubs they begin to share but 'also in the style of thinking and the approaches to basic political and economic questions' (Wood, 2001). How this in turn shaped the day-to-day role of shop stewards needs examination.

Whereas previous union education concentrated on Socialism and Marxism with worker education clearly rooted in the struggle for black power, (Catchpowle et al, 1998:275), today labour's education extensively borrow concepts and principles contained in standard business

management text books. Buhlungu, (2010:118) proposes that enrolling for business or economics degree by top unionist was believed to increase unionist's social standing. Thus mainstream economic and industrial relations theories find their way into the union via union officials who enrol for custom made university courses at both local and international universities especially in America and Britain. Most federations especially COSATU and FEDUSA are placing emphasis on administration efficiency and functional bureaucratic structures as key component of revitalization. This has the likely effect of neglecting Marxism and socialism, the traditions on which trade unionism in South Africa was premised. How the stewards perceive the administrative efficiency based education and how it impacts on their day-to-day roles will be outlined.

There is also a shift in the balance of power in the tripartite alliance between COSATU, ANC and SACP. During the 80s, COSATU was the *de facto* leader of the internal anti-apartheid movement till the unbanning of political organizations in the 1990s. However, the successive poll victory by the ANC since 1994 saw ANC assert its dominance over both the SACP and COSATU a turning point in the tripartite alliance (Webster and Buhlungu, 2004:239). Buhlungu, (2003) observes that COSATU found itself having to compete along with big business, international financial institutions, foreign governments and even other union federations for its ally's attention (Buhlungu, 2003:196). Instead of having policies that are deliberated through NEDLAC, the minister now chooses what can pass through the body or not. Some of the policies that affect labour like the GEAR were implemented without consent of labour. Had the relation in the tripartite equal, labour could have fought for the abandonment of the strategy. Thus the gains of labour through its existence in the tripartite alliance are diminishing each day as the ANC assert its dominance over other parties to the tripartite arrangement. How in turn the impact of this imbalance has a bearing on the expectations of shop stewards on the union will be considered in relation to their day to day activities.

Mills (1948:3) wrote that a 'labour leader' is shaped by the type of organization he or she is in. As a social actor, the labour leader exhibits the character of the union he or she belongs to. Thus in the context of South Africa, the shop steward saw opportunities that the new arrangements brought forth, that needed full utilization. In the light of democratisation, the stewards took advantage of opportunities opened in education to upgrade themselves. They also moved into new positions of power that came along. Opportunities for enrichment like

changing locations and adaption of a classic lifestyle that might have the impact of widening the gap between them and their constituents.

The research intends to explore the challenges that wholesome changes in trade unionism brought on the day-to-day functions of shop stewards at the shop floor. These challenges emanate from union professionalism, adaption of orthodox development methods by the state and the general opportunities that were at their disposal. The study will use NUMSA, one of the biggest affiliate of COSATU as case study.

1.7 NUMSA as a case study.

The National Union of Metalworkers of South Africa (NUMSA) was founded on 23-24 May 1987 (Baskin, 1991:199). It is a product of four unions namely: MAWU, Motor Industry Combined Workers Union (MICWU), National Automobile and Allied Workers Union (NAAWU), United Metal, Mining and Allied Workers of South Africa (UMMAWOSA); (NUMSA, 2009). Two different COSATU unions also gave their metal members to NUMSA: General and Allied Workers Union (GAWU) and Transport and General Workers Union (TGWU). Besides being instrumental in the formation of NUMSA, MAWU had a long history of emphasising shop floor committees that were adapted by NUMSA. At its launch, Baskin, (1994) said the union had a total membership of 131 000 members drawn from sectors in the following sectors: Engineering, Motor, Tyre, Rubber and Auto Assembly Industry. Currently the union has a total membership of 262 976 (see Table I below).

Table 1: Total Membership by Region

REGION	ENGINEERING	AUTO	ELCTRIC. SERV.	TYRE & RUBBER	MOTOR NUMSA	MOTOR MIBCO	OTHER	Total Membership	Total Employers Numsa
KWAZULU-NATAL	**16494**	**5631**	**180**	**2829**	**1115**	**14836**	**2095**	**43180**	**682**
MPHUMALANGA	**12554**	**79**	**183**	**0**	**97**	**3516**	**480**	**16909**	**335**
NORTH CAPE	**3852**	**2**	**65**	**26**	**143**	**4059**	**127**	**8274**	**212**
SEDIBENG	**10192**	**1**	**0**	**10**	**175**	**1802**	**262**	**12442**	**343**
WEST CAPE	**12750**	**1**	**10**	**49**	**162**	**8013**	**0**	**20985**	**654**
J C BEZUIDENHOUT	**27528**	**862**	**472**	**62**	**735**	**10317**	**555**	**40531**	**1210**
HLANGANANI	**16829**	**1388**	**93**	**3**	**979**	**11669**	**127**	**31088**	**530**
EKHURELENI	**32497**	**254**	**1284**	**145**	**746**	**5845**	**1647**	**42418**	**1054**
EAST CAPE	**4039**	**8447**	**18**	**2112**	**1899**	**12564**	**862**	**29941**	**303**
Paying directly to Numsa	0	0	0	0	0	17208	0	17208	**0**
TOTAL	136735	16665	2305	5236	6051	89829	6155	262976	5323

Source: Numsa membership document 2011.

NUMSA organise workers from different sectors: firstly, the Metals and Engineering sector, which is the main focus of this Study, that is industries concerned with manufacture of steel or products made from steel like car components, bolts and aluminium cans. Secondly, the Motor sector that includes motor manufactures car dealers, car parts dealers, motor service providers and service stations. Auto or tyre manufacture is the third sector. This includes all in the rubber industries, especially those who make tyre and assemble cars. Finally the Electronic sector concerned with any of the following, assembly of televisions, telephones and computers.

NUMSA draws its membership from all people who are current workers in any of the industries mentioned above. Membership is open to hourly paid worker or any member of the salaried staff regardless of colour, creed or political affiliation. There are three kinds of membership, Active, Associate and Continuation. Active membership option is available for current employees. To be accorded with the Associate status, one should have worked for the industries covered by the union for at least two continuous years, but no longer work for industries covered by NUMSA. In addition, members should be up to date with their subscription. Workers who have been members of the union for two or more years and have retired due to illness or age are accorded with the Continuation type of membership. The shop steward council has been mandated to validate and accord membership status in any of the three groups (NUMSA Constitution, 2009).

The union has three structures. At the Local level, stewards are elected by workers in the workplace. Stewards automatically become members of the Local Shop Steward Council upon election. All union members are eligible to attend local general meetings. The Regional level is the next level which consists of regional office bearers plus a delegate per hundred members in the local. The regional level is also made up of the Regional Executive Committee and the Regional Finance Committee. At the National level, there is a National Congress that consist of National Office Bearers and a shop steward per 300 members, Central Committee as well as National Executive Committee.

NUMSA is one of the influential affiliate of COSATU. The union contributed policy documents like the RDP that was initially adapted by COSATU and later by the ANC (Sapphire, 2001). NUMSA is affiliated to three different trade union federations: COSATU, the International Metalworkers Federation (IMF) and the International Chemical, Energy and Mining Federation (ICEM).

NUMSA's key activity is collective bargaining with employers. However, there are other areas of activity such as: Training (technical training in the workplace) and adult basic education, health, safety and environment, HIV/AIDS, and gender. NUMSA is premised on three main principles of non-racialism, democracy and worker control and unity of metal workers and all workers in South Africa and Internationally. Its main policies are the workplace policies, the economic policy and the political policy. The work place policies hovers around the idea of reducing the apartheid wage gap, reduce grades to five levels, provide training and improve skills of works, afford women equal opportunities and remove

obstacles that hinder their entrance in the sector as well as have more control over management.

On the economic front, the union looks forward to government policies that place emphasis on the provision of services that improve people's lives like health, transport and access to economic opportunities as well as job creation (Forest, 2011). The union is an affiliate of COSATU which is in a tripartite alliance. It will try to use this alliance to improve the lives of workers.

1.8 Theoretical Framework

This research seeks to use two theories to understand the shop floor challenges faced by shop stewards, their opportunities, and strategies that they employ to mitigate these challenges. The first theory is that of linking structure and agency as articulated by Anthony Giddens, (1993). The research will explore the links between shop stewards' ability to act (agency) and their immediate structures (the workplace and trade union). How do these structures foster or impede shop stewards' ability to act? Jorgen Habermas, (1987) theory of the relationship between the 'life-world' and the 'system' will be used to further understand the shop steward as an actor influenced by the union, the members the shop steward represents and management. Michels', (1959) theory of oligarchy will be used to understand how the growth of a bureaucratic structure in the union has led to the rule by minority. The concept will be complimented by Weber, (1968) explanation an ideal bureaucracy.

1.9 The Structure and Agency Debate Continues

In a bid to deal with the problem of explaining social order and integration, Giddens (1993) developed the stracturation theory. Structure refers to 'rules and resources, recursively implicated in the reproduction of social systems. The structure only exists as memory traces as the organic basis of human knowledgeability and as instantiated in action' (Giddens, 1993:6). By social systems, he implied the relations, interaction and relatively bounded social practices that link persons across time and space. Social structure is not the pattern of action, but the principles that generate action. By agency, Giddens, (1993:9) referred not only to the intentions people have in doing things but 'to their capability' of doing those things in the first place. Agency concerns events of which an individual is the perpetrator, in the sense that the individual could at any time in a given sequence have acted differently.

The theory illuminates the duality of and the dialectical play of agency and structure. The argument is that the two cannot be conceived apart from each other. They are the two sides of the same coin. He argues that structures are enabling, and thus give the 'knowledgeable' agent the capability to work in creative or formative ways. Dual structures are thus changeable. Giddens, (1993) believed the structure only exists in and through the activities of the individual and the human agency and there is a reciprocal influence. The structure and agency are therefore not irreconcilable opposites, rather, they are a duality. Focus should therefore be on the dialectical processes in which in practice, structure and consciousness are produced. Giddens, (1963) conceptualises the structure as both constraining and enabling in the sense that there are certain rules that constrain certain behaviour. In the case of shop stewards, the structure that is the rules regarding protocol, the collective bargaining agreements and their contract at the workplace constrain their behaviour. Since they are active agency shop stewards use shortcuts to go around the system like by-passing the local and regional office to report directly to the national office since these structures constrain them by not sending information to the national office at the right time.

Habermas, (1987) considers the relationship between the structure and the agency in the light of the relationship between the 'life-world' and the 'system' (Habermas, 1987). Life-world referred to the culturally and linguistically organisational stock of interpretive patterns and it represents the human agency. Habermas claims the life-world is: "represented by a culturally transmitted and linguistically organized stock of interpretive patterns" (1987:124). The life-world includes the realm of cultural experiences and communicative interactions that are essentially knowable and inherently familiar. These cultural experiences and communicative interactions are the basis from which all life experiences are conceived and interpreted. The horizons of the life-world flex and move in the same way that we push the boundaries of our understanding of complex issues. As new perspectives in a situation are raised from such diverse contexts such as various action plans, creative dialogues or material limitations the boundaries or horizons of the life-world are identified and extended to interpret complex situations. In some circumstances the horizons of the life-world may shrink, particularly when situations are predictable and less problematic or when options considered for action are reduced. Whether familiar or complex and different, the culture and language in the life-world make it possible for each person to inter-subjectively share their understandings of a situation with the aim of reaching consensus.

In summary, Habermas describes the life-world as inherently familiar and Knowable. Communication and collaboration to reach shared understandings of complex and diverse social situations contribute to the creation of socio-cultural understandings within the life-world. As the interactions within society become more sophisticated, however, formal and strategic structures are established that are not based on the social interactions of life-world actors. The legal system is an example of a strategic structure that develops from the increasingly complex demands of the life-world. Systems and strategic structures such as the law maintain social cohesion particularly in times of rapid change and diversity

The system on the other hand refers to the structural properties of society like the state and the economy. Unlike the inherently familiar and knowable life-world, the systems world is strategic, imposed and external. Features of the systems world become increasingly complex and Habermas (1987) suggests that the systems world uncouples from the life-world. To be effective as a systems entity, however, the systems world must be embedded in the values, beliefs and interactions of the life-world. The differential aspects of the two worlds create tensions even when the systems world functions are embedded within the life-world values and beliefs.

As societies expand through complexity and pluralisation, however, social integration becomes more difficult to achieve. Systems such as the legal system eventually form and organize around the political and socially integrative force of the state organizations, primarily to facilitate and supervise transactions of power and exchange (Habermas, 1987). As transactions become more complex, systems such as the legal system gradually become more exclusive, specialized and differentiated from the life-world. Each stage of differentiation of the systems world results in an increased capacity of the system to integrate more complex or ambiguous transactions (Habermas, 1987). Gradually the systems world uncouples or separates from the life-world as the horizons of the life-world are no longer able to contain increasingly complex systemic requirements

Habermas, (1987) believes there is an interaction between life-world and the system. In the case of shop stewards, the system is made up of the union, constituent and the management. Therefore the shop steward experiences as an individual but within the confines of the workplace. There is interdependence between the system and the life-world, with institutional structures functioning better when actors produce and reproduce them through

communicative interaction. Habermas, (1987) talk about the need of a paradigm combination that integrates structure and agency. He says in the modern world, the system has colonised the life-world, while the structure has colonised the agency. The challenges that the shop stewards face in their day-to-day functions as a result of the 'colonisation' by the system will be explored in this report. The limitations of, and constrains as a result of the complexity of the workplace relations for example extensive interaction with management and union at the expense of the constituents will be alluded to.

1.10 The Theory of Oligarchy

Michel, (1959) did a seminal study of political parties and TUs in Britain. As a result of this study, Michels, (1959) took a pessimistic view regarding the question of internal democracy with in social democracy. The notion of the 'the iron law of oligarchy' was developed by Michel which is premised on the on the view that there are inherent tendencies in every human organisation towards the rule of a minority. He further asserted that social movements begin by making solemn declarations about their commitments to democracy and justice, which when the organisation develops will continuously continue to diminish.

For Michel, (1959) the bigger the organization, the more difficult it is to achieve self-government by the masses. One way to deal with this scenario is the appointment of leaders with specialized attributes, particularly based on educational qualifications. According to Michels, (1959) these leaders became indispensable in the course of time. This type of leadership he called 'oligarchical camarilla' remain in power only due to apathy and ignorance of the masses, but also due to ability to coerce the masses and suppress opposition or revolts.

The growth in size and complexity of an organization inevitably leads to a greater division of labour between the leaders and the led, which in turn leads to 'class differentiation' goal displacement and conservatism by the leadership (Michels, 1959). In such circumstances, democracy becomes an impossible dream while the rule of oligarchy becomes unavoidable reality. In the light of Michels, (1959) observations, unions also have a tendency to develop oligarchies of skilled fulltime officials who make all decisions who make all decisions while the rank and file members lack the skills and information to develop policies and critically appraise the policies of officials. Instances of union participation in complex collective bargaining and involvement of unions in tripartite bodies like NEDLAC are point in time.

Moreover, institutions like Development Institute for Training, Support and Education for Labour (DITSELA) provides education and training to officials, continuously increasing the knowledge gap between the rank and file and officials. Through the embrace of strategic and business unionism, it can be argued that unions are increasingly concentrating on administration and efficiency. For Michels, apathy of masses reinforces oligarchy control and abuse.

1.10.1 Weber' notion of Bureaucracy

In his study of why modern societies performed better than traditional societies, Max Weber, (1968) discovered the prevalence of bureaucracy in most societies. For Weber, the efficiency of a bureaucracy in the performance of its routine task is the main reason why it spreads and becomes indispensable. He also construed it as being impossible to reverse in any society, capitalist, socialist where efficient administration is an important goal. Pertaining to the issues of democracy, Weber saw bureaucracy as not being anti-democratic development but as an inevitable consequence of the development modern democracy where the exercise of authority has to be regulated to achieve consistency and equality of all before the law.

What bureaucratization introduces is a change in the way in which executive leaders are selected by the 'demos' or shapeless masses and the manner in which the masses or interest groups influence the direction of administrative activities by means of public opinion (Weber, 1968). Thus in modern complex societies, democratization does not necessarily entail increase active role of participants in an organisation like a trade union.

Bureaucracy encompasses modern mass democracy because of the need to regularize and standardize leadership; modern mass democracy does not mean greater participation by the demos in the exercise of leadership authority. It introduces a change in which leadership is selected and the way in which the masses exercises influence over the leadership.

In terms of Weber's theory, trade union as modern large scale and complex organizations which operate on the basis of representative demos and seek to regularize their democratic practices and improve their effective administration are bound to develop bureaucratic tendencies. Hierarchies tend to develop with decision powers vested in leadership in seniority and skill, the influence which the members exercise over the bureaucracy through seniority and skill. The influence which the members exercise the bureaucracy though interest groups

and public opinion tends to diminish because of the emphasis on specialised training and skill.

For Weber mass democracy is possible in small or homogenous organisations. Both Michels (1959) and Weber agree that organisations grow larger, mass democracy becomes impossible, with leaders assuming an increasingly greater role in directing the affairs of society or organisation. Their analysis of democracy in complex society and organisations diverge as outlined above. The relevance of both theories for this study is the shared argument that a direct role in democratic decision- making by the demos or the rank and file is unattainable

1.11 Conclusion

This chapter has traced the history of trade unions starting with the emergency of predominantly white trade unions in South Africa. The challenges that faced black trade unions were also outlined up until the black unions were recognised. The origins and importance of shop stewards were also outlined. I have also discussed challenges facing modern unions in the country. These challenges have been shown to emanate from three sources, the apartheid regime and the changing nature of trade unions and the entrance of the nation into the global arena.

Chapter 2

METHODOLOGY

2.1 Introduction

The aim of the study is to examine the challenges facing shop stewards in their day to day activities. I used qualitative method to help him to gain a rich and detailed description of (the shop stewards) understanding of their social world (Neuman, 1994). This chapter discusses the case for using the extended case study, the strengths and benefits of triangulating methods as well as the limitations of the study. Issues of access and ethics will also be discussed.

2.2 The case study research method

Case study research method, defined by Yin, (1984, 1989) as an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used was used in this study. The study adopted a case study method because this research design helped me to understand a complex of challenges that shop stewards face in their day to day activities at the work place. The method also extends experience or adds strength to what is already known about shop stewards through previous researches like the one done by Webster, (1985) and Pityana and Orkin, (1992), just to mention a few. Case study research emphasizes detailed contextual analysis of a limited number of events or conditions and their relationships.

The weaknesses of the case study method are that the study of a small number of cases can offer little grounds for establishing reliability or generality of findings. Moreover, the intensive study of a small variable may result in biased findings. To overcome such shortcomings, I carefully planned and crafted studies of real-life situations, issues, and challenges facing shop stewards. Moreover, case study methods involve an in-depth, longitudinal examination of the challenges facing shop stewards and the various strategies they are using to deal with such challenges. They provided me with a systematic way of looking at events, collecting data, analyzing information and reporting the results. As a result I gained a sharpened understanding of why the instance happened as they did, and why it might become important to look at the phenomena more extensively in future research.

The case study research generally answers one or more questions which begin with "how" or "why" (Yen, 1989). For example, how many female shop stewards were elected this year? Or why are there more male shop stewards than female stewards? The case study research design also allowed me to undertake a critical and in-depth analysis of the issues under investigation. Burawoy, (1979:9) argues that case studies are not chosen for their statistical representativeness but 'for theoretical relevance'.

To assist in targeting and formulating the questions, I conducted a literature review and established findings of research that had been previously conducted. This enabled me to develop refined, insightful questions about the problem. Careful definition of the questions at the start pinpoints where to look for evidence and helps determine the methods of analysis to be used in the study.

2.3 Selection of research site

The study used NUMSA as a case study to examine the research question. One region, Ekurhuleni was selected. From this region, two local offices, Wadeville and Nigel were identified and selected. One factory was selected from each local.

The major reason why NUMSA was selected lies in the innovation and central role the union played in the struggle for the recognition of workers' rights and the emphasis it placed on the shop floor. Its fore runner, MAWU was instrumental in establishing the shop floor structures in the 1970s (Webster, 1985 and Baskin, 1991). This was crucial in that the structures were able to challenge management prerogatives (Von Holdt, 1997) and withstand crackdown against Black trade unions by the apartheid regime. Thus ideally, MAWU pioneered the idea of placing emphasis on shop floor structures.

Upon its formation in 1987, NUMSA continued to use the shop floor to further the struggles of the working class especially in the industries it covered. According to Von Holdt, (1997; 2003) the workplace was characterised by what he termed the 'workplace regime'. NUMSA pioneered a strategy to transform this workplace regime and the shop floor was at the centre of this worker struggle.

In order to achieve this NUMSA adopted a new set of policies and a new negotiating programme, which had to be transformed at the shop floor, obviously by shop stewards (Von Holdt, 1997). One of the new strategies was a bargaining strategy that that set goals to be achieved over a period of 3 years rather than annual bargaining goal. The thrust of the bargaining strategy was to establish a new framework linking grading, training, skills development and pay in the industry. It was therefore important to examine the current challenges shop stewards are facing, taking into consideration tensions that developed when the union was implementing them.

Ekurhuleni is the hub of industrial and manufacturing development in Southern Africa and arguably in the whole of Africa. For NUMSA, the city houses one of its 9 regional centres, Ekurhuleni, which they named after the city. In this region lies the second largest local in the union as a whole, Wadeville. It is from this local that I selected Scaw Metals as focus of study. Scaw has 34 shop stewards which make the plant likely to articulate issues that affect shop stewards, of this total two are full time shop stewards.

Nigel on the other hand is the smallest local in the region. It was therefore of paramount importance to contrast challenges facing shop stewards from a large and smaller setting. From this local, I selected Union Carriage and Wagon (UCW). This factory is characterised by dismissal of shop steward and I sought to figure out the reasons behind such dismissals in relation to challenges facing shop stewards as a result of their daily activities.

2.4 The value of Qualitative Research Methods

The study adopted a qualitative research method as it allows for an in-depth understanding of the various challenges that shop stewards are facing at the workplace in their day to day activities. The aim of the research is to examine the challenges facing shop stewards in the post-apartheid era in the Republic of South Africa, in the wake of democratization in 1994. The entrance of the Republic on the global arena meant that firms had to restructure operations in preparation for stiff challenge on the global market. It is on this basis that qualitative methods were employed in order to answer the research question. The research made use of a triangulation of measures through the use of interviews document analysis and observation. The triangulation of measures allowed me to view the same phenomenon from several angles and hence gave me a better understanding of the individual or group studied in

their own frame of reference and offered an opportunity to make an interpretation which the interviewee allowed (Lemmer, 1992). Interviews were used as the main research instrument, supplemented by observation and document analysis.

2.4.1 In-depth and key informant interviews

The in-depth interview was used to explore challenges being faced by shop stewards in the course of carrying out their day to day activities at work place in relation to the demands exerted on them by the constituent, management and the trade union. The interviews were held with shop stewards at the two sites, chairpersons of Local Shop Stewards Council, NUMSA members, Industrial relations managers, local organisers, and regional organiser (see Table 2).

A total of 27 in-depth interviews were conducted, consisting of 9 female members, and 18 males. (See table 2 below). The in-depth interviews were mostly held in the NUMSA shop steward offices that were designated for union purposes, enabling the respondent to speak more broadly about the topics being discussed (Greenstein, 2003:56). This also enabled me to have an understanding of the various strategies that shop stewards employed to respond to their challenges.

Key informant interviews were held with industrial relations managers and members of the union. These two groups were included because shop stewards do not work in a vacuum, therefore interviewing the people they interact with in their daily activities also gave me an understanding of the challenges they face.

When carrying out the in-depth and key informant interview, I utilised both a note book as well as a voice recorder. The use of the voice recorder was negotiated before hand with respondents; it was not imposed on the interviewees (see appendix for informed consent form). The note book was annotated after an interview. The recorded data on the voice recorder was transcribed before it was analysed. A total of 18 of the 27 interviews were recorded with the consent of the interviewees. In addition, I also jotted some notes during the interviews. Detailed notes had to be made especially in cases where interviewees declined to be recorded.

The Metals and Engineering industry is still male dominated. As a result there was no reasonable proportion of male to female shop stewards. Out of 44 shop stewards from the two sites, there was only one female shop steward. I had to interview more female members to cover up for the disparity. I also seized the opportunity to interview one female shop steward from a different plant that he met at the Local Shop Steward Council meeting.

Table 2: List of Interview Participants

List of interviewees	**Number of Participants**				**Total**
	Male		**Female**		
	Waiville Local	**Nigel Local**	**Waiville Local**	**Nigel Local**	
Regional organiser	0	0	0	0	1
Local organiser	0	1	0	0	1
Local administrator	0	0	0	1	1
Local shop steward chairperson	1	1	0	0	2
Shop stewards	6	3	0	2	11
Human resources personnel	1	1	1	0	3
Ordinary members	1	1	3	3	8
Total	**9**	**7**	**4**	**6**	**27**

2.4.2 Observation

This involves observation and participation by me in the current social setting of the subject which I want to penetrate and learn about (Neumann, 1994). The opportunity given to me to observe elections and attend general and local shop steward council meetings gave me the impetus to understand subjects being studied in their own frame of reference. At regional level, I was attached to the regional organiser who took me to the research sites and formally introduced him to shop steward executive at the research site. From the research site full time shop stewards took over the responsibility of taking me to general meetings at the different sites. Where the site did not have a full time shop steward, the chairperson of shop stewards at the plant would take over the responsibility or delegate any shop steward executive

member to assist me. The chairpersons of the shop stewards committees at the plant had the responsibility of introducing me to the local shop steward council. I was however only able to attend local shop steward council meeting at one site. The other site holds their meeting in the early hours of the evening, a time I felt unsafe to travel.

As a participant observer, I was able to observe and analyse the election procedure at one site since elections at the other site were held before field work commenced. This allowed me to identify the mode of elections, the checks and balances, the nomination procedures as well as the form of election. At general meetings, I was able to identify the types of issues that were discussed, for example at one site; a general meeting was called to discuss the proposal by management to close one department because it was deemed unprofitable. This issue of restructuring will be discussed further in the preceding chapters.

At Local Shop Stewards Council, I was able to interact with shop stewards from different plants in the same local. It was at the Local Shop Steward Council meeting that I took the opportunity to interview a female shop steward who had come to attend the council meetings. It was also at these meetings that shop stewards issues that not only affect their different plant settings but their communities as well (Webster, 1985). It was at one of these meetings that discussions were made by shop stewards concerning how they could chip in and assist families that had their house destroyed by a tornado in Duduza, confirming arguments by Webster, (1985) that shop steward activities in South Africa are not limited to the workplace but the communities that they reside in.

I was also given an opportunity to hang around in the shop steward offices at the research site(s).I witnessed members visiting the shop steward office bringing complains and seeking legal advice from the shop stewards. At one site, I witnessed a family whose relative had passed on being given assistance by the shop stewards. The stewards explained all the benefits the family of the deceased were entitled to and the procedure that needed to be taken to access the benefits. This issue will be discussed further when discussing the role and function of shop stewards as a social worker later in this report.

Participant observation also enabled me to interact with people from different levels, experiences and aspirations. This method exposed me to information on internal conflict and the relationship between the union staff and membership. Participant observation enabled me

to take full account of the events as they transpired (Neuman, 2000). The method supplemented the findings from interviews by enabling me to have a better understanding of the findings. This method allowed me to fully understand for example, the ambivalent role played by the shop steward, which was apparent at some of the selected sites.

I attended 3 general meetings at Scaw and 3 local shop steward councils meetings at Nigel local. I was however not able to attend regional office or national office meetings because the national office did not issue the directive to the responsible regional office bearer. The method supplemented the findings from interviews by enabling me to have a better understanding of the findings as he witnessed certain phenomena as it unfolded.

Observations that I had noted during meetings, workshops and at the research site were kept as mental notes up to a point when I was able to write the information in the note book without drawing the attention or ire of the 'observed', to avoid making respondents suspicious. Making respondents suspicious was likely to make the respondents uncomfortable and in the process, they could have tailor made their behaviour and responds to impress the observer. Analytical notes were compiled in a separate notebook to record constraints and methodological issues and plan the way forward.

2.4.3 Documentary analysis

An extensive analysis of documents was conducted, drawing from both official and unofficial documents. The shop stewards were very supportive as they provided me with union documents: reports, minutes, collective bargaining agreements, congress reports and resolutions, and many other relevant documents.

Some documents were accessed through the Internet from the respective organisations' websites. In analysing the documents I took note of the fact that some documents may omit some information or may be distorted, which may raise some questions with no immediate answers. Only the documents with some relevance to the study question were analysed.

According to Skocpol, (1996), documentary research is relevant in establishing detailed technical and historical information which one would not easily get through, for example,

interviews or observations, for example the grading of crane drivers trained outside the plant and those that were upgraded internally.

2.5 Data interpretation and analysis

The first step in data analysis is linked to the process of extracting themes by reviewing the literature. The themes come from the characteristics of the shop stewards being studied. They also come from already agreed upon professional definitions, from local common-sense constructs, and from researchers' values, theoretical orientation, and personal experience with the subject matter (Strauss, 1987). For example characterisation of shop stewards as man with two masters by Lane, (1974).

Besides literature, themes were also derived based on an analysis of words i.e. word repetitions and a careful reading of larger blocks of texts (compare and contrast). I targeted words that occurred more often, and categorised them as being salient in the minds of respondents. For example terms like 'carrying the mandate of the workers'. A Computer program, *ATLAS.ti* was used to generate word-frequency lists from texts.

The compare and contrast approach is based on the idea that themes represent the ways in which texts are either similar or different from each other. Strauss and Corbin, (1990:84) refer to this approach as the "constant comparison method." An example of themes that was identified using this method is 'women lack self confidence'

Logical analysis was built around the selected themes. Coding was used as a tool to facilitate discovery and further investigation of data (Seidel, 1998). Coding also allowed me to attract explicit words, terms and actions from text, as well looking for implicit meaning in the content of text.

2.6 Sampling

Based on the purpose of the research, non-probability sampling techniques such as purposive and snowball sampling was used in selecting shop stewards to be interviewed. Such sampling techniques were appropriate given their strength in identifying potentially key informants.

Purposive sampling was used by me as a starting point to identify potential interviewees starting from senior shop stewards at both research sites. The sampling technique also allowed me to choose key informants from the human resources department as well as members of the rank and file who could articulate issues that gave insight to challenges facing shop stewards. According to Groenewald, (1986:18) in a purposive selection, the sample is the result of a process of selection which is intentional or non-random. For Sarankakos, (1995) purposive sampling is more than just the selection of subjects but also deals with time, place, type of events and subjects. This sampling method was appropriate in this research as it aimed to investigate responses from a particular social group, the shop stewards. To ensure gender balance, I had to interview more female members from the two sites and a female shop steward from a different site since there was only one female shop steward from both sites.

Snowball sampling was used to enable me to interview respondents who might have the relevant information needed for the research. According to Neuman, (1994) snowball sampling uses multi-stage techniques. In this research began with full time shop stewards of council chairpersons and spread to other shop stewards.

2.7 Pilot testing

A pilot test was carried out at Scaw Metals with the first 4 shop stewards for the purpose of validating research instruments (Neuman, 1994). Pilot testing involves conducting a preliminary test of data collection tools and procedures to identify and eliminate problems, allowing me to make corrective changes or adjustments before actually collecting data from the target population. It provided me with the opportunity to detect and correct other potential problems with research instruments which include questions the respondents may fail to understand, ambiguous questions, double barrelled questions and questions that make the respondents uncomfortable. For example, I avoided asking respondents their salary grades having realised that it made them uncomfortable and they were not willing to release such information.

The pilot phase also allowed me to familiarise with the research area. Thus I toured the workplace he visited to have an idea of the general setting of factory environment. This helped putting respondents at easy since they could talk through issues known to me. For

example I was shown extractor fans at one factory that were no longer functional. At one site, the interviewees showed I the old method of casting and new moulding method while explaining that work output was wrongly based on work methods that had been since replaced. Basing work output on outdated methods then implies that the worker produced extra units without being compensated (Mohamed, 1989). This has relevance in Marx's concept of technology of dispossession.

2.8 The Researcher and the respondents

The ascriptive characteristic of a researcher such as gender and age have a considerable bearing on I and respondents' behaviour during an interview. In the case of this research, my gender, age and the fact that I am also a trade unionist played a beneficial role especially considering that the majority of the shop stewards interviewed were men. My gender and ability to articulate trade union issues helped I discuss issues at par with the shop stewards.

Smith, (1981) state that there are a number of studies that shows that my personality, status behaviour and language affect participants. The ability to establish rapport increased the validity and reliability of the findings. Validity is defined by Smith, (1981) 'as the degree to which the researcher has measured what he or she set out to measure' was ensured. Validity tells us whether an indicator actually captures the meaning of the construct in which we are interested. The validity of data is based on 'a negotiation of the ethical and political dimensions' of the relationship between the interviewer and interviewee (Babie and Mouton, 2001). Reliability implies that the method of conducting a study or results from it can be reproduced or replicated by other researchers (Neuman, 1994). Reliability was increased through the use of precise level of measurement and pilot study that was done at Scaw metals.

2.9 Access and Ethical issues

Participants were recruited on voluntary basis and guaranteed confidentiality; no coercion was used on participants to partake in this study (see appendix for informed consent form) As Burton, (2000) states, in any research, co-operation must be voluntary. Respondents were advised in advance of their right to refuse to answer certain questions and not to take part if they felt so. I guaranteed the confidentiality of all participants by assuring them that all the

information collected would be kept anonymous and confidential and used for academic purpose only. To dispel nervousness and suspicion, I briefed the participants on the rationale of the study, the procedure being followed and how the information collected was to be used. I volunteered to answer any questions and queries regarding the study from each and every respondent.

Most shop stewards showed a keen interest to be interviewed including one local organiser who said it was a necessary move 'to talk to people on the ground and carry their mandate'. Most expressed hope that the national office will take the report seriously and hoped that the challenges they raised were going to be addressed. This report used pseudo names to identify respondents to reduce risk of victimisation.

Getting access to a research site is one of the major challenges faced by a researcher. Neuman, (1994) argues that a researcher may find that he or she is not welcome or allowed at a site. I was so fortunate that the regional organiser took me to all the sites where field work was conducted and introduced him to the shop stewards. The moment the comrades (shop stewards) realised that I had the blessing of the national office, they unreservedly extended their welcome. I did not have to rely on the organiser for further visits since he was no longer a stranger. The shop stewards who were local office bearers also took me to local offices and introduced him to local organisers and other shop stewards. The chairpersons of the two sites also did a splendid effort in introducing me to the human resources departments at both sites without any hassle.

I however faced a nightmare in getting the national office introduce him to the regional organiser. At one point, I had made some discussions with Education Secretaries from other unions due to prolonged delay in getting the green light. It was only through the timeous intervention of the supervisor that I was handed over to the regional organiser that the doors were all of a sudden opened.

2.10 Limitations of the Study

The study acknowledges that the different research instruments used in this study had some limitations. In order to minimise the weaknesses of the research instruments used, I made use of a triangulation of methods (interviews, documentary analysis and observation). This allowed the extension of the strengths of each instrument and limited the weaknesses.

The use of English as the official communication tool was one serious shortcoming I faced. While most interviewees were able to clearly articulate themselves in English, most members found it very had to do so. Unfortunately, I did not have any alternative vernacular to replace English. I could not even romp in another person to interpret since that was likely to breach confidentiality. I asked some of the interviewees to use isiZulu here and there since some challenges are easily explainable in vernacular and asked friends from college to interpret.

Members who came for assistance from the NUMSA offices at the two factories and the local offices assumed that everyone was multilingual. I could not protest since that was to change the complexion of the discussion and change the nature of an intended 'natural setting'. At the general meeting, the mode of communication was vernacular. Even at the local shop steward council, it was purely the same story. I heavily relied on shop stewards he had established rapport with for interpretation.

While the use of a recorder was a very convenient way of capturing the discussion, some key informants refused to be recorded. These were mostly members who were romped in to provide the members' view of services and challenges shop stewards were facing. All shop stewards however agreed to be recorded without expressing any reservations.

At one of the selected sites, one human resources manager declined to take part in the study, as she was suspicious about the motives of the research despite the fact that I gave assurance about confidentiality and an explanation on the research rationale.

With regard to methods used, both purposive and snowball sampling that I used also pose a limit in that neither of these methods is representative. Equally the shop stewards' views from the two sites are not equally representative of the union or the country's shop stewards. Due to the limited time frame, financial capacity and resource, I could not study all the NUMSA shop stewards.

2.11 Conclusion

This chapter has identified the various data collection techniques used in this research. The data interpretation methods were also outlined. It has been shown that I heavily relied on qualitative methods, though these were triangulated with other methods to increase validity and reliability of the research findings.

Chapter 3

PROFILE OF SHOP STEWARDS:

No Material benefits but significant influence at the shop floor.

3.1 Introduction

In this chapter I will chronicle the profile of the shop stewards. More focus will be on their age, their period of service, level of education, benefits and the challenges facing a female shop steward. I will argue that due to the need for representation, members are likely to nominate and elect a shop steward who is better qualified, experienced and able to articulate their issues. It will be shown that shop stewards like members they represent have many years in the firm and are also going through the same experience as them. It therefore makes them likely to articulate the challenges the members are facing. Unlike the classical benefits that Buhlungu, (2010) observed being given to union officials, for NUMSA, shop stewards do not have monetary benefits, since they are sector specific. However, shop stewards have many non-monetary benefits like labour education and attending conference in state of art facilities. There are also possibilities for upwards mobility both within the union and at factory level.

3.1.1 Age of shop stewards

Table 3: Age of shop stewards who participated in the interview

Age range	**20-29**	**30-34**	**35-39**	**40-44**	**45+**	**Total**
Male	1	3	3	1	2	**10**
Female	1	0	0	0	1	**2**
Total	**2**	**3**	**3**	**1**	**3**	**12**

N=12

From table 2 above, it can be seen that most shop stewards are in the age group 30-35 and 35-39 (25%). This is mainly because the collective bargaining agreement in this industry covers weekly paid workers that are mostly on contract. Placing workers on contracts allows management to lay them of when production is low (Lazonick and O'Sullivan, 2000). Thus, in most cases the older generation may not be hired back or due to experience is promoted

into supervisory role. This could have been exacerbated by the fact that shop stewards are normally targeted for promotion by management. Therefore workplace restructuring indirectly undermines shop floor democracy.

3.1.2 Period of Service

The number of years that shop stewards served as workers as well as shop stewards varies considerably as the following cases will show:

Case 1: Work History of Evans.

I first joined this company UCW in 1973, I left in 1975. I went for apprenticeship as a fitter and turner I qualified in 1985. In 1989 I went to AS Transmission in Boksburg. I worked there as an assembler, then I was promoted to manage the spares packaging. The company was liquidated in 2000. Then in 2002, I got sick and I quit then I was fit again to work in 2007, that's when I came back here.

I became a union member in 1979 in Forsberg. When we were there, there were no unions back then, so I was elected as a representative under the liaison committee. Fortunately, we had a clever white guy who was our Human resources officer by the name Luis. We went for training I think it was in 1989.So he brought the union to us. He told us about the union and how they operate. He even said to us this is South Africa, unions are not recognized at the present if you just deal with union you will go to jail; but I am telling you take your chances call the union within the company and join the union. We started scrambling, trying to bring MAWU to the premises

We went to jail for a long time almost every weekend we will sleep in jail, but all the same we kept with it up until the unions were recognized. Here I became a shop steward this year somewhere in February (interview, Evans 20 September 2011).

Case 2: Work history of Sibongile:

My name is Sibongile. I am 45 years of age; I am a mother of four. I am sure I joined this company in 1995, so now the problem of this company is that it worked with contracts ne, so after the contract the people will be let go and will come again you see so it's not 95 and straight away to 2011. 1995 I went out in 2000; I came back again in 2003. 2005 I went out and I came back 2007 to date. I joined the company as a spray painter.

Previously I worked for BMW; I have worked for Ekurhuleni municipality for 10 years. In terms of qualifications, I am computer literate, metric certificate as of now doing apprenticeship. I became a union member in 1995. I was elected as a shop steward this year (Interview, Sibongile 22 September 2011).

From these two cases, it can be seen that shop stewards have massive experience both as shop stewards and as workers, confirming what Pityana and Orkin, (1992) observed during the 1991 study of COSATU shop stewards. The two cases also show that like their members, shop stewards are subjected to the same working conditions, in which they are hired during periods when production is at peak level and laid off when management feels production requirements are low. This will make shop stewards understand the challenges his/her constituent faces. Like in the case of Sibongile, she has been in and out of work due to the contract system. The advent of the need for flexible labour force has allowed capital to hire labour where production is high and fire where there is reduced demand for the firm's products (Buhlungu and Webster, 2006).

The first case also shows other variables regarding the role shop stewards are expected to play. Management took a leading role in bringing the union to the workers. This goes a long way to show that management want to use shop stewards as a tool to control the workers and pacify workers.

3.1.3 The Level of Education

The level of education of shop stewards varied considerably depending with the department he or she represented. Of the total number of shop stewards interviewed,

- 8.33% percent do not even have metric certificate
- 8.33% have a metric and are on apprenticeship
- 16.74% have a National Qualification level 3 in non technical subjects.
- 66.6% of shop stewards have artisan qualification like boiler makers, moulders and fitters and turners.
- Of the total number of ordinary members interviewed,
- 12.5% do not have a metric
- 25% do not have a metric, and these are females.
- 37, 5% have National Qualification Level 6, non-technical subjects,
- 25% have National Qualification Level 4 and the rest have a technical qualification.

While it has been argued that stewards are better qualified than members, (Pityana and Orkin, 1992), the above percentages make the scenario difficult to judge. The regional organizer Du Toit made similar sentiments regarding the level of qualification of the shop stewards:

> *It depends on instances like where you have shop stewards in the older generation, who is literate but are not intellectuals (do not have formal education). Then you get younger generation, some of them who have done further education and training (Interview, Du Toit 27September).*

To sum it all, the local organiser, Zikhali clearly remarked:

> *Members want a person who can be able to challenge management with their issues (Interview, Zikhali 23 September 2011).*

Therefore, it is not only qualification that matters but the ability of the-would be shop steward to articulate issues and tackle management so as to protect the rights and interests of workers.

3.1.4 Hindrance to full Participation of Women in Union Activities

As has been shown in the above chapter that there was only one shop steward from the two sites that the field work was done out of a combined total of 44 shop stewards. The reasons given for this absence of women from playing an essential role at union level range from the structure of the Metals and Engineering sector of which the activities of shop stewards are on the basis of working conditions and workers in the industry, the nature of women themselves, and the attitude of men as resembled by the patriarchal values embedded in the society. Tshoaedi and Hlela, (2006) argue that women started participating in union activities in the

1920s. They however noted that in spite of women's long involvement in trade union and labour struggles, "the South African labour movement continues to be a predominantly male sphere."

The Metals and Engineering industries is characterized as a heavy industry. Traditionally therefore it has been a man only job. Du Toit, the Regional Organizer remarked:

> *The industry has been male dominated. You have your foundries, your heavy machines, staff that are being used there are also heavy. Females would not necessarily be employed in those sectors (Interview, Du Toit 27 September 2011).*

For Bhabhalika, one of the key informants, that has be the case in the past:

> *From our tradition before, we know such things were done by man, its only now that we are accommodating women and also there is that fear from women that if you are a shop steward, this or that gonna happen. It is also up to the union to teach women that they should become shop steward in their relevant companies (Interview, Bhabhalika 6 September 2011)*

It shows there are still few women in this sector. This confirms Budlender, (1992) and Garcia, (2002) argument that though women have joined the industry, they did so in specific sectors. Thus it has been the categorization of women as weak that they found themselves absent from this industry. Moreover Queen Victoria once remarked that "the place of the woman is in the kitchen." Therefore there has been a long term perception by both men and women that women cannot therefore do certain types of jobs. For those women who joined the metals and engineering sector, they are mostly concentrated in the administrative roles or in the labs. It can be argued that they still feel the sector is a man's domain and therefore women cannot preside over affairs that affect men at the workplace. Khetiwe, a female key informant at one of the firms had this to say:

> *The nature of jobs is physically straining, so we are bound to find more male than females, at the same time there are a lot of positions which require physical input from the individual. I work in the plant and I see the job and I can see that this job, grinding, moulding etc requires a lot of physical input (Interview Khetiwe, 15 September 2011)*

Taking a clue from the way the Metals and Engineering sector is structured; the meeting times of the various levels of shop stewards are equally prohibitive. The steering committee of the local shop stewards at one local meet every Monday after work, from 17h00 to deliberate the affairs of the union, for no additional pay. Local Shop Steward Council meetings at Wadeville, one of the locals are held every Wednesday after work. This will

negatively impact on the participation of women as Sophia, the local administrator highlighted:

> *If you are elected a member of the local office bearers, it's problematic because you are suppose to be at that meeting in the evening, as they come from work. These meetings are held from 17h00 to about 19h00rs on Wednesday. So that's the other thing that is problematic to female shop stewards (Interview Sophia 23 September 2011).*

Moreover, the frequency of the meeting times is also problematic. The constitution provides that the Local Shop Steward Council shall meet regularly but at least once a month. The Local Shop Steward Council in which this research took place meet every week in both the two locals as a general council of local shop stewards and also once as an executive committee of the local office bearers. Because women still have to play a role as mothers at their homes, they cannot freely participate in these meetings due to prohibitive meeting times.

The South African society is still a patriarchal society. Though there have been various rules and regulations enacted to ensure gender equity and equality, more still has to be done especially in the Metals and Engineering industry. Du Toit in an interview alluded to the influence of culture when discussing reasons why there are few female shop stewards:

> *That has got to do with custom and culture. There are certain cultures where a woman remains a woman. There are certain cultures where women get recognition for working mothers. You will find male comrades being problematic even if a female gets elected as a shop steward. You find a man not supporting* (*Interview, Du Toit 27 September 2011).*

From patriarch and structure of the industry in question, the blame shifted on to the mature of women themselves as Mbuso, a shop steward bluntly explained;

> *We have got a problem here with females especially in South Africa. The problem is that they do not care. For me I can say if they get paid, they feel that why should I give myself stress to go for the union issues. The only thing is I got the job so I have to work on my life. I think that's the reason they behave that way. On the other hand, when they have got a problem, they know that the union can work for them. They do not want to participate actually (Interview, Mbuso 8 September 2011).*

Sophia made similar sentiments:

> *You know our kids they don't understand the value of union and why they should be unionized. Their belief is that I must go to work and get my salary that's all. They don't show that interest of leading (Interview Sophia 23 September 2011).*

A female shop steward, Moleboheng I met during the Local Shop Steward Council meeting shoved the blame on both men and women:

For those that have husbands, the husbands maybe the challenge, for those that are single, they are lazy. Women don't want to be committed

At plant level, men are criticizing women, saying women are not empowered enough to represent them. It's a question of man not willing to be led by women (Interview, Moleboheng 23 September 2011).

This is a clear case of the dominance of patriarch in the society. Most women seem to have internalised this and have a tendency of allowing men to unilaterally run the public sphere while they continue to dominate in the private sphere. Due to the influence of patriarchy, females seem to be shying away from taking their rightful position in society. Sophia explained the attitude of women that is now inherent in them:

The experience that I have with women are that they feel inferior to man at company level, they are afraid to stand in front of men, maybe and talk, that's the problem and they don't want to be elected as shop stewards. When you try to convince them they tell you I cannot be able to become a shop steward, after work I am suppose to go home and cook. My husband; my kids. If there are workshops, it's very, very tough because they don't want to avail themselves (Interview Sophia 23 September 2011).

I observed during the three meetings that I attended at Nigel local the absence of females from the Local Shop Steward Council meetings. At one of the meetings only two female stewards availed themselves. During the other meeting, not even a single woman attended. When delegates to the REC were nominated, the female who was supposed to attend the meeting by virtue of being a local office bearer gave an excuse.

Moleboheng also saw attitude as another challenge that was now inherent in women:

They have that mentality that men should lead them on the task. Sometimes men want to suppress that's why sometimes women feel inferior. There are those who are gender sensitive who would like to see women growing and helping but there are those who still feel that I am a man, I cannot be led by a woman (Interview, Moleboheng 23 September 2011).

At one site out of a total enrolment of 145 women, there was only one female shop steward. Evans, a shop steward thought patriarch has instilled fear in these women and this prevents them from fully participating in union activities:

It's the freight of the females. You see we have got many females working here so women don't have any trust to women; they just throw their trust in man (Interview, Evans 20 September 2011).

At one plant, management tactics to silence women has also played down the participation of women. As Sibongile explained:

> *Women are so afraid. They are so scared. Most women are scared. Why I am saying that is once you know how to talk, especially your rights, you are becoming a target of the employer (Interview, Sibongile 22 September 2011).*

In addition to management targeting, other structural constrains on women emanate from man taking advantage of women. As Sophia explained:

> *When women say I want jobs, the shop steward or supervisor may say before you get the job, you must do this or that, we do have those cases on the corridors but no-one ever comes up front and tells you I have this problem, I have been employed in this company because I had to do this, you know (Interview, Sophia 23 September 2011).*

In this instance, women continue to conceal the various instances that affect then in their daily lives. Most continue to be taken advantage of and the system is passed from one generation to the other.

At one plant there is employment of women in exchange of sexual favours. Women employed this way normally disqualify themselves from fully participating in the union activities as Sibongile explained:

> *The major thing here, female are given ... especially on positions, eh, they are using favours. It's like before I came here the position in this company as a female employee, I had to do favour I had to do favour for another person like let me say I had to sleep with somebody so there are many positions in this company but female employees are not getting if they do apply for the positions. It's like now you have to be a family of somebody in order to get a position if you are a strict woman like I do not want to do favour for anyone so for me to acquire the position it's a struggle. Men are being the ones that are being recognized mostly not females*
>
> *And like I said before the question of favours most of the women, depends of saying how were you employed in the company. Did you sweat for employment or you just came in? So when it comes to the question of saying you have to voice out your rights it's a struggle, because now you are going to be targeted, they will point at you, don't forget how were you employed in this company, so there is that fear from women(Interview, Sibongile 22 September 2011).*

The reason why women are employed this way is because of their low skill base. At one plant, UCW the Industrial relations manager Denford, acknowledged the presence of women in the company but most he said were in the low skilled base. Ironically at Scaw, most women according to the IR manager, Vundhla are in administrative positions or in the laboratories. In cases where they are abused, most do not have the courage to seek protection from the union structures, as Sophia explained:

> *We are aware of those things, but the problem is the ladies or the female employees are not willing to come forward with those issues (Interview, Sophia 23 September 2011)*

During the time of interviews, one shop steward Francis was investigating a case in which a female employee had been abused by a supervisor. Ironically Francis was elected in a by-election this year to replace a shop steward in his department who had been suspended pending dismissal for investigating the same supervisor for allegedly sexually abusing a female subordinate. The shop steward was suspended when the woman withdrew her case. This point to the fact that women do not have the confidence to come out in the open and disclose any abuse they suffered at the hands of men.

A female informant from the department had this to say regarding the incident:

> *In my department a shop steward was dismissed when he was standing for a woman who was abused by a foreman. When the shop steward was investigating, that female withdrew the case. The shop steward was left alone. The problem is that, females don't have a back bone when it comes to their rights. We don't know our rights. He ended up alone that shop steward and the company charged him of accusing the foreman (Interview, Penina 22 September 2011).*

A female employee at the plant, Mavis was once dismissed in 2005 after she had complained that both shop stewards and supervisors were abusing young girls who were seeking employment. In this scenario the trusted bearers of the law became the criminals.

This situation of taking advantage of women also spreads to union conferences, as Sikana a senior shop steward at Nigel local remarked:

> *I feel female shop stewards are being taken advantage of. There were a lot of female shop stewards before. Some of the senior guys at the national union level were taking advantage of them. In the near feature if my wife is gonna tell me about being a shop steward when I know what is happening there when these people are going to the conference and staff and you know this filthy thing that is done at conferences, I as a man I will say I won't allow you to be a shop steward. These people are dating each other at conferences (Interview, Sikana 20 September 2011).*

When asked about allegations that senior members at the national office are taking advantage of their female counterparts, Du Toit had this to say:

> *At conferences, there is no such thing like abuse, or being taken advantage of, it's consensual. If there was any form of abuse the female comrade would cry foul (Interview Du Toit 27 September 2011)*

The statement however points to the possible external pressure that may force females to succumb. Female shop stewards may be promised a reward like a particular position in the union.

As a mitigatory strategy, the union has set up a gender desk to look into various ways through which the union can empower women. The union is encouraged to go to the companies and try to entice these young women so that they must be active. Gender sensitive meetings should start at the factory before and after election.

3.2 Do Shop Stewards have any Benefits?

In his book, the *Paradox of Victory*, Buhlungu, (2010) alluded to the various benefits that came with the introduction of full-time positions unionists such as full time shop stewards and full time office bearers, while referring to Congress of South Africa Trade Union (COSATU) which he used as his case study. He wrote '*the introduction of full time positions for workers holding union office such as full time shop stewards and full time office bearers has resulted in similar changes at the lower levels of the union. In such cases the perks that come with these full time officers- such as cars, cell phones ... provide the outward indication that those who occupy these positions are important people'* (Buhlungu, 2010:118). Buhlungu assumes that all the above mentioned groups are accorded monetary benefits. But does this apply to shop stewards of the day? What sort of perks do shop stewards receive? Do union member become shop stewards in a bid to access the said perks? If not what are the reasons for becoming shop stewards? Using National Union of Metals Workers South Africa (NUMSA), one of COSATU's largest affiliate, I have established that material perks are not given to four of the five sectors that NUMSA covers. The statement is true when applied to shop stewards in the Automobile sector.

Union policy: No perks for shop stewards: Within NUMSA all union structures have deliberated and agreed that there should be no monetary or physical benefit to shop stewards. In fact, it has been adopted as a resolution at one of the congress. A senior local official had this to say:

> *The matter was debated by all structures (local, regional and national). There is no resolution in the trade union (NUMSA) that allows shop stewards to get any benefits. The benefit which they get must be the benefits which can be enjoyed by each and every employee or ordinary members get on that workplace or trade union (Interview, Zikhali 23 September 2011).*

This being the case, why then did NUMSA structures adopt a resolution that there should be no benefits for shop stewards? Could it that the union feel it does not have sufficient resources to cater for the large volumes of shop stewards? Or the union felt it unfair to transfer the enormous liability to the plant? While the financial constrain could be a factor, the major bone of contention lies in the likely strife and jostling for the shop stewards position that will be created by the availability of related perks. A senior official at regional level had this to say:

> *In the automobile sector there is a grade where shop stewards are graded and that in itself creates problems for us because you start having competition amongst employee[s] and you don't have stability. A shop steward will get the benefit of a car, serviced by the company (Interview, 27 September 2011).*

An official at the local office also made similar conclusion:

> *The employees knowing very well that there will be benefits for shop stewards, they will stand for the position. It will also be difficult for employees to remove certain stewards who will use all within their means to stay in power (Interview, Zikhali 23 September 2011).*

It should be noted that the statement by both regional and local officials points to material benefits. Thus the union structures saw it unwise to introduce perks for shop stewards fearing the strife that might ensure as members fight to undo each other in order to become shop stewards. So if shop stewards do not get any benefit, why do members accept nomination and appointment to become shop stewards? The following answers will tell.

3.3 Reasons for becoming shop stewards

There are a number of factors why members would want to become shop stewards. These seem to have nothing to do with material benefits or possibility for growth. The reasons range from political reasons, family influence as well as what Von Holdt, (1997) called the 'apartheid workplace'. Davies, (1966:11-12) argued that*, 'at every turn, African unions find themselves deeply involved in politics - a fact as true today as it was under the imperial administrators.'* Thus the political arena had a significant influence on the behaviour of every facet of the economic social and psychological aspect of workers and the general populace in South Africa.

The fact that COSATU entered into an alliance with SACP and ANC, like the one between the National Party and white unions goes a long way in showing how worker struggles and political struggles were intertwined (Baskin, 1991, Webster and Buhlungu, 2003 and Finnemore, 1999). It is against this background that workers became union members as the story of the following shop steward:

> *Before I became a union member I was a revolutionary from community based organisation. I was a South African Communist Party (SACP) secretary local so that is what motivated me when I joined this company. I am that person who doesn't want to see people suffering. At the end of the day knowing that somewhere somehow I can be able to assist maybe with my knowledge, experience and my understanding the pain of the struggle (Interview, Sibongile 22 September 2011).*

From this shop steward's statement the emphasis is on complementing gains of the struggle with worker rights. It is on the political arena that members have learnt that they have particular right of which if they don't fight for them, no one will hand them to the workers on a silver plate. Moreover the statement by the shop steward shows that there is a tendency by society to oppress women. The political slogan of freedom for all then acted as a drive for the steward to fight for workers rights.

A family plays an essential role of socialising members in to the society. It provides an opportunity for family members to influence each other and mould each other's character and beliefs along certain lines. It is through this process of socialisation that some shop stewards got influenced.

> *It was because of my brother. Most of my brothers were working in this industry and I like the way they used to do thing. I always want to defend people even when I was still at school. I have seen according to my research the people that are working in the company are mostly from rural areas coming to Gauteng for greener pastures. They didn't even know their rights. Then I wanted to be there to defend them and tell them about their rights. That's what I like to defend them (Interview, Mbuso 8 September 2011).*

From this account there is evidence that there workplace does not provide for an even play ground. The powerful and the clever always hunted for opportunities to abuse the weak. There seem to be insincerity by the predominantly white-top- management in implementing fair labour practices. A statement by one of the shop stewards revealed shed some light:

> *You experience problems in the department and feel my case was not handled in the correct manner. For example I was offered a position previously held by a white. It was said that I was never been in the army so my grade was suppose to remain in the*

grade where I was. They said I was never a soldier (Interview, Maxwell 22 September 2011).

The reasons for becoming a union member and subsequently a shop stewards as articulated by the shop stewards and the members themselves varied from political influence, influence by family members as well as unfair labour practices at the work place. There is however a link between the political history of the country and the history of the worker struggle that continue to shape workplace relationships. While members are motivated by other factors to become shop stewards, are they aware of benefits associated with the seemingly voluntary position?

Shop stewards' conception of benefits: While political and family influence as well as the desire to correct 'the apartheid workplace' is the reasons why members choose to become shop stewards, they have their own conception of benefits. While responding to the question what are the benefits and perks that you receive as shop stewards; their answers indicated some measure of material expectation. All the 9 male and 2 female shop stewards that were interviewed said they were literally getting nothing. The answers showed despair and hopelessness. A reply by one shop steward was rather conclusive:

Shop stewards don't have benefits. The benefits that we are having are the benefits for everyone in the company. There are no special benefits for shop stewards. You go in the office as shop stewards by being elected so it's up to you whether to agree or not but there are no benefits (Interview, Sibongile 22 September 2011).

In this case the benefits are basically a sacrifice that shop stewards have to make to fight for the betterment of the workers. It is merely a moral obligation to struggle with management over issues that affect their (shop stewards) life as workers and the general workforce at large at various workplaces.

The workshops and labour education they receive as shop stewards was given a lover rating:

The only thing I see as a benefit is the type of education or information I am exposed to. Getting exposed to all these Labour Laws and Acts and the experience with getting to engage with management during deliberation (Interview, Francis 20 September 2011).

That there exists a fully furnished office designated for union use was not construed as a significant benefit that is exclusively available to shop stewards. These offices are fully furnished with basic communication items and furniture and fittings like telephone, the computers, the facsimile, tables and chairs. These are in office for use by shop stewards being paid for by the company.

Regardless of absence of tangible benefits, shop stewards have considerable benefits that of course are mostly none material.

Non-material benefits for shop stewards: In terms of physical benefits, there seem to be no benefits for shop stewards. However their role as shop stewards gives them opportunity of a lifetime. Buhlungu (2010) rightly pointed out; most shop stewards have the privilege to spend days in state of the art hotels attending regional, national or international meetings. There are various workshops that allow shop stewards to take turns and attend and leave the workshops with bags and T-shirts and at times monetary allowances. During the interview period I observed that some members of the Local Shop Steward Office bearers went to Belgium for exchange visits. Where workshops are held in areas like Cape Town, shop stewards are privileged in most cases to travel by air. All these privileges cannot be enjoyed by ordinary union membership card bearers.

The union expects the Shop Steward Council to enter into agreements at plant level that benefits the workers. It's therefore of paramount importance that they are well educated to reduce exploitation by management. It is this type of education distinguishes a shop steward from ordinary union membership cardholders. The shop steward is now well versed in labour laws of the country. S/he is now conversant with government blue prints like CCMA, Skills Development and CBA. Ideally, this instils a culture of reading in some shop stewards. Most will use the new information to further their studies in the human resources arena and end up being human resources personnel in the sector. At one of the plants that the interviews were held, the Industrial relations manager was previously a shop steward who greatly benefited from being a shop steward.

Shop stewards are also taught skills and tactics to engage with management. They get knowledge and approaches to present arguments and tackle management. They practice this during their tenure of office and become experts. Their engagement with management and other stakeholders gives shop stewards platform to showcase their talent and potential. This makes then the target for absorption by management and other interested parties

Due to their role and good leadership skills as shop stewards, there are other opportunities in the offing for them; as one local office official noted:

> *Shop stewards are getting first preference to obtain something for the business. As you know that the law has been expanded, there is now the BEE programme. If there is certain department they want to outsource. They give first preference to shop*

stewards to say can you become the BEE in this company. They will say the reason why we want you to be part of this is your knowledge and experience you gained from the trade union (Interview, Zikhali 23 September 20110.

Thus by becoming a shop steward, one increase his/her chances of accessing other opportunities ahead of ordinary members.

There are also a lot of opportunities that are available to shop stewards. The walk-through-the-open-door policy has give shop stewards the permission and room to manoeuvre their way upward. Within the union itself, a quick run down through the NUMSA constitution shows that there are a number of positions that are held by shop stewards or former shop stewards. At all structures, the local, the regional and national structure, there are various committees where one or more shop stewards are elected. Shop stewards can also stand for election to become the president of the union. The current president is still a shop steward. Where shop stewards participate in the union structures, those who showcase their potential get opportunities to be absorbed in the civil services and other sectors as has be alluded to above. These potential absorptions have created what writers like Vlok (2000) and Buhlungu (2010) referred to as brain drain that there is affecting the unions. These writes sees no end in sight for such brain drain.

3.4 Conclusion

This chapter has chronicled the profile of shop stewards commencing with their ages, which showed that most shop stewards are middle aged and experienced workers. It has been shown that shop stewards face similar challenged as their members like that of being retrenched. Patriarch has also been shown to be a challenge to the full participation of women as shop stewards. Due to the fact that the history of the country and labour struggles are intertwined, workers become shop stewards to further political and economic emancipation of women. Regardless of the fact that they succumb to retrenchment like their members, they continue to fight for the right of the employee.

Chapter 4

THE SHOP STEWARD IN THE NUMSA ORGANISATIONAL STRUCTURE

4.1 Introduction

As Weber, (1968) argues, the growth of larger organisations requires an efficient structure to run the affairs of that organisation. He thus concludes that bureaucracy is inevitable in any society. With the growth of bureaucracies in unions, trade unions ceased to be a local affair officiated by men and women who worked by day (Lane, 1974). Its organisation grew away from the workplace and the locality as it added new tiers to its superstructure. It is this growth of hierarchies that Buhlungu, (2010) said characterised unions in South Africa since democratisation. It became common, added Buhlungu, (2010) that leaders invoke seniority in order to discipline competitors or subordinates deemed 'disrespectful of the leadership'. It is this hierarchy that Buhlungu, (2010) said had the potential of widening the rift between the top officials and members and is likely to subvert democratic processes. Lane, (1974) wrote that effective workplace trade union necessitated a form of organisation that went beyond coalitions between a small number of work groups – though these coalitions themselves were sources of strain.

In this section I will review the presence and influence of NUMSA shop stewards in all the structures of the union up to the National Structure. I will also demonstrate that as the hierarchy ballooned, the powers and influence of shop stewards are reduced. A brief composition of each committee and the powers and duties of such committees will be outlined. The second section of the chapter will argue that the development of hierarchical structure resulted in the development of oligarchic tendencies. It is imperative, as Michels, (1959) argues that the growth of oligarchy is inherent in human beings and that as organisations grow, internal democracy is wiped out. It will also be argued that though a specialised workforce has been developed to improve efficiency and reduce bureaucratic problems (Weber, 1968); such workforce has become indispensible and now recommends and executes decisions for the less skilled members at the bottom of the hierarchy.

The Bureaucratic structure of NUMSA

The National Structure • The National Congress • The Central Committee • The National Executive Committee (NEC) • The National Finance Committee
The Regional Structure • The Regional Congress • The Regional Executive Committee (REC) • The Regional Finance Committee
The Local Structure • The Local Shop Steward Council
The Workplace • The Shop Steward Council

From the above diagram, the four distinct levels in the structure of the NUMSA hierarchy are evident. At the bottom is the workplace where shop stewards are concentrated and where the mandate from the workers is taken. The second stage in the hierarchy, the local shop steward council is constituted by majority of shop stewards with the exception of two full time officials as shall be shown below. It was also at these two levels that the research was concentrated. The roles and powers of each committee starting from the workplace are discussed below.

4.1.1 Shop Stewards at the Workplace Level

The NUMSA constitution section 4(1) provides for election by paid up member of shop stewards who will represent them in the Shop Steward Council. The elected members will

represent the members and the union at the workplace they are based at. The constitution provides that the shop steward shall hold office for four years upon election subject to any decision of the National Congress to extend the period of office. Since the research took place in the year when elections for new office bearers was conducted, I was able to observe voting process taking place. While the constitution provides that elections of shop stewards shall be by show of hands, I observed a highly professionalised ballot system. I also noted the presence of an election supervisor sent by the local office who was present for the 29 days of polling at Scaw Metals. The election supervisor told me during an informal conversation that his duty was to ensure that the elections were free and fair.

The constitution provides that once elected as a shop steward, one automatically becomes a member of the Shop Steward Council. The Shop Steward Council is responsible for electing a standing committee that will lead the council. The standing committee will be made up of the Chairperson, the Vice Chairperson and the Secretary. The powers and duties of the Shop Steward as provided by the constitution; subject to the review of the Regional Congress and the Local Shop Stewards Council are to manage the affairs of the Union inside their workplace. This involves negotiating agreements with employers about working conditions in the workplace; maintain order and harmony amongst the members in their workplace; recruit members; settle disputes in their workplace; to report regularly to their Local Shop Stewards Council on any dispute or any grievances of members; to discuss decisions and policies of the Union to members in their workplace; to take up all legitimate complaints of members and call factory General Meetings at least once per month.

Depending with the agreement with a particular plant, a full time shop steward may also be elected. Though not provided for in the constitution (amended in 2009), there are two full time shop stewards at Scaw Metals out of a total of 34 shop stewards. The full time shop steward exist where there is an agreement between management of a particular plant with the union to release a shop steward from company duties to perform union functions on full time basis and on full company benefits. At Scaw Metals, the duties of full time shop stewards include compiling and representing workers during a disciplinary hearing. The full time shop steward can act as Local Organiser and can represent a worker in a different factory during a disciplinary hearing.

The structure of the Shop Stewards Council is predominantly made up of shop stewards. This implies that they have greater leeway to discuss issues they feel should be taken up with both

management and national office. While Weber, (1968) argues that democracy is possible when the organisation is small, events at Scaw Metals seem to say the opposite. During the July 2011 strike deliberations a Shop Stewards Council meeting to deliberate on whether the factory should partake in the July 2011 industrial action was hotly disputed and there was no agreement between the members of the council. This led to the split of the council. Three shop stewards resigned from the council and joined a splinter union. According to Blessing the problem was due to lack of respect among shop stewards:

> *There is no respect among the shop stewards. Some see themselves as more special than others. We must remember that we are fighting for a similar cause. We must unite to fight one enemy* (*Interview, Blessing 13 September 2011).*

It can be seen that the issue of power and influence is a challenge among shop stewards themselves.

4.1.2 Shop stewards at the Local Structure

The Local Structure is made up of the Shop Steward Council members from different plants in the local. The boundaries of the local are determined by REC.

4.1.2.1 The Local Shop Stewards Council: Are shop stewards failing to follow protocol?

Section 4:2(a) (ii) of the NUMSA constitution also provides that upon election, a shop steward becomes a member of the Local Shop Steward Council. The Purpose of the Local Shop Stewards Council is to promote the interests of the Union and members within the jurisdiction of the Local Shop Stewards Council. The constitution provides that the Local Shop Steward Councils shall be composed of all the shop stewards from every Shop Steward Committee within the jurisdiction of such Local Shop Steward Council.

Members of the Local Shop Steward Council are responsible for electing a local shop steward committee that is made up of a chairperson, vice, secretary and the deputy secretary. The elected office bearers will work hand in hand with two full time employees at the local office that is the Local organiser and the Local Administrator. The powers and duties of the local Shop Steward Council as designated by the constitution include dealing with disputes between members and employers; to review and co-ordinate Local Shop Steward Committee activities; to review decisions of the Shop Stewards Committees and to confirm, alter or

reverse such decisions; to elect delegates to the Regional Congress once every four years in accordance with the provisions of Clause 5(2)(b) and to implement policies and decisions taken by the Regional and National structures of the union and federation.

Like the first council, the shop stewards' influence had been broadened by the convergent of ideas and experience of other shop stewards within the same locality. The first group of full time union officials surfaces at this stage. It is through this group that the shop stewards should take their grievances to. If they cannot be dealt with at the local level, they can be taken to the Regional Office and subsequently the National office. It is at this stage that shop stewards are bitter that information dissemination receives a setback. A good example was when shop stewards at UCW wanted the union to challenge the government decision to import wagons from China on the pretext that the local plants did not have the capacity to build the wagons. Shop stewards later made a decision to go and meet with the Secretary General directly after there were delays in the movement of the information within the union structures. In the final analysis the shop stewards were rubbished for failing to follow protocol.

4.1.3 The Regional Structure: Do shop stewards still have significant influence?

The regional structure is made up of three separate structures; the Regional Congress, the Regional Executive Committee and the Regional Finance Committee. As shall be shown below, shop stewards are also found in large numbers at the Regional Structure. However, it remains to be seen whether these shop stewards will not be affected by what Wood, (2001) sees as assimilation and keeping up appearances by union leaders as they interact with business people and government leaders. Buhlungu, (2010) also identified a similar change as union leaders changed dress codes as well as type of vehicles they use so as to present a new outlook to the public.

4.1.3.1 The Regional Congress

The next port of call for the shop stewards is to elect a delegate to the regional office. Each local office will elect one delegate per 100 shop stewards. This implies that a local office with more shop stewards will have more representation than other local offices. The greater the number the more likely the concerns of a particular local will be addressed.

The elected delegates will constitute a regional Congress. The congress will elect a committee made up of a chairperson and vice, a regional treasurer and a regional secretary who will become a full time employee of the union. The duties of the regional congress include to decide on all matters affecting the region subject to the discretion of the National Congress and the Central Committee; to establish Local Shop Stewards Councils and define their areas of jurisdiction; to ensure the implementation of decisions and resolutions of decisions from national bodies; to elect Regional Representatives to the Central Committee; to suspend a Regional Executive Committee for neglect of duty or behaving contrary to or in conflict with the constitution; decisions of the National Congress; decisions of the Central Committee; or decisions of Regional Congress and to elect a new Regional Executive Committee.

It can be seen at this juncture that shop stewards still have significant influence. They will mostly deliberate on decisions that affect themselves as shop stewards as well as decisions that affect the members who have faithfully mandated them to do so. However, there is now a wider group of full time union employees. These are the officials who like in the Local structure whose influences determine issues that can be taken to national office bearers.

4.1.3.2 The Regional Executive Committee (REC)

This committee's mandate is to run the affairs of the union at the regional level. The committee is constituted by members of the Regional Congress, members of the Regional Finance Committee and four shop stewards that are elected from each local in the region. The powers and duties of this committee include to employ persons in the region subject to the approval of the Central Committee; to appoint sub-committees to investigate and report on any matter referred to it; review decisions and activities of Local Shop Steward Councils and to confirm, alter or reverse such decisions; suspend any shop steward or Shop Steward Committee on sufficient cause shown and takeover the management of their affairs until another shop steward or committee is elected; where it deems it appropriate: to institute or defend legal proceedings by or against the Union; and to institute or defend legal proceedings on behalf of individual members or against individual members.

In this REC the influence of shop steward is increased by the addition of four local shop stewards per local. It is in this committee that issues that are brought by shop stewards are adopted or discarded. The high presence of shop stewards means that the resolutions from the various Local Shop Steward councils may find support. However, there exist full time

regional officials whose job is to provide expert advice. It is this expert advice that in most cases is against the will and wishes and perception of members who continue to challenge shop stewards to deliver.

4.1.3.3 The Regional Finance Committee

Three Shop Stewards who will be members of the regional Congress will be elected to work hand with the Regional treasurer as the Finance Committee at regional level. The duty of this committee is to manage the financial affairs of the region as per the constitution of the union. The committee generally exercise supervision over the financial affairs of the region and perform such other duties that will increase accountability and transparency in the use of union funds.

The presence of shop stewards is equally visible. Their presence will make them able to explain to members how their subscriptions are used in the union activities tailor made to uplift their (Member) working standard(s).

4.1.4 The National Structure: Are shop stewards being coerced or co-opted?

This is the highest structure in the union. It is where all issues that are raised by various substructures are deliberated on. The structure has four main sub structures: the National Congress, the Central Committee, the National Executive Committee and the National Finance committee. It is mostly at this level in NUMSA that benefits and behaviour that Buhlungu, (2010) and Wood, (2001) saw inherent in union officials. Can shop stewards tame this tendency or they are co-opted? Is it a case of coercion that Buhlungu, (2010) said is associated with the desire by national office bearers to discipline juniors?

4.1.4.1 The National Congress

The presence of the shop stewards is also visible at the National Congress which is the supreme governing body of the union. From each local a shop steward per 300 members is elected to be representing both the regional and local shop steward council at the National Congress, together with members of the regional officer bearer; who are also members elected from among the shop stewards. The powers and duties of the national office are to make policy for the Union; to decide on resolutions submitted to the Congress by the regions and the Central Committee; to review and decide on the financial position and progress of the

Union; to nominate and elect national office bearers, that is the President; the First Vice-President; the Second Vice-President; the National Treasurer; the General Secretary of the Union; and the Deputy General Secretary. It is also this congress that is responsible for amending the constitution.

The challenge that shop stewards face at this level is the attitude, mentality and the approach that members in this category are prone to. Wood, (2001) observed that members at the national level of union exhibit similar feature like their counterparts in the government, not only in dress but in the way of thinking. Thus decisions made at this level are likely to be biased towards strategic or business unionism that Buhlungu, (2010) called entrepreneurship as opposed to the social movement unionism that unions of the past were premised on. Shop stewards that find themselves at this level, as normal human beings are likely to follow suit and consolidate their newly found identity.

4.1.4.2 The Central Committee

The Central Committee is responsible for the management of the Union according to the constitution; and the rules and policies of the Union agreed to at National Congress. The Central Committee consists of the National Office Bearers; the Regional Chairperson, Deputy Regional Chairperson, Treasurer, and Regional Secretary from each region of the Union plus an additional regional worker delegate elected at each region's Regional Congress. .

The Central Committee shall, subject to the provisions of this constitution and in addition to any other functions prescribed here, have among other things the power to: appoint sub-committees to investigate and report on matters referred to it by the National Congress; review decisions of the Regional Congress and to confirm, amend or reverse such decisions; establish or close down regions and to define their areas of jurisdiction; employ and dismiss any employee of the Union; determine the remuneration and terms and conditions of employment of every employee of the Union; approve and/or amend a disciplinary code and procedure for all employees of the Union; oversee the purchase leasing or renting the union's movable and immovable property; and enter into agreements on behalf of the union.

As can be seen, the influence of the shop steward is continually diffused with the existence of national office bearers whose focus, as one shop steward, Sikana is to gain political mileage at the expense of the workers. This confirms the argument by Wood, (2001) that Union official are behaving and thinking like business professional and therefore national

issues as more crucial than shop floor cases. This issue will be explored further in the proceeding section.

4.1.4.2 The National Executive Committee (NEC)

This committee is responsible for managing the affairs of the union between meetings of the central committee. The committee is composed of chairpersons and treasurers of each REC, the regional secretary from each region of the union as well as National office bearers. The duties of the committee as provided by the constitution included executing all decisions of the Central Committee and National Congress; co-ordinating all plans, campaigns and projects approved by the Central Committee; considers budgets and the payment of accounts as reported by the National Finance Committee; suspend any office bearer or official of the Union for sufficient cause until the matter is decided at the next meeting of the Central Committee; to generally represent the Union and ensure the sound management thereof between meetings of the Central Committee subject to the provisions of this constitution and the objects and policies of the Union; and to issue press statements in the name of the Union.

The decisions of the NEC should at least reflect the interest and influence of shop stewards since the committee is made up of their fellow members they elected at various levels of the structure. However the interests of shop stewards are not always represented as expected. The just ended strike tells a story of how the full time officials do override the aspirations of the range and file and the shop stewards who elect them. While the decision of whether to end or continue with the strike remains in the hands of union members, this time around, their input was not asked for. Instead, the NEC chose to consult the full time officials who advised them to end the strike without the knowledge of the shop stewards and the workers; whose grievances had not been met. Sikana explained the grievances of the shop stewards:

> *We were sold out, we people who were on strike. We were misled. These people did the right thing because they consulted people who know the economics staff. This is the first thing they should have done before the strike. They know the season of strikes; they should have consulted these learned people. The decision they are taking is affecting us. When we went on strike we had more than 20 demands. Out of those demands, none of those demands that we set were not met by employers, but the strike was called off by the national office. And the manner in which the message was cascaded, it was wrong. We heard the message from the media. These people are now obsessed with this political gain of theirs. They will always go to media and sell their image and sell themselves (Interview, Sikana 20 September 2011).*

Another shop steward, Blessing added to the problem surrounding the July strike:

> *Full time officials are there to advice on the best and appropriate decisions. Decision making is done from the local, regional and taken to NEC. In this strike information dissemination was poor. Local committee took decisions for industrial action. Results of the strike were not given to members on structures. Decision to end strike was not taken from members to end strike. Final settlement was agreed without consultation but the figure was agreed (Interview, Blessing 13 September 2011)*

In response the Regional Organizer had this to say:

> *The NEC at the time, because the strike was getting violent, they mandated negotiators to see if it's possible to get a double digit. Now double digit means anything from 10 to 99. Now we at the bargaining council went with the NEC mandate where we managed to get a double digit for the majority of the membership who are at the lowest grade (Interview, Du Toit 27 September 2011).*

From the Organiser's response it can be seen that the accusations that a decision was not taken from the shop floor are true. The NEC advice was actually adopted and implemented. This as shop stewards claim compromises worker control. It's a point in time where the dominance by the national officials is being asserted.

4.1.4.3 The National Finance Committee

This is the committee that has been set up to oversee all the financial issues in the union. In addition to the National Treasurer, the Central committee will second three members from among its ranks to work hand in hand with the treasurer. The members however should reside within 60km radius of the National Office. Those who are from regions outside the Gauteng Province are automatically disqualified from becoming members.

As has been shown from the above, the shop steward is visible at each structure of the union. While the shop steward density decrease as we move up the hierarchy, their presence at every stage makes them able to articulate what they hope the union can do for the members who they are always with.

4.2 Challenges that emanate from the NUMSA's hierarchical structure.

The shop steward is the last man in the hierarchy and remains an important member in the structure, but does not have much power. As the structure grows bigger, the influence of the shop stewards is reduced. Hyman, (1975) wrote that the union still heavily relies on shop stewards for recruitment of members, ensure contributions are in order and in some cases collect subscriptions. Unlike the 1970s when shop stewards used to collect subscription, nowadays, the stop order system has been invented and this has reduced the problem of

collecting subscription though this does not mean that shop stewards do not play an essential role.

Today shop stewards are the main source of information about union activities and decisions for most members. Since most members do not attend union meetings, the shop stewards remain the source of information. Even when the national officials seek to reach the membership through fliers or journals, they normally do so through shop stewards, except if they use members' email addresses or cell phones. Management also gave the shop stewards a direct line that links union office at the factory to the national and regional offices of shop stewards to allow for constant feedback between the shop stewards and union officials.

While the relationship of interdependence is the norm between shop stewards and the full time officials, the balance of control and dependence reflects a variety of influences; based on the knowledge of shop stewards and the union officials as well as degree of autonomy of the workplace organisation. Hyman, (1975) noted that the relationship between stewards and full time officials is affected by the experience and self assertiveness of each. As has been shown in the shop steward structure above, the various committees in the structure have specific powers and duties. When it comes to negotiation on behalf of the union, the NEC is the responsible body. They have the experience and the expertise than local officials. Hyman, (1975) stated that the national union like NEC officials may also exert some influence by defining the issues appropriate for domestic negotiation, in the case of NUMSA the collective bargaining agreements (CBA) and also setting the conditions of service and protocol for the junior offices. It is this influence and autonomy that in some instances increases the gap between the lower and the upper structure of the union.

Michels, (1959) wrote that as unions grow larger, they tend towards oligarchy. In most cases their mission statements have what he calls 'solemn declaration' about worker control and democracy, like in the case of NUMSA, the union states:

> "*NUMSA's structures are like a tree. A tree states exactly how our union structures work. The power is from the roots to the stem and then to the leaves, not the other way around. Let's avoid mistakes where all the power is given to the leaves forgetting the flow of water. There is no part of the tree which can survive on its own. The one needs the other to live. All structures of the union link with each other. In the roots is where the power lies. That's where the factories are and where the shop stewards are elected. When going up the stem, you get the regions. The leaves, flowers and the fruits (the national structures) consume the power from the bottom and deliver the flow of information downwards." (NUMSA Constitution 2009)*

There is an inherent tendency in every human organ towards the rule of the few (Michels, 1959). While there is need for senior officials to take mandates from the national offices as shown in the above quotation, the following discussion with shop stewards will reveal a different story.

Based on set practices, Francis, a shop steward noted that the union wants the shop stewards to follow protocol, which the union seem to violate. He explained:

> *Even in terms of the union itself, in terms of the protocol, the union needs to improve. We can try at a certain level as shop stewards to provide service but if the service is not there in the local or regions, our efforts will be a futile exercise. From the local office the service is not that good. Even in the region it's not so good. That's why you have to find certain individuals that you can choose to speak to so that the issue can be taken up so quickly. Because of frustration we end up going to the national office and communicate with the national office directly. This is because of frustration and pressure from the members whose mandate we carry. If you find that you don't get an answer from the region or the local, what else must you do? Because people you are dealing with they are here, they are in numbers and they put pressure on you (Interview, Francis 20 September 2011).*

From Francis' statement it can be seen that there are some red tapes in the union structures. The local office or regional office bearers screen information they feel should reach the national office. As Habermas (1987) has suggested, the life-world in this case the union structure has evolved to a point where it has assumed control of the system that is the shop stewards. However as active agents, shop stewards do not just seat and become recipients in the system. They have also developed means and method to sustain them. As has been shown in the statement by Francis, shop stewards unilaterally violates the reporting structure that they know is ineffective. Interesting enough, it's for the benefit of the structure because if the issues they take to national office directly are solved, the bigger good public image of the union is at the end of the day enhanced. The fact that shop stewards do not leave the workplace (Lane, 1974) has also been shown to be one of the reasons why shop stewards are under pressure to deliver. It is the same people that voted then into power who always ask them how far they will have gone towards meeting their demands.

The regional organizer admitted that such weaknesses are inert in human being:

> *You have instances where officials responsible for conducting union issues in the area may not pass in the information. But now you should understand that there are elected office bearers who are managers in our instances. You have regional secretary for example who is running the union. The majority of the committee are*

> *employed at different shop floors. There are areas where he can make individual decisions and others that need collective (Interview, Du Toit 27 September 2011).*

In this instance the structure itself serves as an impediment to information transmission due to the number of participants required to make a quorum.

The shop stewards are also custodians of the union at the plant level. However the agreements that the union enters into at the national level sometimes proves to provide serious challenges for the shop stewards. As Weber (1968) noted, specialised staff elected by the demos makes decisions. They decide on the behaviour of the union at specialised groupings like CBA. This confirms the argument by Collins, (1994) that 'policy has now become received wisdom and the result is that structures are transmission belts'. The CBA is a case in time which shop stewards cited as one of their daily challenges. As Stanley explained:

> *The bargaining agreement is outdated in that they were still mirrored in old methods like casting, as shown in the NUMSA emblem. You see that man holding a cup, he is casting. He just took from the pot and is pouring ..., but today, the people are no longer pouring like that. It's a very big port where you have to pull and pour a quatrain frame, you pour something like that (Interview, Stanley 6 September 2011).*

Regardless of the changing work processes of this magnitude, union officials still believe the CBA is quite in order and nothing much need to be revisited regarding the issue of grading which is made necessary by such changes. The regional organiser blamed the younger workers for complaining about the grading system which they think is in itself correct:

> *The employer in the main will bring in new equipment, and it will create an impression on employees for example who are now using computerized equipment to expect payment at higher grade. The guys will expect to earn a little bit high because they believe the machine is worth more (Interview, Du Toit 27 September 2011).*

The other challenge that is also mirrored in the CBA pertains to the issue of employees that are covered under agreement. The IR manager at UCW explained the two categories at the firm while giving reference to the type of skill that exists in the company:

> *We have got two categories, the low skilled and the high skilled. The low skilled are those that are governed by what is known as the main agreement, the collective agreement between the companies' employer organisation and the employee organisations. Their salaries are negotiated centrally by the employer's organisations, their terms and conditions of employment, allowances. Then we have another category of the salaried, the monthly paid, those you find from the clerk to the Managing Director (MD). Their salaries and other conditions are determined by the MD (Interview, Denford 27 September 2011).*

This categorisation of workers according to DU Toit is inherent in the apartheid workplace situation, but does not apply to all industries:

> *Remember we are coming from a legacy and the legacy was your apartheid during those days so it was difficult to have a bargaining agreement for white collar workers in the Metals and Engineering sector (Interview, Du Toit 27 September 2011).*

Since salaried workers were mostly whites and other non-black races, the MD had the prerogative of giving them a better package, which now cannot be offered to a mixed bag of blacks, whites and other races.

According to the Local Organiser, Zikhali having the CBA cover only waged workers has been done to fracture labour solidarity:

> *They have divided us so that they can be able to decide wages for the salaried employees, to decide how much they can be able to offer them. If they were part of the collective bargaining agreement, the trade union was going to enforce what could have been agreed with the council. We have fought this for a long time; they have come up with technical words and terms like schedule and non-schedule to refer to waged and salaried staff. The agreement further stipulates that those who are earning per hour or per week can be covered under collective bargaining (Interview, Zikhali 23 September 2011).*

Grace, a female employee at Scaw also echoed similar sentiments, explicitly showing the nature of the problem:

> *The staff employee's lunch time starts at 13h00, yet meetings starts at 12h00s, so the times clashes. We never get time to discuss things together and our challenges sometimes differ. We don't even belong to the same grading system; since the weekly paid belong to the same bargaining council. We are not able to get a platform to discuss these issues as union members together. It will be much more effective if we can speak with one voice. We need a forum for the salaried staff because the one that is available is for everyone (Interview, Grace 4 October 2011).*

Beside the problem of lack of a forum the set up also has an effect on other issues like maternity benefits. Female workers under CBA are allowed to go on maternity leave on full salary, yet salaried are given 75% of their salary. As Violet a female employee at Scaw Metals explains:

> *The bargaining agreement is unfair to us women. It's like when you want to go on maternity leave, if you are a salaried member, you only get 75% of your salary, yet those on contracts get all their money when they are on maternity leave. Moreover, as salaried staff we are deprived of contributing to the sick fund (Interview, Violet 4 October 2011).*

With regard to the issue of salary, some shop stewards however believe that bargaining through the CBA disadvantages workers in big firms who romp in millions of profits and pays just a little to the workers. CBA restricts the union from negotiating a living wage because each and every wage is determined by the collective agreement reached between the trade union and the employers. The challenge has been explained by Sikana:

> *The issue of money, there are some big companies like this (UCW) who can afford like say 20-30%. These big companies are taking advantage of smaller companies who at the end of the day, they say we cannot afford this. Our turn over per year is like this say five million. Yet companies like this are making Billions a year. So they are using these small companies for a scrap goat. We are in these companies and we know what is happening. They are getting the job from the government through the union (Interview, Sikana 20 September 2011).*

There are other clauses that the national union officials appended their signature on that also poses a serious day to day challenge for the shop stewards. The agreement allows the employer to reduce hours of work and subsequently the salary if management perceives that production should be lowered. This has been explained by Zikhali:

> *On this sector [Metals and Engineering sector] I can say the main issues affecting our members are firstly 'indefinite shot time'. Under this clause, when you work shop time that is indefinite, it clearly means you are not earning what you are suppose to earn in line with your contract of employment. It increases the debts because you are earning what you are supposed to earn. This is not a living wage. Instead of earning a wage for the week or the amount of hours worked, you end up earning a two days amount. The amount earned will not meet your living demands (Interview, Zikhali 23 September 2011).*

The same agreement also allows the employer to lay off workers if management feels a particular department is not profitable. Zikhali also explained:

> *The issue of layoffs: it says for those who belong to the collective bargaining, if the company does not have enough orders, this affect those within the collective bargaining of the industry (Interview, Zikhali 23 September 2011).*

All these problems of layoffs and indefinite short time are mirrored in the neoliberal ideology that the government of the country embraced towards the end of the 20th century (Theron, 2005). The agreement is also rooted in the shareholder value ideology which according to Lazonick and O'Sullivan, (2000) saw corporations shifting from the idea of 'retain and invest' to downsize and retrench'. Thus the focus of the modern day business ethic is to have a more flexible labour force that is dispensable. Management can only hire such labour when need be, which Marx called a reserve army of unemployed labour (Wray, 2009). the focus on shareholder value require management to lay off workers or sell part of physical asserts of the

firm or the whole firm as long as that is expected to increase value for shareholders. Regardless of the fact that learned and knowledgeable national union officials who negotiate on behalf of the union know that these clause damage the survival strategies of the working class, they just forge ahead and append their signatures. The problems that are a result of this collective bargaining that has been centralised since democratisation has left shop stewards according to (Buhlungu, 2010) in a state of powerlessness. They are no longer able to bargain for the workers as per plant conditions.

Asked if as a result of such issues the union should pull out of the CBA, Zikhali had this to say:

> *Pulling out of collective bargaining is viewed as a step back while we have already made some great success related to our needs since we have been part of the collective bargaining* (*Interview, Zikhali 23 September 2011).*

With regard to the issue of worker control, Gostner, (1995) said the onus was upon the stewards to convince the constituency to go by union policies and vision. Gostner commended that the power of the shop steward rested on their power to convince rank and file to go by management and union decision. The desire by the steward to win the favour of rank and file to some extent compromised the issue of democracy since the focus of stewards was now on preserving their job. The decision making process is as described below by Maqoba, Francis, Mbuso and Maxwell respectively:

> *In our meetings, how we take decisions is by influencing each other, we haven't got a situation whereby we need to vote for a certain situation or a resolution to be there. We all influence each other. And if the debate there doesn't end, we always make special meetings on Tuesdays whereby that particular issue is going to be debated again and a resolution can be taken (Interview, Maqoba 13 September 2011).*
>
> *We take decision as per the constitution of numsa whereby one will raise a motion and it will be a seconded or we may have a contrary view. If there is no contrary view, we need to debate between the two motions that came. Let's say we don't come into an agreement that's whereby now we need to vote by show of hands (Interview, Francis 20 September 2011).*
>
> *The only thing to have workers go by what you are saying is to tell them the truth, you need not to play hide and seek, if there is something that goes this way tell them the way it is and then you come up with strategies on how to counter that (Interview, Mbuso 8 September 2011).*
>
> *Well if something is good for them, we try and convince and show them the bigger picture and the brighter side of the idea (Interview, Maxwell 22 September 2011).*

From the above statements, it can be seen that the shop stewards, tough they give members room to air their views they have greater chances to influence them. This is because they are much more learned when it comes to labour issues, (Pityana and Orkin, 1992).

However, the national officials seem to be doing the opposite. Wood, (2003) note that there is a gap between the national officials and members that compromises the concept of worker control. Sikana explains how this issue transpires:

> *The issue of worker control is being used for personal gains. The union is losing the focus to fight for the right of employees at the work place. The union is using this platform for political gains forgetting the core issues of the employees at the plant level (Interview, Sikana 20 September 2011).*

As Wood, (2001) and Buhlungu, (2010) noted, union officials have adopted a new status, and give preference to a new set of allies neglecting their key role; servicing the members. Sikana explained one of the instances this was exhibited when they had invited the General Secretary to come and talk with management over a decision by government to buy wagons from China on the pretext that the local suppliers were incapable:

> *I am talking about the union officials. You will be booked for political parties visa-v-vis union meetings. So but then the official will chose to go to political party's meeting, you see and the pay of that official is coming from us at the plant level. Now our issues must wait while you career at the political level must growth (Interview, Sikana 20 September 2011).*

Buhlungu (2010) also noted that there is an increasing tendency by union officials to instil superiority to juniors. Sikana noted that the union officials have developed ways and means to silence discerning voices. It's no longer the case where according to Lane, (1974) shop stewards used to be described as a nuisance to union officials.

That's the senior union officials have developed strategies that have seen their powers almost unchallenged. Moreover, it appears shop stewards in South Africa have also recognised that there are multiple opportunities that go with being a loyal union official (Vlok, 2000 and Finnemore, 1999). As has been shown upon democratisation a lot of union leaders were absorbed into various governments, with some landing to government posts like the former secretary general of NUMSA, Enoch Gondongwana who is the current Deputy Minister in the ANC led government. Moreover, CASATU has adopted the - enter - through the open door policy whereby all contested positions both in the workplace environment and in the community should be contested to influence change. Thus ideally, shop stewards tend to be less vocal hoping one day to land a senior post in the government or within the union itself.

4.3 Conclusion

The union depends on the shop stewards for information dissemination, membership drive and all the necessary issues and events that take place at the shop floor. However, full time union officials have asserted their dominance on the shop stewards such that they were able to decide without involving shop stewards and general members. Thus decision making in a bureaucracy is vested in the hands of the few and therefore worker control concept is being erode. Structures are continuing to become transmission belts for discussions from above. While they have been meant to increase efficiency (Weber, 1968), senior members at the union have developed seniority and therefore have tendered towards oligarchy

Chapter 5

MAN AND WOMAN IN THE MIDDLE: Serving too many masters?

5.1 Introduction

The shop steward has been characterized as the man/woman in the middle or a woman/man with two masters. In this section I will outline the contestations that the shop steward faces as a result of his/her position. I will explore the argument that members' demands and expectations are much more than what the shop steward can deliver. It will also be shown that management construe the existence of shop stewards as to serve the interest the firm. The role and expectations of the shop steward regarding national policies will also be discussed together with management strategies to silence the shop stewards. Lastly, the role of the shop steward as a social worker will also be brought to the fore.

5.2 The shop steward's work area.

As noted in the above chapter, the trade union ceased to be a local affair officiated by men and women who toiled by day. Its organizational structure grew away from the workplace and the locality as it added new tiers to its superstructure (Lane, 1974). However, this new organisation did not do away with representatives at the plant level. What the hierarchy necessarily left behind at the point of production were the same sentiments and the same sort of men and women who in the previous generations had set the national organization on the road: the shop stewards.

During a tour of the two plants I observed that the shop steward is highly visible at his/her department with members that elected him/her except if he/she is a full time shop steward. He/she does not necessarily 'pack his bags' and leave the workplace as is the case with those that are elected for political positions (Lane, 1974). The shop steward's location remains the same. The duties that the steward used to perform before being elected remain the same. The steward however seldom leaves his/her duties to attend union meetings or represent the worker(s) during a hearing. Worse still the shop steward report to a supervisor or foremen, under whose jurisdiction he/she falls under. Both the foreman and the shop steward's peers will be scrutinizing the shop steward's deeds.

Even at the local level, the shop steward operates as an office bearer and not a full time union official. The duties and responsibilities of the shop steward remains the same. This explains

why most local and even regional level meetings are held after normal working hours. This is also one of the reasons why female participation in these union structures is traditionally poor. Most women have other responsibilities at home than their male counterparts. As a result, the meeting times are an additional burden for the female shop stewards.

5.3 The shop steward in the eyes of the Rank and File and Management.

The shop steward is the point at which conflicting pressures converge. The following sections will profile the pressure that is exerted on the shop steward by the rank and file and management. The type of pressures and expectations these groups exert on the shop stewards will be identified and discussed. An analysis of the various ways through which management will try to silence the shop stewards will follow in the next section.

5.3.1 The Shop Steward versus the Rank and File.

At the bottom of the union hierarchy lies the non-administrative group but arguably the most important of them all are the members. This group provides the union with important resources; membership and funding through subscriptions. The first committee at the bottom of the hierarchy, the Shop Stewards Council is elected by this group. Ideally it is this group of people whose support drives the union to where it is now. Through the mandate they give to the shop stewards, the group expect to be serviced. However, most shop stewards described the demands of members as unreasonable and difficult to achieve.

Nkosi, a union member at one of the factory was of the opinion that shop stewards existed because of their support. It was therefore their duty to honour the support the members gave to them. As a result they do not need to decide on behalf of the members but simply comply with the constituent's directives:

> *Whatever the mandate we give the shop stewards, they need to follow the exact mandates, nothing else (Interview, Nkosi 16 September 2011).*

Evans when responding to the question of what the members expect from shop steward identified demands which show they cannot be achieved under whatever circumstances:

> *Heaven! They expect everything from us. You see members, irrespective of law or no law, what they say they want they expect you to deliver it. So it's up to you as a shop steward to explain every time to members what can be achieved or not (Interview, Evans 20 September 2011).*

For Mbuso a shop steward, the demands of the workers revolve around the issue of grading and salary increments. However, these are issues that are discussed at the collective bargaining council and as a result shop stewards have little jurisdiction over. The NEC is the responsible committee for the union.

> *First of all they are expecting that the shop steward will come up with more money, he will fight with management so that we can get more money. Every day they say hey my man we need money. Yet the steels industry collective bargaining is there whereby they analyse job description and the discussion are saying this kind of a person doing this job is doing grade like grade D. So as shop steward I cannot say I will come up with money for such and such a grade, but when you are going through the collective bargaining (Interview, Mbuso 8 September 2011).*

Its thus can be seen that the shop steward due to the type of education he/she receives now understand the statutory instruments that govern the relationship between management and the work processes in a given industry, in this case the Metals and Engineering industry.

Stanley, another shop steward said that members basically expected satisfactory service. However his challenge was that most of their demands were beyond the reach and ability of the shop steward. Like Mbuso, he felt the shop steward had little or no jurisdiction over what was discussed at the collective bargaining council as the following statement articulates:

> *I would say they expect us to service them to their satisfaction. In fact, members always expect more than the shop steward can or could do, more than what the industry (Metals and Engineering) can give. Members would expect us say to change a rate, only to find that the rate is bargained at the bargaining council. To tell someone that comrade what you are asking for is too much is a challenge (interview, Stanley 6 September 2011).*

On the same issue, Sanele shaded light to one issue that has roots in politics and the apartheid workplace:

> *The expectation from members is for us not to sell them out, and also expecting something beyond your powers that you would not be able to do, like to change a person who is racist, they just expect you to change that particular person, yet it's not easy to change a person (Interview, Sanele 6 September 2011).*

With regard to the issue of race, a female employee at Scaw Metals, Khetiwe also had this to say:

> *I don't know if anything can be done about the issue of racism at this work place. We are subjected to racial insults everyday of the week (Interview, Khetiwe 15 September 2011).*

What is disappointing in Khetiwe and Sanele's statements is the hopelessness that they exhibited regarding the racial assaults that workers in South Africa are subjected to more than a decade after democratisation. What Von Holdt (1997) saw as the apartheid workplace that needed to be deconstructed has not been fully deconstructed to this day.

To make matters worse, the rank and file do not ask for something that they expect in the near future. What they ask the shop steward to deliver is an equivalent of the biblical daily bread. Workers want immediate answers, yet this is not the case as Mbuso explained:

> *When we are negotiating, it's not something that does happen overnight. Discussions are taking more time so people are getting tired of waiting. They will begin to say this shop steward cannot do anything why? Third week now and he is not coming with results we need (Interview, Mbuso 8 September 2011).*

On the same issue, Blessing added:

> *Members want instant answers yet it's not possible to get them. There are procedures that have to be followed before management commit itself (Interview, Blessing 13 September 2011).*

This delay has been identified by Francis as a tactic to silence shop stewards. This will be discussed later in this chapter.

The pursuance of personal issues is also another challenge that shop stewards grapple with in their day to day life at the workplace. It gives rise to the question of whether workers know the type of issues they should take up with management. As Sikana explained:

> *As shop steward we are taken to training for courses on what to do and what not to do and to challenge and the none-issue. Actually you can see that this issue is a none-issue but because of this wrong mentality that I am a union member so I have to take this issue even if it's a none-issue. The none-issue that I am talking about is confrontation between workers. When they argue about something they would want me to make lounge a grievance. We cannot just take up the issue with management (Interview, Sikana 20 September 2011).*

In this case if the members knew that the mandate of the shop steward did not involve taking personal conflicts to management, then probably the confrontation amongst themselves would not be taken up with shop stewards.

Shop stewards are also accused of siding with management and making compromises without the mandate of the workers. Members are convinced that there should be no relationship between management and shop stewards, a social movement conviction based on a black-

worker-white boss of the apartheid era. Any such relationship meant the shop steward was selling workers. Stanley noted the members' perceptions:

> *They always accuse us of drinking tea; and always say yes, yes, yes to management after drinking tea. That's how workers see us, but some of them they know that that is not a true reflection of the situation (Interview, Stanley 6 September 2011)*

According to Diba, members think that shop stewards and management are competing sides and there is no time for friendship or interactions:

> *It's a matter of members if they think if you are a shop steward now maybe you should not laugh with the foreman and supervisor, that now you must be an enemy whereas that's not possible because in order to meet any demand that you have got, you have to talk to this person. They want to see you as a shop steward to be like an enemy of management which is not possible because if you are not going to this office you are enemy of this person you won't solve their problem. That is why they say we don't trust you, allegations will come that you are friend of so and who, now you don't take our demands to management you are a friend with manager and all those allegations, sometimes they are deliberately doing those with those smear campaigns in order to let that shop steward down so that they can take over because they believe that if you are a shop stewards you are exposed to promotion because management can say Diba you know, you are giving us a lot of problems can you come inside (Interview, Diba 8 September 2011).*

There is evidence in this case to show that workers still believe in Social Movement Unionism where the shop stewards and the workers at large had nothing to do with managerial decisions regarding the performance of the firm. Modern day union officials as Vlok, (2000), observed resemble mostly strategic and business unionism; what Buhlungu, (2010) termed entrepreneurship. This means they have to partake in management decision that affects the profitability of the firm like restructuring and subsequently the welfare of the workers. Workers' attitude is still enshrouded in the pre-democratic era where the management of the day was predominantly white and therefore should not see eye to eye with workers.

5.3.2 The Shop Steward in the eyes of Management

Like in the case of members, management expect shop stewards to behave in such a manner that their efforts are tailor made towards meeting managerial targets. During interviews, IR managers from both sites expressed their desire to work with shop stewards and looked forward to seeing the institution of shop stewards existing. One IR manager, Vundhla called the union and stewards social partners:

Remember NUMSA is a social partner in this business so from time to time I would discuss issues relating to work performance, issues relating to what they don't like in the plant, issues that involve the members that must be paid ... deaths benefits any other arrangements, uniforms everything that involves every member we are dealing with (Interview, Vundhla 16 September 2011).

While responding to the question; "are shop stewards useful?" Vundhla the IR manager at Scaw Metals had this to say:

They (shop stewards) are really helpful because sometimes they bring issues to me before I know them sometimes they will raise something that will gonna happen before it happens and sometimes they will come and advise me how best to approach certain situations such that I can appeal to their members(Interview, Vundhla 16 September 2011) .

The IR manager at UCW Denford admitted that shop stewards are important to the organisation. However, there is a special calibre of shop stewards that is cable of seeing the company to another level:

I think shop stewards are very critical. If you have got shop stewards that are strategic enough, you are bound to grow as an organisation, and you can grow far much better than other organizations because shop stewards tend to have influence over the ordinary employees. So if they have that and it's leveraged in a proper manner to the advantage of the growth of the organisation that can actually take the organisation forward. You need shop stewards that are constructive in driving issues, if there are issues that are incorrect, and then they need to be rectified (Interview, Denford 27 September 2011).

From Denford's statement it can be seen that shop stewards are viewed as crucial by management as long as their activities lead to the growth of the company. The influence of shop stewards over member has also been acknowledged in this statement. The IR manager of Scaw Metals, Vundhla echoed similar sentiments, adding that the shop stewards should screen issues before they even come to management:

They are very helpful, but I want them to be more constructive, and be confident from time to time and tell their members that look, management won't support what you are asking us to go and demand from them. I do not want them to think that everything their members asked for will be accepted by management. There are some reasonable and unreasonable demands, we met reasonable demands, if they are unreasonable they should indicate it to their members before they come and talk to us. For example to say that I am in the same grade with so and so, so I must get the same salary, because the grades have got minimum and maximum, so when you join, the firm this year you are at a minimum, so you are graded based on your experience in the company. So if you are promoted from the lower level you cannot demand to be paid the maximum in the grade. So start at the bottom of the scale and grow with the scale as well (Interview, Vundhla 16 September 2011).

In this case shop stewards are expected to act as an extended arm of management screening that management can entertain. The IR manager also recognised the powerful influence shop stewards have over the rank and file and sought to see the shop steward using this influence to benefit primarily the firm. Moreover, it appears shop stewards need more education on grading issues and entitlements so as to avoid making incorrect complains. There should be an agreement regarding the grade that workers that have been transferred from a particular line or department due to closure should assume.

The shop stewards also know management will need them for the benefit of management. Regarding this scenario Stanley had this to say:

> *A person only recognizes you when you are good, when you are bad, doesn't want to recognize you. Our management when they are facing problems they do contact us and request us to speak to the workers if it's in need of the workers or if it's out of their will. For example we had a situation of a wheel plant which was closed. Management came forward to the shop steward, to approach the head office to go and approach the customer. In that situation it shows that management knows that the union can also play a role in terms of getting their customers* (Interview, *Stanley 6 September 2011)*

Stanley and Sanele added another instance where the shop steward is of greater importance if it favours management as shown by their statements below respectively:

> *Like in the form of a stoppage in a particular department, management will call us to go and intervene and get the workers go back to work that's where they needed us most (Interview, Stanley 6 September 2011).*

> *They don't just jump in and say we are charging these people because they have stopped. They will need us to intervene and speak to people and find out the problem and the people once they are back to work then we can sit with management and try to solve that problem (Interview, Sanele 6 September 2011).*

Diba summed up the management expectation from the shop steward:

> *Management says we are disrupting production every time. If there are work stoppages in a particular department management accuse shop stewards, they said you should have stopped that before it happened. Even if it's a legal or illegal strike, they will say you as a shop steward you are not leading in the right way. If workers are stealing or coming drunk at work, all accusations come to stewards that you are not teaching them very well, you are not giving them information. Your members are undisciplined because of you (Interview, Diba 8 September 2011).*

In this case the shop steward is viewed as the policeman for management; to spy and weed out unruly elements from among the workers in the plant. The shop steward is also anticipated to sniff out trouble and nip the problem in the bud. The institution of the shop

steward therefore exists in a sense to serve management and not worker interest, according to the above quotations.

Evans, a shop steward said management did not expect anything from the shop stewards – except to suppress the needs of workers in favour of management:

Management expects us to silence the workers and listen to management (Interview, Evans 20 September 2011).

Another shop steward, Maxwell remarked that:

> *Our duties have moved from what we are suppose to be doing on a day to day basis in to doing certain things that management is suppose to be doing (Interview, Maxwell 22 September 2011).*

The reason why Maxwell said this can be deduced from Sibongile's sentiments regarding what management expects from the shop stewards:

> *They expect us to carry out their mandate, whatever it is to the employees. Whatever favours them, they expect us maybe to call a meeting, tell the employees that management want us to do this and this, that is we have to motivate whatever they want us to put across to employees (Interview, Sibongile 22 September 2011).*

Thus management sees the shop stewards as their gateway to the workers. They don't have to worry about convincing the workers; all they need is to arm-twist the shop steward and expect the job done; the shop stewards were expected to face off with the workers on behalf of management.

Regardless of all the engagements shop stewards make with management, Lane, (1974) wrote that the relationship is unequal. Rittau and Dundon, (2009) writing on roles and functions of shop stewards in a workplace partnership argued that management sponsors the partnerships, as shown by provision of office and related stationary. Rittau and Dundon (2009) also noted that union roles and spheres of influence under social partnership are limited because management controls the agenda. Due to this unequal relationship management always bull doze their way and makes shop stewards go against the mandate of the constituent. Stanley said that management always tell them that it was their firm and therefore had the prerogative to control it:

> *It's their company that is what they always tell us. So where it suits them they will use us, where it doesn't suit them, they won't. So the way they take us is just like any ordinary worker, they just recognize us when they are in trouble (Interview, Stanley 6 September 2011).*

Maxwell made a raw description of management:

> *The type of management is the kind of stubborn management. They do things as they please. Like changing conditions of employment, they do that unliterary. When the MD feels there is something that he feels like doing, he does. He does not care who it affects and how it affects them. If he wants to save costs, he will not call us he will just save costs (Interview, Maxwell 22 September 2011).*

This unequal balance of power can also be seen from the following statement by Vundhla:

> *There are some other decisions which are for management prerogative and sometimes those decisions don't go that way. Consultation about that decision, before you decide to advertise, before you decide to change this person from this department to other departments, its management privy information but they (shop stewards) want it. From their side, they say this or that information are our task we don't need permission from you which I have been telling you(Interview, Vundhla 16 September 2011).*

From the statement by this IR, manager, there are certain managerial prerogatives and they don't need to consult shop stewards with regard to making such decisions and executing them. The manager also argues that the shop stewards also have their closed door agreements in which they brush management aside since they strongly believe management is outside that scope of reference. However it is managerial prerogatives in decision making that has a more bearing on the workers in most cases. This prerogative is enhanced by the fact that management has power and has been trusted by the owners to run the firm on their behalf.

From the above discussion, it can be seen that management is always seeking favours from the shop stewards. Management is seeking gains for capital from labour, yet labour's mandate is to crave out gains for the general upkeep of the workers. It has also been shown that management has the upper hand and shop stewards are the weaker partners in the relationship.

Surprisingly management continues to ignore and take a back seat with regard to crucial issues like safety. There are clear cases or instances of violation of standard safety regulations. It appears that management is merely focusing on issues of company profitability, an approach that has roots in the growth of financial sector and its impact on non financial sector. The ideology could also be rooted in the shareholder value tendency of shifting from retain and invest to downsize and retrench (Lazonick and O'Sullivan, 2000). This calls upon management to focus on cost saving strategies in the firm. Maxwell gave an outline of the situation regarding safety:

> *When we talk about safety issues we talk about non compliance on the side of the company, in July, we had to deal with the issue of paint shops. People become asthmatic because of the fumes from the paints. We only found that the extractor fans in the paint shop were no longer working. We had to challenge management.*
>
> *In another department called S90 where they are dealing with welding, you can imagine a situation where there are no extractor fans but people are welding; its fumes everywhere...(Interview, Maxwell 22 September 2011).*

Sikana echoed the same sentiments but pointed out that the issues of Occupational Health and Safety (OHS) and personal protective equipment was not sufficiently provided. Sikana had this to say:

> *The employer can see work with dangerous things, they are slowly entering your system like in welding there are fumes, where we are working with paint, and there are fumes and smell of the paint. On such issues, they give employees cheap staff, they want to save company's money so that the company makes more profit. So they say what cheap staff we can get, for example, the masks, for the disposable ones, they will ask the workers to continue using them for about 5 days (Interview, Sikana 20 September 2011).*

Asked if the department of labour carried out a blitz inspection on the company, Maxwell explained that the inspectors were called and came but management took them to the wrong plant:

> *We called the inspectors and they came over. However they were taken to other sites. I personally called the inspector and asked him to come and see me, and then I showed him the situation on the ground. After that management is taking time to act over the issue (Interview, Maxwell 22 September 2011).*

In this case the shop stewards showed that as active agents, they are not just recipients of a system but they are shaped and they continually shape the system. Having realised that management was taking inspectors to departments the firm is fully complying with OHS issues, the shop stewards asked the labour inspectors to come and physically see them and were shown the respective departments where there were high levels of non compliant.

The failure by the labour inspectors to identify the crucial issues raises a question: are labour inspections effective? If so why is it that the department cannot instil discipline in firms and make them conform to set standards?

Besides the problem of fumes, the paint shop at this firm also has other related problems that have a negative impact on the health and welfare of the workers. There seem to be no solution in sight at the moment; as Maxwell explained:

> *At the moment we still have a problem in the paint shops. The spraying machines they are using are not designed for wagons but for cars (Interview, Maxwell 22 September 2011).*

While shop stewards target to crave out gains for labour, their relationship with management shows that management intends to use then for its gains. Functions of shop stewards are approved of if they have relevance to the growth and profitability of the firm. The management has also exhibited an inhuman attitude as shown in the case of the paint shop and the welding shop. That both black and white managers connive to let people work in an environment that has visible harm on the human body is unjustified. It resembles a higher degree of cruelty against mankind.

5.4 Management Tactics to silence the Union

Since the shop steward is the worker's voice, Lane, (1974:206) wrote that 'shrewd employers sought to use him as an instrument over the rank and file'. I discovered that in South Africa, shrewd employers have developed more tactics both to use and silence shop stewards for the betterment of capital. As shall be shown below the life world that is management has developed various means and techniques to colonise the system that is the shop stewards Habermas, (1987). The most popular technique that is used to divide the loyalty at the shop floor is what the Local Organizer; Zikhali described as 'poaching' an active person:

> *They poach by giving him a position. It is common and it's happening. We have lost a lot of shop stewards, who have been promoted to management positions, and those promotions to show that it's a poach(er); it's not happening through relevant structures. When I am talking about the relevant structures, I am talking about communicating with the union office where the shop stewards belong to. We just get being informed, after a month, 2 month or more ... specifically, it take time for the union to know (Interview, Zikhali 23 September 2011).*

When asked the statistics to show the prevalence of such poaching, the organizer said they just sent them to the Regional Office. The Regional Office also said they sent the statistics to National Office and did not keep duplicate information. At the end of the day, I could not get statistics. However, based on informal discussions during the Local Shop Steward Council meeting, the figure is approximately 5%.

Apparently, management seem to have identified an inherent weakness in shop stewards; they are hungry for success like any other human being. In addition they are always striving to get a better remuneration. The Regional Organizer, Du Toit commended:

> *As a working person you work to improve your life so it's entirely up to you*.

The Local Administrator, Sophia observed that the workplace is not giving workers a living wage and therefore they are always hungry. This as she explained is the reason why shop stewards are vulnerable to absorption and bribery.

> *Besides promotions, management knows we are hungry; they call shop stewards in the corner, just trying to neutralize him if he is active. Sometimes they bribe him. You will find the shop stewards no longer coming to the office, the shop steward no longer taking workers grievances to management or to the office (Interview, Sophia 23 September 2011).*

Diba, the Scaw Shop Stewards Council Chairperson also echoed the same sentiments:

> *Even if you tell people that the promotions are not right, because people are hungry, they continue to take them (Interview, Diba 8 September 2011).*

Asked the position of the union regarding absorption of shop stewards, Zikhali said they accepted that everyone had the right to be promoted but there was need to follow certain rules:

> *What we always say is, actually that before being a shop steward, you were a worker and you must have all the rights that other workers have, but we want to see a shop steward to be treated like any other workers, you must not get promoted because you are a shop steward, or because you signed some documents, you sold some workers. We want, if there is a position you apply, follow all the necessary routes and report to the union that I applied for that job, they must be aware that you can be taken in that management job. But not to but given in a silver plate that Diba, from tomorrow you are a manager, now its favouritism and it's against the law. It needs to be advertised, if I am interested I must apply. Not to use workers in order to get there (Interview, Zikhali 23 September 2011).*

From the statement of the Local organizer, Zikhali, it can also be deduced that the union position is that if a shop steward is promoted, there is need to formally inform the union. According to Webster, (1985) one of the duties of shop stewards was to inform the national union about changes in management. It appears shop stewards because they are mostly gunning for promotions are not telling the union changes amongst the shop stewards themselves; thus they are no longer sounding the alarm in this instance.

The IR manager at Scaw, Vundhla dismissed the assertion that shop stewards are targeted for absorption by management. He insisted that it was purely based on merit. During the interviews he made the following defence:

> *Look we don't promote people because they are stewards but we promote people because they have got the potential, we promote people because we believe there also*

handle a bigger responsibility beyond that of a shop steward (Interview, Vundhla 16 September 2011).

Literary, his statement may be interpreted to mean that shop stewards because of the knowledge and expertise they get during their tenure of office as shop stewards, they became much more experienced and therefore became mature for a ‘ a bigger responsibility’ as Vundhla puts it. Besides shop stewards knows how to get a point across to the members. Thus because they know the language of the workers, management will therefore be interested in a leader who can influence workers towards achieving the goals of the organisation.

Vundhla’s counterparts at UCW, Denford saw an inherent destructive stance that will make management use another tactic against shop stewards, dismissal. He explained:

Some stewards are always destructive. They go in the meeting and are always fighting, fighting. One thing that I have found most companies doing is promoting that person into higher position so that he is not part of the shop stewards. Management will promote that person or trap that person and have him dismissed (Interview, Denford 27 September 2011).

The basis of Denford's assertion at this company can be linked to what one shop steward; Maxwell said was the reason why he became a shop steward:

Guys were too militant than diplomatic. They are issues you don’t need to fight for but negotiate (Interview, Maxwell 22 September 2011).

Denford could therefore be right that some shop stewards could be unrealistic. Even though it’s one of the tactics that his firm used he denied all the charges and refused to be drawn into disclosing further details surrounding pending cases of dismissed shop stewards a few month after assuming a new role in the firm.

The tactic of promotion and dismissal has been further developed by Sikana, a shop steward at UCW. There are a number of steps that management follows before they can get rid of the shop steward. Firstly:

They set up a trap. While they deny us enough time to plan, they have enough time to sit down and plan against you. These people they sit down and discuss about you and plan on how to get hold of you, they will set up something. If they see you are a disciplined shop steward, they give you a post and set up a trap. This happened to one of our shop steward here (Interview, Sikana 20 September 2011).

Having decided to set a trap the next target is:

> *They will check your qualifications, and create a position that is related to your qualifications. Because we are all here for money, we are all here to grow and to see one on another level. You will apply, you go to interview and they will select you as the best candidate (Interview, Sikana 20 September 2011).*

The final stage will be monitoring your performances and any silly mistake you are gone. In one of the pending cases at UCW, the shop steward before being promoted used to operate a crane without a license. Upon promotion, they found him driving the crane preparing for the day's work in his department. He was charged for driving a crane without certification and subsequently dismissed.

The tactic of trapping and dismissing shop stewards can occur outside the scope of promotions as exemplified by the following case at UCW. A female employee complained to one of the shop stewards that she had been abused by the supervisor. However events that followed pointed to a trap as Evans the UCW Shop Steward Council chairperson explained:

> *We had a case in the paint shop, his department to investigate. Somebody phoned Murray and Robertson, the Holding company of UCW, informing them that he (the shop steward) is there intimidating workers or forcing them to act against their superior, which is wrong without any permission. He was charged, but when we wanted to know who phoned the main shareholder, that woman he was representing was pointed. When we investigated the women, the women said no ways this man never intimidated us, he never told us to lay a charge against this man. We decided it because we felt strongly that this man was victimizing us. So there were no witnesses in that case but now the company suspended him. We have taken the issue up and we know he will win but we will never have him back again. The company will buy him out (Interview, Evans 20nSeptember 2011).*

According to Sibongile, this is one of the issues that scare away women from seeking to become shop stewards.

> *That also make ordinary female members who would say eish in the future I want to be shop steward, it makes them scared, that should I be a shop steward I become the target of the employer* (*Interview, Sibongile 22 September 2011)*

Besides 'poaching' and traps and dismissals, management also uses delaying tactics as a strategy. This has the problem of fracturing the workforce and diminishing confidence in the shop stewards. Francis a shop steward at UCW explained:

> *Management takes a lot of time before they respond to issues that we shop stewards will have raised. They take time before we reach an agreement or before a particular issue is resolved. Members will keep on asking how far we will have gone. This will give an impression to members that shop steward is weak and therefore will need replacement during the next election (Interview, Francis 20 September 2011).*

Another easier way that management positions to frustrate shop stewards is through seconding an executive to the negotiating table who has little or no power to change the firm's stance. Maxwell noted this problem at UCW:

> *We are working in a company that is a sort of dictatorship or monopoly; it was even said to us in a meeting that the Operations Director does not have a mandate on a new issue. The only mandate he has is when things are written down. So our challenge is why do we sit with a person who doesn't have a mandate? It is a futile exercise because we just come and deliver our issues and they go in and discuss it and decide ok how do we go around with it and they come up with a negative answer (Interview, Maxwell 20 September 2011).*

Management also has a tendency of shifting goal posts. They shift the blame to dismissed shareholder or a different management like in the case of Scaw Metals as exemplified by the following explanation from Luke, a key informant when responding to a question on whether shop stewards are taking their mandates:

> *Shop stewards are failing to address issues that date back to the year 2000. They are failing to nail down management. There was an agreement that the company will build houses and these were supposed to be given to workers. Up to now the houses have not been built (Interview, Luke 16 September 2011).*

When asked about this issue, management at Scaw Metals professed ignorance to this arrangement. In fact the IR manager Vundhla hinted during an interview that he commenced work at Scaw Metals this February. This is related to what Lazonick and O'Sullivan, (2000) saw as inherent in the notion of shareholder value. The shareholder value focus has allowed corporates to appoint a CEO (management) from outside. If he/she fails to satisfy the expectations of management, then he will be dismissed. All the promise and the gains that workers will have realized disappear with him.

The CEOs knowing their predicament have also been so unfriendly to the working class. They use everything in their power to ensure they achieve targets set for them by shareholders. For example at UCW, the following is the scenario as explained by Sibongile:

> *In this company it's like we are having a dictator of an MD, and the problem we always have in this company is that there is a change in management, somebody is being appointed as MD. In a few years that somebody is resigning, then come a new MD with his own things and wants to implement his own rules and there is this friction. There is no understanding between the union and management that is the shop stewards because all the time they change management, so it's difficult, we are having an issue here trying to resolve with management, the next thing, that person has resigned. The new person when he comes in he wants to start afresh (Interview, Sibongile 22 September 2011).*

The above illustrations shows that indeed shifting management will also help shareholders deprive workers of any gains they will have made. The idea, as illustrated above is simple, blame it all on the previous executive or MD. The new MD does not have anything to do with that. The message is like, 'let's go to the drawing board and start afresh'. Thus issues may be taken up with management, when agreed upon management is replaced and the issue has to be bargained for again, regardless of the fact that written and signed agreement exists, new management refuses to assume responsibility, as Maxwell gave another example:

> *There was an agreement in 2004. It was a grading exercise, which the shop stewards then soon after that agreement they resumed duties as supervisors. Now it seems to us that management tried to hide that agreement and when you request for it they say it does not exist. It was found out somewhere in 2010 that the agreement indeed exists (Interview, Maxwell 20 September 2011).*

The advent of neoliberalism and new national legislations has also had an effect on shop stewards. To start with neoliberalism brought in new forms of work like subcontracting and outsourcing, (Theron, 2005). This, it has been suggested will allow management to focus on their core business (Buhlungu and Webster, 2006). With regard to legislation, there is the BEE project to empower black people in South Africa. For those companies that decide to outsource some of its activities, and decide to bring in the BEE component, management normally choose shop stewards to take over the outsourced business. This is meant to ensure that management do away with one threat, the shop steward. The other reason is that the company will receive recognition from the state that the firm is moving towards meeting the state's BEE agenda. Zikhali explains the process and impact on the shop steward structure and the workforce:

> *Shop stewards are getting first preference to obtain something for the business. As you know that the law has been expanded, there is now the BEE programme. If there is certain department they want to outsource. They give first preference to shop stewards to say can you become the BEE in this company. They will say the reason why we want you to be part of this is your knowledge and experience you gained from the trade union. This is another way of getting the shop stewards on their side. A shop steward once he (she) becomes a business man/woman or a shareholder, he (she) is no longer going to be a good shop steward (Interview, Zikhali 23 September 2011).*

From the above discussion, it can be seen that while management recognize the existence of the shop stewards as provided for by the Labour Relations Act, management is still insincere in its dealings with shop stewards. Management tries from all angles to silence shop stewards and prevent them from craving gains for the members they represent, the workers. The shop stewards on the other hand seem to be hungry for success and recognition. The knowledge

and experience they accumulate during their tenure of office as shop stewards makes them knowledgeable and susceptible to absorption.

5.5 The role of Shop Stewards in the implementation of National Policies

As Clarke (2004) noted, the gains for labour that were ushered in when the country dawned democracy were new Acts like Employment Equity Act and Skills Development Act. All these skills are meant to improve the lives of the traditionally disadvantaged black population, both male and females. The Employment Equity Act is aimed at ensuring that the black populace (male and female) gain ascendance to senior management posts that have been traditionally reserved for whites. It should be noted that through the Industrial Conciliation Act of 1925, most artisan, supervisory and management positions that were reserved for whites, coloureds and Indians only (Davies, 1966; Horrell, 1961 and Ncube, 1985). Ncube, (1985) wrote that even though blacks lacked particular skills during the period in question, they were denied the chance to do so, while other races were given the opportunity. While the Wiehahn commission' recommendations in the 1980s led to the recognition of the black person as an employee (Baskin, 1991 and Ncube, 1985) this did little to change the administrative outlook of major firms. Von Holdt, (2003) called this the apartheid workplace regime. It can therefore be seen that these Acts were aimed at correcting these imbalances. As has been explained earlier, the shop steward does not leave his workplace simply because he becomes an elected official. One of the duties of the shop steward is to ensure that these laws are correctly implemented. From the following discussions, it can be seen that it is still a struggle to achieve the implementation of national policies.

A key informant at Scaw, Nkosi had this to say regarding the implementation of Employment Equity Act at the firm:

> *The issue of equity is a national issue, but I think in this company we still have a long way to go. The shop stewards have to push a lot more, the company has to comply. Somehow they do comply but it's not enough (Interview, Nkosi 16 September 2011).*

From the statement by Nkosi, it can be seen that the responsibility is on the shop steward to ensure that management complies. Nkosi also gave an insight to the problem partial implementation of the policies by management arguably where it finds fit to do so. The issue of management succession that is inherent in the issue of shareholder value (Lazonick and O'Sullivan, 2000) has given management the impetus to shift stand points and in the process

shift production processes and subsequently leading to workplace transformations. The following statement by a female employee, Cecilia, further shades light on the impact of shareholder value on the implementation of national policies:

> *I will say the issue of equity and skills development in this company is a disaster. We had a three year plan and the previous management applied it. With the new management everything just went down except now that they are dealing with the issue of welding school. It's not so good (Interview, Cecilia 7 September 2011).*

Sibongile, a shop steward saw the issue of skills development that is being implemented at UCW now as a fluke. The issue is only talked about when the firm is expecting huge business from the state:

> *The issue of skills development, this company is very poor about that. They just started now but I think it's a camouflage. Whenever there is a big business that will be coming from government they will do this thing of saying they want to promote people, we want to skill people because now they are eying something from the government. They do that because they have a hidden agenda (Interview, Sibongile 22 September 2011).*

Another employee at UCW, Maria added:

> *For all these years that I was here it was not at all done. Sometimes we were taken to a special training where were given basic training like how to cut wires, but there were no certificates. It was only this year that that apprenticeship started due to pressure on management from unions. For the apprenticeship, I think it was very unfair because they only consider those who are permanently employed. They had to re-advertise because those who are on contracts had applied most, but they said it was only for those employed on full time (Interview, Maria 7 September 2011).*

From the statement of Sibongile and Cecilia, it can be seen that Skills Development Act is implemented in relation to the expected gains for the firm. As long as management does not see any value in it, then it's not implemented.

Moreover, the statement by Cecilia confirms what Theron, (2005) wrote that workers in precarious conditions are disadvantaged when it comes to Skills Development. As Cecilia explained they are in the grade that does not qualify for en-skilling. Their situation will become worse due to the fact that their nature of employment is erratic and they are not paid a wage that would enable then to engage in part time studies to upgrade themselves.

Zikhali, the local organiser also added a new dimension to the reason why management is not taking the issue of skills development seriously:

> *Skills development get not to be implemented at the workplace because most employers feel it affect their business, they want the training to be implemented after hours, whereas we as a trade union we want skills development to be implemented during working hours on each and every work place. For those employees on training, we also require them to be paid full remuneration during their training. We are not getting successful because the implementation gets affected by labour brokers. There is no law or rule that regulates labour brokers or enforces them to implement skills development on workers they deal with, except the trade union (Interview, Zikhali 23 September 2011).*

The concept of shareholder value also plays a significant role in explaining the management behaviour that began in the last quarter of the 20th century. Due to emphasis on shareholder value, the focus being increasing their returns on investment, large corporations shifted attention from manpower development. A few of the workforce that had the skill also saw their salaries sky rocketing. This led to the growth of salary differentials between employees. Worse still these large corporates have their head quarters stationed in the developed states and these are staffed by technically qualified workers. Thus the decision not to en-skill workers can also be said to be associated with the need to keep wages low.

Regarding Employment Equity, Maqoba a shop steward at Scaw see its implementation as a face cover. He also noted the existence of committees which seem to be highly ineffective:

> *The Employment Equity is there by name but companies are not complying in developing the disadvantaged people. I am talking about the blacks. Because they say the white woman was disadvantaged. There are the skills development committees but how many benefited out of that (Interview, Maqoba 13 September 2011).*

Sanele, other shop stewards argued that the practical component of the implementing of the programme is still far from being a reality. Management seems to be using gender and race to get rid of the black populace:

> *They can be compliant in terms of papers but practically, these people they are not compliant. They will bring you a white woman who is gonna be your manager taking out someone who is coloured or black (Interview, Sanele, 6 September 2011).*

From the above, it can be seen that shop stewards are expected to oversee the implementation of the national policies. However, they seem to have little control over the implementation process. Moreover, firms have been shown to selectively implement the policy in a way that suits them. The issue of gender has also been used to diffuse influx of blacks into management.

5.6 The Shop Steward as a Social Worker

Among the issues that shop stewards deal with is the issue of social work. Lane, (1974) wrote that shop stewards helped members with issues like tax problems, marital problems and issues like completing forms. During the time I spend in the shop steward offices at one of the sites, Scaw Metals, I observed full time shop stewards assisting a family whose relative had died to complete claim forms from both NUMSA investment company and from the employer, Scaw Metals. At one instance at the same site, I also saw a couple of members visiting the office with forms seeking assistance from the shop stewards on how best to complete the documents. The reason why workers were visiting the offices was to enlist the services of shop stewards in completing the forms. The reasons are that firstly, the adult literacy level is low, standing at just above 20%. Secondly members were asked not to sign any forms in their departments which they did not understand. The Shop Steward Council chairperson at Scaw said they encouraged their members not to do so because some of them concerted to termination of employment unknowingly.

The shop steward also acted as the constituency's translator and interpreter. He/she represent the members during hearings as Maqoba explained his duties:

> *To represent the workers in terms of* emacaleni, *when the worker is being charged, it is my duty to represent that worker and also to advise comrades and say please comrades please behave and be a grown up person(s). It goes further as you have seen, there were women whose husbands passed away and have to tell the family what the NUMSA investment company stand for (Interview, Maqoba 13 September 2011).*

Sanele also commended on the issue of assisting family members:

> *We assist families that have problems like when a family member who was a NUMSA member has passed away. We also assist representatives of NUMSA investment companies, by if there is any misunderstanding or if workers want to find out something, we also give out that information by that time the representatives are not there* (*Interview, Sanele 6 September 2011).*

For Blessing, workers at the work place are subjected to a variety of insults and his duty was to handle their grievances:

> *I can say I am a grievance handler here. I deal with issues of harassment from supervisor, intimidation, vulgar language, sexual harassment and other issues where workers feel they have been mistreated. These are all due to poor relations (public) by management (Interview, Blessing13 September 2011).*

According to Diba, the shop steward is concerned with issues that affect workers during their life time as workers and he has to ensure that they get the best out of their working life:

> *I will say my day to day duties is to deal with issues of workers that are short paid, workers that need more money, promotion, attend cases almost every day, cases of alcohol, cases of theft attend management meetings as a chairperson. I must make sure that I must attend to the issues of safety issues of skills, like I am almost every day dealing with those and overall to listen to the-complains of workers (Interview, Diba 8 September 2011).*

For Francis, issues of safety and income disparities are the most crucial components of the shop steward's tasks:

> *Mostly we are dealing with issue of safety and also income disparities; Issues of inconsistence within the company in terms of applying the policies and the rules of the company (Interview, Francis 20 September 2011).*

Since workers do not know their rights, Evans, saw his duties revolving protecting this calibre of workers:

> *To protect the workers: in actual fact, to give clarity to the workers on the flow of their rights and to give advice where they go wrong. But normally the way I treat my shop steward duties at the company is that I don't just advise the members, I also advice the supervisors, as to how to work with people, in actual fact the union that brought me up ... and told me not to grief but to create peace and protect workers always (Interview, Evans 20 September 2011).*

For Mbuso, striking mutual understanding between the worker and management is of paramount importance:

> *The duties of a shop steward according to me are to make sure that there is an understanding between an employer and an employee. That the employee knows his rights, then where there is something that doesn't go the way it should, let's say the employer is treating you in an unfair way then shop steward needs come in and say the law doesn't work like this and need to make sure the company follows the labour laws (Interview, Mbuso 8 September 2011)*

Lane, (1974) argued that in such situations, the shop steward could become in certain areas of concern an expert, a man to go and see, a secular curator who took pride in his pastoral role.

From the above, it can be seen that the shop stewards' role stretches across a number of areas that affect the worker during his or her lifetime as a worker and what might affect the worker later in his/her life time. Issues of compensation and completing union documents are undesignated duties that shop stewards do as part of servicing members.

5.7 Conclusion

The role of the shop steward is inherently contradictory. In this chapter it has been shown that the major challenge that Shop stewards are facing from union members at their plants are the demands that that are exerted on them. At the same time management, their paymasters expect them to support every move that is put on the table. As a mitigatory strategy, shop stewards always strive to explain to members of the range and file every progress and challenge that they face. Transparency has been a key strategy for shop stewards. In addition, shop stewards continue to push their agenda with their pay masters regardless of the unequal balance of power between them. Where possible, shop stewards have gone a step further to consult DOL on matters of health when management failed to act on the safety of workers.

Chapter 6

CONCLUSION AND RECOMMENDATIONS

6.1 Conclusion

The challenges that shop stewards are faced with at the shop floor are inherent in the current context of globalisation exemplified by externalisation. These processes have permeated into the structure of the union and the work processes. Coupled with the apartheid workplace regime that need to be deconstructed, all the challenges are borne by the shop stewards because of their position in the hierarchy of the union and also due to the fact that they are directly answerable to the members who they spent most of their time with.

The process of deconstructing the apartheid workplace is still a challenge in the country. While black workers have found themselves into management due to enabling laws and Acts, the top management is still predominantly white. There are still cases of racism that are prevalent in the factories, with the black worker being treated as inferior to the white worker. The scenario is so dire that shop stewards themselves have learnt to live with the situation. They now believe there is little that can be done to change the behaviour of a person who is a racist.

The continued existence of a dangerous workplace is a sign of the continued problem that was inherent in the apartheid regime. Management continues to have work done under inhuman conditions with insufficient or improper protective equipment, in direct violation of the country's OHS Act. It has been shown that disposable protective equipment is being recycled and that minimum conditions are not met for certain work environments like the absence of extractor fans in the paint and welding shops, exposing workers to asthma.

Management has also developed tactics to silence the shop stewards. Besides the traditional technique of 'poaching', more ruthless ways have found themselves at the disposal of management. Firstly, there are delays in signing and implementing an agreement. Some agreements will lapse along the way while some will be thrown away with the advent of a new management. Management has also been shown to have developed a tendency of designing a position that will be tailor made for a targeted shop steward, who upon recruitment in the new position is trapped and subsequently dismissed. Even if the steward win the case at the labour tribunal, the company will buy the steward out to ensure that he is never employed at the same firm again.

The advent of globalisation has seen most corporates tending towards improving work processes to make corporations more competitive in a world market characterised by fierce competition. As a result new technology has been and is still being developed and introduced replacing old production methods like the replacement of the process of casting by moulding. Workers in the new environment become more productive and their output is more than what their contracts stipulates. In the process, workers expect an equivalent adjustment in their salaries as well as grades. Unfortunate, the grade of workers in this predicament is not in any way being reconsidered. Equally, the salary structure remains stagnant.

Globalisation has also brought with it the need for flexible labour force. As a result, workers can go on what is termed short time. Thus whenever the employer feel there is no sufficient demand for particular products, the number of working hours for workers is equally reduced. In certain circumstances, this leads to retrenchments. The influence of the concept of shareholder value has a hand since a shift towards emphasis on shareholder value has seen most corporates moving from 'retain and invest' to 'downsize and retrench'. Thus management could easily sell physical capital or the firm as long as it feels that will increase the value of the firm on the market.

Taking a clue from the manner the Metals and Engineering sector is structure; the union has developed its own hierarchical structure. As Michels has argued, this hierarchy has led to oligarchy. Buhlungu, (2010) also argued that union officials tend to instil superiority over subordinates in the lower ranks of the structure. Moreover the growth of red tapes is imperative, with office bearers at each level surfing information they feel should not reach national leadership. Senior union officials are also seen to be giving preference to issues that are of business and political nature, ignoring shop floor issues.

Members have also been shown to have their share of the blame. Their misunderstanding of their rights and their love of alcohol is the main challenge. Issues that shop stewards are struggling with almost on a daily basis pertains to absenteeism that is related to excess intake of alcohol or workers caught on the premises drunk. If workers were to develop good work ethics, the challenges shop stewards are facing could be minimized.

Regardless of all these challenges, by virtue of their position as shop stewards, various opportunities are available for them. They are free to contest for various positions that are available in the union structure. Since the union takes them through a variety of course, it

makes them knowledgeable than ordinary members. Their exposure to with management processes also makes them ripe for absorption.

As active participants, shop stewards have developed strategies and tactics that enable them to evade red tapes that are associated with the bureaucratic structure in the union. It has been shown that they in some instances bypass certain committees they are suppose to report to and go directly to the general secretary.

6.2 Recommendations

Women seem to be facing challenges when it comes to union involvement. Further studies are needed to identify the impediments that stop women from fully participating as shop stewards.

One of the challenges that shop stewards are facing is that most employees do not know their rights as workers. It is highly recommended that the union increase members' access to education about their rights and responsibilities as workers.

There are numerous meetings that shop stewards are holding. The frequency, though necessary since it enables members and stewards alike to be updated with daily trends, the frequency and timing is also excluding those who have other schedules elsewhere like capacity building for shop stewards.

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Interviews
To protect all the interviewees I have used pseudonyms throughout the text. Below is a list of interviews conducted over the two and a half months (August to September). All of these were formal interviews

Regional Organiser Interviewed (Du Toit): Interview 27 September 2011

Local Organiser interviewed (Zikhali): Interview 23 September

Local administrator interviewed (Sophia): Interview 23 September 2011

Industrial Relations Manager Scaw Metals (Vundhla): Interview 16 September 2011

Industrial Relations Manager UCW (Vundhla): Interview 27 September 2011

Shop stewards interview (Scaw Metals): Bhabhalika, Stanley and Sanele; Interview 6 September 2011, Mbuso and Diba; 8 September 2011, Blessing and Maqoba; 13 September 2011. **UCW:** Evans, Sikana and Francis; 20 September 2011, Sibongile and Maxwell; 22 September 2011, Moleboheng; 23 September 2011.

Union members Interviewed (Scaw): Khetiwe, 15 September 2011; Luke and Nkosi, 16 September 2011, Grace and Violet; 4 October 2011. **UCW:** Penina, 22 September 2011; Cecilia and Maria, 7 October 2011.

APPENDICES

In depth Interview Schedule for shop stewards

Research introduction

My name is Nunurayi Mutyanda. I'm interested in learning about the challenges you have encountered at the shop floor. What I'm most interested in is hearing how you handled the situation. In simple terms I am interested in learning about how you cope with problems at the shop floor.

Themes to be addressed: shop stewards

What is the respondent's name, date of birth and place of origin?

When did you join this company? In which capacity?

Which other companies have you worked for? For how long?

Reason for leaving

Which qualifications do you hold?

Union membership

When did you become union member? What motivated you to become one?

Type of union

When did you become a shop steward?

What are your day to day duties?

How many female shop stewards do you have?

What are the income and other benefits that you are entitled to?

How often do you meet, where and what time?

Services needed from: Management, Union and Members?

Who is involved in collective bargaining?

What problems arise as a result of collective bargaining?

Relationship with members

What does the rank and file expect from you as their shop steward?

What accusations are levelled against you by members?

Decision making

How are decisions made at the shop floor?

How do you get the rank and fine to go by your suggestions?

Management.

Who takes issues up with management?

How best do you describe the relationship between you and management?

Which tactics is management using to try to silence you?

What accusations are levelled against you by Management?

How do you defend yourself in the wake of this criticism?

Human Resources!

Tel me about yourself Qualifications held

Company enrolment: why male oriented

How are you balancing the gender issues in the firm?

How do you describe the skills base of female employees?

Issues that shop stewards bring to your attention

How have you dealt with some of the issue?

What do you expect shop stewards to do?

That they are doing

And not doing

How helpful are shop stewards to the firm

Challenging faced by stewards

Relationship with shop stewards

Management tactic to silence union

How far have you company gone in implementing:

-skills development agenda and

Employment Equity

Union members

What is the respondent's name, date of birth and place of origin?

Work experience

When did you join this company?

In what capacity?

Which other companies have you worked for? How long?

Reason for leaving?

Which qualifications do you hold?

When did you become a union member?

What motivated you to become one? Type(s) of unions?

What do you think are the functions/roles of shop stewards?

To what extent are they representing you?

What issues do you take to shop stewards?

Are you getting satisfactory services from shop stewards?

Do you have female shop stewards? If not why?

If they were there would you accept them as your stewards?

What are the income and other benefits that shop stewards are entitled to?

How often do you meet, where and what time?

What do you feel shop stewards are not doing?

What actions are taken against you in the process by stewards?

Decision making

How are decisions made at the shop floor?

How best do you describe the relationship between you and management?

What do you feel Management is not doing for its workers?

Local/Regional organiser

Information about name, age, date of Birth

History as a trade unionist

Issues that shop stewards bring

What the office expect shop stewards to do

Support the office give to shop stewards

Issues around collective bargaining, skills development and employment equity

Total shop steward enrolment

Level of education of shop stewards

Management tactics to silence the union

Benefits for shop stewards

Challenges facing women

University of the Witwatersrand

P. Bag X3

Johannesburg

2050

Informed Consent Form for interviews

I…… hereby consent to participate in an interview for the research project conducted by a University of the Witwatersrand Sociology student Nunurayi Mutyanda. The purpose of the study has been explained to me and I understand that my participation is voluntary. I am aware that my responses will be kept confidential and that there will be no direct benefits or rewards for my participation in the study.

Signature……

Date……**…….**

University of the Witwatersrand, Johannesburg
Private Bag X 3,
Johannesburg, 2050

Consent form for tape recording

I _____ agree to my interview with Nunurayi Mutyanda for his study on challenges facing shop stewards being tape recorded. This tape and transcripts will not be seen or listened to by anyone else besides Nunurayi Mutyanda and will solely be used for him Masters Research. All the recordings will be archived, with my identity protected, after the research.

Date…….

Signature…….

School of Social Sciences

University of the Witwatersrand

Private Bag X 3,

Johannesburg, 2050

NUMSA Research Unit

153 Bree Street

NUMSA Head Office

New Town

Johannesburg 2001

Dear Sir/Madam

RE: Application to Conduct a Research with your Firm

My name is Nunurayi Mutyanda. I am a Global labour University student at University of the Witwatersrand. I wish to carry out a research at Scaw and Union Carriage to examine the workplace challenges facing shop stewards in post-apartheid South Africa.

I would like to focus on shop floor challenging facing shop stewards in post- apartheid South Africa as they interact with their constituents, full time Union officials and management.

This study can then help trade unions in addressing challenges faced by shop stewards at the shop floor in the course of their day to day duties at the workplace.

The information is strictly for academic purposes

Your assistance is greatly appreciated.

Regards

Nunurayi Mutyanda

E-mail: nunurayi.mutyanda@students.wits.ac.za

NATIONAL UNION OF METALWORKERS OF SOUTH AFRICA

EKURHULENI REGIONAL OFFICE

MBUYISELO NGWENDA HOUSE
287Commissioner Street
BOKSBURG
1459

P.O BOX 1523
BOKSBURG
1460

E-mail: meschackr@numsa.org.za

TEL: (011) 892 5073
FAX: (011) 892 3044

ORGANISING, CAMPAIGNS & COLLECTIVE BARGAINING

DATE: 31 AUGUST 2011

To whom it may concern.

Reference: Clearance for Nunurayi Mutyanda Student no; 562145 to study at NUMSA (EKURHULENI REGION.)

This serves to confirm that the abovementioned student has been granted permission to do research on challenges facing shop stewards with NUMSA from August to December 2011 using Union Carriage & Wagon and Scaw Metals shop stewards as case studies.

This permission is granted only to the abovementioned student and it's for academic purposes only.

The student will be held accountable for the collected information and is held liable in the event that it's used for purposes other than stated in this letter.

Use of information outside the stated purpose should be negotiated with NUMSA and written consent be obtained before doing so.

Regards

Pp:fikile

MESCHACK ROBERTSONS (Regional Organiser)

Name and Surname of shop steward _____ If yes, for how many years _____

ID Number _____ Male/Female _____ Cell number: _____

e-mail address: _____ Home address: _____

Does your company pay your subscriptions to: Numsa | Mibco | X the right one **Are you an alternate shop steward** YES | NO

Details of shop stewards training attended: **Courses attended: X** if attended

In-duction	*Date attend-ed*	**Case handl-ing**	*Date attend-ed*	**EEA**	*Date attend-ed*	**SDA**	*Date attend-ed*	**HIV/ Aids**	*Date attend-ed*	**LRA**	*Date attend-ed*	**Main agree-ments**	*Date attend -ed*	**Health and Safety**	*Date attend-ed*	**Other (specify)**

Exploitation divides! Decent Jobs unites! Smash capitalism!

Dear comrades

At a meeting of the shop stewards election task team on 27 May we agreed that we would try and send to regions a spreadsheet of all the companies where Numsa organizes. The membership department has done wonders with their computers and our database to give details of all the companies where we have members broken down by region and local. The files are too big to e-mail so I have put them all on X drive.

Find this information on the X drive:

X:\finance and admin dept\membership\membership broken down by company, region, sector and local.june 3 2011

1. In the case of those companies **under MEMS** (engineering, auto, tyre, motor paying to Numsa), they have supplied us with:

- Name, address and contact details of company
- Sector
- Local

FORM 3

Numsa shop steward elections 2011 - 2015

(NB - one form per shop steward)

Name of company: _____ Number of Numsa members in factory _____

Address of company: _____

Company telephone: _____ Company fax no: _____

Date of election: _____ Sector: _____

Numsa region: _____ Numsa local: _____ Have you been a shop steward before? Yes/No ____

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- Local

Which company committee do you represent Numsa in at your company: **X** if attend

EE	Training	Health and safety	HIV-Aids/ wellness	Social responsibility	Other (specify)			

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