

A theory-based analysis of labour unions in the South African Public Service

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Abstract

This study provides a theory-based analysis of labour unions in the South African Public Service (SAPS), focusing on the evolving dynamics of labour relations, power structures, and collective bargaining processes. The research investigates how both historical legacies and contemporary socio-economic conditions shape the role of unions within the public sector. Specifically, the study examines the influence of apartheid-era policies, post-apartheid reforms, and the impact of global economic trends on labour organisations. Theoretical frameworks such as institutional theory, social movement theory, and marxist perspectives, along with indigenous frameworks like ubuntu philosophy, worker democracy, liberation unionism, and social movement unionism, underpin the analysis. The research follows a qualitative design, drawing on an in-depth analysis of academic literature, policy documents, legal frameworks, and secondary data sources to uncover trends and patterns in labour relations. Key findings reveal a complex interplay of socio-economic inequalities, political governance, and legislative frameworks that continue to shape union activities within the SAPS. Additionally, the study highlights the importance of socio-cultural dynamics in understanding labour relations within a historically charged environment. This paper contributes to theoretical debates in industrial relations by offering nuanced insights into the challenges and opportunities confronting unions in the South African public sector. The findings have practical implications for policymakers, union leaders, and public administration practitioners aiming to encourage more equitable labour relations and promote social justice. Ultimately, the study provides a framework for rethinking labour union strategies in light of contemporary challenges and the broader pursuit of transformation in the public service.

Keywords: collective bargaining, liberation, labour unions, labour relations, public service

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Introduction

The transformation of trade unions in the South African Public Service (SAPS) remains a critical area of study, particularly in light of the country's complex socio-political and economic landscape. While the Labour Relations Act of 1995 and other post-apartheid reforms aimed to improve labour conditions, unions continue to face significant challenges, including socio-economic disparities, global economic pressures, and tensions with the state over fiscal policies (Blyton & Turnbull, 2004). These dynamics are compounded by the historical legacy of apartheid, which systematically excluded black workers from organized labour, and the evolving role of unions in a post-apartheid, neoliberal economy. This study examines how these factors continue to shape the transformation of labour unions in SAPS, with a particular focus on the intersection of institutional frameworks, indigenous labour philosophies, and contemporary economic conditions.

The theoretical framework for this research draws on Marxist Theory, which views labour unions as instruments for class struggle, advocating for the interests of the working class against capitalist exploitation. Institutional Theory provides insight into how legal frameworks and policies, such as the Labour Relations Act, shape the strategies and actions of unions within a formal regulatory environment. Social Movement Theory expands the scope of union activity beyond economic demands, framing unions as key actors in social and political movements, especially in post-apartheid South Africa. Finally, Indigenous Perspectives, such as Ubuntu and Liberation Unionism, offer a culturally relevant lens for understanding unionisation in a post-colonial context, highlighting collective solidarity and community empowerment. This research is critical because, while existing studies have explored various aspects of labour union transformation such as the evolution of COSATU (Buhlungu, 2010), union strategies under neoliberalism (Macun, 1997), and worker alienation (Bezuidenhout & Buhlungu, 2011) few have integrated the full range of theoretical perspectives that encompass both global labour trends and indigenous South African labour philosophies.

The knowledge gap this study addresses lies in understanding how the interplay of historical, institutional, and socio-economic factors continues to shape the transformation of unions in the SAPS, and how indigenous concepts can inform contemporary union strategies. By offering a more comprehensive theoretical approach, this research aims to provide practical insights for union leaders, policymakers, and public administration practitioners to strengthen labour relations, advocate for social justice, and improve service delivery in the public sector. This study applies three key theoretical frameworks to analyze labour organizations within the South African Public Service (SAPS). Marxist Theory provides a critical perspective on class struggle, highlighting the inherent conflict between capital owners and workers. It emphasizes labour unions as instruments for challenging economic exploitation and advancing the collective interests of the working class (Harvey, 2010). Historically, South African unions, such as COSATU, adopted Marxist principles to combat racial capitalism during apartheid and advocated for redistributive justice in the post-apartheid era. Institutional Theory focuses on the role of formal and informal institutions' laws, regulations, and organizational norms in shaping union strategies and operations (Scott, 2001). Within the SAPS, institutional factors such as the Labour Relations Act of 1995 provide a framework for collective bargaining and dispute resolution, while socio-political dynamics influence the functioning of unions within public sector governance structures.

Building on foundational theories, this study integrates Marxist, Institutional, and Social Movement frameworks to provide a comprehensive lens for understanding the multifaceted dynamics of labour unions. These theoretical insights bridge the structural, socio-economic, and cultural dimensions shaping union strategies within the South African context. Social Movement Theory positions unions as agents of collective action, mobilizing workers to achieve broader socio-economic and political objectives (Tilly, 2004). In South Africa, unions have historically functioned as social movements, integrating labour struggles with political activism to address systemic inequality and advocate for social justice. These frameworks, complemented by indigenous perspectives such as Ubuntu Philosophy and Liberation Unionism, reflect the distinct nature of South African labour unions. Ubuntu, rooted in communal values and solidarity, emphasises the interconnectedness of workers' struggles with societal well-being. Meanwhile, Liberation Unionism reflects the unions' historical role in advancing

both workers' rights and political liberation. This theoretical grounding provides a critical lens for understanding the historical evolution, socio-economic dynamics, and unique challenges confronting labour unions in the SAPS.

Global transformations in labour organizations marked by challenges such as deindustrialisation, the rise of precarious work, and the expansion of digital platforms offer comparative insights that contextualize the South African experience, revealing both commonalities and unique adaptations in response to global pressures. Globally, labour unions have experienced significant transformations over the past few decades, driven by various socio-economic and political changes. One of the most notable trends has been the decline in union membership in many developed countries. This decrease can be attributed to several factors, including deindustrialisation, the rise of the gig economy, and increasing employer resistance to unionization. Deindustrialisation has led to the shrinkage of traditional manufacturing sectors, historically the stronghold of union activity, while the gig economy has fragmented the workforce into individual contractors, often lacking the collective bargaining power of traditional employees. Employers have also become more adept at resisting unionization through legal and illegal means, further eroding union density (Visser, 2006).

In response to these challenges, labour unions have been compelled to adopt new strategies to stay relevant and effective. They have increasingly formed partnerships with community organizations, broadening their advocacy to include broader social issues such as racial justice, environmental sustainability, and economic inequality. This shift recognizes that labour issues are intertwined with other social justice concerns and that building broader coalitions can amplify their impact. Additionally, unions have leveraged digital tools for mobilization, using social media and other online platforms to engage members, organize actions, and communicate their messages more effectively in an increasingly digital world (Milkman & Voss, 2004). The globalization of the economy has also seen greater international solidarity among labour unions. As multinational corporations have expanded their reach, unions have recognized the need to coordinate their efforts across borders. This has led to the formation of transnational labour alliances and the launch of global campaigns against exploitative practices by multinational companies. These efforts reflect an understanding that the interconnected nature of global labour markets requires a unified response to issues that transcend national boundaries (Bronfenbrenner, 2007).

Moreover, a growing focus has been organizing workers in informal and precarious employment sectors. Recognizing the expanding number of workers in these categories, unions have shifted their attention to those traditionally outside their reach. This includes workers in informal economies, such as street vendors and domestic workers, and those in precarious employment, such as part-time, temporary, and gig workers. By addressing the needs of these workers, unions aim to remain relevant and inclusive, acknowledging that the future of work is likely to involve more non-standard forms of employment (Schmalz & Doerre, 2013). Despite these adaptive strategies, unions face substantial challenges in the modern era. The decline in membership and traditional power bases, coupled with the rise of neoliberal economic policies favoring deregulation and labour market flexibility, have placed unions in a precarious position. However, the ability to innovate and form broader alliances offers a path forward, demonstrating the resilience and adaptability of the labour movement in the face of ongoing changes in the global economic landscape. The trajectory of South African labour unions, intertwined with the socio-political upheavals of apartheid and

its aftermath, shows the resilience and strategic adaptability of these entities. This historical lens sets the stage for examining contemporary labour relations and their implications for service delivery.

The history of labour unions in South Africa is deeply intertwined with the country's socio-political landscape, particularly the system of apartheid and its eventual dismantling. The early labour movement in South Africa emerged in the late 19th and early 20th centuries, primarily among white workers. These early unions were predominantly focused on protecting white labour from competition with cheaper black labour, reinforcing and entrenching racial divisions within the workforce. This racial exclusivity was a deliberate strategy to maintain higher wages and better working conditions for white workers while systematically excluding black workers from these benefits, thereby institutionalizing a racially stratified labour market (Hirson, 1979). The landscape of labour unions shifted significantly in the 1970s and 1980s with the rise of black trade unions. This period was marked by a surge in labour activism among black workers, catalyzed by the Durban strikes of 1973, which highlighted the growing dissatisfaction with the oppressive labour conditions under apartheid. These strikes led to independent black unions and federations, such as the Federation of South African Trade Unions (FOSATU) and later the Congress of South African Trade Unions (COSATU) in 1985. These unions were critical in the anti-apartheid struggle, advocating for labour rights and broader socio-political changes (Baskin, 1991). Labour unions were integral to the anti-apartheid movement, mobilizing workers and coordinating with political organizations like the African National Congress (ANC). They not only fought for better wages and working conditions but also actively challenged the apartheid state's legitimacy. Unions organized mass protests, strikes, and other forms of resistance, often facing severe repression from the state.

Despite this, they succeeded in galvanizing significant support and played a crucial role in undermining the apartheid regime. The collaboration between labour unions and political movements was pivotal in sustaining the momentum of the anti-apartheid struggle (Webster & Adler, 1999). With the end of apartheid in 1994, labour unions gained significant political influence in the newly democratic South Africa. The Labour Relations Act of 1995 and other progressive labour laws were enacted, promoting collective bargaining and safeguarding worker rights. These legislative changes were a testament to the unions' newfound power and role in shaping the post-apartheid socio-economic landscape. However, the post-apartheid era also presented new challenges for unions. They had to navigate the complexities of balancing their political alliances with the ANC, which had transitioned from a liberation movement to the governing party while continuing to advocate for the interests of workers. Additionally, unions had to address ongoing socioeconomic disparities and the rising expectations of their members in the context of high unemployment and economic inequality (Southall & Webster, 2010). The history of labour unions in South Africa reflects a dynamic interplay between labour activism and broader socio-political transformations. From their early days of racial exclusivity to their pivotal role in the anti-apartheid movement and their continued influence in the post-apartheid era, South African labour unions have been critical actors in the country's ongoing struggle for social justice and economic equity. Labour unions, conceptualized as collective entities advocating for workers' rights, serve as critical intermediaries within the workplace. By aligning this understanding with the unique historical and socio-economic contexts of South Africa, the study frames unions as pivotal agents of change and equity.

Labour unions, or trade unions, are organized groups of workers that come together to negotiate better working conditions, wages, and benefits with their employers. This collective bargaining process aims to balance the power dynamics between individual employees and employers, providing workers with a stronger voice and a platform for advocating their rights. Employees join unions to secure fair compensation, job security, safe working conditions, reasonable working hours, and respectful treatment. As Freeman and Medoff (1984) highlight, the primary needs of employees form the foundation of their decision to engage in collective union activities. Labour unions act as intermediaries between employees and employers, representing workers' interests and negotiating improved terms of employment. They provide support during disputes and protect workers from unfair practices. Additionally, unions offer legal assistance, education, and training, enhancing their members' capacity to assert their rights (Hyman, 2001). The effectiveness of unions relies on strong leadership, member engagement, and the ability to adapt to changing economic and social conditions (Kelly, 1998). Employers, who hire employees to perform work, have their own set of expectations, including productivity, efficiency, compliance with company policies, and the achievement of Organizational goals. They aim to maintain profitability, competitiveness, and a harmonious workplace environment (Kochan, Katz, & McKersie, 1986).

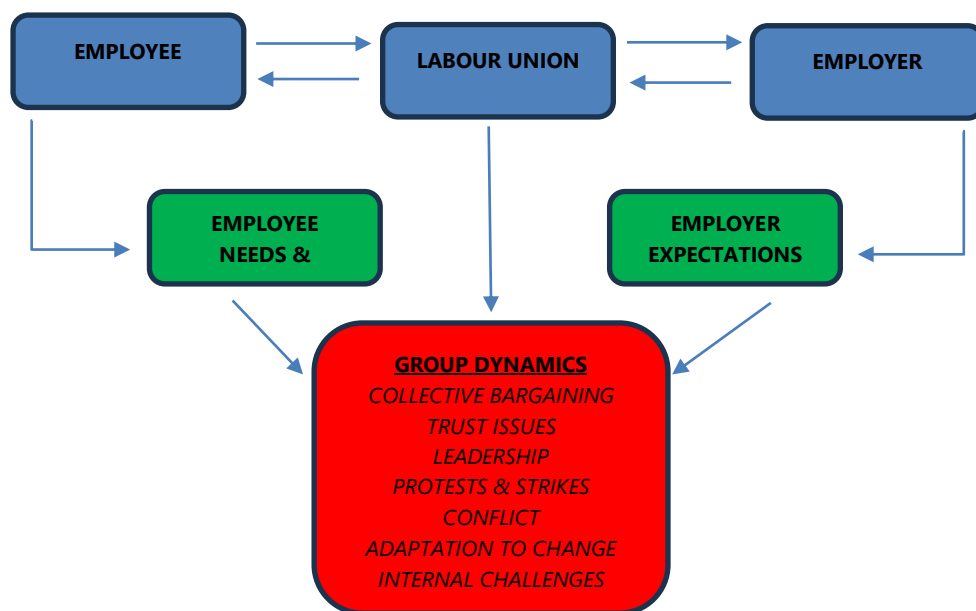


Figure 1: Conceptualisation of Labour Unions
Source: author construct, 2024

Employers often view unions with caution, perceiving them as potential obstacles to managerial flexibility and cost control. The dynamics between employees, labour unions, and employers are shaped by several challenges and processes. Collective bargaining is a fundamental process in which unions negotiate with employers on behalf of their members to establish terms of employment. This process can lead to improved wages, benefits, and working conditions, but it can also be contentious, sometimes resulting in strikes or lockouts if agreements cannot be reached (Clegg, 1976). Trust is a critical element in these relationships. Historical conflicts, perceived injustices, and lack of transparency can erode trust, necessitating

consistent communication, fair practices, and mutual respect to rebuild and maintain it (Kramer & Tyler, 1996).

Protests and strikes are common tactics used by unions when negotiations fail. These actions can effectively pressure employers but also carry risks such as income loss for workers, disruptions to business operations, and potential legal repercussions (Tilly, 2004). Effective leadership within unions is crucial for articulating members' needs, negotiating with employers, and mobilizing collective action. Strong leaders can inspire confidence and solidarity, whereas weak leadership can lead to internal conflicts and diminished influence (Fantasia & Voss, 2004). Conflicts between unions and employers are inherent due to their differing interests and priorities. These conflicts can manifest in various forms, including legal battles, industrial actions, and public disputes. Conflict resolution mechanisms, such as mediation and arbitration, are essential for managing and resolving these issues constructively (Serrano, 2010). Unions must also adapt to changing economic conditions, technological advancements, and evolving labour markets. This includes addressing the needs of new types of workers, such as those in the gig economy, and adopting digital tools for organizing and communication (Milkman & Voss, 2004).

Internally, unions face challenges such as maintaining member engagement, ensuring financial sustainability, and addressing diversity within their membership. Promoting and encouraging a democratic and inclusive union culture is essential for long-term viability (Fairbrother, 2008). Externally, unions operate within a broader socio-economic and political context that presents challenges such as legislative changes, economic downturns, and shifting public perceptions. Navigating these external factors requires strategic advocacy and coalition-building with other social movements and community Organizations (Waterman, 2001). The labour unions play a critical role in mediating the relationship between employees and employers, advocating for workers' rights, and striving to balance power dynamics in the workplace. Understanding the needs and expectations of both employees and employers, along with the complex group dynamics and challenges inherent in union activities, is essential for effective and fair labour relations. Through collective bargaining, strong leadership, and adaptability, unions can continue to be a force for positive change in the labour market.

Research Methods

This study employs an exploratory research design, integrating a qualitative approach to comprehensively analyze South African Public Service (SAPS) labour organizations. The qualitative approach allows for a more robust and nuanced understanding of the complex dynamics to triangulate findings with literature and enhance validity (Creswell, 2014). Specifically, the study is exploratory and descriptive, aiming to uncover patterns and insights into labour unions' historical and contemporary roles in the SAPS. The data collection exclusively relies on secondary sources to ensure rich and detailed literature. Secondary data will be drawn from academic literature, policy documents, legal frameworks, historical records, and previous studies on labour unions in South Africa. This comprehensive literature review includes sources such as books, journal articles, reports, and archival materials, providing a historical and theoretical context for the study (Babbie, 2013). The extensive use of these sources ensures that the research is grounded in established knowledge and thoroughly examines the topic to construct a detailed narrative and analytical framework.

Qualitative data from comprehensive literature reviews and document analysis will be analyzed using thematic analysis. This involves coding the textual data to identify recurring themes, patterns, and categories relevant to the research questions. The thematic analysis identifies critical issues, challenges, and dynamics within labour unions and their interactions with the SAPS, providing deep insights into various stakeholders' documented experiences and perspectives (Braun & Clarke, 2006). Despite its comprehensive design, this study faces several limitations. First, the reliance on secondary data may introduce biases or inaccuracies inherent in the sources. To mitigate this issue, efforts will be made to cross-verify data from multiple sources. Second, the absence of primary data collection, such as interviews or questionnaires, means that the study cannot capture current firsthand experiences and perceptions, which may limit the depth of qualitative insights; however, as part of the four-part series, other studies will undertake primary data collection. This reliance on secondary data could result in an over-dependence on existing literature, which may not fully reflect recent developments or emerging trends (Babbie, 2013).

Another limitation is the potential difficulty in accessing sensitive or classified information within the SAPS, which could constrain the scope of the analysis. Since the study relies on publicly available documents and previously published research, there may be gaps in the data that could impact the comprehensiveness of the analysis. Finally, the study's focus on the SAPS may limit the generalizability of findings to other sectors or contexts within South Africa or beyond. However, the detailed case study approach provides valuable insights that inform future research and policy development in similar settings (Yin, 2014).

Results and Discussion

The evolution and role of labour unions in South Africa's Liberation struggle

The evolution of labour unions in South Africa is deeply intertwined with the country's socio-political and economic history, and their role in the liberation struggle is central to understanding their development. Labour unions in South Africa began to form in the late 19th and early 20th centuries, primarily among white workers. These early unions were driven by the need to protect white labour from competition with cheaper black labour, reinforcing the racial divisions of apartheid society (Hirson, 1979). The pre-apartheid era saw industrial unions advocating for better working conditions and wages for white workers, while black workers were systematically excluded from union benefits and protections (Marks & Trapido, 2014). During the apartheid era (1948–1994), unions faced severe repression as the apartheid government implemented laws to curtail the activities of black labour unions. Despite this, black unions demonstrated remarkable resilience, with significant milestones including the 1973 Durban strikes that signalled the resurgence of a militant black labour movement. These strikes led to the formation of independent black unions, such as the Federation of South African Trade Unions (FOSATU) in 1979, which later merged into the Congress of South African Trade Unions (COSATU) in 1985 (Baskin, 1991).

These unions played a dual role in both advocating for workers' rights and becoming critical agents in the broader political struggle against apartheid. Collaborating with political organizations like the African National Congress (ANC) and the United Democratic Front (UDF), unions engaged in strikes, protests, and civil disobedience to challenge the apartheid regime's economic and social policies (Webster & Adler, 1999). Key leaders, such as Elijah Barayi, the first president of COSATU, and Cyril Ramaphosa, a prominent figure in the National Union of

Mineworkers (NUM), were instrumental in steering the labour movement towards political engagement, ensuring that unions were not only a force for workers' rights but also for broader socio-political transformation (Baskin, 1991). The strategic use of strikes, protests, and civil disobedience was a hallmark of their resistance, further galvanizing the workforce and radicalizing union strategies. The contributions of labour unions to policy and legislative changes during and after the liberation struggle were profound. Their activism led to the landmark Labour Relations Act of 1995, which institutionalized collective bargaining and enhanced worker rights in post-apartheid South Africa (Bendix, 2010). Furthermore, unions played a critical role in shaping broader socio-economic reforms aimed at rectifying the inequalities entrenched by apartheid, influencing policies that promoted social justice and economic equity (Southall & Webster, 2010). Through their participation in the National Economic Development and Labour Council (NEDLAC), unions exerted influence on key economic policies, further solidifying their role in post-apartheid governance.

Thus, the historical evolution of labour unions in South Africa reflects their resilience and adaptability in the face of political and economic challenges. From their early role in protecting white labour to their instrumental involvement in the anti-apartheid struggle, and their ongoing influence in the post-apartheid period, labour unions have remained central to the pursuit of workers' rights and social justice. Their legacy continues to shape the labour landscape in South Africa, depicting the enduring importance of collective action and solidarity in the pursuit of equality and political transformation.

Labour Organisation in the South African Public Service

The current structure and organization of public sector unions in South Africa reflect a robust framework designed to address the diverse needs of public sector employees while navigating the complexities of modern labour relations. Major unions within the public sector include the Congress of South African Trade Unions (COSATU)-affiliated unions such as the South African Democratic Teachers Union (SADTU), the National Education, Health and Allied Workers' Union (NEHAWU), and the Police and Prisons Civil Rights Union (POPCRU). These unions boast substantial memberships, with SADTU representing over 264,000 educators, NEHAWU covering approximately 274,000 health and allied workers, and POPCRU advocating for around 150,000 police and correctional service employees (Southall & Webster, 2010; SADTU, 2023; NEHAWU, 2024).

Union governance and leadership within these organizations typically follow democratic principles, with elected representatives and officials serving fixed terms. The governance structures often include national executive committees, provincial and regional bodies, and local branches, ensuring representation and accountability at all levels. Leadership strongly emphasizes worker participation and grassroots involvement, aligning with the unions' historical commitment to democratic practices and worker empowerment (Baskin, 1991). Public sector unions' primary functions and activities encompass a range of roles aimed at improving their members' working conditions and rights. Collective bargaining is a cornerstone activity where unions negotiate wages, benefits, and working conditions with government employers. These negotiations are critical in securing fair employment terms and addressing grievances related to employment practices. Through collective bargaining, unions strive to balance the interests of their members with the fiscal constraints and policy objectives of the government (Bendix, 2010).

Worker representation and advocacy are also central to the activities of public sector unions. Unions provide a voice for workers in various forums, ensuring that their concerns and interests are represented in policy discussions and decision-making processes. This advocacy extends beyond immediate workplace issues to broader socio-economic and political matters that impact workers' lives. For instance, unions actively campaign for social justice, equitable service delivery, and public sector reforms (Webster & Adler, 1999). Training and capacity building are essential functions that public sector unions undertake to enhance the skills and knowledge of their members. These programs focus on various topics, including labour rights, negotiation skills, leadership development, and sector-specific technical training. By investing in the professional development of their members, unions aim to empower workers to effectively advocate for their rights and contribute to improving service delivery in the public sector (Von Holdt, 2002).

Despite their significant roles and contributions, public sector unions in South Africa face many challenges. Rulashe and Ijeoma (2022), argue for the importance of all stakeholders in the public service to hold each other accountable and contribute to an effective public service. This includes the labour unions. Internally, unions must contend with issues such as leadership disputes, financial management, and maintaining member engagement and solidarity in an increasingly complex and diverse workforce. Externally, they navigate a challenging environment characterized by economic constraints, political pressures, and a sometimes-adversarial relationship with government employers. Additionally, the rise of new employment forms, such as contract and temporary work, challenges traditional union organizing and representation models (Bendix, 2010).

However, these challenges also present opportunities for public sector unions. By adopting innovative strategies and adapting to changing labour market conditions, unions can enhance their relevance and effectiveness. This includes leveraging digital tools for communication and mobilization, forming strategic alliances with civil society organizations, and advocating for policies that address contemporary labour market realities. The prospects for public sector unions in South Africa depend on their ability to remain adaptable, responsive to member needs, and proactive in shaping the labour landscape (Southall & Webster, 2010). To conclude, the structure and organization of public sector unions in South Africa reflect a mature and dynamic movement dedicated to advocating for workers' rights and improving public service delivery. Through their collective bargaining, worker representation, and training activities, unions play a vital role in the public sector. Despite facing significant challenges, the resilience and adaptability of these unions position them well to continue making meaningful contributions to the labour movement and broader society.

Transformation of Labour Unions in the South African Public Service

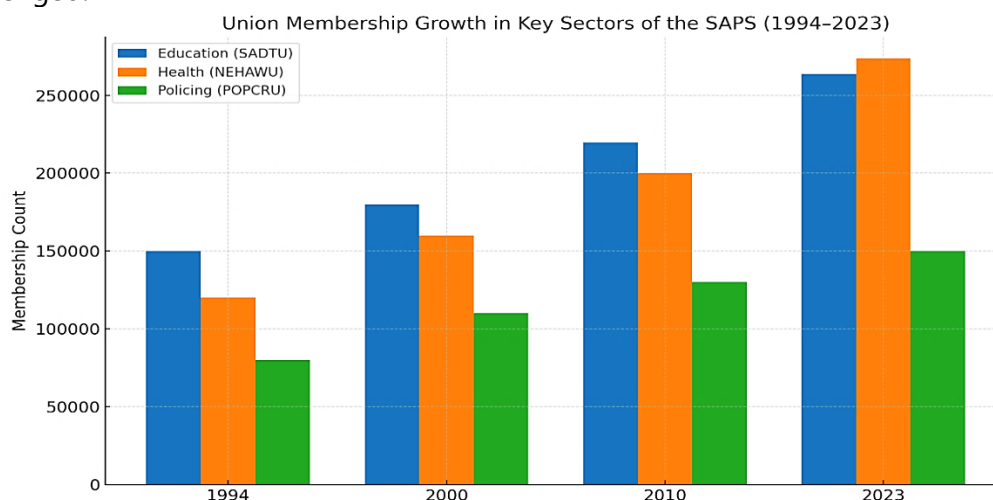
The period before 1994 was marked by apartheid-era repression, which stifled black unionization. However, pivotal events such as the 1973 Durban strikes laid the foundation for organized labour movements, culminating in the formation of COSATU in 1985. During this period, unions were key actors in the anti-apartheid struggle, integrating labour activism with political resistance. With the advent of democracy, the Labour Relations Act of 1995 institutionalized collective bargaining and expanded worker rights. Unions enjoyed heightened influence, particularly through their political alignment with the ANC.

Table 1. Key Milestones in the Transformation of Labour Unions in the SAPS

Period	Major Developments	Impact
Pre-1994	<ul style="list-style-type: none"> - Apartheid-era suppression of black unions (1948–1973). - Rise of black worker movements (1973–1990). 	<ul style="list-style-type: none"> - Worker mobilization despite systemic repression. - Formation of COSATU (1985) as a major federation.
1994–2000	<ul style="list-style-type: none"> - Labour Relations Act (1995) institutionalizes collective bargaining. - Strong political ties between unions (e.g., COSATU) and the ANC. 	<ul style="list-style-type: none"> - Increased influence of unions in shaping labour policies. - Legal recognition of public service unions.
2000–2010	<ul style="list-style-type: none"> - Economic challenges and neoliberal pressures. - Growth in public sector union membership (SADTU, NEHAWU, POPCRU). 	<ul style="list-style-type: none"> - Expansion of unionised workforce. - Increased tensions over wage negotiations.
2010–2023	<ul style="list-style-type: none"> - Strain in ANC-union alliances. - Rising public sector strikes. - Increasing challenges with informalization of work. 	<ul style="list-style-type: none"> - Decline in union influence in policy-making. - Continued struggles for equitable wages and fair treatment.

Sources: adapted from Webster (2009), Southall and Webster (2010), SADTU (2023), NEHAWU (2024).

Public sector unions such as SADTU and NEHAWU grew rapidly, reflecting the sector's significance in labour organization during the transition to democracy. Economic pressures and neoliberal reforms introduced complexities for public sector unions. Despite economic stagnation, unions expanded their membership, particularly in the education, health, and policing sectors. However, tensions arose as the government sought to curb public spending, leading to contested wage negotiations and increased strike activity. In recent years, public sector unions have faced declining influence due to strained political alliances, rising informal employment, and austerity measures. While unions remain central to wage bargaining and advocacy, their ability to shape national policy has diminished. The growing informalization of work further complicates union strategies, as traditional organizing models are increasingly challenged.

**Figure 2.** Union Membership Growth in Key Sectors of the SAPS (1994–2023)

Sources: Webster (2009), Southall and Webster (2010), SADTU (2023), NEHAWU (2024).

The bar graph presented here illustrates the evolution of union membership within key sectors of the South African Public Service (SAPS) from 1994 to 2023, focusing specifically on the education, health, and policing sectors. These sectors are represented by three major trade unions: the South African Democratic Teachers Union

(SADTU), the National Education, Health and Allied Workers' Union (NEHAWU), and the Police and Prisons Civil Rights Union (POPCRU). Membership within SADTU, the largest education union in the country, grew from approximately 150,000 members in 1994 to an estimated 264,000 by 2023. This significant increase reflects both the central role of education in South Africa's public service delivery and the union's success in mobilizing educators to secure better working conditions, wages, and broader socio-political rights in a post-apartheid context. NEHAWU, which represents workers in the health and allied sectors, saw a notable increase in membership, from around 120,000 in 1994 to 274,000 in 2023. This growth is indicative of the increased emphasis on healthcare provision and the growing recognition of the need for collective bargaining in addressing the workforce challenges within South Africa's public health system, especially amidst pressures related to resource allocation, staff shortages, and the impacts of neoliberal economic policies on public health.

The membership of POPCRU, representing police and correctional service employees, grew at a more moderate pace, from 80,000 in 1994 to approximately 150,000 by 2023. While this sector experienced steady growth, it reflects both the complex relationship between unions and the state in the policing sector, as well as the institutional challenges faced by unions in advocating for their members within the context of state security apparatuses and public service austerity measures. This graph encapsulates the broader trajectory of unionization within South Africa's public service over nearly three decades, highlighting the dynamic interplay between union growth and the socio-economic and political transformations that have occurred post-1994. Despite the challenges posed by economic pressures, austerity measures, and the evolving nature of public service delivery, the steady growth in union membership, particularly within the education and health sectors, highlights the continued relevance of trade unions in advocating for workers' rights and enhancing labour conditions in the public sector. The growth in union membership highlights the vital role of labour movements, not only in shaping the working conditions of public sector employees but also as significant political actors, given the considerable voting power they command.

The increasing unionization in sectors such as education and health highlights their influence on governmental leadership, with unions playing a central role in advocating for workers' rights and driving broader socio-political transformation.

Contemporary Issues: Challenges and Opportunities for South African Unions

Contemporary global trends such as digital transformation, gig work, and the post-pandemic recovery have introduced both challenges and opportunities for South African labour unions. As industries increasingly integrate automation and artificial intelligence, unions face the dual challenge of defending workers against job displacement and advocating for retraining programs, particularly in sectors like mining and manufacturing (Visser, 2021). However, technological advancements also offer unions the opportunity to enhance their organizing capabilities through digital tools, social media, and online campaigns, which can help mobilize workers and expand union reach. The rise of gig work has fundamentally altered the labour market, with many workers lacking the protections afforded to full-time employees. Unions, traditionally focused on formal sector workers, must now adapt by developing new strategies to organize and advocate for gig workers. Some unions have already begun mobilizing gig workers, particularly in the taxi industry, and are pushing for legal reforms to extend labour protections to these workers (Schmalz & Doerre, 2013).

Digital platforms can also serve as tools for organizing gig workers, facilitating collective action that was previously challenging to achieve.

The COVID-19 pandemic has further exacerbated socio-economic inequalities and reshaped the labour market. South African unions have been vocal in advocating for workers' rights during the recovery, pushing for policies that create decent jobs and provide fair wages and social protection. The pandemic has accelerated discussions on the future of work, with unions calling for greater labour market flexibility and stronger social safety nets (ILO, 2020). Through forums like NEDLAC, unions have played a critical role in ensuring that workers' interests are represented in recovery policies, advocating for improvements in working conditions and expanded access to essential services. Despite these challenges, there are significant opportunities for unions to innovate and strengthen their representation. By embracing digital tools for advocacy and organisation, unions can increase their relevance in the modern labour market. Moreover, unions can broaden their scope by engaging with social movements and advocacy networks, addressing broader societal issues such as inequality, climate change, and gender discrimination, thereby reinforcing their role as agents of social change (Waterman, 2001).

Theoretical Analysis

The application of Marxist theory provides a critical lens through which to analyse the dynamics of labour unions, particularly in the context of South Africa's history of apartheid and its aftermath. Marxist theory posits that societies are divided into classes based on their relationship to the means of production, and class struggle is inherent in capitalist systems where the bourgeoisie (owners of capital) exploit the proletariat (workers) for economic gain (Marx & Engels, 1848). In the South African context, this theory illuminates the persistent class divisions exacerbated by apartheid policies, where racial discrimination intersected with economic exploitation.

Within Marxist theory, labour unions are viewed as organizations that emerge from and represent the collective interests of the working class. They engage in class struggle through various tactics such as strikes, protests, and collective bargaining to challenge the economic power structures perpetuating inequality. In South Africa, unions such as COSATU have historically mobilized workers to demand better wages, improved working conditions, and broader socio-economic reforms. These actions not only aim to redress economic injustices but also seek to dismantle the racial and economic inequalities inherited from apartheid (Webster & Adler, 1999). Moreover, Marxist theory highlights the impact of union actions on social and economic inequality. By organizing workers and advocating for redistributive policies, unions contribute to narrowing the gap between the wealthy and the working class. In South Africa, this has been evident in union-led campaigns for minimum wage laws, social security reforms, and progressive taxation policies to reduce poverty and enhance social justice (Von Holdt, 2002).

Institutional theory offers another perspective on the role of labour unions, emphasizing the influence of formal and informal institutions in shaping union behavior and interactions. Institutions, such as laws, regulations, and organizational norms, structure the strategies and activities of unions within a given socio-political context. In South Africa, the legal framework established by post-apartheid legislation, including the Labour Relations Act of 1995, has institutionalized collective bargaining and worker rights protections. These institutional structures provide a framework within which unions operate, influencing their strategies, negotiations with employers, and

relationships with state and corporate actors (Bendix, 2010). As viewed through institutional theory, union interactions with state and corporate actors are characterized by negotiations, lobbying, and occasional conflict over policy and regulatory frameworks. Unions in South Africa engage with government departments, corporate entities, and industry associations to influence labour laws, economic policies, and workplace practices. This interaction is shaped by the balance of power between stakeholders and the institutional mechanisms through which decisions are made, highlighting the complexities of union-state-corporate relationships in a democratic society (Bendix, 2010).

Social movement theory provides another perspective on labour unions, conceptualizing them as dynamic social movements that mobilize collective action to achieve broader social change. Unions in South Africa have often functioned as social movements, advocating for economic justice and political reform, human rights, and democratic governance. They mobilize workers through strikes, protests, and grassroots campaigns to address systemic inequality, discrimination, and exploitation (Webster & Adler, 1999).

Mobilization strategies unions employ as social movements include community organizing, media campaigns, and coalition building with other civil society organization's. These strategies aim to amplify the voices of marginalized workers, challenge dominant narratives, and pressure policymakers to enact progressive reforms. In South Africa, unions have played pivotal roles in mobilizing mass protests against austerity measures, privatization policies, and labour market deregulation, demonstrating their capacity to influence public discourse and policy outcomes (Von Holdt, 2002). In conclusion, the application of Marxist theory, institutional theory, and social movement theory provides complementary perspectives on the role and impact of labour unions in South Africa. These theoretical frameworks illuminate the complexities of union dynamics, their interactions with state and corporate actors, and their contributions to social and economic justice. By analyzing union behavior through these lenses, researchers and policymakers gain deeper insights into the transformative potential of organized labour in shaping democratic governance and promoting inclusive socio-economic development.

An Afrocentric View of Labour Movements

An Afrocentric view of labour movements incorporates unique perspectives rooted in African philosophies, historical experiences, and socio-political contexts. This approach contrasts with traditional Western-centric views by emphasizing communal values, collective identity, and the interconnectedness of social struggles. Several key concepts within Afrocentric labour movements include Ubuntu Philosophy, Liberation Unionism, Worker Democracy, and Social Movement Unionism, each contributing to a nuanced understanding of labour activism in African contexts.

Table 2. Afrocentric Theorisation of Labour Organisations

Theory	Articulation
<i>Ubuntu Philosophy</i>	Ubuntu Philosophy forms a foundational aspect of Afrocentric labour movements, emphasising the interconnectedness of humanity and the importance of communal solidarity. Ubuntu, derived from Southern African Nguni languages, encapsulates the belief that individuals thrive through relationships with others, ensuring mutual care and responsibility (Ramose, 2002). In labour movements, Ubuntu Philosophy encourages unions to prioritise collective well-being and advocate for social justice that benefits the broader community, not just union members. This philosophy underpins efforts to promote equitable labour practices and to challenge economic inequalities entrenched in colonial and apartheid legacies.

<i>Liberation Unionism</i>	Liberation Unionism emerged as a response to oppressive regimes in Africa, particularly during periods of colonialism and apartheid. These unions, such as those formed under COSATU in South Africa, integrated political struggle with labour activism, viewing economic emancipation as intertwined with national liberation (Baskin, 1991). Liberation Unionism emphasizes the role of unions in advocating for broader societal transformation, including democracy, human rights, and economic justice. It aligns with the African liberation movements' goals of dismantling colonial structures and building inclusive societies where workers participate in decision-making processes (Webster & Adler, 1999).
<i>Worker Democracy</i>	Worker Democracy is another critical principle within Afrocentric labour movements, advocating for participatory decision-making and transparency within unions. This concept challenges hierarchical structures inherited from colonial administrations and promotes grassroots democracy where members actively engage in union activities (Von Holdt, 2002). Worker Democracy promotes accountability among union leaders, ensuring their actions align with members' interests and aspirations. In practice, it involves initiatives such as direct elections, regular consultations with members, and mechanisms for feedback and grievance resolution (Webster & Adler, 1999).
<i>Social Movement Unionism</i>	Social Movement Unionism represents a dynamic approach to labour activism that transcends traditional collective bargaining to encompass broader social justice issues. Rooted in African liberation struggles, Social Movement Unionism mobilises workers around shared grievances and aligns with other social movements to amplify demands for systemic change (Bendix, 2010). In South Africa, unions have collaborated with civil society organizations on issues ranging from environmental justice to gender equality, reflecting a holistic approach to labour activism that addresses intersecting forms of oppression (Southall & Webster, 2010).

Source: authors construction, 2024

The table on Afrocentric theorization of labour organization's provides a framework for understanding labour movements within the context of African historical, cultural, and socio-political realities. Afrocentricity, as applied to labour organizations, challenges Western-centric models of industrial relations by emphasizing indigenous knowledge systems, values, and communal solidarity. It posits that African labour movements should reflect the collective spirit of African societies, rooted in concepts such as Ubuntu (human interconnectedness) and Ujamaa (familyhood and cooperative economics), which advocate for mutual support and communal development. Afrocentric theorization critiques the imposition of Western labour models on African contexts, which often ignore traditional African practices of work and community organization. By integrating Afrocentric perspectives, labour unions can better address the unique needs of African workers, particularly in post-colonial and post-apartheid societies. This theoretical approach highlights the importance of inclusivity, social justice, and the decolonization of labour relations, advocating for policies and strategies that reflect the socio-cultural realities of African workers, rather than adopting foreign paradigms that may not align with their lived experiences. Ultimately, Afrocentric theorization offers a transformative lens for understanding labour organization in Africa, focusing on solidarity, empowerment, and cultural relevance in ways that resonate with the African worker's identity, history, and aspirations.

A Legislative Perspective

In South Africa, labour unions operate within a comprehensive legislative framework to protect workers' rights, promote fair labour practices, and regulate industrial relations. In addition to the legislative frameworks mentioned earlier, the Constitution of South Africa (Act No. 108 of 1996) plays a fundamental role in shaping

the legal landscape for labour unions and workers' rights in the country. The Constitution, often regarded as the supreme law of the land, provides overarching principles and rights that underpin labour relations and the operation of trade unions within South Africa. Key legislative frameworks applicable to labour unions include.

Table 3. Legislative Frameworks for Labour Unions

Legislation	Articulation
<i>Constitution of South Africa of 1996</i>	Freedom of Association (Section 18): The right to form and join trade unions and other associations is protected, ensuring workers can <u>freely organise to pursue their interests collectively.</u>
	Labour Rights (Section 23): This section enshrines the right to fair labour practices, which includes the right to engage in collective bargaining, strike action, and participate in union activities without <u>unjustifiable discrimination.</u>
	Equality (Section 9): Prohibits unfair discrimination on various grounds, including race, gender, and religion, ensuring that all workers are treated equally and fairly within the workplace and by trade unions.
	Social Rights (Section 27): Includes the right to fair labour practices, access to social security, and protection from unfair dismissal, reinforcing the state's obligation to protect workers' rights and <u>promote social justice.</u>
<i>Labour Relations Act (No. 66 of 1995)</i>	Freedom of Expression (Section 16): Protects the right of unions and their members to freely express their views, engage in peaceful demonstrations, and advocate for labour rights without undue interference.
	This Act governs collective bargaining, dispute resolution, unfair labour practices, and the rights and responsibilities of employers, employees, and trade unions. It provides the legal basis for union recognition, strikes, lockouts, and the establishment of bargaining councils.
<i>Basic Conditions of Employment Act (No. 75 of 1997)</i>	This Act sets out minimum standards for working conditions, including work hours, leave entitlements, and remuneration. It ensures that employees, including those represented by unions, are protected from exploitative practices.
<i>Employment Equity Act (No. 55 of 1998)</i>	The Act promotes equity and diversity in the workplace by prohibiting unfair discrimination, implementing affirmative action measures, and requiring employers to report on their progress towards achieving workplace equity.
<i>Public Service Act (No. 103 of 1994)</i>	This Act governs the conditions of employment, rights, and obligations of public service employees. It includes provisions for disciplinary procedures, grievances, and establishing bargaining structures within the public sector.
<i>Public Finance Management Act (No. 1 of 1999)</i>	While primarily focused on financial management in the public sector, this Act indirectly affects labour unions by influencing budgetary allocations, which can impact public sector wages and conditions of service negotiated through collective bargaining.
<i>Skills Development Act (No. 97 of 1998)</i>	This Act promotes skills development and lifelong learning opportunities for employees, including public sector employees. It requires employers to contribute to skills development initiatives and establish workplace training programs.

Source: author construction, 2024

Table 3, Legislative Frameworks for Labour Unions, highlights the crucial role of South Africa's Constitution in shaping labour law. It establishes a foundational framework for laws like the Labour Relations Act (LRA) and the Basic Conditions of Employment Act (BCEA), ensuring workers' rights to organise, bargain collectively, and participate in policy-making. The Constitution also provides a mechanism for challenging laws inconsistent with its provisions, empowering unions to advocate for improved conditions and fair treatment. However, while these laws offer a legal basis for union activities, their implementation faces significant challenges. Political interference, economic constraints, and bureaucratic inefficiencies often hinder the full realization of these rights. For example, while the LRA facilitates collective bargaining, delays and procedural barriers from employers can undermine negotiations. Moreover, the legal framework's rigidity sometimes limits unions' ability to address broader issues, particularly for informal or gig workers who are excluded from traditional labour protections. Though these legislative frameworks are essential, they must evolve to address contemporary labour challenges, including informal and precarious employment. Unions must continue to advocate for not only legal compliance but also for more transformative changes to ensure fair representation and protection for all workers.

Conclusion

The discussion on labour unions in South Africa reveals a complex and dynamic landscape shaped by historical legacies, theoretical frameworks, legislative frameworks, and contemporary challenges. Historically, South African labour unions have evolved from early racial divisions in the pre-apartheid era to becoming pivotal actors in the struggle against apartheid. Forming federations like COSATU in the 1980s marked a significant shift, consolidating worker power and linking labour struggles with broader political and social movements to dismantle apartheid (Webster & Adler, 1999). This historical trajectory emphasizes the intertwined nature of labour activism and political liberation in South Africa, where unions played crucial roles in mobilizing workers and challenging the oppressive apartheid regime. From a theoretical perspective, Marxist theory has provided a foundational framework for understanding class struggle and economic inequality within South African labour movements. Marxist analysis highlights the inherent conflicts between capital and labour, framing unions as critical for advocating workers' rights and redistributive justice (McHenry, 2006, Seekings & Nattrass, 2005).

Institutional theory, on the other hand, emphasizes the role of legal frameworks and organizational structures in shaping union behavior. In South Africa, legislative acts such as the Labour Relations Act and the Basic Conditions of Employment Act provide the legal foundation for collective bargaining, dispute resolution, and protection against unfair labour practices (Department of Labour, various years). Afrocentric perspectives, including Ubuntu Philosophy, Liberation Unionism, Worker Democracy, and Social Movement Unionism, offer unique insights into the values and strategies of South African labour unions. Ubuntu Philosophy advocates for communal solidarity and collective well-being as central to union actions, advocating for inclusive economic policies that benefit all members of society (Ramose, 2002). Liberation Unionism integrates political struggle with labour activism, aligning unions with broader movements for social justice and national liberation (Baskin, 1991). Worker Democracy promotes participatory decision-making within unions, ensuring that leadership remains accountable to the membership (Von Holdt, 2002). Social Movement Unionism

mobilizes workers around broader societal issues beyond workplace grievances, enhancing unions' role in advocating for systemic change (Bendix, 2010).

Despite these theoretical insights and legislative protections, South African labour unions face various challenges in the contemporary era. Internal challenges include leadership conflicts, financial sustainability, and maintaining membership engagement amidst changing economic realities. Externally, unions navigate pressures from global economic trends, political interference, and the rise of informal and precarious work arrangements (Schmalz et al, 2018). Balancing political alliances, particularly with the ruling African National Congress (ANC), poses additional complexities, influencing unions' effectiveness in independently advocating for members' interests (Southall & Webster, 2010). Moving forward, there are critical implications for policy and practice. Policymakers must prioritize strengthening labour laws to address emerging challenges such as informal work, gig economy arrangements, and technological disruptions. Effective implementation and enforcement of existing legislation are crucial to protecting workers' rights and promoting fair labour practices across sectors. Practically, union leaders should focus on enhancing member representation, enhancing transparency in governance, and utilizing digital tools for organizing and communication.

Recommendations for future research include longitudinal studies to assess the long-term impact of legislative reforms on labour relations and workers' rights. Comparative analyses with other global contexts can provide insights into effective union strategies and organizational models. Intersectional approaches that examine how race, gender, and class intersect within union dynamics are essential for understanding and addressing inequalities within the labour movement. Additionally, evaluating the effectiveness of digital transformation in enhancing union resilience and member engagement remains a critical area for exploration. In closing, the discussion attempts to demonstrate the multilayered nature of South African labour unions, shaped by historical struggles, diverse theoretical influences, legislative frameworks, and contemporary challenges. Addressing these complexities requires a comprehensive approach integrating theoretical insights with practical strategies to strengthen union effectiveness and uphold workers' rights in the evolving socio-economic landscape.

Acknowledgement

This article is the first of a four-part series of papers in this specific niche that will see a collective of studies which will include empirical investigations and collaborations with several scholars and researchers. The series is dedicated to understanding the complex nature and origins of labour relations and organization's in South Africa and abroad while appreciating the struggle of the working class in the modern world.

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