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Research Report:

Challenges in organising informal workers: A study of gendered Home–Based Care work in post-apartheid South Africa

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Dedication

The research is dedicated to my two sons; Sean and Ryan and my brother and Cde, the late Mangauzani (PTUZ former Treasurer).

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This study would not have succeeded without the assistance of the subjects mentioned below. Special thanks goes to the following :

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Abstract

The purpose of the current study was to determine the constraints to and opportunities for organising the gendered home-based care sector in post apartheid South Africa. Also the gender aspect of care work has been closely examined and the study has revealed that societal stereotypes that view care work as women work in the private sphere have to a greater extent contributed to the devaluation of care work in both society and as a form of paid care work. Qualitative research methodology was used in the form of documentary analysis, interviews and participant observation. The research findings demonstrate that unions themselves, resources and legislation/ policy issues pose as major barriers to organising these atypical workers. Generally, most unions are not yet ready to embrace informal workers into the mainstream as it entails innovation of new organising strategies that could be out of their comfort zone, the pumping out of a vast amount of resources and the avoidance of the huge obligation of breaking through legal barriers. Grassroot mobilising around gender needs has been proposed as the most appropriate strategy for organising the newly emerging mobile and precarious workforce which comprises principally of women. An undeniable link between the formal and informal economy has also been confirmed as formal institutions such as NGOs, hospital, clinics and private companies through the Expanded Public Works Programme here in South Africa make use of informal labour to execute their obligations in the HBC sector. From a gender perspective, this study argues that female jobs are despised by society let alone trade unions where democracy and gender sensitivity should be practiced. Devaluation of female jobs herein care work could be the reason why NEHAWU has taken too long to organise the HBC sector. Finally, results of the study have demistified the societal stereotypes that female jobs are difficult to organise as HBC workers were more than willing to join NEHAWU.

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Chapter 1 Introduction

1.1 Introduction

Recently, there has emerged a new sector in the health delivery system popularly known as home based care (HBC). In South Africa as well as in other countries, there has been a demand for home-based care (HBC) work in which women are mostly involved. This HBC work involves the care of the disabled, the frail elderly and the sick (NEHAWU, 2006: Marais 2005). The HBC sector has contributed significantly to both social and economic development in South Africa.

In post apartheid South Africa, the demand for care work has tremendously increased due to HIV/AIDS such that the disease has been "transformed from social plight into private misfortune, with the task of 'coping' assigned to the afflicted" (Marais 2005:65). Usually womens' cheap labour is exploited in order for the state to cut costs (Makwavarara 2004: Marais 2005 and Mulima 2004). On the other hand Mwilima (2004:1) argues that society views women as caregivers such that care work in the home is not supposed to be paid. However, as more women enter the labour market, a crisis for care work within families is created such that they (families) are forced to hire an HBC worker to perfom care work in the home for the sick, the elderly and disabled in the home during the day (see Marais 2004: Bakker and Gill 2003). The new development in which care work is commodified is referred to as home-based care (HBC) and the workers are referred to as HBC workers[1].

Usually NGOs, churches, clinics, both public and private hospitals or private companies are subcontracted by the state to execute the private health care system obligations. Here in South Africa, the HBC sector operates under the Expanded Public Works Programme (EPWP). The caregivers usually operate under NGOs as volunteers . It is estimated that there are 62 000 HBC workers

[1] HBC workers are also referred to as caregivers in this study.

employed by NGOs countrywide known as community care givers (CCG) and approximately 500 000 people have benefited from HBC work. These HBC workers receive a monthly stipend of between R500 - R1000 (NEHAWU report 2007). These stipends are erratic, unregulated and untaxed. As such, HBC volunteers can end up being exploited by the people to whom they are contracted. This is unlike a situation where one is employed and they are protected by the law. Employed people are able to protest for better wages and salaries without the threat of losing their jobs. Unfortunately HBC workers' status as volunteers makes it difficult for them to exercise their freedom of expression, right to collective bargaining, or protest about unfair working conditios and poor wages (NEHAWU 2007).

Of note is the fact that these workers are vulnerable but are not represented by a union (Interview with Shireen Samuel, NEHAWU national organiser for Social Development Department 05/10/07). The argument is that they are not regarded as workers and are not covered by the Labour Relations Act (LRA). Ironically, these workers sign a memorandum of understanding (MoU), when they are recruited which qualifies them to be regarded as workers too. The MoU in this case works as good as a contract signed by other ordinary workers. It outlines job description, pegs stipends, working hours, vacation or resignation procedures as well as stipulates rules for disciplinary procedures [see Appendix A].

Having considered the plight of these workers, the union responsible for public service workers, National Education Health and Allied Workers Union (NEHAWU) resolved at its 6th National Congress in 2004 to organise and recruit these volunteer workers so as to challenge this unfairness (Interview with Shireen Samuel- 05/ 10 /07). In a bid to attempt to organise these workers NEHAWU is faced with some challenges. This research therefore seeks to find out about the constraints to and possibilities of organising these workers with specific reference to the strategies that NEHAWU employs in organising these workers.

1.2 Background

Transformations in the global economy have remarkably affected workers' economic roles particularly women. Technological advancement has resulted in restructuring, informalisation, as well as subcontracting of work arrangements beyond state regulation (Portes et al, 1989). Neo-liberal policies such as privatisation and the promotion of "labour flexibility" reinforce inequality between men and women (Marais 2005). Likewise the flexible labour market here in South Africa has had a detrimental effect on women as workers (Orr 2004). Indeed, women have been polarised in terms of poverty as many of them are the victims of retrenchment due to lack of skills as well as stereotyping (Braunstein 2006). Most of these women will turn towards the informal economy particularly because it is easy to enter (Hassim and Razavi, 2006: ILO, 2002). They are then forced back to the private sphere where they will have to take care of family members in terms of societal norms and the sexual division of labour in the home. This notion is supported by Bakker (1996a) as she argues that the privatisation project is forcing women to engage as care-givers in the family and as community workers in the labour market.

It should also be noted that globalisation has also brought about the emergence of a new gender order, resulting in many women entering the labour market as a form of cheap labour especially in the manufacturing industry owned by multinational companies (Bakker 1996a). Instead of being paid better living wages in the labour market, women are usually underpaid due to lack of skills or because of the male-breadwinner bias (Elson and Catagay 2000). In order to subsidize their wages, they are then forced to operate informal income generating projects, resulting in a double shift. Consequently, this has led to a social reproduction crisis resulting in many families resorting to hiring of a 'stranger' often referred to as home-based care (HBC) worker in the home during the day to provide care work for the sick, disabled or frail elderly in the homes in exchange for money as family women members engage in public wage labour for

family survival. In other words, this involves the “reprivatisation of reproduction” (Bakker 2003:76). This dynamic means that social reproduction is assigned back to its “natural” place, the private sphere, in other hidden forms (2003:76). In addition to economic hardships, the HIV/AIDS pandemic has meant that residential care is needed for those patients who are discharged from public hospitals (Marais 2005).

On the one hand, some women are forced to work free of charge for the love of their beloved ones or simply because they are women and are expected to do it in society (England 2005). On the other hand some women care-givers do it for monetary compensation which England (2005) refers to as ‘commodification of love‘ whereby one has to feign their feelings (love) to take care of the sick, disabled and the frail elderly in exchange for money. The main focus of this research is on voluntary workers. Presently in South Africa there are approximately 62 000 HBC workers (NEHAWU 2006).[2] The majority being employed by non-governmental organisations (NGOs), private companies, churches or private clinics or in mines (NEHAWU 2006). Of great concern here is the fact that most of them are mostly recruited as volunteers by NGOs, with the hope of getting experience and entering into the formal mainstream of health professionals one day (Personal Interview with Lebohang Matete 17/04/07).[3]

According to NEHAWU (2006), home based care workers are workers too and need a union to represent them for the improvement of their working conditions, remunerations, and the need for their work to be regarded as decent work. As a consequence, NEHAWU has embarked on a mission to attempt to organise these home-based care workers as they fall under the health sector. It is also hoped that organising these workers would go a long way to revitalise the union itself. Many professional health workers are deserting the country in search of greener pastures abroad resulting in membership loss to the union.

[2] Most of the information quoted from NEHAWU is mainly based on its report of 2006.
[3] Lebohang Matete is the instructor for a local NGO that trains HBC workers here in South Africa.

Given this background, this study explores the constraints to as well as opportunities for organising HBC workers, including organising strategies engaged by NEHAWU. The research found that the project has not gotten very far. Union, workers, and legal barriers all explained why this project has thus far not gotten off the ground. Despite the obstacles to organising, HBC workers have demonstrated their eagerness to unionise. The gender aspect of care work has also been revealed. Women have always been regarded as second class citizens (whose value is in the private sphere) by society as well as in the work sector which is the reason why unions could be reluctant to organise within female jobs (see Mwilima 2004). In the case of HBC workers, it is difficult for society to acknowledge their work as paid labour because care work has always been regarded as women's responsibility in the home. Therefore 'offloading' public care work which is supposed to be perfomed in public hospitals back to the private sphere - (reprivatisation of reproduction) is viewed as legitimate and cheaper as women's cheap labour is exploitable (see Bakker 2003).

1.2 Aims of the study

The present study aimed to address what the constraints to and the opportunities for organising home-based care workers were. Within this framing question, the research studied what strategies NEHAWU undertook in order to organise home-based care workers and whether these strategies were successful in organising and recruiting home based care workers. The research also examined how receptive home-based care workers have been to NEHAWU's efforts, and why or why not. Finally, the study explored the relationships between gender, home-based care work and organising outcomes.

1.3 Rationale

The research is important in a South African context in that the research will help in coming up with viable complements to institutionalised health care (hospital care) in the form of home based care. Awarding incentives in the form of better wages and other benefits through union representation would extrinsically motivate HBC workers and retain them. Recognising and acknowledging the

significance of HBC workers in public hospitals would help to alleviate staff shortages in the health delivery system as caregivers could be hired to assist the nursing staff in the same way their other health counterparts are hired. If they are operating in formal institutions like public hospitals, this would be easier for the union to reach out to them for organising purposes because as it stands, these workers are fragmented and it is difficult to identify them. In the same vein, by operating under formal institutions, an employer to bargain with will be guaranteed in the form of government departments such as the Department of Health (DoH) and the Department of Social Development (DoSD). If organised, the HBC workers are guaranteed of permanent reliable contracts as the union would be able to represent them as well as to negotiate with the employer on their behalf. Attractive incentives would motivate other unemployed people to engage in this paid care work and retain those already practising thereby reducing unemployment.

The NEHAWU report of 2006 indicated that there are about 150 000 -200 000 HBC workers here in South Africa. Most of the unemployed women and youth are finding a net in this sector for survival. If accommodated as decent workers, the large population of HBC workers would also be beneficial to NEHAWU as a union in terms of union revitalisation as membership is boosted (see Lopez, 2004; Savage, 2006; Kenny, 2005). Furthermore, it is important for the union to address the issue of HBC workers due to membership loss of other health professionals who emigrate for greener pastures therefore weakening the union numerically and politically. To the HBC workers it is important for them to be organised, because through union representation, they would be able to have better remunerations, improved working conditions and would be able to exercise their rights as workers in terms of the ILO standards (Robinson 2006).

The research literature on informal work, care work and organising in particular is limited. The study will produce useful descriptive data and will address a gap in this literature. It will help to explain the difficulties in organising informal workers through a case study of gendered care work in which women are the ones mostly

affected. The link between informal work, care work and women is manifested in this study. Also the myth that women workers or female jobs are unorganisable is also debunked (Tait 1996; England 2005).

This study also informs policy through the recommendations given at the end of the research. It will go some way to specify how HBC specifically and informal workers in general could be recognised in socio-economic programmes here in South Africa. The study also reveals the difficulties in organising informal workers, highlighting viable and effective strategies that could be employed by unions for organising the newly emerging workforce. The study can serve as a pointer to trade unions, NGOs and other civil society groups in organising their members or for recruitment drive purposes as well as indicate further areas of research.

1.4 Population Study

The study focused on HBC workers working within Gauteng province under Greater Johannesburg district. The researcher had some face- to- face contacts with HBC workers working for NGOs that are subcontracted by the Department of Health (DoH) as volunteer counsellors, operating in clinics or engaging in home visits, most of whom were based at Orange Farm.

1.4.1 *A Note on Orange Farm*

Situated 40km south of Johannesburg in the Vaal is an informal settlement known as Orange Farm. The place is home to many HBC workers operating within and around Johannesburg. Also located there are a number of Non-Governmental Organisations (NGOs), funded by the Expanded Public Works Programme (EPWP) to execute HBC work on behalf of the state. These NGOs would in turn train and hire HBC workers who are predominantly women to perfom care work in homes, hospitals, clinics, mines or private companies. The research has revealed that the NGOs include among others Rise and Shine, Let

us grow, Bokomosa, Luthando, Deep South, Banimolokwane, Thalithalinkuan, Vilde Beesta, Ditholwane tsa kopano and Siyaphumelela Simunye.

Orange Farm comprises mainly of black families engaging in informal economy activities as a way of earning a livilihood. Therefore the demand for HBC work within this community is high as many cannot afford the high cost of institutionalised care in both private and public hospitals (see Bezuidenhot and Fakier 2006). It his study, Marais (2005 :68) asserts that HBC work is a true reflection of a dual health system. On the one hand are the wealthier and healthier who have access to excellent private health facilities whereas the poor and sick suffer at the mercy of the overburdened public health sector where they are usually referred back to the private sphere for HBC. Indeed, most black South African families are suffering in this neoliberal era as the state is struggling to cut down on public expenditure, resulting in stock outs within public hospitals as well as staff shotages.

1.5 Chapter Layout

The research starts with chapter one which encompasses the introduction, background, aims of the study, rationale, and context of study. Chapter two is a review of literature followed by chapter three which focuses on methods employed by the research in addressing the question of constraints to and opportunities for organising HBC workers. Chapter Four examines findings and discussions on the union and organising, and chapter five presents findings and discussions on workers and the gendered aspect of care work. Finally, chapter six presents the conclusions of the research findings and offers some recommendations.

Chapter 2 Literature Review

2.1 Introduction

The current chapter will draw from a variety of literature and arguments from different scholars concerning organising informal HBC workers, the challenges faced therein as well as the gender dimension. Both similar and different research findings from other studies on challenges in organizing informal workers and studies of gendered Home–Based Care work in other countries will be examined. This will assist in answering the questions that the research seeks to address which have been highlighted above.

The literature review argues that there are several barriers to successful organising efforts emanating from unions, workers, employers and labour law/policy (Lopez 2004; Cooper and Patmore 2007). The study by Cooper and Patmore (2007) provide rich data on problems faced in organising informal workers generally. They attribute obstacles to organising to several factors such as resources, legislation, poor communication, geographical position, state of the economy, politics, religion, rivalry, unions, workers and employers.

By contrast, my research has revealed that the union and labour policy/law pose as major barriers to organising HBC workers. The differences between my findings and those of Cooper and Patmore (2007) could be in terms of trades and methodology used in the studies and to some extent on gender bias. In their research, Cooper and Patmore (2007) were able to study both female and male workers and managed to cut across trades. Considering similarities between my study and Lopez's (2004), the reason could be that both our studies principally made use of participant observation and were concentrated on one type of trade (HBC/ homecare sectors) comprising mainly of women. Again, my main focus was ceNEHAWU as a union and how it might hinder organising as well as the strategies it used to organise the above mentioned sector.

However, my study did not manage to solicit any data from other trades or male workers such that needs of male workers could be different from those of female workers hence different constraints to organising could be noted. Yet my study managed to reveal a very important factor omitted by Cooper and Patmore (2007) and Lopez (2004) in their studies. My study demonstrates that there is need for innovation of new organising strategies to cater for the new mobile workforce comprising mainly of women and argues for the need to take into cognisance the issue of gender in all organising efforts in order to curb conflict of interests between male and female workers which might lead to divisions. Lack of solidarity among workers poses a major problem to organising efforts by unions (Webster 1985). In light of this observation, it is important to demonstrate whether HBC workers in South Africa are eager to unionise despite barriers.

2.2 Difficulties with organising Home-Based Care workers

Traditional ways of union organising have focused on manufacturing industries and fulltime, permanent male workers, who are confined to one workplace (Cobble, 1996; Tait, 2005; Savage, 2006). All these aspects do not match with the contemporary workforce, predominantly women as gender needs are different. These changes to the labour market push unions out of their comfort zone. Unions have to deal with atypical informal types of work such as casual, outsourcing or subcontracting. In their efforts to organise this type of workforce, unions are faced with so many obstacles (Krinsky and Reese, 2006; Savage, 2006; Cooper and Patmore, 2007).

2.3 Organising Constraints

In their efforts to organise workers, unions are faced with so many challenges. Different scholars such as Cooper and Patmore (2006), Lopez (2004), Krinksy and Reese (2006), Tait (2005), Webster (2005), Cobble (1996) have come up with several constraints to organising.These include among others the unions themselves, workers, employers, legal/ policy issues, meagre reources (both human and financial), gender perceptions, poor communication, lack of

commitment, worker fragmentation, social and cultural differences, workers own lived experience, geographical position of union offices, union bureaucracy, union workers fear for change, politics, dictatorship, in –house fighting, rivalry, small union size or union busting efforts and threats by employers. The folowing section closely examines these constraints to organising.

To begin with, one of the major constraints to organising resides in the legal framework (Lopez, 2004: Cobble, 1996; Tait, 2005). South Africa has rigid laws in terms of organising (Orr 2004). The traditional laws do not accommodate the new type of workforce which is always mobile and usually operate in informal activities (see Cobble 1996). Further for collective bargaining purposes, these workers are fragmented and delinked from each other such that they cannot come together for solidarity purposes. Any worker can join a union but the bigger issue is that only “employees“ are included under labour law, and have the right to organise. The law defines trade union membership by employee status. According to Orr (2004:39), here in South Africa, subcontraction makes use of independent contractors who are excluded from the Labour Relations Act (LRA) such that the group of casual and contract workers are not protected. She further advocates for the need for the “amendments to the law, to ensure that employers cannot use commercial contracts to escape labour law“ (2004:39). Also Kenny (2004) argues that South African labour law defined around the formal employment relationship contributes to the marginalisation of atypical workers in union organising.The HBC sector is a true reflection of maginalised atypical workers who are subcontracted by formal institutions such as NGOs which makes it complicated for the caregivers to be regarded as employees since they usually operate as volunteers. Moreover these caregivers do not know their employers.

The issue of the employer to bargain with could be another barrier to unions‘ organising efforts. Unions might be successful in their organising efforts, but this might be of no use if there is no employer to negotiate with (Horn, 2004;

Webster, 2005). The study confirmed the issue of absence of bargaining partners as an obstacle to organising HBC workers here in South Africa. As mentioned above, most of them are mobile with no fixed employer, and many are volunteers. If they are volunteering, in terms of the law it would be difficult to confront the relevant organisation for bargaining purposes (Lopez, 2004).

In other circumstances, employers also complicate organising efforts. Most employers would somewhat channel resources to union busting by even hiring consultants to deal with pro- union members (Lopez, 2004; Milkman, 2006; Cobble, 1996; Tait, 2005). Research findings have revealed that some DoH officials (as the department funds HBC projects) wield the power to threaten or dismiss HBC workers who threaten to be millitant.

While a different sector, Milkman's study of contracted labour found that manufacturers are secretive about which contractors they work with and the list of contractors keeps changing monthly thereby hindering union's accurate record keeping (Milkman 2006). The same situation is also experienced within the HBC sector as NGOs are secretive about who HBC workers' real employers are. Moreover, the workers are delinked from each other as they usually operate in isolation (see Ally 2005: Marais 2005).

Organising hindrances could be attributed to union size coupled with resources and commitment (Cooper and Patmore 2007). The research argues that if more resources are invested into the informal home based care sector it would be easy to formulate a database of employees. This database would point out the exact numbers of people involved in this sector making it easy to decide on the benefits of unionisation. Usually if a union is smaller in size, it means that it is also limited in financial resources . As a consequence, it cannot draw on reserve funds to support sustained industrial action or large scale recruitment drives (Cooper and Patmore 2007).

There is a close link between union size and resources, as the size of membership determines the amount of subscription for servicing purposes (Cooper and Patmore 2007). In fact, the bigger the union, the more likely for it to have amble resources drawn from membership subscriptions and vice-versa. On the same note, Tait, 2005 attributed the failure of some Poor Workers Unions to lack of financial resource due to small union size. In the same vein, larger union size also strengthens a union politically. Size of a union is fundamental when it comes to collective bargaining and industrial actions such as strikes. If a huge membership is involved, there is great impact on society, business and the state (Patmore and Cooper (2007). There is more likely to be a quick response to the grievances unlike if the group is too small, not much effect is experienced. On the same note, Savage (2006) suggests that unions would rather merge so as to counter such problems as resources. This is the reason why it is important for HBC workers here in South Africa to be organised by an already established union- NEHAWU.

On another note, Webster (2005), argues that unions make it difficult and suspicious for workers to join due to corrupt activities such as ‘robbing‘ members of subscriptions for own personal enrichment purposes. Lopez (2004) also points to the lived realities of workers own experiences of corrupt unions as contributing to their negative reception to unions. A study of Self Employed Women’s Union in South Africa (SEWU), revealed that during their membership drive campaigns, they encountered a lot of resistance, as hawkers and the self employed claimed that they had been robbed by many organisations who promised do deal with their grievances (Webster, 2005). This view is supported by Lopez (2004) when he states that workers’ own lived experiences of corrupt unions might hinder unionisation by workers as they (workers) are suspicious of being robbed.

On the same issue of workers‘ lived experiences, it may be more problematic for the union to organise in a situation where workers found that they lost their jobs as a result of organising efforts even though it is obviously not the union that fired them, but the manufacturer in an effort to avoid worker empowerment. (Milkman,

2000). This increases fear for them to unionise as they fear losing their jobs in this global competition (see Webster et al 2007). Workers might also resist unionisation due to previous exposure to regimes that assassinate union leaders (Cooper and Patmore 2007). For instance, after the brutal attacks of ZCTU national leadership in 2006, many activists withdrew from union participation, and obviously it had a negative impact on workers aspiring to join the union. Likewise, the nationally broadcasted 2007 strike by SATAWU members here in South Africa which resulted in a loss of lives could potray a bad picture on unionisation which might also negatively affect aspiring HBC workers to unionising.

Dictatorship might also prevail within unions (Savage 2006). Instead of relinquishing duties after a term of office, some leaders would rather cling to power due to greediness. Other constraining issues to organising may be that union workers fear change. Savage (2006) argues that a high level of rank and file participation in union activities might mean that union officials relinquish their duties, which could be a difficult task in a labour movement in which power is deeply entrenched (2006:230).

Tait (2005) asserts that internal organisational difficulties might hinder organising efforts. This could be in-house fighting for leadership positions therefore diverting attention and resources from organising. On the other hand rivalry, between unions with the same agenda might occur (Cooper and Patmore 2007). This research has revealed such behaviour between NEHAWU and another union that is also responsible for public service workers- HOSPERSA.

The geographical position of the union also matters (Cooper and Patmore 2007). Here, the issue is about membership accessibility to the union. In a South African context it would be necessary to ellicit the kind of information that would reveal where the largest population of home based care workers is. The bottom line is that union offices should be located in convenient places that are accessible to members. The geographical area of the union determines member participation or attendance to meetings. Bezuidenhout and Fakier (2006) argue that the fact

that University of the Witwatersrand cleaners are dispersed and most stay in Soweto which is quite far from their employers offices, where union meetings can be held make it difficult for these janitors to participate in union business or meetings. Just like sweepers, HBC workers are poor and cannot afford movements that involve transport fares. Moreover, they usually stay in townships that are often far away from union offices.It is important for all these factors to be considered because the study has revealed that core groups formed at the beginning of NEHAWU's organising project disintegrated due to lack of communication and distance with regional offices.

The issue of division and solidarity might be critical (see Kenny 2005). Webster (1985) also asserts that there are social and cultural differences among workers themselves which divide them. This is also supported by Milkman (2006) when she gives an example of the social differences between Latino and Asian workers. These differences divide the workers such that they cannot unite over their grievances and therefore get organised. Again the different motives for engaging in care work could result in a conflict of interests among the workers as some might be doing it out of love whereas some for monetary purposes (England 2005).

Another important point to consider is that care workers may suffer from low self-esteem due to the fact that their work is devalued by society such that they might not perceive themselves as valuable workers in society (England 2005). This might make them resist unionisation. If this is the case then, unions have the added task as Robinson (2006) suggests that if women engage in public wage work, they should be autonomous and be able to make decisions in the household thereby getting more freedom. What this simply means is that women should be empowered to have self-confidence. It is the responsibility of the union organisers to instill confidence in these workers as Tait (2005) rightly states that unions empower their members.

In support of the above notion, taking into cognisance issues of gender when women workers organize, the issues of autonomy and leadership are crucial. Organizations like Self Employed Workers Union (SEWU) in Durban have however demonstrated that women organizers have always been most effective in organizing women workers (Webster 2005).

Hindering factors to organising could also be attributed to the workers themselves. Due to the nature of their workplace behind closed doors usually in isolation with closed personal contact with immediate boss, service workers are hardly noticed (Cobble, 1996; Ally, 2005). This means that there is a direct employee-employer relationship which may be personalised. This personal relationship might facilitate positive dialogue between the employee and the employer such that they can negotiate on salaries, working conditions on a face-to-face basis (Ally, 2005; Cobble, 1996). In this case, the worker would not see the reason to unionise and make contributions in the form of subscriptions to unions. Rather, they would perceive the unions as an unwelcome “third party” to their employment relationship (Lopez, 2004). On the other hand, some workers are ignorant as to who unions represent. They think that unions are there for factory workers only (Cobble, 1996).

Another obstacle could be that workers might become too attached to their clients emotionally resulting in what England (2005:390) refers to as “emotional hostage effect“. Workers may feel that they are betraying the people that they are providing a service to. They may argue that anyone can perfom their role that they are performing hence it may not be necessary to get financial compensation (England and Folbre (1999). They may ask if it is ever possible to pay for the emotions they use when they are executing what they feel to be their God given duties. In his argument, Marais (2005:67) states that society assumes that ‘care‘ is what ‘comes naturally‘ to women such that women themselves sometimes have to allude to societal norms of being confined to the private sphere. Therefore this research examines whether there are contradictory motives in the engagement of home based care work.

Having mentioned the constraints to organising home based care workers, it is also relevant to highlight some of the new organising strategies that have been proposed by various scholars to address some of these difficulties.

2.4 'New' organising strategies

Voss and Sherman (2000) argue that "business unionism" is no longer of much relevance with the current workforce but rather what is required is a shift to "comprehensive campaigns". Milkman (2006), argues that it is possible to organise migrant workers. Considering the similarities between the two groups in terms of their geographical positions (marginalised groups in society), the same sentiments could also be shared on HBC workers. However, effective union organising strategies should be employed. Cobble (1996) proposes that women workers are ready to unionise. In order for these workers to be organised, Milkman (2006) emphasises the need for strong leadership in already existing unions to take responsibility of these organising campaigns. Leadership alone is not all. She argues that migrants are vulnerable themselves and should be ready to fight for their survival (Milkman 2006). This will make it easier for organisers to reach out to them. The same notion is also echoed by Cobble (1996) when she suggests that for organising to be successful, the workforce itself should be solidly organised as they (workers) have to be militant to oppressive non-union employers.

In her argument Milkman (2006), suggests that a special type of unionism would be more appropriate. She mentions that immigrants have social networks, which could be exploited for organising. This would help on communication as well as countering language barriers. Unions should shift their focus from the workplace and form alliances with communities (Krinsky and Reese, 2006; Tait, 2005). However, Krinsky and Reese (2006) caution that such strategies are contextual; one strategy that applies to one union or trade could not be necessarily applicable to another trade or craft.

Tait (2005) also suggests that new strategies have to be used. She attributes the success of poor workers unions to community-based organising. She further suggests “Social Justice Unionism”, which is characterised by bottom-up bureaucracy, as an ideal model of unionism (Tait 2005). A good example is the recent success story whereby community-based immigrants’ organisations successfully initiated a boycott on May 1, 2006 which was dubbed the ‘Great American Boycott’, through ‘community-based mobilisation’ (LRMC 2006) From this scenario, it is clear that immigrants themselves are militant and ripe enough to accommodate any union efforts. Likewise, according to the research findings, HBC workers demonstrated that they are ready for unionisation.

As indicated above, the same strategies or slightly different ones could also be used on HBC workers. The fact that they are vulnerable, low waged and work under harsh conditions should compel them to be receptive to unionisation. Jackson (2007) also unveils a success story on immigrants organising through forming alliances with grassroots community-based organisations to successfully organise immigrant farm-workers. This therefore shows that grassroot mobilising is very crucial to successfully organise the current predominant informal workforce.

By adopting some of the strategies mentioned above and applying them on HBC organising efforts, this might be useful as these community-based organisations are familiar with community members. This could be very useful for mobilising purposes as well as locating of the HBC workers who are usually fragmented. For instance, Lopez (2004) proposed that it is effective and easier for unions to work with rank-and-file members for grassroot mobilisation as they would easily link up with their colleagues and communities in which they live. Nonetheless, these rank-and-file members have to be trained in order to be able to carry out certain obligations (Lopez 2004). Though this could be an effective strategy, this research demonstrates how these circumstances could be a threat to some union staff members who might not want to lose their roles that they might be more comfortable with (Lopez 2005).

Again, Lopez (2004) advocates for a shift in union organising strategies. He also agrees on community based organising/ grass-root organising as an effective tool for organising service workers. According to him, “Social Movement Unionism” model would be appropriate for these type of workers. This entails the formation of alliances with the community or other relevant stakeholders for instance NGOs, for mobilisation purposes. This raises questions about the union itself, as to whether or not the union is rooted in the community. However, contexts are different such that the situation might not be replicated in a South African enviroment.

Lopez (2004) further argues that face-to-face interaction is another remedy. He suggests that it would be very appropriate for unions to establish rank- and –file leadership within their structure. Clawson (2003) adds that the use of rank-and-file members is a very important strategy as it is easier for workers themselves to locate their colleagues. The Self-Employed Women’s Union (SEWU) in South Africa also made use of this strategy as they indicate:

“Home-workers are even harder to get in touch with than street vendors. We get to know them through our street vendor members” (SEWU 2007).

This example is useful for organising HBC workers in that the research methods depended on some of the HBC workers to locate their colleagues during interview sessions through snowball sampling.

As a method, Cobble (1996) critiques the use of site- to- site organising as neglecting those workers who are operating informally. She proposes a “Community-wide grass-root approach”. She states that “Union-Run-Employment Agency” (UREA) would appeal to contemporary mobile workforce especially to the home-based care sector. In this situation, workers affiliate themselves first to a union and then employers would be hiring workers through the union. These UREAs help in binding workers together as there is a face to face contact with unions (Cobble 1996). The “Hiring of Hall” approach is another strategy that

could be used (Cobble 1996). It facilitates organising because valuable services are offered to the employer through use of trained reliable source of labour. They in return pay employees better salaries. This means that members are retained and other non-unionised workers are attracted.

Regional and cross-industry campaigns could be viable organising strategies (Cooper and Patmore 2007). Unions embark on a membership drive irrespective of the trade. In the case of HBC workers, it would be advisable to reach out to these workers irrespective of their employer (HBC employers are heterogeneous) and accommodate them on a membership basis rather (Tait, 2005). In the case of HBC workers in South Africa, it will be important to specifically examine whether NEHAWU is considering a membership based unionism that is based on identity and whether it would be viable for organising these workers. This is because the HBC workers have different 'employers', such that for a certain employer, there could be just a few of them which would crush the notion of workplace organising. Another strategy could be the signing of contracts with prospective employers as bargaining partners. A good example of this is that of contracts, such as the one signed by Work Experience Programme (WEP), an organisation established for welfare workers in the United States, with Local Government as bargaining partners in order to protect workers rights (Krinsky and Reese, 2006).

Another strategy, would be to build around gender issues for instance maternity protection or child care facilities (Cobble, 1996; Tait, 2005). Given the gender profile of the sector, there is need to cater for female needs as well because, most of the basic needs that are provided are mainly based on traditional business unionism whose focus was mainly on bread and butter issues other than roses as well (SEE Bread and Roses film). Workers not only need wages but also social security such as medical aid (Bezuidenhout and Fakier 2006). In addition to that, unions should target programmes which could assist members with obtaining services such as housing, health needs and others (Bezuidenhout and Fakier, 2006; Hassim and Razavi 2006). A good example is that of the Self

Employed Women's Association (SEWA) in India, which has managed to provide life and asset insurance to its members (WIEGO, 2007:Hassim and Razavi 2006). In return membership has been boosted.

On the other side of the coin, as mentioned before, unions have to mobilise and budget for adequate resources for organising (Lopez, 2004; Tait, 2005). Unions should commit enough resources for organising as this demands a lot. For Milkman (2006), it is easier to organise immigrants if adequate resources are mobilised. Likewise in order for NEHAWU to be able to achieve on their organising campaign for HBC workers, they should commit enough financial resources. Both organisers and the HBC workers need a lot of material motivation.

2.5 The Gender Dimension of Care Work

2.5.1 Care work in a post-apartheid South Africa

South Africa had a long history of apartheid in which its labour policies have been questioned. Previously, concern was raised over the issue of Labour Laws which were drawn along racial lines and favoured white people. This meant that black women had to suffer in terms of class as workers, race and as women since capitalists had to exploit patriarchy in order to make use of women's cheap labour (NALEDI 2006). Black women had to suffer more unlike their white colleagues who were paid better wages and in turn had to hire black women to perform care work for them as nannies (see Bezuidenhot and Fakier 2006). However, as feminists waged wars against patriarchy and the "overarching unequal system responsible for women's inferior position, it is unfortunate to note that some of the very white women also oppressed their black female domestic workers (NALEDI 2006:31).

At democracy, gender equality was emphasised and labour laws were amended to cater for all races, classes and gender. Women were given the same

opportunities as men and entitled to equal wages and benefits for the same jobs as men. Though this could be a plaussable move, it is unfortunate that for female jobs like care work the remunerations are very poor due to societal stereotypes that care work is meant for women and likewise those men engaging in female jobs suffer the pay penalty (England 2005). This apparent gender inequality in terms of sectors means that women are not entitled to the same opportunities, access and incentives as men. Yet both in the current constitution and in the labour law, there is explicit anti-discrimination clauses.

It is important to note that the above situation has its bearings in the cultural norms of society which prescribed specific roles for females and males. In South Africa, most female employees work in the services sector, as nurses, nurse aid, teachers and, general services (office cleaners) while male employees are generally concentrated in labouring/vending, craft and trade as well as plant and machine operations . This trend has continued today where the country has been ravaged by the devastating effects of the HIV/AIDS pandemic hence the high demand for care work . The majority of people seeking health care are those with HIV or AIDS related diseases and this has put a strain on the health care system for those not carrying the virus. Staff burn out as well as brain drain to other countries where the effect of HIV/AIDS is less extensively felt or more manageable has been the negative downside.

Currently, South Africa has over 4 million people living with HIV/AIDS. Like most countries in Africa, South Africa has had to shift the burden of caring for HIV/AIDS patients from the public hospital/clinics to the ‘private sphere‘ in the form of HBC which Bakker (2003:76) refers to as “reprivatisation of reproduction“. In this case, a stranger is hired in the home to perform care work for family members who are sick, frail elderly and disabled as family women members engage in paid work (NEHAWU 2007). The deinstitutionalisation of old people from old homes and people with disabilities a as way of cutting down expenditure by the South African government has exacerbated the need for care work in the home of which the burden falls mainly on women (Marais 2005).

The over-reliance on women for unpaid care labour in the absence of greater institutional or state support poses as one mechanism for the reproduction of gender inequality more broadly (Folbre 2001). Consequently, a huge amount of care work within families tend to undermine women's career mobility and therefore contributes to gender inequality in the labour market as well as in the family (Traustadottir 1991). In support of this notion, Marcenko and Meyers (1991) assert that overloading women with the burden of care in the home restricts their access to the labour market and reinforces the devaluation of their work thereby resulting in gender inequality both in the private and public spheres. Moreover, women usually perform care work without enough support from the family, community or the state for incentives (Lewis, Kagan and Heaton 2000).

Again a new kind of workforce is emerging, as many workers are losing their jobs in the formal economy because of the introduction of new technology due to globalisation (Lopez, 2004). Consequently, most of these workers, predominantly women will settle themselves in the informal economy or are forced back into the private sphere where they will have to perform care work for family members, or in some cases have to rely on welfare assistance (Krinsky and Reese, 2006). People who suffer from HIV/AIDS get admitted into hospitals but the system is reluctant to prolong their stay as it is a costly service (NEHAWU 2006). In light of this background it is important to question and understand the environment in which HBC work exists in South Africa. Gendered stereotypes that inform the devaluation of care work also need to be highlighted as this will aid in the promotion and regularisation of work in this very important growing sector. In her argument, England (2005) points out that care work is devalued in society because it is carried out by women.

The above mentioned notion is supported by Prugl (1999:204) as she states that "Globally women bear by far the greatest responsibility for care work". Some women are migrating from the South to the North to become immigrant workers, where they normally end up as care-givers and get paid for commodification of

their emotions (England 2005: Ally 2005). A good example is that of the one third of Filipino women who now work in more than 180 countries around the world as migrant domestic workers (Ally 2005). The burden of care work has been exponentially increased under the conditions of globalisation (Prugl 1999).

Notwithstanding the domestic work that is done in the home, women are also involved in paid wage work for family survival which means a continuation of the assumed domestic roles (Robinson, 2006). This is also attributed to a paradigm shift in which most families are becoming increasingly female headed due to the AIDS pandemic (Hassim and Razavi, 2006). Also a spouse could have been retrenched and the woman has to engage in informal activities so as to cater for family needs, or in some cases for poverty alleviation so as to subsidise low wages (Robinson, 2006). Where there is need for substitution for care work in the home, it is usually a woman that is hired as a dometic worker and rarely a man (Marais 2005:65). Home-based care work can be viewed as part of this context of the increasing burden of paid and unpaid domestic work on women as shall be discussed in the subsequent section.

2.6 Home-based care work

Home care is defined as the provision of health services by formal or informal care-givers in the home in order to promote, restore and maintain a person's maximum level of comfort, function and health including care towards a dignified death (Marais 2005). Kilborn (1994) defines home-nursing workers as workers who offer an alternative to institutionalised care assisting the elderly and the disabled in their homes. The World Health Organisation (WHO), defines HBC as the provision of health services by formal and informal care-givers in the home. This research defines Home-Based Care (HBC) work as informal personal nursing or care work that is usually administered by women in the home for the elderly, the disabled, and the sick, AIDS patients nowadays.

It is crucial to note that HBC work is different from the traditional unpaid 'domestic work' that is carried out by family members or the traditional paid

domestic work, whereby one is hired by the family to assist with household chores. With home-based care, a “stranger” is hired to take care of family members who need extra care. The South African government, since 2003 and is expected to last until 2009, includes HBC programmes as part of its Expanded Public Works Program (EPWP) to promote social and economic development in the country. Its main social strategy is to train and create work opportunities for about 122 240 caregivers by 2009 (EPWP Social Sector Plan 2004/5-2008/9). However, Marais (2005) perceives care work in South Africa from another angle as he states that

“Decentralisation of health service delivery was aimed at replacing the fragmented and and highly discriminatory system of health care provision established during the apartheid era with one that would be more equitable , efficient, accountable and empowering‘‘.

On the other hand, he views HBC work as a result of neo-liberal policies which makes it imperative for the state to cut down on its expenditure (Marais 2005). In the same vein he further argues that social life is succumbing to the rules of the market (see Polanyi 1957), as “the responsibility for providence and calamity , for life and death is lodged with ever –smaller units of society; the individual“ (Marais 2005). The current study has however confirmed this as the state is gaining at the expense of womens‘ cheap sometimes unpaid labour in terms of social reproduction and care obligations .

Given the motives to the reasons why the South African government has introduced HBC work, it is crucial to examine some models on care work. In his comparative study of South Africa and Uganda on HBC work, Akintola (2004) points out that there are various models of care work . He outlines six different models which paint a picture of this emerging sector. However, of importance is the community home-visiting care programmes which use women volunteers (who are not or sometimes paid) to recruit and provide patients with basic nursing care as well as spiritual and moral support. Women involved in this

volunteer care giving work describe it as extremely involving. Besides from caring for the sick, this type of work entails visiting several homes a day, working long hours and walking in the heat of the day to assist the sick. This often causes physical and psychological stress as well as financial stress (Akintola, 2004: Marais, 2005).

Where diseases are communicable home based care workers risk becoming infected themselves in an industry that is still yet to be regulated and conditions of work attached to it (Marais 2005). Social stigma is another negative impact faced by caregivers. Akintola (2004) reports that home based care workers risk being estranged from their friends by taking on this role especially where the disease is incurable. It is important to note that this burden of caring for the sick falls disproportionately on women as they are the main providers of services in the home (Akintola 2004). He argues that men rarely assist either because they are somewhere else earning a living or by deliberately shirking on their responsibilities. According to NEHAWU (2006) HBC is strenuous in the light of the demands exerted by people who have HIV or AIDS as well as the obvious fact that there is a need of unionising the sector and decreasing gender inequalities. A research carried out by NEHAWU in 2007 has revealed that approximately over 500 000 people have benefited from HBC services in post apartheid South Africa. Another scholar, England (2005) has also studied HBC sector and came out with relevant theories on care work which shall be discussed below.

As indicated above, the research also borrowed the framework proposed by England (2005) in order to explain how care work is gendered. There are explanatory perspectives like “prisoner of love” perspective; the “devaluation” perspective; and, the “commodification of emotion” perspective. The literature review argues that care work is devalued in society because of the stereotype that regards it as women’s role in the private sphere. The fact that care work is already devalued on gender basis would not make much difference to society’s perception even if it is performed as paid work (England 2005). However, Marais

(2005) argues that home-and community based care is not cheap but appears so "because the true costs are hidden, deflected back into the communities and domestic zones of the poor" (2005:67).

On the other hand, the prisoner of love perspective argues that domestic labour is usually taken as a "labour of love" which does not have monetary attachments in comparison to that labour sold to the capitalist (Fox, 1980). According to England (2005), this perspective argues that care work is based on innate caring motives of care workers which allow employers to automatically pay them less. On the other hand, care workers admit that their job is easy and lacks skills. Also, these workers might get too attached to their clients emotionally such that they see no reason to neglect them in demand for better remuneration. England (2005: 390) refers to the phenomenon as an "emotional hostage effect".

Finally the commodification of emotions persperctive focuses on how many service jobs require workers to act emotions they do not really feel. Hochschild, (1993) called this emotional labour. In line with this, England 2005 also states that a certain scholar, Wharton also conducted a research in 1999 to find out about the psychological implications of "deep acting". Although she did not succeed in coming up with the desired results, she found out that a number of workers appreciate the social interaction their work offers them. A negative discovery was that the commodification of one's labour is alienating and exploitative. This is because of the lack of a formal contract between the concerned parties which accompanies a personal commitment to family members (Fox, 1980). Household work is different from wage work in which one sells one's own labour power for money.

According to England (2005), the devaluation perspective argues that care work is associated with women, especially women of colour, and therefore is poorly rewarded. Little social recognition is given to both care work and the women workers in society. England and Folbre (1999) argued that female-dominated jobs involving care work are particularly devalued because women are expected

by society to perform this type of work. A good example is given by Hassim and Razavi (2006 : 22) when they argue that the " Confucian principle of 'filial piety' which underpinned the reluctance of East Asia states to fund social care services, relied on women's unpaid care work in the family". In this regard women's care work or any other female dominated profession is devalued because women are not supposed to be breadwinners for the family and in terms of HBC work they are paid less because of societal expectations that women should be responsible for care work in accordance with the sexual division of labour. In his argument, Marais (2005:67) asserts that 'care' according to society is what 'comes naturally' to women, effectively locking women even more securely into the domestic sphere (2005:67).

In the same vein, England's (1992) empirical research on occupations involving interactive service work demonstrated that service occupations such as nursing, teaching or care work had a "pay penalty": The fact that the job is regarded as a female one then means that automatically those people involved in it, irrespective of sex, are paid less (England 2005). On another note, devaluation can negatively impact on those who perform care work in the family. The fact that the domestic worker is not paid for her efforts will ultimately affect her social status and power within the household as they deem themselves as of little value to the general welfare of the whole family (Fox 1980).

From another perspective, the patriarchal system biases constrain both wages and state support for home care since it is identified with women. Elson and Cagatay (2000) refer to this as 'male breadwinner bias' which tends to allocate social benefits in terms of men's participation in the labour market. This bias neglects the link between social reproductive work done by women in the home and the paid productive work done by men in the public sphere.

According to Petersen and Morgan (1995), devaluation of care work does not only affect women but also those males who will also engage with this type of work. This notion is also supported by England (1992) when she indicates that

most female jobs pay less than male ones after assessing educational requirements, working conditions and skills levels. The main reason could be that women are disproportionately represented in these occupations. Also most of these care-givers have little or no education let alone skills other than those given during basic care work training (NEHAWU 2006). To some extent, this devaluation could be on racial grounds as most professional care work that is performed by white women might be awarded better wages (Hondagneu-Soleto, 2001; Romeo, 1992).

On the other hand, the Domestic Labour Debate of the 1970s argued that capitalism simply takes domestic labour for granted. Marxists acknowledged that wage labour actually depended on women's care work for it to sustain itself (Fox 1980). If women were to cease from carrying out domestic reproductive labour, then capitalism would suffer from a lack of human labour for production. In this regard it is important for women's care work in the private sphere to be rewarded in the same manner as their male counterparts. Moreover, there seem to emerge a new social order whereby both men and women have to be responsible for care work in the family because of what Bakker (2003) referred to as social reproduction crisis. This is supported by Robinson (2006) as she cogently points out that there has been an erosion of traditional gender dichotomies regarding women's and men's roles. To her everyone is both a care –giver and a care receiver irrespective of sex (Robinson, 2006:11).

2.5 Why Organise Home-Based Care Workers?

Home based care work actually contributes to the backbone of production because it sustains capitalism (Fox, 1980). Unfortunately home based care workers are neglected. As indicated in the theories above, some HBC workers do their work on emotional grounds whereas some do the work to earn a living. Despite the significant work that care givers carry out on a daily basis, they receive little or no wage at all at the end of the month. For instance, some

workers are paid only in stipends or transport allowances. They do not have job security, social protection, a steady wage, respect and dignity (NEHAWU 2006); they operate under very poor conditions. Above all they should have a voice to represent them so that their grievances are dealt with (Gallin 2000).

Home-based care workers are workers too and therefore should exercise their rights as workers (Robinson 2006). As it stands, most of them are low- wage earners and have no social protection as well as other benefits and yet they carry out significant work, which is usually risky especially when working with HIV/AIDS patients or those suffering from tuberculosis in the home. If poor workers are unionised, they would be entitled to better wages, social protection, earn dignity and respect and also be protected from harsh conditions of service (Tait, 2005; Cobble, 1996).

It is believed that unions empower their members which will equip them to be able to advocate for broader, social and economic justice, beyond their economic lives (Tait, 2005). Workers not only need higher wages and better working conditions, but also require recognition, respect and dignity as human beings. This is emphasised by Tait (2005: 1) when she remarks that, “Union rights are human rights”. Lopez (2004) also emphasises the need for service workers to be unionised for better wages, improved working conditions, on the job dignity and safety.

Lopez (2004) also argues that if these service workers are unionised, they would revitalise the traditional unions that have been weakened by globalisation (Lopez, 2004; Kenny, 2005: Krinsky and Reese, 2006). Loss of jobs does not affect workers only but also leads to a decline in union membership, which might weaken the labour movement both numerically and politically (Lopez 2004). Clearly this situation is avoidable as the unions will then have to deal with workers who are precarious, isolated and have no permanent places to operate from (Cobble, 1996). It is therefore argued that organising these workers is most advantageous.

2.6 HBC as Informal/Voluntary work

2.6.1 Definition of informal work

In her working paper, Mankopf (2007) defines informality as the absence of characteristics that belong to “formal” activities such as decent work which involves regulations, job security, better wages, social security, for instance pensions, protective legislation and union protection. The informal economy is described in terms of it being subordinated to and based on the periphery of the formal economy. However, this notion was rejected by Moser (1981) as presupposing a clear dichotomy between the two sectors of the economy. Furthermore, the pre-conceived clear division negates the fact that these two sectors are closely intertwined in terms of production and distribution systems and rely on each other for survival. However, the main difference between the formal and informal economies is that the latter sells goods without paying taxes. As a result, it functions as a shadow economy (Portes and Castells, 1996). It is necessary to scrutinise this dichotomy and to ask what kind of payment home based care workers in the informal economy receive for their services.

Basically there are three schools of thought on informal economy: the Dualist perspective, the Structuralist perspective and the Legalist perspective (WIEGO, 2006). Scholars in these schools of thought attempt to identify the informal economy in terms of the formal regulations. The Dualist School (1970s) is also referred to as the livelihood framework. This was popularised by the International Labour Organization (ILO). The Dualist school views the informal economy as survival activities performed separately at the periphery of the formal economy, which is as a result of a rapid population growth, or a deficiency in economic growth leading to a lack of employment opportunities (Chen, 2005).

In the same vein, the dualist perspective could also be perceived as the “livelihood framework”, which argues that the informal economy is a “means of

gaining a living, including livelihood capacities, tangible and intangible assets" (Grown and Sebstad, 1989:175). This is a very important point especially if one considers that most volunteer home based care work givers are in the programme to gain experience for better jobs in the future. South Africa's economy has been regarded as a dual economy (Mbeki, 2003). This could mainly be attributed to race and classes that existed due to apartheid. In this case, it is clear that there is a big gap between the poor economic activities and those of the rich. In fact, the market- oriented modern model coexists side by side with the informal undeveloped economy (Mbeki, 2003). While the poverty conditions of HBC work might suggest that it be understood in terms of survivalist activity in a dual economy, by looking at the structure of the HBC sector, it is clear that the formally registered NGOs or private companies make use of informal labour in performing their daily duties. This suggests some interconnection between formal and informal sectors that have been explored in this research. Linking this to the research, in terms of organising and the fact that HBC workers operate under formal bodies this might assist in creating opportunities to organise workers as they can be easily located. There is also the opportunity to have employers to bargain with.

The second school of thought is the Structuralist School (1970s and 1980s), which is also referred to as a Neo-Marxist framework. The proponents of this school of thought are Alejandro Portes, Manual Castells, and Caroline Moser. They reject the idea of perceiving the formal and informal economies as parallel and co-existing. Instead, they view the informal economy as a subordinate but interconnected part of the economy and a source of cheap labour for the formal sector. This situation is what is currently happening in the home based informal care sector in South Africa. For instance, on the one hand there is the health care system which tired from accomodating the same type of customer in hospital/clinic (that of the HIV/AIDS patient) will gladly release them to a more surbodinate type of care that of home based care. Although HBC's reliability has not been measured, this has not discouraged hospitals/clinics from discharging their patients too soon.

Again, these two sectors are interconnected and interdependent in different forms of production (see Castells and Portes, 1989). The research argues that the interconnectedness between the formal health care system and the informal home based care sector has increased in the face of terminal illnessness around the globe. Globalisation has been blamed for the culmination of different forms of flexible employment relations that have emerged recently (see Webster, 2005).

In light of the point mentioned above, hospitals and clinics are decentralising health care for people affected with HIV/AIDS through their heavy dependence on networks of home based care and informal caring labour of women. They are doing this through outsourcing, sub-contracting and casualising the work of these vulnerable women in this unregulated sector. All these three forms of employment relations are epitomised in home-based care work. A process occurs when this happens. First, workers are out-sourced from NGOs as volunteers. Secondly, they are sub-contracted through NGOs or private companies that are sponsored by the state to carry out home-based care work in order to alleviate a crisis in the health delivery system. Finally, they are hired as casual workers by big mining companies to cater for the health needs of their workers (NEHAWU 2006).

By way of concluding the literature review, it has been noted that HBC work is principally carried out by women and as unpaid work and therefore has a gender aspect. For post apartheid South Africa, it is of great importance to bring these atypical workers into the formal mainstream, the public service sector. This would help in creating permanent jobs in the formal sector, building capabilities and assets for the poor, supporting a development strategy of shared economic growth as well as removing the excessive burden of gendered care work to future generations. On the same note, Appelbaum et al (2002:1) advocates for a model in which there is “shared work valued care“. This means sharing of good jobs including care work for the same value between men and women. Principally, if

organised these workers would be able to exercise their rights and also job security is guaranteed.

Theories of care work have been discussed which further the debate on informal home based care work. They also give justification as to why care work in post apartheid South Africa is devalued and not paid for in the same way as productive labour in public work is paid for. It also reveals myths about how women or women's work is said to be unorganisable, which could pose some challenges for union organising. However, as we have seen, many scholars challenge this notion when they argue that women workers are ready to unionise (Cobble, 1996; Milkman, 2006; Tait, 2005; Lopez, 2004). Some constraints to organising as well as possibilities have been discussed. Strategies and models of organising have been proposed. NEHAWU's strategies on organising successes as well as failures in other contexts have been highlighted. Methods that were employed to unravel the constraints in organising informal workers in a gendered environment will be discussed in the following chapter.

Chapter Three: Methodology

3.1 Introduction

This chapter discusses the methods employed in the research study. A combination of documentary analysis, semi-structured interviews and participant observation was used to gather qualitative data in order to answer the question on challenges faced in organising HBC workers. The procedures, limitations of the study, ethics as well as the method of data analysis are discussed in this chapter.

The findings of this study make reference principally to three categories of subjects namely, union personnel, HBC training authority personel and the HBC workers themselves. Unfortunately no contact was made with any of the employers who are mainly NGOs since the researcher relied heavily on NEHAWU for access to these stakeholders. The HBC project is still at its preliminary stage within NEHAWU such that this will come in a later phase contrary to prior anticipation by the researcher that the research had already kicked off such that reaching out to the employers through the union's assistance was going to be easy.

The intention of this research was to explore the challenges faced in organising HBC workers. Basically, there are two types of research which are quantitative and qualitative methods. According to Greenstein (2003), the qualitative method often involves the gathering and analysis of in-depth information on a smaller group of respondents. This method is based upon the need to understand human and social interaction from the views of insiders as well as the participants during the interaction. On the other hand, quantitative methods tend to focus on attributes of individuals at the detriment of linguistic and sociological issues such as language use and social context.

Of the two methods, I chose to make use of the qualitative method in order to solicit in-depth data based on experiential views of the respondents and

participant observation of NEHAWU‘s organising efforts, in order to understand constraints to and opportunities for organising HBC workers, as well as possible viable models and strategies that could be employed for organising purposes. This method was also useful in that it creates a face-to-face dialogue with a participant whereby questions and responses are clarified (Cohen et al 2001). In other words, the use of qualitative method facilitates probing and making of choices.

In order to establish the challenges faced in organising HBC workers, several methods were combined. First, key informant interviews were used with different stakeholders involved with HBC workers, including NEHAWU’s organising department and the training authority for HBC workers, Lethukukanya. Secondly, to determine the strategies used by NEHAWU, as well as state policy on HBC work, document analysis was employed. Finally, I employed the participant observation method in order to explore the approaches used by NEHAWU in mobilising HBC workers as well as workers‘ responsiveness to the union. This was done by mobilising the workers directly with the assistance of two of their colleagues and attending the union’s strategic planning meetings and workshops.

3.2 Sampling

The main target of the study was the union responsible for public service workers here in South Africa- NEHAWU, the training authority for HBC workers- Lethukukanya, and HBC volunteer workers who live within the Johannesburg area. Twenty HBC volunteer workers were interviewed for at least twenty minutes each due to time constraints on their part since they were interviewed at their workplace while rendering their services. The rest of those not directly interviewed were covered through participant observation by engaging them in informal discussion and through soliciting information from the membership forms that they had to sign (see Chapter 5). The type of methodology used was qualitative; therefore a non-probability sampling was used. This entailed the selection of subjects into the sample according to their relevance to the study (Neuman, 2000).

3.2.1 Snowball Sampling

A snowball sample was used to locate HBC workers for interviews. According to Neuman (1997), snowball is a method used for identifying and sampling cases in a network, of which it can also be referred to as network chain, referral or reputation sampling. It is used in studies where it is difficult to locate a population and thus where one has no sampling framework. In this case, the HBC workers are scattered and therefore it is appropriate to use this method.

This method provided for relatively easy access to the population in different workplaces in which HBC workers operate from. However, the disadvantage is that it might lead the researcher to people of the same group known to each other and might be unwilling to disclose some information or activities after having liased with each other (see Cohen et al 2001). The first contact with an HBC worker (Anna) was facilitated by both the training organisation and the union. Anna later introduced me to Febbie at a clinic at Orange Farm and thereafter, the reliance was now on other HBC workers interviewed to give me further contacts of their own colleagues operating from other clinics, NGOs or hospitals. Sometimes, I was fortunate enough to find the workers at one workplace, for instance at Orange Farm, six HBC workers were able to organise themselves for some interviews in a short period of time making it easier to reach out to them.

3.3 Data Collection Techniques

A combination of documentary analysis, face-to-face interviews with semi-structured questionnaires and participant observation was used.

3.3.1 Documentary Analysis

An analysis of primary data on both NEHAWU, as well as the state's policies on HBC was done in order to detail how the union and the state have framed HBC work and organising HBC workers. Specifically, I examined documents containing strategies used by NEHAWU for organising HBC workers, such as

reports, minutes of meetings, and the union's proposal for the project. The documentary analysis technique was very useful in that it managed to give in-depth detail on NEHAWU as a union and the strategies it employs in mobilising and organising HBC workers. Some literature on state policy concerning HBC work was also used.

Documentary Analysisis is a qualitative method in which a researcher has to analyse documents in order to come up with data that is relevant to the research. The documents are in two parts namely: personal documents and official documents (McMillan and Schumacher 2006). According to them, a personal document is "any first person narrative that describes an individual's actions, experiences and beliefs" (2006:357). A personal document is usually discovered by the researcher or could be derived from participants. Personal documents exist in the form of a diary, personal letter and anecdotal records (McMillan and Schumacher 2006). It is important to note that documents can also emerge during an interview or participant observation (2006: 357). On the other hand, official documents are obtained from organisations or companies. These include among others minutes of meetings, working papers, memos and draft proposals which give an internal perspective of the organisation including official chain of command and leadership styles and values (McMillan and Schumacher 2006).

Additionally, official documents could also be used for external communication meant for public consumption as newsletters, brochures, public statements and news releases (McMillan and Schumacher 2006:357). For this study, the researcher made use of personal documents by collecting written stories from participants as well as their own Memorandums of Understanding. These were of great assistance as they enlightened both the researcher and the union on the HBC workers grievances, which were very crucial to note so as to come up with suitable organising strategies. Official documents used were in the form of union reports, minutes of meetings, the union's constitution and newsletters- NEHAWU Bulletin. The analysis of these documents revealed the union's commitment to the HBC organising project as well as how the union itself can pose as an

obstacle to organising. The analysis of the report concerning the trip to America contributed by highlighting the strategies used by SEIU in organising homecare workers, which also mapped NEHAWU's organising strategies.

3.3.2 Semi-structured interviews

Interviews are a more formalised, systematic and extended version of one-to-one conversation (Makore-Rukuni, 2001). The main aim of interviews is to maximise chances of finding rich data that is simultaneously valid. This is because issues are investigated in an in-depth way to find out about how individuals think and feel about a topic and why they hold certain opinions (Cohen et al 2001). There are sensitive topics or issues that people might not feel to express in a group, which would be easier to express through a one-on-one interview. I had to use semi-structured interviews for both HBC workers and NEHAWU organiser so as to solicit in-depth information relevant to the study as well as any other information that could be hidden which would assist in addressing the question at hand. Through probing, these interviews provided detailed information, making it possible to gather information in considerable details. For instance, some of the workers were reluctant to reveal their grievances because of fear of the officials from the DoH and their employers, but once they were stimulated with certain general questions concerning their wages or working conditions, they opened up.

The guiding principle for selecting interviewees was not representative, but made to take into consideration the different stakeholders who are directly or indirectly involved with HBC workers. I chose interviews in order to add a human dimension to impersonal data. Infomation that was supposed to be shared was shared through interviews, and unlike in a group discussion, the information cannot be released. Interviews allowed free expression of opinion without fear. Open, basic questions were asked but some were created during the interviews to allow for flexibility to probe for details and discussion of issues (see Appendix B for interview schedules)

3.3.3 Participant Observation

Participant observation involves both observation and participation by the researcher in the social setting of those being researched, which gives room for the researcher to penetrate and learn more about the subjects (Neuman, 2000). By so doing, the researcher would be able to gain an in-depth understanding of the findings from information gathered through observation. On the other hand McMillan and Schumacher (2006:347) defined participant observation as " a combination of particular data collection strategies; limited participation, field observation, interviewing, and artifact collection" Therefore, the observer should always be alert so as to capture all relevant details as she will be playing multiple roles. Through observation, a researcher would be able to access social processes that would be otherwise hidden (McMillan and Schumacher 2006:347)..

This method was chosen for this study to enable the researcher to find out more about the constraints to as well as possibilities for organising. As discussed in the literature review, it is clear that there were certain organisational issues within NEHAWU that could be obstacles to organising itself. This method also gave room for observing the HBC workers' response to organising. The unique opportunity of engaging in participant observation for four months enabled me to make some useful observations in terms of forms of organising and strategies used by NEHAWU. I was also able to observe the participants carefully by making follow-ups of which I managed to get information as to which sex is mainly involved in carrying out care work and the receptivity of HBC workers to NEHAWU's organising efforts.

Participant observation took place in two different contexts: in the union offices and HBC workplaces. Within the union offices the researcher would make observations during meetings, workshops and any agenda that had to do with the HBC project. The researcher also participated in some attempts to recruit HBC workers in order to find out about how these workers are receptive to NEHAWU's

organising efforts. After failing to get an organiser to shadow the researcher ended up acting as NEHAWU's organiser!. The workers were observed at their workplaces - clinics within Orange Farm. This was done during interviews and meetings. Here they would reveal their sentiments concerning organising and the researcher would then note down all the relevant material related to the subject under investigation.

Participant observation, which formed the backbone of my research methodology played the principal role in this study. Unfortunately, instead of shadowing NEHAWU organisers I had to go solo in order to have direct contact with the care-givers. Efforts to engage an organiser to go out with were fruitless due to past experiences as the union had made some attempts to organise nurse aides before of which the project just collapsed after having channelled a lot of resources. The union argued that it was difficult to release an organiser from Gauteng Province for the pilot project since there were other objectives that needed to be accomplished within the union's mainstream organising. I elaborate on this difficulty in my findings- Chapter 4

However, through participant observation I managed to gather much data on constraints to and possibilities of organising HBC workers in regard to the union itself. This technique was quite limited in the initial stage of the study as there were several interruptions due to commitment to other major union activities. First there were preparations for NEHAWU's 8th Congress and then the public service strike that hit all the corners of South Africa referred to as "Mama of all strikes". Despite this, the researcher had to continue paying visits to NEHAWU in case there could be other scenarios of interest to capture with regard to the research.

In the end, I used participant observation in the following contexts: attending strategic meetings on how to go about the organising project. Here I took note of different union officials' views with regard to the question on constraints to and opportunities for organising HBC workers. The researcher also attended a mini

workshop on the 12th of October 2008 which was meant to familiarise organisers from Gauteng Province on the project. Here I got to learn about NEHAWU's strategies on organising HBC workers. By hanging around the organiser's office and NEHAWU offices in general I managed to observe among others union officials' attitude towards this project concentrating on such aspects like bureaucracy, resources availability, time and commitment. Observations pertaining to HBC workers were mainly done at Orange Farm where I observed the HBC workers with each other at their workplace Clinic X. Here I managed to answer the question on the workers' receptivity to NEHAWU's organising efforts and whether they were organisable or not. Due to time constraints, I was not able to go out into the communities with the HBC workers so that I would observe them while perfoming their duties in their clients homes. Also by meeting these workers (women) time and again, I managed to make observations on the gender aspect of care work as well as the link between gender and organising outcomes.

Through participant observation, the researcher was able to overcome observer reactivity (Mcmillan and Schumacher 2006). As anticipated before, the researcher was able to assimilate and integrate within the union. During the first few days, I could sense that some union workers were uncomfortable with having me around and perceived me as a threat but later got used to me. The reason could be due to the fact that the office I was allocated to work from belonged to one organiser who had just resigned. Worse still the fact that I am a foreigner, a Zimbabwean for that matter exacerbated their fear of having their jobs taken away by foreigners. Moreover, after learning that i was an intern researcher, some thought that I had probably come to observe them but after getting used to me, they had to operate the way they are used to despite my presence. Also they were not able to feign their emotions unlike if I had just studied them for a short period of time or a few hours.

Participant observation required that daily field notes of the researcher's experiences in meetings and in the field with HBC workers be noted down. The

field notes were dependent on observations made daily when the researcher went out organising or had any meetings or workshops concerning organising. These notes were useful for data analysis as one cannot rely on memory.

However, there were some limitations to this type of study. First, observation itself could be limited if there is little or nothing to observe at all (Lopez, 2004). A good example is that during my first days of observation, there seemed to be nothing much to observe as no significant events related to the HBC project occured. .Participant observation is time consuming as well (McMillan and Schumacher 2006). Enough time should be spent with subjects so that one gets accurate information, and the limited period of time set aside for the study was too little such that I had to find my own time to keep on track.

While it provides valuable information, the data is sometimes difficult to analyse. One has to rely on memory as well as field notes, which require an interpretation to recall what has been witnessed on the site. In order to counter this problem, I had to ask for permission to write down points especially during interviews. It is also difficult to separate analysis and observation as each observed event has to be analysed. This demands a lot of alertness from the observer (Cohen et al 2001). To a lesser extent, an observer might be biased which could distort information validity and reliability (Makore-Rukuni 2001). If resources were available, a tape recorder was ideal to use as it would have saved time and it would have provided an opportunity for replay where clarification was required. Unfortunately I did not manage to get one and had to rely on my own senses (hearing and sight) so as to capture information.

3.4 Limitations of the study

Only 20 HBC workers were interviewed and their views will not be representative of all HBC workers in South Africa. Data should not be generalised. The validity of the data obtained would be applied in terms of its appropriateness to a situation (Makore- Rukuni, 2001). Limitations of data collection methods might affect the reliability and the validity of the research outcome (Makore-Rukuni,

2001:76). As indicated in the discussion of methods used, there are some constraints of using each method. For instance, participant observation requires extended time. However, this was countered by making use of the triangulation of methods to strengthen each method (observations, interviews and documents) in terms of their limitations.

Little time was allocated in order to carry out the research as well as to do follow ups. To overcome this problem, wise planning was done. Other than relying on the amount of time allocated, the researcher had to find her own time to conduct some follow-ups later. Adjustments were done where possible. The process was done gradually with the final attainment of data analysis taking place. The researcher was able to improvise so as to meet the target as well as get solutions to riddles emanating from the research. For instance, after learning that the NEHAWU organisers were not prepared to conduct field work within the time stipulated for the study, I made the initiative to get in contact with the HBC workers directly.

Since the HBC workers are fragmented it was difficult to locate them easily. I relied mainly on NEHAWU as well as snowball method, whereby the HBC workers had to refer me to their colleagues. Management of these interviewees, that is to keep track of them as they are always mobile, was very crucial and a challenge to this research such that the researcher had to be very alert and innovative.

The other problem was that of language barrier. I speak Shona and English languages, but many HBC workers spoke indigenous South African languages. In order to counter the problem, I got assistance from two HBC workers, Anna and Febbie to do some translations for me since there were no NEHAWU organising personnel to shadow. Despite the language barrier, the HBC workers were very co-operative and understanding making the interview sessions flow smoothly.

3.5 Ethical issues and Access

Permission was already awarded by the Head of Organising Department for NEHAWU for a partnership in this research. I spent four months working within the union.

In terms of the workers, the HBC workers signed a Memorandum of Understanding in which they are not allowed to divulge some workplace secrets as well as conditions of service as indicated by one of the HBC workers during an interview. In this case there was a need to therefore protect workers who spoke with me and prevent the use of real names. Therefore pseudonyms were used except for public figures and prominent union officials like organisers.

Participants had the right to be informed of the purpose of the study and had to comply to participate on their own. They were allowed to choose to participate, or not in the study after receiving relevant information about the risks and harm that could arise if they participate in the research. Also, they were free to terminate their participation at any given time if they so wished. The participants were required to agree orally for interview purposes.

The results of the study will be disseminated through meetings, workshops, fliers, posters and the media to the participants if they so wished. In this research it is very important as the participants need to be organised thereafter. For instance, the workers signed membership forms to be forwarded for negotiations with policy-makers and different stakeholders. It is crucial to update the progress at each stage to these workers so that they stay informed. Debriefing and dehoaxing refers to giving explanatory information to reduce the negative effects of deception (Makore-Rukuni, 2001). Participants have to be briefed on what has transpired during the research. This shall be done at a later stage after the

report has been submitted to the union and a way forward concerning organising has been mapped.

Furthermore, the research will feedback and inform NEHAWU's organising programme. Recommendations on how best to organise these workers have already been forwarded to the National Executive Council of NEHAWU for policy planning purposes.

Chapter 4 Union Strategies

4.1 Introduction

The current chapter presents and discusses the results obtained from a study on constraints to and opportunities for organising HBC workers in post-apartheid South Africa. The findings of this study have revealed NEHAWU's constraints to organising caregivers as well as its strategies for organising these workers therefore the chapter deals with policy issues, SEIU's organising strategies vis-vis NEHAWU's strategies, NEHAWU's strategies in practice that is the seven pillars of its organising campaign, use of 'phonebanks', signing up of membership forms and mobilising around gender issues. These themes build up knowledge on organising and strategies that could be employed by unions for organising purposes.

The strategies used so far have been very useful in winning the hearts of these "angels of mercy". HBC workers have been receptive to the union's organising efforts though the union sometimes demonstrates a lack of commitment to the project and is very slow as far as progress is concerned. There seems to be some reluctance and mixed feelings within the union in organising these caregivers probably because the sector is dominated by women. In as much as society and feminists in particular might think that the patriarchal system has been eradicated and that gender parity now exists, this study has revealed that unions themselves are gender blind and undemocratic in terms of recognising women as equal partners in the workplace as there seems to be that perception that a woman's place is in the private sphere. This notion is supported by Mulima (2004) when she asserts that "at all levels, society perpetuates the stereotypical images and roles of women as home-makers" (2004:82). Further, Makwavarara (2001) argues that:

"Trade unions reflect the patriarchal idea that women's labour is not 'real' labour and that somehow women in the formal and informal labour market are transitory and filling in before they return to their true (unpaid) work" (2001:77).

Makwavarara attributes this to the fact that union leadership is principally concentrated in men's hands such that they (men) are the ultimate decision-makers. On the other hand Orr (2004) advocates for the need for women to take up leadership positions as well as recruiting women as organisers in unions so as to make union agenda gender sensitive and that it would also encourage more women to join trade unions (2004:44). But it is astonishing to mention that a woman is at the helm of NEHAWU's presidium and yet she seems to be reluctant to push women's agenda forward or maybe it could be suppression by male counterparts. This then gives rise to the question that "Are women in top organisational positions available as place holders, to represent women or just for window dressing?". Through this study, it has been proved that some women tend to forget their responsibilities of representing and pushing women agenda when they get an opportunity to be in top positions of organisation because they simply want to meet organisational goals and so are co-opted (see Hassim 2001). HBC work is a women issue and NEHAWU's president's voice (as a woman) should be heard as far as the project is concerned but surprising all my stay at NEHAWU I did not even get an opportunity to discuss the project with her in order to get her sentiments about the project.

However, it is important for NEHAWU to represent its vulnerable workers especially women. Overally, the study has demonstrated that the strategies used for organising these workers correspond directly with the workers receptivity to union efforts. In short , there is a close link between organising strategies and organising outcomes.

4.2 Background information on the union and project

Situated in the heart of the city of Johannesburg at No. 56 Marshall Street is the famous workers' union popularly known as NEHAWU. Its popularity has been promoted recently by the big strike that took place in June 2007 - " Mama of all strikes" which the union commanded. Today if one utters the name 'NEHAWU', great attention is given. I have personally experienced it because the moment I

got to one of the clinics at Orange Farm on a NEHAWU ticket, the welcome I got from HBC workers there was overwhelming.

NEHAWU simply stands for National Education Health and Allied Workers Union. It was established in 1987 as an association for employees which is not for gain and as a corporate body having perpetual succession, legal existence and all the legal powers of a juristic person. Its objectives include among others to recruit and unite workers so as to share their economic and social welfare in order to foster unity, co-operation and comradeship, establish relationships with other unions as well as to build international working class solidarity and bilateral relations with other unions internationally.

Having analysed these objectives, I see the reason why NEHAWU had to take the stance of organising HBC workers: in order to fulfil one of its major objectives which is to represent the interests of the working class. Their argument according to Guy Slingsby, (Policy and Research officer), is that if the union is to represent the interest of all workers, then they should consider the plight of atypical workers, in this case HBC workers because they fall under the union's umbrella as health workers. The other major argument is that " organising HBC workers can strengthen public service delivery" (Slingsby 2007). In this case the South African citizens shall benefit from the project as it would go a long way in alleviating staff shortages in public hospitals. Through legal representation and better incentives, the HBC workers are retained.

Given this background, as I got on to the union's premises I had several questions as to how NEHAWU was to tackle this organising burden. As I entered through the tight security officers by the main entrance, I wondered whether the comrades within the union were going to be co-operative by letting me partner with them as a student intern from an academic institution, University of Witwatersrand. I was referred to the third floor where the Organising and Servicing Centre (OSEC) is. Intially I had gotten in contact with Guy Slingsby at a colloquim arranged by the Global Labour University (GLU)' co-ordinator Mandy

Moussouris. Guy was the only person that I knew there. He is the very person who had attracted me there after he highlighted the project. Guy had to introduce me to the then Head of Departmert , the cheerful Ray Jefta. The three of us then had a mini meeting on the 11th of July 2007, so that I could spell out my expectations and they also share theirs. Ray was so co-perative enough and gave the directive that I get all the necessary documents and material I needed for the progress of my academic research. He said I was to work with Shireeen Samuel who is the coordinator for this project. An office and telephone were also to be allocated to me later.

"Just feel free to come in anytime. Never mind to check on me for permission unless there are pressing issues that need my attention" (Ray Jephta 2007)

These were Ray's closing remarks. These gave me a sign of relief and the tension I had before began to unfold. From that day onwards, I was free to just pop in at NEHAWU for follow-ups and clarifications in regard to the research.

4.3 Barriers to Organising HBC workers

Generally speaking, organising is not such an easy task as it requires commitment, patience, diligence and perseverance. As mentioned by Krinsky and Reese (2006), unions are faced with so many obstacles in their efforts to organise workers. Some of these problems are attributed among others to unions themselves, workers, employers, political climate, policy, legal issues and so forth (Cooper and Patman 2007). My findings deal mainly with the union's major sources of barriers namely , resources (financial and human), commitment and velocity, communication, as well as legislation and policy issues.

4.4 Forms of Organising and strategies

The current workforce is unique in that unions have to deal with atypical informal types of work such as casual, outsourced or subcontracting. This is echoed by Cobble (1996) when she points out that unions have to deal with workers who are precarious, isolated and have no permanent places to operate from. It

therefore poses challenges in the ways unions have to organise (Tait 2005: Savage 2006). Considering this, the following section shall be a discussion on the form of organising and strategies used by NEHAWU in its organising efforts for HBC workers who also form part of the new workforce. Most of the information is based on my interview with Shireen and a workshop that was carried out on the 12th of October 2007.

4.5 NEHAWU Policy

The following section shall present NEHAWU's policy as revealed by the documentary analysis. The policy is also grounded on the union's personnel visit to a union in America known as SEIU, which had already successfully organised home care workers (Lopez 2004). Before embarking on the organising project, NEHAWU had to consult an American union, SEIU which had successfully organised homenursing workers for exchange of ideas. So NEHAWU officials had to visit their colleagues in America. The team from NEHAWU comprised of Shireen Samuel (Project coordinator), Guy Slingsby (Policy and Research Officer), Lebo Matete (from the training authority – Lethukukanya) and Prabir Badal (the union's National Treasurer).

"The whole idea of this trip as indicated before was to learn from the American experience and borrow those aspects that are applicable to the South African context" (interview with Shireen 2007).

The above statement clearly indicates that no policy had already been put in place before the trip. In this regard it is important to mention SEIU's organising model and then map NEHAWU's organising model. The subsequent section shall present SEIU's organising model.

4.6 SEIU's Organising Model

From the SEIU experience NEHAWU was able to borrow three major strategies Grassroots organising and political mobilisation around day to day worker issues; this became the foundation of all organising work. Policy Changes aimed

at restructuring the system to benefit workers while delivering better care to clients; these bacame the tools for accomplishing change. Coalition building between workers, clients and advocates ; this became the means of asserting public pressure to effect the organising goals. (NEHAWU 2006). Of the three strategies, SEIU emphasised the one on grassroots organising as the backbone. This is in line with such scholars like Tait (2005) who attributed the success of Poor Workers unions to grassroot mobilising. Indeed grassroot organising plays a fundamental role in organising as has been revealed by the recent research.

4.7 NEHAWU Strategies

From the SEIU experience, NEHAWU managed to borrow some of its strategies of their organising model that are applicable to the South African context in order to design its organising campaign. These shall be highlighted in the next section. Before outlining NEHAWU's strategies, it is crucial to present a table demonstrating the organising project's timeline –Table 1

Table: NEHAWU's Project Timeline

Year/ Month	**Activity**
2004 (June)	6th Nat. Congress resolution to organise HBC workers
2005 -2006 (October)	No activity noted.
2006 (November)	Meetings and correspondence with SEIU. Visit to America (SEIU)
2007 (February)	Formation of core groups to coordinate and run the recruitment campaign.
2007 (Feb-April)	Research on HBC sector by Lebo
2007 (July-December)	Research + pilot recruitment project

The above table demonstrates the progress of the research so far. As indicated, NEHAWU made its resolution to organise HBC workers at its 6th congress in June 2004. From July 2004 up to October 2006, no activity was noted unti when

NEHAWU began to communicate with SEIU, a union in America that had successfully organised homecare workers in order to solicit ideas as to how to go about organising HBC workers here in South Africa. A team from NEHAWU, sponsered by SEIU, went to America for idea exchange and a bit of some field work. In February 2007, after learning from the Americans, some core groups were formed at grassroot level to assist with co-ordinating the recruitment campaign. During the same month, Lebo the HBC instructor from Lethukukanya conducted a research on the sector as the union was not quite familiar with the HBC sector. Thereafter, a pilot recruitment project kicked off with Gauteng as the pilot province. The campaign shall be explained in the subsequent section.

4.8 NEHAWU Campaign

From the SEIU experience, NEHAWU has managed to borrow one of its fundamental strategies – the use of campaigns to organise homecare workers. The campaigns are meant to sensitise policy–makers, the government, employers and society (clients) on the importance of home based care here in South Africa. According to Slingsby, the campaign shall be embedded in NEHAWU's currently running campaign named "Improved Service Delivery Campaign". The HBC campaign's focus is basically targetted at the need for recognition of women's caring work in society and to raise awareness to policy-makers on HBC workers' status, the need for better wages and improved working conditions for these workers.

It is a fact that care work is devalued in society because it is carried out by women (England 2005: Marais 2005). In light of this, the HBC workers campaign would be necessary for recognition purposes. Shireen proposed that by informing society through the media or press or fliers, some well-wishers might even pledge their financial support to NEHAWU to assist with the project. The campaign involves seven pillars namely recruitment, sectoral determination, legal challenge, community/ stakeholder involvement, political intervention/ lobbying, media campaign and direct action, which shall be discussed below.

4.8.1 Recruitment

Gauteng province has been used as the pilot and a baseline survey targetted at soliciting basic information concerning organising from HBC workers has already started at Orange Farm, in Johannesburg. The findings will be cascaded into other provinces through workshops. The pilot has served as the first step to organising and shall determine whether to continue with the project or leave it at an early stage before both financial and human resources are wasted (Shireen Samuel 2007). If the pilot works out, the findings would then be rolled out at national level.

A variety of strategies have been suggested of which some have already been implemented as indicated before such as signing up members for recruitment purposes. The signed up membership forms would be forwarded for policy puposes within the union and relevant stakeholders such as the DoH and DoL for negotiation purposes. Since the workers are fragmented, the organisers made use of one – on - one recruitment or sometimes addressed them as a group during their metings. According to the plan, other strategies would entail workplace visits as well as house visits. Thereafter, area meetings for all HBC workers aspiring to join the union will be convened, with NEHAWU secretariat (Source : Shireen Samuel – HBC mini workshop 10. 10. 07)

The organising team would go out with a complete kit for marketing purposes. This means that ample resources have to be provided as pointed out by Lopez (2004). The kit comprises of union attire such as caps, t-shirts or bags, recruitment pamphlet, union literature for (marketing purposes) and membership forms. Lists and maps are part of the kit necessary for location and identification of the different areas where these workers are located.

A Note on the List

The idea of a list was adopted from the SEIU experience as they (SEIU) organisers stressed the need for keeping a list of the HBC workers for contact

details and union's statistics records. From my experience with the use of phone banks, I do agree with the idea as long as there is constant update in the case of turn overs. In order to be successful in organising HBC workers, a list is a very crucial component. According to NEHAWU (2007), the list can be created by getting records from the training authority, making use of core group members to compile lists and contact details of their colleagues so that they can be captured in the database. Organisers should also attend in-service training sessions, leadership workshops for the HBC workers or even go on house - visits and also by target the cheque-pickup points. Further, the need to update the database time and again as this industry experiences a considerable wave of turnover was emphasised.

4.8.2 Sectoral Determination

Sectoral Determination is the decision made by the Minister of Labour to determine wages as well as conditions of employment for people working in a particular sector in this case HBC sector, which is not supposed to be negotiated (Source: Vusi Mabizela: Private Health National Organiser- NEHAWU). This is usually geographically determined, for instance HBC workers in Gauteng might get wages that could be different from those in Limpopo Province as there could be differences in terms of conditions of service that HBC workers in these different provinces are exposed to.

Since these workers are not covered by the LRA and hence no Sectoral Determination, NEHAWU has to first apply for determination for welfare sector , setting minimum wages and working conditions. Additional research on the sector and submission on volunteers has to be done as well. SD is part of the preliminary policy issues that NEHAWU is planning to establish before the organising of HBC workers takes place. With SD, wages for HBC workers are set and it would be easier to mobilise these workers with stipulated figures fought for by the union at hand. Plans are still underway to engage with negotiations in terms of Sectoral Determination.

According to Stewart Marshall (NEHAWU's HOD for OSEC,) a Sectoral Determination by the Minister of Labour has to be made so that the minimum wage for the workers is pegged. This would entail that an employer for bargaining purposes be established such that the union would have to make direct deductions for subscriptions like is done with other members for servicing purposes. As it stands, the stipend payments are erratic such that it is difficult to demand any subscriptions from these poor workers!. However, setting a minimum wage is not enough as Mulima (2004: 87) argues that

" Minimum wage legislation benefits only a few and it is difficult to enforce minimum wages when much of the labour is in small scale agriculture and informal activities, and when there is an elastic supply of unskilled labour available at very low wage."

Moreover, setting a minimum wage does not guarantee that a substantial amount will be generated into the union through subscriptions since these are low paid workers. Also there is a stipulated percentage that is supposed to be deducted from members according to the constitution. The union therefore argues that for this sector to be sustainable, a huge population of caregivers have to be recruited. This justifies the reason why the baseline survey (as shall be explained below on signing up) was necessary in order to come up with empirical statistics to show the number of HBC workers committed to joining a union.

4.8.3 Legal Challenge

A legal requisition was lodged with the legal unit to give opinion to challenge the status of 'volunteer versus workers'. The study has revealed that two HBC workers have been dismissed from rendering their services at X clinic in Orange Farm under unclear allegations . One of the letters states that:

"This letter serves to confirm that Mana has been dismissed from rendering her services at X Clinic...." (Dismissal letter 2007).

The issue was brought to light as part of the workers' grievances. The two cases were then forwarded to the union as the HBC workers were soliciting for legal assistance. Though NEHAWU cannot service these workers as they are not yet members, both the organising department and the legal department for NEHAWU have agreed to assist the two workers and use their cases as an opportunity to engage with the relevant policy-makers, the DoH and DoL and challenge the unfair treatment these workers are exposed to and their status as volunteers.

According to NEHAWU's constitution only paid up members can be serviced but in this case since the HBC sector is a prospective sector for the union , they found it worthy to legally assist these workers. The cases were framed around the issue of whether volunteers are eligible for dismissal because as it stands, they are not regarded as workers (so that they would not get paid wages). The argument was that if they are liable to dismissal then they are just as good as other workers such that they should be paid better monthly salaries and be awarded benefits such as social protection, maternity leave and other benefits.

At the time this report was written, the two cases were still being examined within the legal department. Legal officers still need to establish the circumstances that led to the dismissals. A hearing for the HBC workers had already taken place but the employer's[4] side was still to be interrogated. However, the progress of the cases has been crippled as there is not yet a definite employer to bargain with.

4.8.4 Community / stakeholder involvement

This involves the establishment of strong relations with broad base community organisations in the various areas of recruitment. Plans are underway to meet and lobby with such organisations like Sangoco, local councils, civil society groups, NGOs and broad - based community organisations provincially and

[4] So far there is no definite employer such and it is difficult to establish who exactly the employer is. This dilemma has crippled the progress of the cases.

nationally. As indicated before, alliances have already been established with several stakeholders relevant to the project. For instance, a close link already exists between NEHAWU and the training authority for HBC workers-Lethukukanya.

In an interview with one union official from NEHAWU , he indicated that coalition building was very crucial in this project. He gave a very good example of how NEHAWU linked up with the South African Communist Party (SACP) in their Public Service Delivery Campaign of which the campaign was a very successful one. Through a telephonic interview Slingsby was quoted saying:

“It is very important for the union to engage with civil society groups or to take political platforms such as the Polokwane congress to network with civil society groups, NGOs or political parties such as ANC or SACP and form alliances... for example our Public Service Delivery Campaign was successful because we managed to hook up with SACP for political support“ (Simon 2007).

4.8.5 Political intervention / lobbying

There is need to meet with the Minister of Labour and the Minister of Health and Social Welfare for negotions on the inclusion of volunteers in Sectoral Determination. According to Krinksy and Reese (2006), strong political background plays a fundamental role in organising as the more political influence, the easier it is for the union to break through state barriers. For instance, the recent national public service strike took the country by storm as it was commanded by one of the politically powerful unions in the country.

Simon reiterated the need for unions to have good relations with policy makers in order to further their interests. He further added that unions should also be politically strong in order to stand on their ground when it means fighting for the workers. A very good example is that given above whereby NEHAWU hooked up with SACP for their Public Service Delivery Campaign.

Another official also supported this notion as she mentioned that political alliance is fundamental in sensitising and building consciousness to political leaders on the plight of HBC workers. Simon also pointed out that NEHAWU should have taken a political platform to bring to light HBC workers' plight at the recently ended Polokwane Congress.

4.8.6 Media Campaign

The use of media is one of the fundamental tools for the campaign as it helps in publicising and sensitising both the HBC workers and the rest of the world on the importance of this sector. This is relevent for recognition and mobilising purposes. A variety of media instruments will be used such as press, print and electronic media. Strong ties should be established with journalists. All meetings and activities should be recorded including updates of events taking place in such publications like the COSATU Shop Steward and NEHAWU Special Bulletin which has already published an article on HBC workers in its Nov/Dec 2007 issue. Also NEHAWU communications department should attend some recruitment activities for coverage (Shireen Samuel 12.10.07).

4.8.7 Direct Actions

When all of the above have been set and accomplished , direct action with the employers, clients and other stakeholders will entail. This is in the form of community mass meetings, marches and demonstrations against unfairness in terms of the HBC workers' status as volunteers, erratic and little stipends, lack of benefits and poor working conditions. Shireen suggested that workshops be conducted for both organisers and HBC core group members to strategise on which angle to begin from.[Source: Shireen Samuel 12.10.07)

Besides the campaign discussed above, another strategy pertaining to organising HBC workers has been proposed and shall be discussed below.

4.8.8 Signing up of members

An on-going baseline survey is being conducted with Gauteng as the pilot province. This requires HBC workers to just sign up membership form to show their eagerness to join the union without having to pay up an initial joining fee. Though they have the right to collective bargaining, in terms of the LRA, these workers cannot be organised by a union because of their volunteer status unless it has been challenged and they are then regarded as employees. This is because workers rights to organise are framed in terms of the employment relationship of which it is difficult for this sector as the workers are not regarded as employees.

In the same vein, NEHAWU is not allowed to take any subscriptions from them in terms of the LRA and NEHAWU's constitution. The signed membership forms would only be used to serve as evidence that HBC workers are willingly to join the union. This strategy of getting the workers to sign up was utilised during mobilisation and sensitisation about the union and by the time the report was written, fifty two workers had signed up!. The figures obtained would be used for negotiation purposes with different stakeholders who include among others policy-makers, officials from the Department of Labour, Department of Health, employers such as NGOs, churches and private companies.

4.9 Strategies used in Practice

4.9.1 Phonebanks

The use of database provided by the training authority was one of the strategies employed by NEHAWU. The database was in the form of a register for the training authority which contained personal contact details for the HBC trainees. This was used in conjunction with phone banks. The organiser would call from the office and have some interviews with the HBC worker over the phone. I also made some attempts to have some interviews using this strategy after failing to get somebody to go out with on the field. Although the strategy saves time and is easier to use, it had a lot of demerits. The following phone conversation is a true testimony to this:

“ Wena , do you think she can resurrect from the dead ? Maria died long back in 2003. What do you want from her....“

Honestly I could not wait to face this confrontation but to politely say “ I’m sorry. I didn’t know about it“

The problem here was that I was making use of very old database which was compiled over five years ago. The training officer for HBC workers had attempted to organise these workers before NEHAWU’s efforts and had compiled the database as an affiliate association to the nurses‘ council (Interview with Lebo Matete 18.07.07) The use of phonebanks as a strategy can only be fruitful if the database is updated time and again. Some other problems with this strategy were that some HBC workers gave contact numbers for their siblings or spouses of which in most cases there was lack of co-operation from the other end. In other cases, some HBC workers provided non-existent numbers or would inform the union that they have long resigned from that field.

When probed on why they had resigned, most of them cited the problem of poor wages. I only managed to get hold of only six workers (20%) out of thirty. The problem I faced was that the respondents were reluctant to reveal information over the phone. Some had given the contact cell numbers of their siblings who were irrelevant to the study and I could not solicit any required information from them. Of the six, one of them was a man who indicated that he had given up HBC work because of the poor stipends.

Another problem was that of language as some of them would just bang their phone once I started communicating in English or would just respond “Wrong number“ so as to avoid me.

This prompted me to embark on actual field work for real face to face interviews. After highlighting the problems to Shireen, we later agreed that I go out rather

than operating from the office. She then arranged with the training officer from Lethukukanya to provide some HBC workers for me to go out with, which automatically involved the use of rank-and –file members.

4.9.2 Core groups

In its organising efforts, NEHAWU also made use of rank-and –file members. Lopez (2004) emphasises the need to make use of rank -and- file members as a useful tool to organising. This is also supported by Tait (2005) when she attributes the success of Poor Worker's Unions to the use of grassroot mobilising, which entail the use of general members other than union office bearers.

At the beginning of the year in February, some core groups were formed to assist with the co-ordination and running of the organising campaign of the project at grassroot level. Shireen described this strategy as a very useful one as it made it easier to locate HBC workers by making use of their colleagues on a one-on-one basis. The caregivers had to inform their colleagues about the union who in turn would visit the union or would learn more about the union through their training officer, as he was working hand in hand with the union. This would save the organiser's time because she would just request the area co-ordinator to organise and prepare for meetings whenever she wanted to address the caregivers.

However, the core group collapsed around May 2007 when attention was diverted to the big public service strike. Lack of communication and lack of resources to support the co-ordinators in terms of transport and telephones contributed mostly to the failure of the core group. Unfortunately, there was none among the interviwees who had been part of the first group. On the same issue of communication, one of the stakeholders involved in this project pointed out that lack of commitment on the union side actually demoralised the workers as they had no-one to turn to or to update them on the developments concerning the projects as he was quoted saying:

"At least it is a relief that you are here . People at NEHAWU are too slow and tend to lack some commitment which has demotivated these workers. Since you are around maybe you can push for more action because the union is the worker's only hope. From the organising efforts made so far, it is clear that the workers are ready to unionise" (Lindani 2007).

Lindani also revealed to me that these workers had attempted to organise themselves prior to NEHAWU's efforts which clearly demonstrated their eagerness to unionise. Shireen indicated that she has attempted to locate original core group members but this has proved fruitless such that there was need to re-establish another group which proved to be a huge hassle.

4.9.3 Resources (Financial / Human)

According to Lopez (2004), having enough resources is essential for organising purposes. Through participant observation, I have managed to note that in as far as the project on organising HBC workers had been put in place four years ago, no budget has been specifically set aside by the union for its smooth running. Contrary to the number of years of the database used by NEHAWU, it should be noted that the database was compiled by the training officer from Lethukukanya who had to pass it on to NEHAWU. Remember, NEHAWU had to rely on Lethukukanya records for any information pertaining to HBC workers since all the HBC workers had to pass through the training institution as trainees for HBC work. On the issue of resources, the study has revealed that lack of resources is also a contributory factor in crippling the progress of this organising project (see Cooper and Patmore 2007: Tait 2005: Lopez 2004).

In terms of human resources, no organisers have been specifically assigned to do organising for the project. One of the union officials indicated that there was a of lack of financial resources to hire a coordinator/ organiser specifically meant for this project. The study revealed that since this was a pilot, it was difficult to hire someone now because the results of the pilot might not be desirable for the

project to continue. In the case of failure to pursue the project placement for that extra member of staff would be difficult.

On the same issue as above, it is also difficult for Shireen to commit herself to the project full time as she has other responsibilities as the Social Development National Organiser. For instance, by the time I got to NEHAWU at the initial stage of the research, Shireen was actively involved in organising the nationwide public service strike popularly known as ‘Mama of all strikes‘ commanded by NEHAWU. Therefore, it meant a lack of commitment to the HBC organising project. This is also coupled with bureaucratic issues whereby organisers could not just be released from Gauteng province at any given time for this pilot project. According to one of the union officials it was only wise to release organisers when all had been set and when the project was now fully running in order to save both human and financial resources.

From observations made, it is clear that the project of HBC organising was started before mobilisation of enough resources. Also the need to organise HBC workers was only adopted as a resolution but with no clear specific plan or budget put in place. A union official admitted that a decision to organise HBC workers was adopted at a congress in 2004 but the union lacked some knowledge about the sector. According to her, it was resolved that a research about the sector be conducted.

In fact, the need to organise informal workers was called for by COSATU which is the mother body of which NEHAWU is an affiliate member. In response to this call, NEHAWU decided to embark on the organising project probably as a fantasy or political gymick or just to subscribe to COSATU’s ideology. It was also imperative for NEHAWU to organise these workers in response to the government policy to expand HBC as the demand for care work increased resulting in staff shortages in government hospitals (Shireen Samuel 05.10.07). Arguably, the project seems to be concentrated mainly on paper than in actual practice!

Based on participant observation, this study has revealed that commitment and the significance of the HBC project seemed to be low within NEHAWU. At some point, one of the union officials was claimed to have proposed that the project be put aside for a moment as no progress had been noted. The researcher had to intervene with recommendations that were forwarded to the National Executive Council (NEC). The fact is that only the union personnel for the organising department are committed to the project as they are working day out to see it progressing and running.

Again there seem to be less female voice in as much as decision-making within the union is concerned. The project could be supressed probably because it comprises mainly of women who are vulnerable and looked down upon in society. This divides the union as probably those who are gender blind would not see the need for these women to have union representation and see this as a waste of time and resources. On the other hand this project needs a strong woman or man who is gender sensitive to push forward the agenda. Other than discussing the progress of the project with union officials from the Organising and Servicing Centre (OSEC), I did not have an opportunity to chat or come across other union officials to discuss the project. A random check with other union officials from other departments revealed that most of them were not familiar with the project as one union member had to ask me:

“You said you are researching on HBC work, what does it have to do with NEHAWU? (Nkosi 2007).

However, an interview with one of the union officials revealed the significance of the project within the union. He indicated that in order for NEHAWU to represent the interest of the working class who fall under its jurisdiction, it had to consider the plight of HBC workers who needed union protection. To the union, as part of the restructuring taking place in the workplace, it was imperative for it as a COSATU affiliate to encompass atypical workers in their structures as a form of

stimulating and reviving the unions that had been weakened both numerically and politically by globalisation (union revitalisation). This therefore entailed developing viable organising strategies to recruit these workers. Additionally, on a longer term, this project would assist in improving public service delivery, help with job creation as part of the millenium goals! (NEHAWU 2007)

4.10 Union Organisers‘ opinion on organising HBC sector

Having highlighted the strategies employed by NEHAWU in organising HBC workers so far, it is very important to establish whether the strategies have been of any use or not. Again it is fundamental to mention the receptivity of these workers to NEHAWU’s efforts.

It is evident from observations made that, NEHAWU itself as a union sometimes seems to be sceptical about organising these workers due to legal implications. From the union’s view, organising these workers is a policy issue and entails channelling a vast amount of resources towards breaking the legal barriers and yet the members are not already contributing any subscriptions for servicing puporses. However, there was a suggestion to come up with a proposal for funding from donor communities other than just relying on the union’s budget.

When I asked about the receptivity of HBC workers to NEHAWU’s organising efforts so far Shireen Samuel had this to say:

“ Janet, I‘ m sure you have seen it yourself that these women are very promising and eager to unionise. Most of these women are vulnerable and have several grievances. For instance they need maternity protection and better wages of which they know that they can only achieve that through the union. In fact, the majority of our members comprises of women.“ (Shireen 05/10/07).

After posing a question of whether these women are able to take up leadership positions she stammered a little bit and retorted:

“ Er-e, of course a few of them take up leadership positions such as shop stewardship but in most cases this might come in conflict with family obligations you know societal expectations. Anyway, recruiting them as members is not a problem“ (Shireen 05/10/07).

The study has revealed that several factors aligned to the union have contributed to the organising project’s delay in ‘taking off‘. NEHAWU is still lacking in its commitment to pay attenton to the needs and interests of vulnerable workers, especially women. As it stands, NEHAWU’s commitment to organising HBC workers is still questionable as there are some possibilities of the union to drop off the project as indicated by one of the union officials during an informal chat. The major barrier to organising according to a union official interviewed, is legislation coupled with resources crisis. It was indicated that sourcing for grants or donor funding would need the union’s approval and this proves to be a hassle given the bureacratic red tape within the union. Had it not been for this bureaucracy, the project should have gotten huge funding from such donors like International Congress of Trade Unions. In terms of human resources, SEIU has pledged to send one of its organisers down to South Africa to assist with organising. On the other hand the project seems to have been imposed as has been revealed by the following statement extracted from the report on the NEHAWU/SEIU exchange program

“ In line with the need to organise HBC and CBC workers as agreed to in the 6th NEHAWU National Congress, OSEC has taken some important steps to implement this resolution“. (NEHAWU 2007:1).

The above statement indicates that there was a prior agreement that HBC workers had to be organised though the parties in agreement have not been revealed. This implies that whether or not OSEC members subscribed to the notion, they still had to fulfil the resolution.

The report also pointed out that NEHAWU was implementing the project in line with the 9th COSATU Congress (2006), which was calling for and encouraging its affiliate members to organise and embrace informal workers aligned to their trades. This according to COSATU, would assist to curb the negative effects of global forces that had weakened unions both politically and numerically (NEHAWU 2007:1). This notion is supported by Orr (2004) when she contends that

" This is the time for trade unions to take up joint campaigns and action with workers in the informal economy to build a movement that challenges rampant profiteering and exploitation and creates the possibility of a society that puts people first" (Orr 2004:40).

Indeed labour has been weakened by globalisation such that unions should find ways of sustaining themselves by embracing those retrenched workers who have no option but to find a net in the informal economy. Likewise, NEHAWU by implementing the organising project , could have taken a lead in responding to COSATU's pleas.

From another angle, the same report mentioned that NEHAWU was motivated by the fact that HBC workers had initially attempted to organise themselves without success before (NEHAWU 2007). NEHAWU could have highjacked and implemented this project to utilise the opportunity that had been created by the HBC workers themselves prior to the union's efforts.

On the issue of legislation posing as a barrier to the union's organising efforts, the current study has also revealed that there are several legal factors involved in terms of the South African Labour Relations. To begin with, Labour Law Ammendments around issues such as the definition of an employee, since employers have used loopholes in the law to disguise employment relationships (Orr 2004:42). Further there should be an extension of bargaining council

services to atypical workers. This entails the breaking of several barriers in terms of policy issues.

According to Steward Mashal, the HOD for OSEC the major policy issue is the Sectoral Determination which should peg the minimum wage for these workers. To, him it is important to know the wage figures so that the union is guaranteed of sustainable subscription relevent to service these caregivers. There is evidence from this notion that NEHAWU is keen to know the contributions these poor workers would bring to the union of which currently because of their erratic poor stipends these workers might fail to subscribe to the union. Moreover, the legalities involved in the whole process require huge amounts of money such that the union seems to be reluctant to draw upon resources from other sectors to fight for these workers rights.

The chapter has focused on the union constraints to and possibilities of organising as well as the strategies that NEHAWU has employed to organise HBC workers. A variety of constaints to organising have been noted with the major ones being legislation, resources as well as lack of commitment and poor communication. Strategies both proposed or implemented by NEHAWU include recruitments campaign, use of phonebanks, formation of core groups to assist with the coordination and running of the recruitment project. The merits and demerits of the strategies have also been noted. Having examined the union's role in the organising project, the next chapter shall look at the workers' position in the organising process.

Chapter 5: Data Presentation and Analysis : Workers - “Angels of Mercy

Anna’s weekly diary

“I wake up early in the morning around half past four and perform my household chores. Thereafter, I prepare breakfast for the family. It is my duty again to see that both my husband and two sons have a warm bath and dress up in clean ironed clothes before they leave for work and school. I remain behind to make sure that the utensils that have been used for breakfast are cleaned and the floor is smart before I leave for work at 6:30am. I have to walk for 20minutes to get to Clinic X . At exactly 7 o’clock , I should be in my supervisor’s office to log in and collect my T.B patients‘ drugs to take during home visits. But as soon as I get to my workplace headache, stress... starts as I ponder about my poor patients‘ welfare and the fact that it is now four months without having received my stipend. The stress is exacerbated by the fact that the director of my NGO is no where to be found. Some say she has run away and is now out of the country. Back home my husband sometimes scolds and shouts at me for wasting the family’s resources in a job that does not pay as I sometimes take some food stuffs to bring to my poor clients and I have to rely on him for taxi fares- no wonder I resort to walking sometimes. But anyway, only God knows and I do hope that one day he shall reward me. Above all I keep on coming to work because I love my job and my clients/ patients. At lunch time, I sit down with my colleagues , chat, share and console each other about our grievances as care givers. At four o’clock I knock off and walk back with one of my colleagues who lives in the same neighbourhood and is a single mother. When I think about her, I count myself lucky that at least I have my husband for financial support - what about her and the two children?. When I get home, I have to do all the household chores because my sons cannot do them. I wish I had a girl child to assist me! After preparing supper, I help the children with their home work. On Saturday I do thorough cleaning and all the weekly laundry. The following day, which is Sunday, I wake up early again to prepare for the church service as I am a christian! “.

Anna is a 39 years old female caregiver with secondary educational background. She has worked in the HBC sector as a community health worker (CHW) for six years under an NGO called RS. She receives a stipend of R1000 and works for eight hours for five days a week. When asked whether she had signed a contract Anna had to say:

"What is a contract? Do you mean a Memorandum of Understanding (MoU)? I am a volunteer and we (HBC workers) are not regarded as workers. Last year (2006) we were asked to sign a MoU but we refused as we did not agree with the contents of the document" (Anna 2007).

Anna demonstrated her knowledge and faith in a union and that she was eager to join a union. She pointed out that she was overwhelmed by NEHAWU' stance to assist and organise them like other workers. Again, she was motivated by the fact that she wanted legal representation through the union as she had just been unfairly dismissed from rendering her services at Clinic X under unclear allegations. To show her keeness she offered to assist me in locating other caregivers for the research within Orange Farm where she worked and lived. There I had to meet other caregivers – Febbie being one of them. Like Anna, Febbie had also been unfairly dismissed from Clinic X under allegations that she had awarded herself unlawful maternity leave.

5.1 Introduction

The previous chapter focused on union policy and strategies to organising HBC workers. The following chapter examines the workers' like Anna's side of the story. The themes in this chapter encompass conditions of employment, employers, working conditions, workers' attitude towards their work, gender and HBC work and the workers receptivity to the union's organising efforts.

5.2 HBC workers

Of the the twenty respondents interviewed, all of them (100%), are indigeneous South African women operating as voluntary caregivers. This brings out evidence that care work is principally carried out by women. Their age ranged from twenty –three (youngest) to forty –five (oldest). In terms of educational background, four (20%) received only primary education; fifteen (75%) attained secondary education whereas only one (5%) got educated up to matric level and was doing social auxillary work within the HBC sector. The number of years served as volunteers ranged between four and eight years. Five (25%) had served for four years; three (15%) had served for five years; ten (50%) for six years; and only one (1%) had served for seven and eight years respectively. Fifteen respondents received a stipend of R1000 each per month; four (20%) received R620 and finally, one (5%) received R500 per month. All of them (100%) had not signed a job contract and all again (100%) were willing to join NEHAWU as they managed to sign up membership forms provided.

[Table 2 gives a summary of these charateristics]

Table 2: Background Information of 20 respondents from South Africa

Name	Age	Sex	Level of education	Employment experience	Employer	Amount of stipend	Contract signed	Interest in union	Job tittle / duties	Working hours	
Anna	39	F	sec	6	R S	R1000	None	Yes	CHW	8	
Febbie	36	F	sec	6	DS	R1000	„	„	VCT	8	
Sandra	32	F	Matric	5	Lut	R620	„	„	PMCT	6	
Grace	23	F	sec	4	Bok	R500	„	„	OVC	8	
Fatima	32	F	sec	4	Lut	R620	„	„	CHW	6	
Thandi	37	F	sec	6	RS	R1000	„	„	PMCT	8	
Nonsi	31	F	sec	4	RS	R1000	„	„	OVC	8	
Lindiwe	32	F	Pri	6	DS	R1000	„	„	CHW	8	
Thamary	28	F	sec	6	Lut	R620	„	„	CHW	6	
Luthi	26	F	sec	4	Siya	R1000	„	„	PMCT	8	
Lebo	30	F	sec	5	Thali	R1000	„	„	CHW	8	
Memo	45	F	Pri	8	Lut	R620	„	„	OVC	8	
Thabile	35	F	sec	6	Bani	R1000	„	„	S A	8	
Tinyiko	34	F	sec	5	Ditho	R1000	„	„	PMCT	8	
Tabeth	42	F	Pri	7	RS	R1000	„	„	CHW	8	
Lena	29	F	Sec	4	DS	R1000	„	„	PMCT	8	
Annie	31	F	Pri	6	Thali	R1000	„	„	OVC	8	
Sharon	32	F	Sec	5	Siya	R1000	„	„	PMCT	8	
Tudu	33	F	Sec	6	DS	R1000	„	„	CHW	8	
Morang	35	F	Sec	6	Thali	R1000	„	„	SA	8	

5.2.1 *Febbie*

Thirty six years old Febbie is a caregiver with secondary education just like Anna. She has worked as a Voluntary, Counseling and Testing (VCT) counsellor for an NGO called DS and has six years experience. She claims that she did not sign any contract and like Anna she could not subscribe to the contents of the MoU. She works for eight hours a day for five days a week and receives a stipend of R1000 but had this to say:

" The stipend of R1000 is too little for the work that I do and on top of that the payments are unreliable. I was last paid three months ago and received nothing while I was on maternity leave. Look here, when you are pregnant enough financial support is needed for medical check- ups and to buy preparation for the baby. Thank God I had my husband to support me. After returning back from maternity, Diana (the hospital matron) had to unfairly dismiss me claiming that I did not comply with the MoU regulations and exceeded my leave days. After getting advice from our HBC instructor Lindani, I consulted the DoH and the Department of Labour (DoL) on the matter but nothing was solved as I had to be referred back to my employer (NGO) who denied being my employer and had to refer me back to the clinic matron. During this struggle, I got information about NEHAWU's efforts to organise and represent HBC workers. I was so glad and hoped that very soon my troubles will be over. I hope to participate fully in the struggle until we are recognised as workers and have our issues taken seriously. Feel free to contact me any time". Thereafter, Febbie had to join me and Anna to address workers at Clinic X[5].

5.2.2 Memo

Among the twenty HBC workers interviewed was a forty five years old female caregiver called Memo. She has worked for eight years specialising with

[5] Both Anna's and Febbie's cases have been forwarded to NEHAWU's legal department as test cases. Though these workers are not yet members to be serviced, the two cases would act as evidence in the fight for these workers rights.

orphaned and vulnerable children (OVC) programmes as a volunteer under an NGO named Lut. She claims that she did not sign any contract since she started operating as a caregiver. She receives a stipend of R620 a month and like the other two cases, the payments are not consistent. Memo complains that as a volunteer she is expected to work for only four hours but it is not the case at Clinic X as she lamented that:

" When we started working, we were informed that volunteers are supposed to render their services for a maximum of four hours a day. But here at Clinic X we are expected to start work at exactly seven o'clock in the morning and knock off at four o'clock. After all, we are working for nothing. I last got my stipend three months ago. Sometimes I cannot afford to send my children to school and I fear that some might not go for secondary school just like me. I only did primary education and dropped out of school because of poverty. I am a single mother and therefore have to rely on child grants, selling of fruits and vegetables so as to subsidise my salary. Sometimes I have to walk to work and if I take a taxi it means compromising my children's welfare" (Memo 2007).

When asked about whether she knew about a union, she indicated that she had little knowledge from her previous job as a cleaner. She believed that joining a union would assist in solving her problems as a worker as she was quoted saying:

"I am ready to join NEHAWU at any time . But e-er two months ago people from HOSPERSA came and I joined with other colleagues. What then should I do? Can I join two unions at the same time. (Memo 2007).

In response to the question as a researcher and trade union activist, I advised her that she has freedom of association and that the choice was hers. What I was only interested in was the fact that they (HBC workers) get union representation and recognition as workers.

The three above illustrations from Anna, Febbie and Memo are some of the examples of stories told by HBC workers interviewed. As indicated in the methodology section, the researcher was dealing with a group of workers with almost the same grievances and stories. Therefore the researcher selected those examples which are richer in information. Other care givers' background information is given in the above table. Together the information gathered helped me to come up with the following themes: conditions of employment; working conditions; the workers' attitude towards their work; gender and HBC work and finally workers' receptivity to union's efforts. These shall be discussed in the following section.

5.3 Conditions of Employment

As indicated in the table above, all caregivers interviewed are employed by NGOs whose names are given[6]. The NGOs are funded by the Department of Health under the EPWP project and in return subcontract caregivers as volunteers to execute care work in the homes, both private and public health institutions such as clinics and hospitals as well as private mining companies such as Anglo Platinum. Again all the workers indicated that they did not sign any job contracts but were required to sign a Memorandum of Understanding (MOU) document. The MOU included the following items: recruitment requirements; job description for volunteers; information on stipend payments; performance review; work schedule which included such aspects like working days and working hours, punctuality, public holidays, annual leave, sick leave and compassionate leave. Also included was information and procedures that pertained to resignation and disciplinary procedures. [see Appendix A.]

[6] Pseudonyms have been used to protect the workers. Exposing out the names of the NGOs might be detrimental to the workers security as there are some sensitive issues involved.

The employment conditions are appalling as these caregivers are prone to dismissal at any given time. Despite the fact that these workers are volunteers, they are dismissed at any time for no apparent reason as indicated in Anna and Febbie's illustrations above. The study also revealed that HBC workers are constantly threatened with dismissal if they complain about their wages or any other unfair working conditions. A good example that was given during a session with these workers was that in (2007) they were all threatened with dismissal after they (caregivers) had organised an unlawful strike when they had failed to get their stipends on time. They however, felt the punch when they learnt about Anna and Febbie' dismissal such that when I asked whether they wanted to participate in a demonstration they expressed mixed sentiments as some said:

"We are ready because we want to fight our own war. If we can't do it, who will do it for us?" (Group A :2007).But others were more worried: "The people from the department of health have threatened to despatch some police officers to beat us up whenever we threaten to strike. So we don't want to die and leave our families alone". (Group B :2007)

From the above statements it is clear that even if these caregivers share the same grievances, they somehow differ in terms of their militancy. Though they have solidarity as demonstrated by the term "we" in their responses they have differences grounded on religion as well. For instance some say that they are christians and are supposed to be abide by chrisianity doctrine such that they believe strikes are destructive and interfer with peace.

These workers have a lot of grievances related to gender needs. Most of them are still of child bearing age such that they emphasised the need for maternity leave and maternity protection. They demanded that they need reliable wages during pregnancy for the purchase of preparation for the coming baby as not all of them had partners to support them. In terms of daily general needs as private sphere operators and responsible authorities, these workers also emphasised

the need for them to have improved wages so that they are able to keep up with inflation and buy adequate family provisions for daily use as one of them was quoted saying:

“Everyday I come to work but I have to struggle to buy food to prepare meals for my family before I leave. My husband does not care but just wants to see food on the table. Sometimes I leave my children without food to eat and to take to school. Please people from NEHAWU help us so that we get better stipends enough for buying food and clothes for our families and to pay rent, water and electricity“ (Sandra 2007).

5.4 Employers

These workers expressed much fear in their employers as well as officials from the Department of Health. Some were unwilling to pour out their grievances for fear of “sellouts“ who would betray them to these officials. Some HBC workers had already been dismissed from rendering their services which exacerbated this fear. This notion is in line with Lopez 2004 whereby he indicated that workers own lived experience may make them unreceptive to unions. After realising that they could be dismissed at any time, some HBC workers actually expressed some fear when I first talked to them. Some could not express themselves freely fearing that probably there could be sell outs among themselves. One of them had to ask:

“Did you ask for permission to talk to us from the matron? Last time we were harassed by the owner of our organisation after speaking to people from Union X and the name of the clinic appeared in the newspaper. We were then threatened with dismissal“. (Lizy 28/11/07).

Another finding is that these workers are employed by formal institutions such as Department of Health (DoH) NGOs, clinics, both public and private hospitals or large private companies especially mining companies like Anglo-Platinum, Department of Social Development, EPWP- different government departments and municipalities (NEHAWU report 2007). But unfortunately most of these workers seem not to know their employer as highlighted by one of the HBC workers who had just been dismissed during an interview :

" We don't know our employer. If we go to the clinic management they say we don't know you, we only know Patricia (the NGO director). If you go to her she would refer you to the DoH. The people that side are scary and you can't approach them". (Lerato 2007 HBC worker).

All the twenty interviewees expressed ignorance as to who exactly their employer was. The only information that they had was that the NGOs who had subcontracted them as caregivers were responsible for paying out their cheques (stipends).

On another note, one of the stakeholders involved from Lethukukanya indicated that a certain union named HOSPERSA began organising these workers after they had learnt about NEHAWU's efforts. Rivalry , according to Cooper and Patmore (2007) can create confusion and divide the workers politically as confirmed by one of the HBC workers during an interview:

" We are now confused as to which union to join. Recently, people from Horspiesa came and we joined. So are we allowed to join two unions at a time because we want to join NEHAWU as well?" (Sibo 27/11/07).

After pointing out that NEHAWU was "too slow" in this project, Lebo advised that NEHAWU should increase its velocity or else there was the danger of being overtaken in the long-run as it is clearly indicated in the above statement

that the workers are “too desperate to grab anything that comes along to solve their grievances“

5.5 Working Conditions

5.5.1 Stipends

As indicated in the table above, the workers salaries range from R500 –R1000 per month. Of the twenty interviewed only one (5%) received R500; four –(20%) received R620 and the majority fifteen (75%) received R1000. The stipends received are dependent on the NGO that one works for. There is however, need to check on whether these NGO’s are also receiving different amount of funds from the DoH. With regard to the stipend issue, the study has also revealed that the stipend payments are erratic. When I interviewed them, the caregivers indicated that it was now three months since they got their last batch of stipend. This anomally can be blamed on the MOU’s stance on the issue of stipends where it is clearly indicated that

“ Volunteers stipends will be paid on the last day of each month or whichever date agreed upon by the paying organisation“ (MOU 2006:4).

With regard to this, even though NGOs are funded by the same department they are independent on the way they make use and dispatch their funds, the negative consequences of which are felt by the caregivers.

The study has also revealed some fraudlent dealings that must be taking place as one NGO –DS is just operating on paper but not in practice. The caregivers from this NGO reiterated that they cannot locate their director and some claim that she has bought a very beautiful house within the “poshy“ suburbs of Johannesburg whereas some say she has left the country but funds are believed to be still pouring into her account. The workers are just hopeless as they do not

know who to approach. When asked why they are still coming to work even though, the caregivers sympathetically answered:

“ We love our job and our clients and we still have hope that we will still get our stipends one day“ (Caregivers Group B 2007)

But one of them cited the reason that she cannot at this point’s time give up her job and stay at home as she regard this as her profession and part of her. Efforts to contact the director’s sister were fruitless as her mobile phone number always indicated that it was unavailable.

5.5.2 Working hours and duties

In terms of working hours, caregivers are expected to render their duties for a maximum period of four hours but according to this study most of the caregivers operate for about six to eight hours. Of the twenty interviewees, seventeen (85%) worked for eight hours whereas three (15%) worked for six hours. Their duties range from community health workers (CHW), prevention of mother to child treatment counsellors (PMCT), voluntary counselling and testing (VCT), orphaned and vulnerable children (OVC) counselling and social auxillary work (SA). Of those interviewed, seven (35%) were CHW ; six (30%) were PMCT; one (5%) did VCT; four (20%) were OVC counsellors and finally two (10%) were social auxillary workers.

With regard to working experience, from those interviewed the range is between four and eight years. Five (25%) had worked for four years; four (20%) had worked for five years; nine (45%) had worked for six years; only one (5%) had worked for seven and eight years respectively. Despite the pre-assumption of the literature review that this sector has a high rate of turnover, from the current research data this is not so. Most of them are retained and consoled by the fact that they are gaining experience and hope to find themselves in the formal mainstream of the health delivery system one day (see Moser 1989) This notion

has been shared by almost all the caregivers interviewed as most of them were quoted saying:

“ We hope to be nursing sisters one day. But the problem is that they train us but do not give us certificates because they think that we can run away and join the private sector or secure places as nurse aides or nurse trainees“ (Caregivers 2007).

However, my interview with these workers does not guarantee the fact that there is no turnover in this sector. There is evidence from one of the strategies employed by the union to try and locate these HBC workers – use of ‘phone banks‘ whereby some of those contacted indicated that they were no long performing care work.

5.6 Workplace Relations

In terms of supervision, the workers interviewed work under the matron of the clinic of which they have one of them who is also a caregiver to supervise them. But ironically the matron does not want to involve herself with stipend issues or any other grievances. At seven o’clock every morning, they assemble at the supervisor’s office to collect drugs and medication to take to their T.B/AIDS patients in the homes. When asked about their relationship with other workers within the clinic such as nurses, pharmacist or cleaners, they pointed out that some of the nursing sisters are helpful enough and they were very supportive and had actually enlightened them about joining NEHAWU. Nonetheless , there are those who have a negative attitude towards these workers. For example one of the caregivers, an elderly woman had to narrate her nasty experience with one of the nursing staff members at Clinic X :

“ I came to work with a swollen tooth hoping to receive treatment as a staff member. So I had to go in front of the queue so as to be served first and resume my duties as I am caregiver at the same clinic. But I was surprised to hear the

nursing sister shouting at me to go back and join the queue as I was interferring with her work. The nursing sister also added that she was in charge in that room“ (Memo 2007).

I also picked up that there was much tension between caregivers and lower rank nursing staff members as several undocumented stories were highlighted to me. But a chat with the matron during one of the visits revealed that she was sincere and really appreciated these workers services as she was quoted saying:

“ I know that these people do a lot of work and really appreciate it but their wages are very poor. I really support your initiative to organise them. You are free to address them BUT you cannot take any photographs whilst you are within the government premises because I will be accountable for that if anything is published“ (Matron Siphelani 28/11/07).

The above mentioned matron from Clinic Z was so co-operative. She demonstrated her appreciation for the job that is carried out by these ‚angels of mercy‘ on a daily basis.

It is clear that the professional nurses symphathise with the plight of HBC workers. The above mentioned matron gave us enough time to address these workers despite the fact that they were supposed to be busy at work. I learnt from one of the HBC workers that some of the professional nurses were the ones who were actually encouraging them to join the union for the solutions to their grievances.

5.7 Workers‘ constraints

A few barriers were experienced with the HBC workers themselves. Most of them were so glad and receptive to NEHAWU’s efforts due to their grievances. For instance, when we visited one of the clinics at Orange Farm, the HBC workers demonstrated some interest and managed to immedately organise

themselves. After addressing them and sensitising them about the union all of them managed to sign up.

The major problem faced was that they were quite fragmented geographically and some of them perform their duties in homes (home visits). Here they operate behind closed doors usually in isolation with closed personal contacts just like domestic workers as contended by Ally 2005, which makes it difficult to be noticed or to located. We later resorted to catching them early in the morning at their NGOs command centres where they converge to be allocated daily obligations before being dispatched to different homes.

Again, it was fortunate that the union had established some close links with the training authority for HBC workers-Lethukukanya. The idea was a briliant one, very relevant and important for easier location and identification of HBC workers. Lethukukanya had to provide database or contact lists for HBC workers since they all had to pass through the organisation for training purposes.

On a lighter note, turnover is another negative feature found among these workers (Lopez 2004) The observation was made during initial attempts to contact these workers using "phone banks" as a strategy. When asked about why they had decided to quit, most of them cited the problem of poor remunerations, inconsistency in payment, and lack of benefits. Though Marais' (2005) indicates that HBC kits are being provided by the government departments or funded by donors, the current study revealed that these workers are operating under risky conditions as they do not have protective material to use when carrying out their work. These workers have several grievances such as no access to maternity leave, operating without protective clothing as some are working with T.B patients, no uniform allowances and yet they are required to dress professionally like the professional nurses and are not awarded transport allowances. Most of them have to travel a long way to get to their workplaces as one of them lamented:

“I don’t know where they think we have to get the money from to come to work. I have to board two taxis to get here. At home, I leave the children suffering as I sacrifice to come to work. It is now three months since I last got my stipend. This stomach needs food (she then holds her stomach in a very symphathetic way) Please people from NEHAWU help us. Working for eight years for nothing is not a joke“ (Memo 08/10/07).

The above quotation demonstrates that these workers sometimes have to sacrifice their own resources and family welfare at the expense of their clients. Due to emotions some of them even pointed out that they sometimes have to take their own children’s food to feed their poor clients even though they themselves get nothing. This is what England (2005) coins labour of love as these workers are performing the work out of love. On the other hand, Marais (2005:65) refers to it as “the poor subsidising the poor“ as most of these caregivers, according to the research also come from poor families.

5.8 Workers‘ attitude towards their work

The study has revealed that these workers have mixed feelings towards their work as they have engaged in this type of work for several reasons. From the interviews, there are those who have decided to do so out of love; then some as a means of earning a livilihood whereas others hope to gain experience and get promoted as professional nurses one day. Despite their differences, these workers share one common grievance- the need for recognition as one of them specifically pointed it out during an interview:

“ We need recognition for the work that we do.They don’t regard us as workers but just regard us as volunteers. We are always threatened with dismissal whenever we try to complain about unfair treatment or poor wages. But how come they fire volunteers who actually volunteer to render their services. The

thing is that these people are hiding something from us . But any way there is nothing we can do for even though they illtreat us we cannot leave our patients for the sake of money " (Sthabile 2007).

The above quote speaks to their understanding of their work.They are forced to accept their status as volunteers or atypical workers and automatically operate informally without signing a job contract. Most of the workers interviewed shared the same sentiments. It seems as if some are now emotionally attached to their clients at the expense of their own families as one of them an old lady indicated

" What else can I do? Of course I am working for nothing but I can't leave my patients to suffer because they need my services. God will reward me one day" (Memo 2007).

Of the twenty interviewed, twelve revealed the fact that they entered this sector with the hope of gaining experience and enter the formal health delivery system at some point (see Moser 1989). These workers admitted that the government gives them access to training but does not award them certificates in fear that they might desert the sector.. The oldest in the service has served for fifteen years. It is a fact that not all of the HBC workers entered the sector for the above mentioned reason. Of the twenty interviewed, six indicated that they engaged in HBC work as a way of earning a livilihood and are so disappointed that the job does not pay (see Chen 2005). They therefore have to subsidise the little stipend by engaging in other informal economic activities such as selling fruits and vegetables [see Memo's story]. Only two elderly HBC workers indicated that they were doing HBC work for the love of their patients and also pointed out the moral aspect of care work as one was quoted saying:

"I do it out of love for my patients. I can't just watch people die. The bible says we must help our neighbours just like the Good Samaritan. Every time I go to church, I also pray for my sick clients and orphans. Nobody can reward me more

than God and even if I don't get the reward now here on earth, I will get it in heaven" (Tabeth 2007).

The above quotation demonstrates that HBC work is both extrinsically and intrinsically motivated. Tabeth's love (intrinsic motivation) and the moral aspect that God rewards those who do good (extrinsic motivation) drives her to perform HBC work even if she does not get any material things such as money in return for her services.

Grace indicated that she decided to engage in care work as a volunteer after her brother had died of AIDS. Although she indicated that she passed her secondary school but failed to get a place for training as a nurse, Grace just like Tabeth has both intrinsic and extrinsic motives driving her as she was quoted saying:

"When my brother was sick ,it seemed like some family members were shunning away from him. This community health worker - Mercy would come every morning to bath him, feed, administer drugs on him and counsel both my brother and family members. This struck me the most because we seemed not to care about our own relative but an alien had to sacrifice her time and effort on my brother. After learning more about this worker I decided that I should also join as a volunteer to assist sick members of the community. I also hoped to make a career out of this as I had passed my secondary education. Mercy had also informed me that if I started as a volunteer and gain experience then my chances of training as a professional nurse one day were high. I then got 69 days training immeditely" (Grace 2007).

The two above quotations reveal what England (2005) referred to as "Labour of Love". In this case care work is done mainly for the sake of love for the sick family members or other or community members. Care givers become emotionally attached to their clients such that they forget about their poor wages or the fact that they are not paid at all. When asked about how they felt when

they realised that HBC work does not pay, both Tabeth and Grace pointed out that they cannot leave their patients to suffer for the sake of money as life is more precious and cannot be restored back once it gets lost.

On another note, all the interviewees demonstrated some fear for their own health because of their working conditions. The study has revealed that these caregivers are exposed to several health hazards as they do not have protective clothing to wear whilst carrying out their duties. Most of them are treating T.B. patients under the Direct Observation treatment popularly known as DOT. Tuberculosis is a very contagious disease which can easily be transferred from one individual to another. One HBC worker mentioned that sometimes some of the patients spit at them whilst they are administering mouth wash on them which is very risky. This is shocking such that I asked her whether the patients do it deliberately or unintentionally. She had this to say:

“Oh-o no, they do it out of pain. How could they be cruel to those people who are helping them? The solution used for mouth wash is so bitter“ (Lindiwe 2007).

On the same issue as above, one of the interviewees, Thamary claims that she once contracted T.B from her job and had to be on treatment for some time. When asked why she had to come back again after getting well she indicated that she was just a single mother who had no any other source of earning a livilihood for her and her daughter. She also hoped that maybe one day she could secure a place as a professional nurse as she had passed her secondary education. In the same vein when all interviewees were asked about why they still engage in HBC work and yet their health is at risk, some included the moral aspect again by saying:

“ We go to church and we believe that God will always take care of us. He cannot let us suffer twice from poor wages and make us get sick again after we make efforts to help his own souls“ (HBC workers)

Some married HBC workers reported that they always have marital conflicts with their husbands on the health isssue. On the other hand some claim that their husbands think that they are neglecting their social obligations in the family as mothers to their own children and carers for their husbands because of home based care work. They no longer have enough time with their families even during weekends for those who do home- visits. One cargiver (Fatima) had to say :

“My husband does not want me to go anywhere over the weekends as he always wants to be with me. The unfortunate thing is that I have to take drugs to my clients. So on Saturday I wake up very early in the morning when he is still fast asleep and pretend as if I am doing household chores and shopping for breakfast. I make sure that I pop around the neighbourhood so that I take drugs to my clients. It is easier for me on Sundays because I carry the drugs as I go to church and passby on my way“ (Fatima 2007).

5.9 Gender and HBC work

The study has revealed that HBC work is principally carried out by women. Of the twenty interviwees, all of them (100%) were women. Though those interviewed claim that there are also male caregivers, efforts to get into contact with any of them in all the eight visits that the researcher made to Orange Farm were fruitless. The fact that women predominate in this sector could be a perpetuation of the patriarchal system and societal stereotypes that care work should be carried out by women. It seems like men would be crossing boundaries when they decide to engage in female jobs such as care work such that those males who decide to do so are despised just like their female counterparts. This is supported by England (2005) in her Devaluation framework

whereby she argues that care work is devalued in society and less paid as wage work because it is done by women. Likewise those men who engage in it will also suffer a wage penalty.

From the research findings, some of the interviewees indicated that they did not have any problems when carrying out their duties because HBC work is just a replication of that ordinary household work that they are used to doing in their own homes such as bathing their children, cooking and carrying babies on their backs. Unfortunately, I did not manage to get hold of the male caregivers so as to get the other side of the story. HBC work needs patience as well as tolerance as indicated by one of the caregivers when asked about how she felt about her own job. Her response was:

“This job is not easy. One has to be patient, warm hearted and tolerant like us women. I don’t think men will be able to wait for this long for their stipends otherwise you would hear that somebody has been killed“ (referring to the NGO’s director) (Nonsi 2007).

Another caregiver retorted to the same question in this way:

“For me to be able to help these patients whole-heartedly I have to forget all about money and work as if I am performing household chores in my home because to me it is just the same. The only difference is that you will be carrying an adult other than a baby on your back! (she then laughs). Anyway it is better than the household work that I do in the home“. (Tinyiko 2007).

From the above quotations, it is clear that women themselves like the rest of the society tend to devalue care work because they think it is work that they ought to do in their homes. To women like Tinyiko it is better to go out to other homes and perform care work and get a few rands no matter how much other working in their own home without getting paid. This notion coupled with emotions make

HBC workers tolerate the poor stipends and likewise pose as constraints to organising. They do not realise the importance of the social reproductive work they do (Bakker 2003). The capitalists (NGOs) in return exploit their lack of knowledge and gain from the grants they get from the Department of Health (DoH), that are meant to benefit these workers.

There are some who acknowledge the fact that care work is devalued in society because it is carried out by women. One interviewee stated this when she responded to one of my probing questions on what she thinks could be the reason why they are getting little stipends. Here is Lena's response:

" I think these people think we have husbands to take care of us and our stipends are only meant to boost up the family income. What they do not know is that not all of us have husbands or partners to take care of us. Even those with husbands should not always rely on them for everything. We have to be independent as women. The reason why they pay us less is because we are women! They know men can toyi-toyi (demonstrate) anytime but women alone do not think about that" (Morang 2007).

The above statement reveals some links between patriarchy and capitalism. As capitalists employ women workers they usually make use of the patriarchal system whereby men are expected to be the families' breadwinners what Elson and Catagay (2000) refer to as male-breadwinner biase. What these capitalists tend to forget is that when women engage in paid work they are doing it as independent individuals without any male attachments. In her statement, Morang has also revealed the aspect of millitance. She revealed one societal stereotype that men are more militant than women. This could be the reason why HBC workers suffer silently and are unnoticeable- how could they be noticed when they do not have the courage to get onto the streets to demonstrate against unfair treatment..

On the other hand men also believe that HBC work is supposed to be done by women to subsidise their husbands‘ income as one of them was quoted in a telephonic interview saying:

“ How could a family man like me get R1000 a month or sometimes even failed to get anything at all and yet I need to pay rent, buy food for the family, pay school fees for my children and of course my beer. I think this job is only suitable for women as they are patient and tolerant. After all they have husbands to support them“ (Themba 2007).

The above quotation is a true reflection of a perpertuation of the patriarchal system hence the male breadwinner bias as proposed by Elson and Catagay (2000). Women are viewed as assistants in the homes such that they are not always entitled to formal jobs. It is normal to society to find women engaging in informal income-generating projects such as selling fruits and vegetables. But considering the new global gender order where there has been an increase in women employment , it is no longer relevent to regard care work or other tasks in terms of gender (Bakker and Gill 2003). In support of this notion, Robinson (2006) argues that everyone is a caregiver and a care receiver. As women engage in public work, those men who remain in the home will have to perform household duties including care work. The HIV and AIDS pandemic has also exacerbated the need for performance of care work by both sexes.

5.10 Organisable? / Workers views on the union

These workers are keen and ripe for unionisation such that they were only waiting for a union to embrace them. Prior to NEHAWU’s organising efforts, these workers had taken the initiative to attempt to organise themselves as an association. They were therefore very receptive to the notion of having NEHAWU to represent them as a union. It was so easy to come up with the initial core group as the workers were so eager and enthusiastic when they heard about this development through Lethukukanya their training organisation.

Thereafter, the message had to be spread by word of mouth such that whenever the HBC workers learnt about the union, they would make an effort to get in contact. Most of them were motivated to do so because of their grievances. When I first got in contact with them, they were more than ready to share their sad stories with me as indicated in the above discussions. Due to lack of enough time, I had to asssign them to jot down their stories andforward them to me later.

Iniatially, I came in contact with one of them and she had to direct me to her colleagues. Within two days, thirty two HBC workers (all of them women) had already signed up. Constant follow –up visits were done and by the time this report was written, fifty two members had signed up. However, constant contact with these workers after they signed up left me with so many questions to answer. Most of them wanted to know when the union officials were coming to address them because I clearly indicated to them that I was just a researcher and that union officials would come some other time to address them.This gave me a clear picture of which sex is mainly involved in care work and also the fact that these women were eager to join the union therefore dismissing pre-conceived stereotypes that female jobs are difficult to organise (see Cobble 1996). However one HBC worker showed her anxiety as to whether NEHAWU would take their issues as HBC workers seriously when she asked me:

"Are you here to help us or you just want to make money out of us? I am saying this because people always come and address us and leave for good after they get whatever they intended to have". (Tudu 2007).

The above statement justifies the reason why intially some HBC workers seemed reluctant to co-operate as not every caregiver that I got in contact with was ready to be interviewed. Some even asked whether they were to pay any subscriptions fearing that they might be robbed of their few rands (see webster 2005: Cooper and Patmore 2007). From this I got to know that officials from

HOSPERSA had already addressed them and made them pay twenty five rands as joining fees. When asked about whether they had gotten any assistance or communication from HOSPERSA, the interviewees indicated that since they paid up their membership fees none of the officials had come back to them.

5.11 Conclusion

This chapter focused on the workers as stakeholders in NEHAWU's organising project. Several points and stories have come up during interviews with these caregivers. Of note here is the fact that most of them are doing care work for the sake of money other than out of love only. The HBC workers demonstrated their willingness to join NEHAWU so that their working conditions are improved. The research has also revealed the aspect of internalised oppression by women themselves as they feel that care work is their responsibility in the home (Makwavarara 2001), though they disagree with the stipends they are awarded for doing the work. Some of them have also revealed the moral aspect of performing care work, whereby they view God as awarding them the overall incentives for doing good to his people who are in need.

From the above discussion, it is clear that women are very promising and eager to unionise depending on the strategies employed. Through mobilising them around gender issues, HBC workers have demonstrated a positive response torwards unionising. Despite the societal expectations that care work is a women issue of which they (women) have clearly indicated in some of the interviews that they are performing care work as paid work, that is as a source of earning a living. Societal stereotypes and expectations did not interfere with HBC workers decisions to sign up as prospective members for NEHAWU as has been indicated. From observations made, if completely organised these workers have the potential to perform wonders as female as they are!.

Chapter 6 Conclusions and Recommendations

6.1 Introduction

This chapter presents the conclusions of the research on challenges in organising informal workers in the form of HBC work in South Africa with a focus on HBC workers living in Johannesburg area. Some suggestions and recommendations for further academic research and policies are also proposed.

This explorative qualitative research systematically investigated the constraints to and opportunities for organising HBC workers in a post – apartheid South Africa. The study explored the organising strategies employed by NEHAWU in organising care givers and also examined the receptivity of HBC workers to the union's efforts. Further, the link between gender and organising outcomes was also unravelled.

From a standpoint of organising as a theoretical tool for analysis, this research developed an understanding of the new forms of organising within a mobile and precarious workforce as well as possible strategies that could be used. The findings indicate that the union itself could be the major obstacle to successful organising campaigns. According to Lopez (2004) unions can hinder organising through bureaucracy, lack of commitment, lack of enough resources and this has been confirmed in this study. To a smaller extent, the workers might also pose some hindrances as pointed out by Cooper and Patmore (2007). The employers side was not examined fully as the researcher could not get into direct contact with any of them due to some problems highlighted in the findings section.

The aspect of gender was also manifested as another barrier to organising as women constitute the majority of care givers. Societal stereotypes that view care work as a woman's responsibility have contributed to the devalution of HBC

work as a form of paid work (England 2005). It is a pity that HBC work's significance has been undermined even in this era of a high prevalence of HIV/AIDS whereby women are the mostly burdened with the responsibility of taking care of the sick members of families and communities. Likewise, this line of thinking might also be felt within trade unions. NEHAWU's reluctance to take off on this project as fast as possible could be attributed to the above mentioned notion of devaluation and therefore the lack of male voice to push the agenda forward.

Through an anaysis of NEHAWU's organising strategies, this study contributes to the field of union organising and provides possible policy recommendations to trade unions, NGOs or civil society groups in responding to challenges faced by unions due to inevitable global forces such as workplace restructuring or downsizing which would consequently lead to a decline in membership. The research argues that integrating informal workers (HBC workers in this case) into the formal mainstream would assist in union revitalisation.

In accordance with the literature review in this study, there are various constraints to organising but opportunities are also available for organising. The literature also reveals that there is an undeniable link between formal and informal economies. The literature further points out that whilst HBC work plays a very important role in post apartheid South Africa which has been ravaged by the HIV/AIDS pandemic, it is still devalued within society since it is mainly carried out by women. The contribution of this study is its new approach of looking at this phenomenon from the standpoint of organising.

It is a fact that labour has been weakened due to globalisation and this has compelled unions to come up with strategic solutions to the problem. NEHAWU has therefore taken a plausable initiative to organise HBC workers who at the moment are operating as volunteers. By embracing these atypical workers, there is hope that NEHAWU's membership would be boosted.

In the subsequent section, the research addresses the implications of findings as discussed in Chapters 4 and 5 for policy and practices vis-a-vis NEHAWU's HBC organising campaign. Recommendations as to how policy makers and union officials (NEHAWU) can facilitate successful organising campaigns are proposed. Additionally, suggestions arising from questions that emerged from this study for further research are highlighted.

6.2 Conclusions

The current study was designed to investigate the constraints to and opportunities for organising HBC workers with the innovation of effective strategies relevant to the newly emergent workforce. It has been proved that it is possible to organise HBC workers who are predominantly women. HBC workers demonstrated that they were more than ready to unionise as evidenced by their willingness to sign up membership forms for NEHAWU. This demistifies the preconceived notion as pointed out by Cobble (1996) that unions are reluctant to organise female jobs as they think that they (female jobs) are difficult to organise. In line with this, Mulima (2001) also argues that women are perceived by employers as less competitive workers because of their childcare responsibilities and likewise unions might also be reluctant to organise female jobs because of the same perception.

However, the research has confirmed Lopez' (2004) findings that sometimes unions pose as barriers to organising. In as much as there is a need for a shift from traditional ways of organising, equally important also is the need for employers to bargain with for this sector. Strategies could be effective but without a bargaining partner, NEHAWU's efforts and resources would be wasted. Amble resources to 'fuel' the organising campaign should be mobilized. From a gender perspective, the study has revealed that mobilizing and organising HBC workers around gender needs such as maternity

leave/protection could prove effective depending on the majority of workers per sector or trade.

6.3 Recommendations

1. There is need to have a project co-ordinator specifically meant to run the project. From observations made, it is clear that the current organiser is overburdened as she has other responsibilities within her branch. The project is a labour intensive one such that if NEHAWU is to be successful in its organising and recruitment drive for this sector much commitment in terms of human resources is required. It would also be wiser to make use of rank- and- file members by establishing core groups to assist with the co-ordination of the project at grassroot level.

2. Ample resources have to be mobilised and channelled towards this project. The HBC project is catered for in the general budget of the union of which it might be neglected in terms of priorities. Therefore, there is need for budget reforms such that a separate buget has to be set aside specifically for this project.

3. New organising strategies other than the traditional ones have to be tailored for this newly emergent sector. Other than operating in the traditional single workplace, these workers execute their duties in isolated places and are also fragmented such that locating and mobilising them could be a huge task. Solidarity among the workers should also be encouraged through organising area meetings where they converge together and share their stories and grievances.

4. NEHAWU has to accelerate its velocity in terms of both constitutional and legislation reforms so as to be able to embrace and service these workers.

Quick movements also have to be made in terms of bargaining partners. Winning the hearts of the workers without employers to bargain with, might mean a fruitless intervention. Again, there is strong need for coalition building

among the union, workers, employers and civil society in which the clients are derived from (Social Movement Unionism) as advocated by Lopez (2004).

5. Constant updates through core group members should be done in order to keep the workers informed on developments taking place at each level. This would guarantee hope to the workers and assists in retaining them. A high rate of turn over would mean that the union would have to pump out vast resources every time which is costly.

6. Campaigns and media material should be developed in order to market this sector for recognition purposes. There is need for appreciation of women's valuable work in society in the form of HBC work. There should be a shift in union thinking as well as attitude towards female jobs. NEHAWU should demonstrate a zeal to have these workers organised in the way it does to male jobs by investing more effort and commitment.

7.There is a strong need to revisit the legislation (Labour Relation Act) which secludes these workers because as it stands, it is difficult for unions (NEHAWU) to manouvre through the organising agenda as the union is partly supressed by the law which is defined around employee status.

8. The excesses brought onto women as a result of their care giving roles need to be invested in by the government of South Africa, because their households are increasingly being affected as they have to cater for extra burdens that is discharged from the public hospitals.

9. To the DoH, it is crucial for it to conduct an investigation and audit with regard to the fate of funds dispatched to NGOs to pay stipends to the HBC workers of which they are failing to get. Also the discrepancy in the amount of stipends paid to these caregivers has to be examined. The question is on whether they (NGOs) are given different amounts of money or not.

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