



**Exploring Organisational bureaucracy on the effectiveness of the trade unions in South Africa: the case of the South African Democratic Teachers ‘Union in the Mzi Mthembu Region, Durban in KwaZulu-Natal.**

A DISSERTATION SUBMITTED IN FULFILMENT OF THE REQUIREMENTS FOR THE AWARD OF MASTER OF SOCIAL SCIENCE IN INDUSTRIAL ORGANISATIONAL LABOUR STUDIES AT UNIVERSITY OF KWAZULU-NATAL (HOWARD COLLEGE).

STUDENT NAME: KHANYISILE MKHIZE

STUDENT NUMBER: 211555584

## **ACKNOWLEDGEMENTS**

In loving memory of my late mother, Nomthandazo” maK”

To my husband Sandile Mngadi, thank you for your support, patience, understanding and for your unwavering faith in me when I almost gave up.

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Lastly to my ancestors for consistently shinning their light on my path.

## DECLARATION

Except where noted, all the research presented in this thesis is my own.

No other university has accepted this thesis for credit toward a degree or examination.

No data, pictures, graphs, or information from any other source has been used in this thesis without proper citation.

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Whenever possible, I have cited the original source material and clearly indicated the specific sections of my published work that were written solely by me.

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Signature:  Supervisor: Ms Mbalenhle Mahlangu 

Student number: 211555584

Date: 20 March 2023

## **ABSTRACT**

The purpose of this study is to contribute to the ongoing discussion regarding the idea of a trade union bureaucracy in education. The method used to gather information was a qualitative one. It employed interviews and a review of the relevant literature to compile this data. An interpretive paradigm was used in this research. It analyzed the responses of the participants to identify themes and patterns that were then used to organize the qualitative data. Findings indicate that while the South African Democratic Teachers' Union plays an especially important role in the professional development and governance of schools, there is an overwhelming perception that union bureaucracy is a serious problem. The influence of the alliance partners on the SADTU's functions and mandate in the region is incredibly high and impacts the proper governance of the schools in the province. To assess this issue further, the study explored Marxist interpretations, which have for a long-time drawn attention to the way bureaucratization engenders profound changes to the dynamics of class struggle. In conclusion, the study sheds light on the contributions, while theoretical and analytical criteria offer a critical review of the available Marxist contributions while considering contemporary history. The study's key recommendations are that SADTU should look at itself as an autonomous and independent union far from interruption of schools. The study also mentions strikes and teacher militancy as issues that must be addressed differently, particularly by educating members and providing relevant skills to its leaders, such as skills in representing members and education policies.

## LIST OF ABBREVIATIONS

|         |   |
|---------|---|
| ANC     | African National Congress                                     |
| ANES    | American National Election Studies                            |
| CNE     | Christian Nationalist Education                               |
| CCMA    | Commission for Conciliation, Mediation, and Arbitration       |
| CIO     | Congress of Industrial Organisations                          |
| COSATU  | Congress of South African Trade Unions                        |
| ECC.    | Employment Conditions Commission                              |
| FOSATU  | Federation of South Africa Trade Unions                       |
| ICWU    | Industrial and Commercial Workers Union                       |
| ICFTU   | International Confederation of Free Trade union               |
| NACTU   | National Council of Trade Unions                              |
| NCS     | National Curriculum Statement                                 |
| NAPTOSA | National Association of Professional Teachers of South Africa |
| OBE     | Outcomes based Education                                      |
| TUCSA   | Trade Union Council of South Africa                           |
| SACE    | South African Council of Educators                            |
| SACP    | South African Communist Party                                 |
| SADTU   | South African Democratic Teachers' Union                      |

|       |  |
|-------|--|
| LRA   | Labour Relations Act                                     |
| BCEA  | Basic Conditions of Employment Act                       |
| ACFTU | All-China Federation of Trade Unions                     |
| CCMA  | Commission for Conciliation, Mediation, and Arbitration. |
| CAW   | Canadian Auto Workers                                    |
| PPN   | Post-Provisioning Norm                                   |

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## **CHAPTER ONE: INTRODUCTION AND BACKGROUND**

### **1.1. Introduction and Background**

Since 1996, when South Africa decentralized school governance, several legal disputes involving bureaucratic actions and poor administrative decisions made by education administrators have shown a lack of respect for or a misunderstanding of democratic values and principles necessary to improve education. Throughout history, important political and legal confrontations in public education have arisen over questions of educational governance, methods, and instructors, as well as the purposes and means of education (Evans, Huber, & Stephens, 2014). As an illustration of their disregard for proper school administration, education officials often ignore the advice of school boards to deport pupils who cause problems (Evans et al. 2014). The unilateral appointment of educators by provincial education authorities, in contravention of school governing bodies' recommendations and legal modifications, reveals a planned scheme to re-centralize authority and power in important areas of education. While there is no doubt that teachers are essential and that their professional development should be supported, research also shows that many schools are not getting the help they need to do their jobs well or adapt to rapidly shifting contexts. Trade unions in the field of education can play a crucial role in ensuring that problems like these get addressed, and this situation exemplifies that.

This study takes a developmental perspective in defining teachers' 'professional needs,' recognizing that to be effective educators, teachers must first acquire and hone the knowledge, skills, and competencies necessary to do their jobs well. Any effort aimed at ensuring that educators' professional needs are met is, by definition, an ongoing commitment to expanding practitioners' ability to apply their existing knowledge, skills, and competencies in the unique organizational and cultural setting in which they operate. The democratic structures of school governance established by the South African Schools Act 5 (hereafter the 'Schools Act') lay the groundwork for cooperative governance between education authorities and the school community. It was hoped that by enacting these rules, the state, parents, and teachers could form a partnership based on mutual respect and democratic power distribution.

The SADTU is divided between democratic demands and its principles, where more often, the need for bureaucracy has not only dissipated into more complex governance patterns but has increased even more (Evans et al. 2014). While democracy does not have abstractly theoretical

ties to bureaucracy, every democracy in the world depends on efficient red tape (Evans et al., 2014).

Bureaucracy, as defined by Hopkin (2002), is described as a governing system characterized by hierarchy and impersonality. It is meant for work carried out lawfully with little flexibility or discretion and without arbitrariness or favouritism. In addition to the optimistic characterization that enhances the successful and productive operation of organizations, red tape, responsiveness, delays, insufficiency, ineptitude, centralized elitism, and undemocratic tendencies are also major factors in SADTU bureaucracies (Kgari-Masondo et al., 2019). From its start in the 1990s, SADTU has been an odd and progressive teacher union for educators and non-educators alike who yearned for independence in South Africa. As a result of its efforts to address education's numerous problems, SADTU gets bad press. SADTU fought valiantly for better teacher wages and working conditions. The union's aggressive approach and bureaucracies draw harsh condemnation from both members and the public (Paddy & Jarbandhan 2014).

Globally, workers have argued that trade unionists have let them down, betraying their institutional ideals due to unnecessary bureaucracy (Jaramillo & Wright, 2015). In South Africa, there is a significant gap between the emotional nature of SADTU and the tangible realities of institutional processes. Where bureaucracy has been pointed out by Kgari-Masondo, et al. (2019) as one of the biggest obstacles to the union's progress, other researchers assert that SADTU is complicit in the nomination of educators to high positions for political reasons (Paddy and Jarbandah 2014; Ramphele 2009; Zengele 2013). SADTU, according to Diko and Letseka (2019), victimized and intimidated teachers who disagreed with its bureaucratic methods to address the problems they encountered. Teachers' unionization has been cited by anti-SADTU activists as the key to the collapse of the educational system in the country. This study will explore how conservative and progressive approaches to SADTU impact work-oriented ideologies to illustrate their ongoing impact.

## **1.2. Problem Statement**

There exists a considerable body of research indicating that teachers face limited opportunities for professional development and have a restricted role in crafting policies that try to enhance their skills, despite the prevalent discourse emphasising the importance of teacher quality

(Poltrock & Goss, 1993; Bascia, 1990). Teacher unions play a crucial role in advocating for the interests of educators and facilitating avenues for their professional development. Therefore, it is crucial to enhance the strength of unbiased teacher unions to address the issue of inadequate professional support for educators.

The South African Democratic Teachers Union (SADTU) exerts a substantial influence on the execution of policies that have an impact on the professional activities of teachers. According to academic research conducted by Chisholm (1999) and de Clercq (2013), teachers perceive SADTU as a crucial organisation for safeguarding their rights and enhancing their professional performance. Nevertheless, the presence of bureaucratic tendencies inside the South African Democratic Teachers' Union (SADTU) can impede the flow of constructive criticism from its members, so creating an impression of unresponsiveness. According to Heystek (2015), critics contend that the presence of excessive procedures and hierarchical structures might impede the active involvement of members in decision-making processes and hinder their ability to express concerns.

There is an increasing body of evidence suggesting the presence of internal disagreement within teacher unions in South Africa based on political associations (Pillay, 2019; Mokgalane, 2019). Although SADTU has been responsible for organising professional development initiatives, there have been reports indicating that bureaucratic processes may facilitate the suppression of dissenting opinions among teachers (Zengele, 2013). The claimed connections between SADTU's bureaucratic structure and government authorities have purportedly facilitated specific professionalisation initiatives while simultaneously stifling criticism. This gives rise to significant inquiries concerning the representativeness of the Union.

Trade unions serve as the primary means through which workers' rights and benefits are advocated for within a capitalist framework, albeit with certain limitations in their ability to effectively combat exploitation (Heery & Fosh, 1990). According to Lipset (1956), discussions may be significantly influenced by bureaucratic officials, leading to a potential divergence of interests between these leaders and rank-and-file members. The political affiliations between unions and the government in South Africa have the potential to exacerbate the existing conflicts between the bureaucracy and the workers (Bramble, 2013). Bureaucracies, in their pursuit of establishing organisational structure, have been argued by scholars to exhibit a

tendency towards conservatism, as officials within these systems prioritise self-preservation (Kelly, 1998). According to Devinatz (2003), the existence of rules that grant authority to leadership allows entrenched union elites to establish priorities that are disconnected from the concerns of their members.

The need to analyse the perceptions of bureaucratic alienation between the hierarchy of the South African Democratic Teachers' Union (SADTU) and its members in the KwaZulu-Natal province is important, considering the reliance of unions on participatory engagement, as highlighted by Peterson (2002). According to Von Holdt (2002), the presence of bureaucratic norms inside the labour movement poses a potential threat to the essential communication routes between leadership and members, hence impeding the progress of social change. The objective of this study is to investigate the experiences of teacher union members in the Mzi Mthembu Region, with a particular focus on the potential misalignment between bureaucratic inclinations and effective representation within the South African Democratic Teachers' Union (SADTU). This study further examines the impact of political ties on the organisational performance and mandate of SADTU.

This study aims to develop a framework that examines the viewpoints of individuals at lower levels of authority to uncover effective techniques for reconciling bureaucratic structures with participatory involvement within teacher unions. The objective of this initiative is to enhance communication channels between leaders and members by amplifying the views that are often marginalised or overlooked. Insufficient scholarly research exists that examines the effects of bureaucracy on South African labour unions from the perspective of their members. This study aims to fill the existing knowledge gap by employing the South African Democratic Teachers' Union (SADTU) as a case study. The results of this study will contribute to the advancement of scholarly discourse on the topic of restructuring labour unions to optimise professional growth prospects for teachers who are part of these organisations.

### **1.3. Key research questions**

The study is guided by the following key research questions:

- i. What is the impact of bureaucracy on the effectiveness of SADTU within the Mzi Mthembu Region in Durban, KwaZulu-Natal?
- ii. What extent of influence do the alliance partners impose on the SADTU on its functions and mandate in the region?

- iii. What bureaucratic strategies can be harmonised within SADTU to effectively advance the interests of its members?

#### **1.4. The main objectives of this study**

The main objective of this study is to: Explore organizational bureaucracy on the effectiveness of trade unions in South Africa with specific reference to Mzi Mthembu Region in Durban, KwaZulu-Natal.

- i. To investigate the impact of bureaucracy on the effectiveness of SADTU within the Mzi Mthembu Region in Durban. KwaZulu-Natal.
- ii. Examine the influence that the alliance partners impose on the SADTU on its functions and mandate in the region.
- iii. To explore strategies in which bureaucracy can be harmonized within SADTU to effectively advance the interests of its members.

#### **1.5. Significance of the Study**

South Africa has a long history of trade unionism, stretching back to the 1980s when immigrant white miners established the Witwatersrand goldfields. In the 1920s, black workers were excluded from collective agreements, and the roots of the apartheid labour system were laid in the mines. The South African Trade Union Congress was established in 1955 as the country's first non-racial union federation (SACTU). Tracing the history of SADTU back to pre-colonial times helps people understand the importance of the union.

When people learn about South Africa's history of liberation struggles long before European colonizers arrived, it gives them an understanding of why they can fight so hard. SADTU merged with the purpose of promoting one reform agenda. The overt political purpose was to link the campaign for better working conditions for teachers with the national democratic movement's goal of toppling apartheid authority (Amoako 2013).

Nonetheless, the brief review of past and current literature highlights some issues in SADTU bureaucracy as a significant example of contact between people and the unions. This literature pays particular attention to the union members (Lipsky 2010) to emphasize the need to conceptualize both bureaucracy and its impact on performance.

Exploring studies of bureaucracy reveals answers to old questions in comparative studies, such as the sources of success, such as unions, political design, and new systems, and how different

variables may impact the performance of different stakeholders, to which SADATU is not immune. It is possible to argue that there is not enough research available on how bureaucracy affects the servicing of regular union members and how the numerous levels of hierarchy affect the functioning of labour unions, and that this is a problem. This argument highlights the need for additional research of this type to be conducted in industrial-organizational labour studies.

Therefore, it is likely that the results of this study will contribute to new information in the field of industrial-organizational labour studies and other relevant fields. This research will also be beneficial to SADTU authorities since it will serve as a source of reflection and, ideally, have an impact on policies governing organizational structures and decision-making processes.

### **1.6. Structure of the dissertation**

The thesis will be structured into six (6) parts which may change depending on the themes that will develop upon completion of the study.

#### **Chapter 1: Introduction.**

This chapter summarizes the study's context, problem statement, objective, research concerns, and significance.

#### **Chapter 2: A study of the literature.**

This chapter conducts a systematic review of the literature pertinent to the research issue. This section clearly defines the study's research background.

#### **Chapter 3: Theoretical framework**

This section discusses the theoretical underpinnings of the analysis and how they fit together.

#### **Chapter 4: Research Methodology**

This section discusses the sampling methods and population to be analysed, as well as the data instruments and techniques that will be used to analyse the data in order to accomplish goals and draw some strategic conclusions.

**Chapter 5: Results and discussion.**

This chapter summarizes and discusses the data collected, emphasizing the main observations, their significance, and their relationship to the literature.

**Chapter 6: Summary, conclusion, and recommendations.**

This chapter summarizes and concludes the report, reflecting on the study's findings and contribute to the body of information. Additionally, recommendations and suggestions for the practical implementation of such results will be made to determine the feasibility of alleviating the problems faced by SADTU.

## **CHAPTER 2: LITERATURE REVIEW**

### **2.1 Introduction**

The literature is reviewed in this chapter. To set the stage for the reader, I first review the key ideas behind the research. Next, I'll talk about some of the overarching ideas that have come up for me when interacting with empirical facts and other sources, such newspaper articles and government texts like the Constitution. This research is limited to articles that focus on how important school stakeholders perceive SADTU's bureaucratic tendencies in the classroom.

### **2.2 Overview**

#### **2.2.1 The Concept of Trade Union**

Webber explains that the phrase refers to a group of people who work together to preserve or enhance their working circumstances. It has been variously defined by various writers. 2019 (Jackson). A trade union is "an ongoing, long-term organization of workers, created and maintained for the explicit aim of promoting and safeguarding the interests of the members in their working relationship," according to Dale (2012). A trade union, sometimes known as a labor union, is an organization of employees or workers who have come together to advocate for and achieve common economic and social goals. Trade unions are organizations whose leaders negotiate with employers and management on behalf of their members to improve working conditions, pay, and other benefits. Pay, hours, and grievance procedures are just some of the issues that might be discussed during collective bargaining.

Unions and collective bargaining have long been crucial in maintaining stable workforces in advanced countries by increasing workers' share of economic gains, enhancing working conditions, and reducing unemployment. Unions for employees have developed in reaction to changes in the political, social, and educational climates around the concept of rights, including the right to organize, the right to bargain, and the right to settle the terms and circumstances of employment. Hence, unionization has been critical in raising workers' living standards via the establishment of minimum wages, rules governing appropriate work hours, health and safety precautions, and general enhancements to the workplace (Rao 2010:293). A trade union is an association of employees or employers of independent workers, and it is not a sporadic gathering of workers. The primary focuses of a trade union are collective bargaining and coordinated, concerted action. It was established to safeguard and advance the members' economic, political, and social interests. Unions are primarily concerned with economic issues

and seek to advance their goals via concerted group effort. Methods for achieving goals include collective bargaining and negotiation.

### **2.2.2 The origins of unionism in South Africa**

At the turn of the century, British artisans brought trade unionism to South Africa. The first white South African craft unions focused on preventing blacks from entering their industry because of their inferior skills and the fear that they would drive away white workers (Horrell, 1961:1). Afrikaners were allowed to join craft unions, but Africans were not only excluded from such organizations but also prevented from joining due to a lack of necessary skills. Unitarians believe that race and level of education should be the only criteria for admittance to a labor organization, and hence they discriminate against black people who want to join white unions (Ncube, 1985:151). As a result, racism and socialism were shown to be mutually incompatible ideologies in the South African setting due to the racist and elitist actions of craft unions. Labor on one side and capital on the other, as Marxists see them, did not exist in South Africa in the traditional sense (Ncube, 1985). There was a distinct racial divide between white unions and black unions.

Historically, black labor unions did not appear in the United States until 1917. The Industrial and Commercial Workers Union (ICWU) of 1919 was the first organization to actively seek to organize black employees into a union (Baskin, 1991:7). According to Ncube (1985:152), the ICU was founded out of the anger felt by the black masses after they were denied basic civil liberties like the right to vote and land ownership. As a result, black people from all walks of life and schools of thought joined the ICU, turning it into an "amorphous, messianic popular movement" that ultimately failed to distinguish between economic and political issues due to their inherent intertwined nature and thus failed to achieve its goals (Ncube, 1985:152). According to Baskin (1991), the ICU was pivotal because it began a legacy of black labour resistance.

The worker's committee for African American workers was formed in the 1930s, and it played a pivotal role in advancing the cause of civil rights for black workers into the 1960s. Before 1979, this was the only legal method for black employees to have a voice in the workplace (Horrell, 1961; Ncube, 1985). The Industrial Conciliation Act of 1956 banned the registration of mixed unions unless they had authorization from the minister, notwithstanding unions' push towards the extremes of traditional Marxism's capitalist and labour philosophies (Ncube, 1985;

Baskin, 1991). What this did was put an end to whatever progress or improvement workers had made during that time.

According to Webster (1985), the Illegal Organizations Act and General Laws Amendment Act of the early 1960s were particularly damaging to labour unions. According to Ncube (1985) and Baskin (1991), the multiracial Trade Union Council of South Africa (TUCSA) exerted a great deal of influence over the few black unions that survived the dark decade. This decision was overturned four years later. Even though most union officials were hiding out abroad, a grassroots movement was forming to fight back. Independent trade union organizing campaigns began in the 1970s in Durban, Cape Town, and the Witwatersrand at the same time. According to Baskin (1991), these unions formed due to the efforts of many different people and organizations, including the remnants of previously banned (Black) trade unions, the ANC, intellectuals, and international organizations like the ICFTU, which provided financial support to the unions.

The Wiehahn Commission of Investigation was established in 1977 in response to the widespread strikes that had become commonplace in the early 1970s. Among its many responsibilities, it investigated the shortcomings of current labour legislation and made recommendations for reform. The panel pushed for African workers to be given the legal protection to organize and join unions. According to Ncube (1985), these suggestions were a watershed moment in the development of the South African labor movement. The first black labor unions were able to request official recognition from the government for the first time in the country's history. The Wiehahn suggestions inspired the formation of two federations: the COSATU in 1985 and the FOSATU in 1979. In 1986, the National Council of Trade Unions was established. COSATU has always intended to have a dual role in the economy and the government (Bendix, 2000).

### **2.2.3 Historical connotation of SADTU**

Teachers of all races, religions, and sexes in South Africa may become members of the SADTU. The organization representing educators is of the opinion that the profession of teaching, more than any other, shapes our identities and the social fabric of our society. The union believes that harmony between members' professional and trade union lives is crucial to the long-term success of both the union and its members, as well as the greater good of society. Education International is a worldwide trade union coordinating organisation that organises

over 23 million members in the education sector across the world. It is affiliated with the Congress of South African Trade Unions (COSATU). SADTU was established on October 6, 1990. It was ground-breaking in that it united several teacher groups that had been separated along racial lines. SADTU's disobedience in this matter has been essential in bolstering anti-racism efforts in South Africa. With over 240,000 members in all nine provinces, the union has grown to become the biggest teachers' union in South Africa.

Teachers in South Africa reflect the roots, ideological manipulation, and social engineering goals of political victories throughout history. The current administration of South Africa is included below. A historical description of the South African educator places that individual at the centre of every effort to shape the country's future during its entire era of social and political change. The early Christian missionaries' goals of 'civilising' indigenous societies via education are still reflected in modern teacher education practises. To some extent, the present teacher that South Africa has created is a product of the cultural dynamics that followed the period of Christian missionary education, with the post-1948 CNE system emerging successful in terms of control. An important historical touchstone in any investigation of the formation of the RSA educator is the formalisation of CNE as part of the institutionalisation of "Afrikaner nationalism" and the systematic oppression of Africa.

The underlying power relations of this education system have not only warped "they professionalise and/or unionise" rhetoric in the education sector but also intruded on the function of a teacher in the process of nation-building. After the republicanisation of South Africa in 1961, "Afrikaner nationalism" unilaterally took on the task of decolonization to the exclusion of other races, which in turn helped to establish a racialized working-class" structure characterised by racialized but otherwise indistinguishable "class" similarities. The teacher applicant was ethnically classified as belonging to one of three tiers of the middle class: the lower, middle, or upper classes. Due to this incorrect categorization, educators continue to struggle with their shifting sense of "class identity" and the role they play in the process of nation-building.

Both 'British colonialism' and its stand-in, 'apartheid,' took aim at a teacher who saw her job as contributing to the country's strategic and economic progress. This ideological undercurrent favoured a white supremacist learning and teaching environment, and the teacher took on the

role of enforcer. What developed from these arrangements was a school system in which it was assumed that teachers would "bracket their philosophy of life," even if doing so went against the grain of the post-racial ethos of the time. As there is no agreed-upon definition of "patriotic teacher" or "patriotic student," the harm done to South African educators' "mindsets" is evident in the failure of the education system to generate either. With this system in place, being a teacher became even less respected than being a nurse or police officer. Teachers' underpayment, inadequate income, and inadequate compensation system caused many dedicated educators in economic development subjects to leave the field. With craftsmen and associated professions being a primary school de-linked activity, the scenario has a multiplicative impact on South Africa's manufacturing skills base. Because of this, a major strategic task for SADTU is to either reacquire these talents or develop them in its current crop of members.

SADTU was established in 1990 to address the difficulties inherent in the movement toward teacher unionization, professional growth, and student-centred learning. Considering the liberation movement's role in addressing this issue, SADTU had to take it on within the larger social emancipation framework of the NDR. The militant spirit that drove teacher unionization at the time remains at the forefront of the development work of unions created at that time. This task was carried out in a manner consistent with the wider mass democratic movement's strategy of increasing the militant nature of society in opposition to apartheid colonialization and all that it represented. The anti-apartheid campaign expanded its territory into the realm of teacher professionalisation, development, and unionisation. Future generations of educators will continue to draw inspiration from the teacher militancy that helped establish SADTU as a progressive force for change in South Africa, even though such inspiration may be decontextualized for them.

The contrast between 'teacher rights' and 'learner rights' to 'uninterrupted' instruction is always brought to the forefront within the context of the sensitivity under which education fights are conducted. A strong, shop-floor-militant attitude towards teacher unionisation was therefore facilitated by society's somewhat disapproving evaluation of the consequences of teacher unionisation. Militancy was fuelled by the status of the majority of SADTU members during Apartheid, which exacerbated their "class identity crises" in the context of teaching in a hostile climate over franchise-related rights.

This set the stage for the public sector collective bargaining system to include teachers' unions. In order to advance the liberation of society from all traces of "apartheid colonialism," the progressive teacher union movement needed to redefine strategy and tactics in light of this recognition. This required outlining a course that both furthers the NDR and sets the stage for the ongoing education of the next generation. There was heightened awareness throughout the SADTU formation process of the risks of becoming a pro-capital teachers union due to the exclusive interpretation of teacher unionisation. A deliberate choice was made to transform SADTU into a working-class and pro-poor social organisation with a militant element opposed to the unjust labour and service policies of any administration. Strategically, what they mean for SADTU's long-term development is an open topic.

#### **2.2.4 Overview of Organizational Bureaucracy**

Bureaucracy research has been revitalised beyond functionalist perspectives. A growing scholarly focus on deconstructing bureaucratic systems' inherent paradoxes illuminates the disconnect between their purported operational efficacy and the tangible consequences that often manifest as estrangement, irrationality, and inefficacy within organisational environments (Turk, 2021). Changes in focus point have improved understanding of bureaucratic dynamics, including informal social ties, power dynamics, hidden resistances, and accountability reimagination. Researchers correctly place bureaucracy under marketization and capitalist state restructuring in contemporary scholarship. They bravely challenge its impartiality and inexorability. Gall (2020) emphasises the complex relationship between historical and sociopolitical elements that shape bureaucratization. Gall (2020) reframes bureaucracy as a dynamic and disputed area with the potential for transformative change and collective action (Uetricht, 2022). This critical perspective challenges bureaucracy's pervasive influence on human consciousness and calls for a democratic reorganisation.

Modern scholarly discourse must appreciate the significant contributions of new ethnographic studies on organisational life. These research' innovative approach revitalises this domain's analytical framework. Deeply exploring the subject matter, these ethnographies illuminate the informal dynamics that shape workers' actions and attitudes as they traverse bureaucratic disempowerment. Additionally, this research reveals workers' subtle resistance to bureaucratic institutions' disempowering impacts. The research of Koşar (2020) and Paulet (2020) shows how bureaucratic systems depend on employees' tacit knowledge. This understanding is crucial for managing the complex relationship between standardised procedures and real-world

complexities. Workers can establish a semblance of informal autonomy and derive personal meaning from their work within bureaucratic rationality, suggesting the possibility of collective voice and solidarity. Bureaucracy paradoxically cannot eliminate human spontaneity, as people ingeniously find ways to assert their agency inside the rigorous framework of the organisation (Lê, 2021).

Modern bureaucracy analysis examines how bureaucracy subjugates social structures and lifeworlds. DeFilippis et al. (2022) examines how bureaucratic ideas like technological rationality and market managerialism shape education and social welfare. Gall (2020) examines how state restructuring, financialization, and fractionalization affect bureaucratic invasion. This study has piqued academic attention in the political economic catalysts and ideological systems that lead to technocratic administration replacing substantive democracy (Sandoval, 2022).

Bureaucratic colonisation constrains potentialities, turns human services into commodities, severing care tasks and community connections, and replaces human-centred reasoning with algorithmic objectivity (Kaufman, 2021). These effects are examined critically. Critical scholars argue that the economy must be reintegrated into the social fabric to create a harmonious relationship between economic activity and social dynamics. They also champion interactive conversations to democratise decision-making and empower individuals to shape collective action (Turk, 2021). Finally, critical scholars stress the need to decolonize governmental institutions from bureaucratic strangleholds to create a more inclusive and equitable society. When faced with bureaucracy's disillusionment of personal value and alienation from critical society activities, the need to fix it becomes clear.

Given these formidable challenges, contemporary social movements are manifesting themselves as catalysts of transformative action, seeking to transcend bureaucratic hegemony through grassroots mobilisation, collaborative initiatives based on mutual assistance, and vigorous campaigns driven by individual power (DeFilippis et al., 2022). These movements aim to democratise society by redistributing agency to the periphery, allowing ordinary people to participate in local governance (McCallum et al., 2020). The decentralisation of bureaucratic authority meets modern difficulties while adhering to radical traditions.

Scholars use their utopian imaginations to imagine alternatives to bureaucratic systems (Turk, 2021; McCallum et al, 2020). A counter-narrative can be seen in the ability of feminised institutions to facilitate collective growth, ecological organisations to reconcile human and environmental needs, self-directed workers' cooperatives to eliminate alienation, and socialist wealth democratisation in communities. These deeply optimistic perspectives stress the need to transform democratic futures through social activity. Bureaucracy research now focuses on ordinary resistance practises. This research also critically examines bureaucracy's colonial effects and connects with grassroots attempts to rethink the system. This reorientation helps place case studies like the teacher union instance in a larger context of bureaucratic dynamics, resistance, and democratic regeneration.

### **2.3 Bureaucracy's Impacts on Union Effectiveness**

Recent case studies demonstrate that excessive bureaucracy and complex procedures for decision-making hampered unions' potential to promptly respond to emergencies like pandemic layoffs (Greer et al., 2022). Bureaucratic arrangements demarcating specialized functions prohibited establishing comprehensive strategies connecting different concerns across sectors. Lead negotiators focused narrowly on formal contracts whilst jobless members urgently sought resources and engagement in wider labor alliance-building (Chunn & Gavigan, 2020).

Centralizing of authority in specific executive hands during catastrophes also obstructed clear information flows to strengthen solidaristic ties against employers (Zeilig, 2020). Researchers highlighted how bureaucracies produced dependency dynamics that manifest sharply during extraordinary moments, however typically eluded attention under regulated settings (Anner et al., 2021). Furthermore, tendencies to elevate nominated professional staff over lay leaders risked impeding prompt deployment of on-ground member knowledge regarding fast-moving effects.

Critical study indicates how excessive proceduralism and top-down control reversed priorities, as abstract regulations sacrificed human needs during calamities like the pandemic (Anner et al., 2022). Union bureaucracies conditioned to favour structured bargaining above all became complicit for failing communities in crises, notwithstanding radical histories of cooperation. This recommends probing the unique bureaucratic architectures that eventually hampered

capacity to mobilize rapid, empowered social response sensitive to victims' perspectives (Atzeni & Ness, 2022).

Longer-term repercussions similarly expose bureaucracy's downsides, as depleted organisational cultures trouble regaining momentum post-crises in situations where bureaucratic inertia prevails (Gumbrell-McCormick, 2020). Whilst mainstream unions centrally involved in tripartite policy consultation gained exposure, experts warn merging labor onto state-managerialist panels risked ultimately eroding counter-hegemonic opposition (Doğan, 2021). Such cooptation forces render bureaucratized unions vulnerable losing touch with ground reality.

However, scholars likewise caution against presenting constituencies as intrinsically anti-bureaucracy, emphasising that underprivileged groups may pragmatically utilize official channels for incremental change despite inbuilt restrictions (Chun, 2022). Bureaucratic systems created via protracted political strife paradoxically provide crucial platforms to relay some demands whilst foreclosing more radical aspirations like removing hierarchies (Connell, 2021). This piece of literature serves the purpose of providing a contextual framework for understanding the conflicting consequences of bureaucracy on the efficacy of unions. It achieves this by examining examples of crisis when the impacts of bureaucracy on union effectiveness were not readily apparent in the past.

The analysis of bureaucratization in unions necessitates an examination of its form, its emergence and adaptation within socio-political contexts, the effects on representation, and the potential for significant advancements in grassroots democratisation (Uetricht, 2022). The analysis of the dialectical effects of bureaucracy is crucial to enhance the participatory nature of unions and their ability to engage in social struggles in a context of instability. A thorough analysis is necessary to guide the rethinking of bureaucratic reform in a manner that fosters the development of cultures that empower the revitalization of labour.

#### **2.4 Political Affiliations and Labour Union Representation**

Current scholarly investigations are examining the effects of partisan political connections on union representation, often resulting in intricate dynamics between bureaucratic structures and the active involvement of union members (Anria & Rodriguez, 2021). According to Dogan (2022), comparative research reveals that within revolutionary contexts, the integration of

unions into the machinery of political parties resulted in a significant transformation of leadership, shifting them from being radical advocates to becoming state bureaucrats. Following their assimilation, labour unions encountered challenges in reclaiming their autonomy. The interests of the dominating party have permeated and replaced the internally generated member priorities (Seidman, 2021).

During the process of transitioning to electoral democracy, some labour unions pursued autonomy because of their disillusionment with the statist system (Anner et al., 2021). Nevertheless, the challenge of overcoming partisan biases was made more difficult due to long-standing affiliations that had been cultivated via years of political conflict. According to Seidman (2021), throughout post-transition eras, the use of models that differentiate electoral operations from workplace organising has facilitated more robust communication channels between leadership and members. This statement holds significant implications for the examination of the impact of party affiliations of South African teacher unions, considering the country's historical background of revolution.

Anner (2020) argues that the inclusion of unions inside vanguard parties has inherent hazards, notwithstanding the potential benefits it offers in terms of mobilising anti-colonial opposition. According to Bramble (2013), the perception of unions as mechanisms for transmitting party doctrines resulted in the establishment of hierarchical structures that centralised authority, ultimately impeding labour engagement after independence. The establishment of leadership patronage patterns has developed a culture where individuals anticipate receiving benefits in exchange for exhibiting allegiance to a political party, rather than focusing on cultivating their own self-directed abilities (Palmer & Nielson, 2022).

Moreover, in situations characterised by a partial attainment of emancipation, persistent socio-economic inequalities, and the challenges posed by neo-colonial forms of governance, ruling parties sometimes find themselves tempted to maintain bureaucratic control over civil society organisations like as labour unions, to reinforce stability (Doğan, 2022). The labour leaders faced intricate identity conflicts as they had dual roles as both state officials and advocates of the workers. This situation required them to navigate through conflicting solidarities, as discussed by Gentile (2021). Consequently, the bureaucracies that were established over the

course of liberation movements faced the potential of impeding the process of independent union reactivation following political transitions.

According to Mercea (2021), although organisational autonomy has been crucial in revitalising communication between leaders and employees, there is a growing consensus among analysts that political non-partisanship alone is not enough, considering the essential public functions performed by labour. In addition to formal divisions, the capacity of unions to maintain internal democratic cultures that empower members to prioritise their demands relied on the implementation of leadership accountability mechanisms like as periodic elections, term limits, and explicit policy development procedures (Seidman, 2021). The process of reimagining, therefore, requires a shift in focus away from abstract disconnections and towards the empowerment of everyday participation through bureaucratic systems.

## **2.5 Rethinking Alternative Approaches Beyond Bureaucracy**

Contemporary academic discourse emphasises the necessity of transcending dichotomous assessments of bureaucratic systems to envision alternative institutional frameworks that promote accountability, participation, and social empowerment (Sandoval, 2022). DeFilippis et al. (2022) argue for the importance of attending to the prefigurative endeavours of subaltern communities in their pursuit of constructing grassroots counter-power that transcends entrenched institutional frameworks. The pervasive use of bureaucratic jargon poses a potential risk of perpetuating its limited range of potential outcomes, rather than shedding light on areas of individual agency and autonomy (McCallum et al., 2020). The examination of unions involves the scrutiny of routine micro-level activities in which workers challenge bureaucratic marginalisation and establish alternative democratic prospects (Uetricht, 2022).

The case studies included in Conway's (2020) work demonstrate novel approaches to union reform, which aim to redistribute leadership responsibilities, dismantle artificial divisions between officials and members, and foster a dynamic governance structure that promotes member-driven initiatives. The utilisation of sectoral negotiating councils in experiments deviated from the conventional dichotomy between leaders and followers by actively engaging rank-and-file members as negotiators and organisers. This approach fostered a communal navigation of intricate logistical challenges, as opposed to relying on centralised control by appointed experts (Uetricht, 2022). The implementation of a well-founded restructuring

process has facilitated the formation of dynamic solidarities, hence enhancing the capacity to adapt and effectively respond to localised priorities.

According to DeFilippis et al. (2022), the implementation of participatory leadership development programmes that prioritise peer learning and horizontal organisation has demonstrated effectiveness in fostering cultures of member self-mobilization. These programmes have proven to be successful in overcoming the limitations imposed by bureaucratic structures and the exclusive reliance on professional union staff. The implementation of comprehensive organisational structures that promote the autonomy of workplace collectives in strategizing, raising consciousness, and planning direct action is crucial for revitalising labour movements and countering the tendency towards rigid business unionism.

According to Anner et al. (2021), it is important to acknowledge that bureaucratization is not an inherent or fixed state, but rather a product of historical development influenced by human actors and their interactions under changing limitations. This phenomenon instils optimism for the development of significant alternatives that empower individuals who have historically been marginalised by bureaucratic systems, such as women, immigrants, and racialized groups. This progress signifies a shift towards the intersectional reconstruction of social classes. The urgency of democratising unions as institutions for participatory democracy is more evident in the face of escalating capitalist austerity, the rise of authoritarian neoliberal regimes, and the pressing challenges posed by the climate crisis (Gall, 2021).

The comprehensive examination of human agency presented in this study offers foundational elements for envisioning revolutionary alternatives that surpass the worn-out rationales of bureaucracy, ultimately leading to the establishment of truly liberating institutions (Sandoval, 2022). In the present day, there is a pressing need to reaffirm the significance of radical imagination in opposition to the prevailing forces that assert the absence of any imaginable alternative futures beyond the influence of capitalism. The DeFilippis et al. (2022) study focuses on doing research to find various instances of creative grassroots mobilisation. This research aims to provide valuable resources and insights that can contribute to the achievement of democratic and participatory futures. New feminist, ecological, and socialist organisational

forms that surpass the scope of bureaucracy can emerge from the culmination of these collaborative experiments.

## **2.6 Theoretical Literature Review**

### **2.6.1 SADTU and the collective bargaining principal in schools**

Collective bargaining, defined as "managing salaries and other key conditions of employment through agreement between unions and employers," has its roots in nineteenth-century British innovations, according to Chan and Hui (2014:221-242). In eight Western countries, including the United States, collective bargaining is often seen to advance worker interests. According to the findings of these two academics, trade unions' principal tool for enhancing members' working conditions was collective bargaining, which was bolstered by the possibility of workers' collective actions. Trade unions used this as one of their key tools to improve workers' circumstances in the workplace, so the story goes. The idea that economic issues are given too much weight in collective bargaining negotiations has gained traction in recent years. Worker bargaining, they argue, is "better regarded as a political activity rather than an economic one."

Numerous academics have concluded that political power and collective bargaining are intricately intertwined and hence cannot be studied separately. It has been reported by Flavin and Hartney (2015: 896–911) that in the 1950s, the great majority of American educators were against their coworkers participating in any political activity beyond voting. Despite this, by the late 1970s, American educators had become one of the most politically engaged organisations in the nation. According to an analysis of state-level data from the ANES between 1956 and 2004, researchers discovered that following the passage of such a statute, educators' political engagement rose dramatically across the board. Even though union membership did not rise during this time, this was discovered to be the case. They then looked at how teacher unions were able to effectively organise and mobilise their members for electoral politics thanks to the financial backing they received via collective bargaining. Teachers, unlike the general population, were more likely to report being solicited to become politically active by a non-partisan group following the passage of a forced bargaining statute.

Kuruvilla and Zhang (2016) both highlight how the Chinese perspective on the labour movement and collective bargaining is somewhat different. Collective bargaining is handled extremely differently in this area of the world compared to the West, especially in two key respects. To provide just one example, whereas Freedom of Association is a cornerstone of

most collective bargaining regimes worldwide and allows employees to join any union they want, in China, all workers are forced to join the All-China Federation of Trade Unions (ACFTU). Workers in China do not have the legal right to go on strike, in contrast to the practises of other countries. Yet, it seems that collective bargaining is becoming more widespread in China, despite these important distinctions.

There is evidence to support the argument that these folks "hoped that possibly its minor non-economic charms might grow to have increasing relevance as time went by," even while they regarded the economic security of employees as the most crucial part of collective bargaining. Later studies looked at collective bargaining systems in six industrialised nations, and their authors concluded that factors like the level of bargaining, where it takes place (at the plant, regional, or national level), and the amount of management granted by collective agreements all play a role in the system's overall efficacy. They saw it not only to improve employees' economic situations but also to improve their social and political standing in the workplace. The discussion going on in the West over collective bargaining sparked this idea. China's approach to development is different from the West's.

Consequently, the Chinese context must be considered while discussing collective bargaining in China. The focus should be here. The Chinese government has publicly criticised the compromised stance and bureaucratic style of Western labour unions. Collective bargaining is when employees form a group to bargain for more favourable working conditions with their employers. They often form unions, although not always, to protect their interests and those of their fellow employees. Workers' unions are seen quite differently in China than they are in the West. Trade unions in China have a restricted role to play in advocating their members' interests since they can only represent those interests.

When it comes to understanding South Africa's regulatory framework for the labor market, Borat, Naidoo, and Yu (2014) argue that the Labour Relations Act (LRA) and the Basic Conditions of Employment Act are the two most essential pieces of legislation in the post-Apartheid period. To promote economic growth, social fairness, labour peace, and workplace democracy, LRA 66 of 1995 creates the Labour Relations Council as a platform for collective bargaining between workers and employers. This is achieved through regulating trade unions'

freedom to organise, and by encouraging and facilitating collective bargaining at both the company and industry levels.

BCs, or Bargaining Councils, are organizations formed between business groups and registered trade unions in a certain sector and territory. Settlements on issues such as the minimum wage and other employment benefits are common outcomes of collective bargaining. The LRA has also set up mechanisms for settling labour issues and keeping peace in the workplace. The Commission for Conciliation, Mediation, and Arbitration (CCMA), the Labour Court, and the Labour Appeal Court are all examples of such institutions.

The BCEA 75 of 1997 lays down the bare minimum in terms of working conditions, such as the required number of hours worked per week and the compensation for overtime, vacation, and illness. In 2002, the Act was revised to establish the ECC. The ECC is accountable for advising the Ministry of Labour on the minimum wage and other conditions of employment in vulnerable industries.

Labor laws, although preserving workers' rights, have been criticized for creating a disincentive to remove employees, even if they are not productive. This is the case since employees' rights are safeguarded by law. This is due to the lengthy time commitment associated with South Africa's intricate processes for firing workers, which might entail things like CCMA hearings. In 2006, the mining sector, for example, took the longest, on average, to settle conciliation claims. As a matter of fact, this was true in every sector (37.3 days, which is above the stipulated duration of 30 days). Moreover, Bhorat et al. (2013) found that, although all other criteria stayed the same, some locations displayed a lower frequency of industrial disputes and a greater degree of efficacy in the settlement of such conflicts.

According to Ntuli and Kwenda (2014), the post-Apartheid administration has considerably modified the South African Constitution and adopted new policies to minimize wealth disparity following the country's return to democracy in 1994. As was previously indicated, the legislation that supports the wage determination process in the current regime is the Labour Relations Act (1995), which grants employees the right to join labour unions and offers a forum for collective bargaining. Considering the new situation, lawmakers enacted this regulation.

Collective bargaining may occur either at a centralised location or at a specific plant. The term "centralised bargaining" refers to the process through which several labour unions in each industry or sector negotiate pay and working conditions with multiple employer organisations. This happens when labour unions and employer groups have been given the green light by the appropriate ministries, indicating that they effectively speak for most of their constituents. The Bargaining Council agreements may be expanded to include non-union employees in the specified industries. The criteria might be waived for non-members if they petitioned the minister (Bhorat et al., 2012).

Level 2 collective bargaining occurs at specific plants. Workers' unions might bargain with factory management for pay raises and improved working conditions that are unique to that facility. The agreements established here might serve as an addendum to the negotiating council's Union members who are also negotiating council members are entitled to the same union premiums as non-bargaining council members. Wages in the competitive sector are set by employers, presumably in accordance with choices made by those employers to maximise profits, as opposed to the union sector, where wages are set in the way outlined above.

Unions and employers in negotiating councils confront a problem not shown in the figure above: that of parties in the bargaining councils themselves. With so many cases of labour unrest in South Africa recently, it's time to consider whether parties to collective bargaining should be under any kind of duty to do it in good faith. One may make the case that recognising this obligation in South Africa would be good for business and workers alike.

Almost a third of Canadian workers are union members, and most public sector employees are union members, either by choice or by law, as described by Bowal and Moore (2015). This raises the question of whether the discussions are being conducted in good faith. Unions provide members with more influence than they would have as individuals during the bargaining and implementation of collective agreements. By joining a union, workers give up their ability to bargain with their employers on any aspect of their employment. This shifts the burden of leadership from the employees to the union, which is a substantial shift in power dynamics. Because of this, it is crucial that the union effectively reflect the interests and requirements of its constituents. As a result of this responsibility, known as the union's duty of

fair representation of the interests of the members, talks are more likely to be conducted in good faith as opposed to bad faith.

The Provincial Labour Relations Acts and Codes and the Canadian Labour Code outline many of the regulations that govern unions (for employees regulated by the federal government). For instance, many union activities are outlawed under the Alberta Labour Relations Code. Employers, employer groups, rival unions, and workers are all potential targets of strong-arm tactics, which include "coercion, intimidation, threats, promises, or undue influence of any type" (section 151). The union's duty to adequately represent its members is reflected in the statute as a restriction as well. Unions are prohibited by law from acting arbitrarily, discriminatorily, or in bad faith while representing employees in accordance with the applicable collective agreement.

As in Canada, the guiding concept also holds true in South Africa. A strike organised by a union in response to a disagreement with an employer, such as one over the interpretation of collective agreements, is a legal and protected form of protest according to the Labour Relations Act, Act No. 66 of 1995 (the LRA). To guarantee that a strike is legal and protected, the union must follow several procedures both before and throughout its duration. Section 64 of the LRA gives a detailed explanation of these procedures. A councillor at the CCMA must have been made aware of the dispute, a certificate must have been issued stating that the dispute has not been resolved, and the employer must have been notified of the strike at least 48 hours in advance, or 7 days in advance if the employer is the state.

If the strike is authorised in this manner, it will qualify as a safe strike. It's important to note that when a strike is protected, it implies that no worker may be dismissed or penalised for taking part in the strike. Any member who intentionally harms another person or causes property damage during a strike is in violation of the Labour Relations Act and might face serious penalties.

This inquiry was assigned to the researcher. This is particularly relevant when dealing with the issue of acting arbitrarily, unfairly, or otherwise not in good faith. If SADTU has acted inappropriately, a suggestion will be made to address the issue and make things right.

This is the general point that this section is trying to express. The impartiality of SADTU's role as an observer in the rollout of the redeployment policy is at stake. When the redeployment policy is implemented, the union's activities must show that it is treating all teachers fairly, not just those who are members of SADTU. All teachers are potentially affected by the redeployment policy. In this scenario, SADTU's behaviour will be scrutinised closely. Hence, if this study is to achieve its goals, it must do what it set out to do.

### **2.6.2 SADTU and professionalism in governance**

Educators and policymakers have been discussing teachers' professionalism, as reported by Wu, Cheung, and Chan (2017:59–70). They believe that a teacher's knowledge and competence are the foundations of their professional identity. Professionalism among educators is an ever-evolving idea as new expectations are put on them, particularly in the aftermath of legislative reforms aimed at increasing the quality of education. These changes may tip the educational system's power structure in a new direction. Teachers may have conflicting emotions at this time. Some teachers may be able to advance their careers and seize new possibilities for self-improvement thanks to the shifts. Teachers in Hong Kong have been profoundly affected by the education changes adopted over the previous three decades, as detailed by Wu et al. (2017:59–70). To implement these changes, state and federal education administrators must cede power to local school boards. Yet empowering teachers is an ongoing process. The increased workload in recent years has made it more difficult for teachers to exercise their authority in the classroom. The journey to education reform in Hong Kong has been marked by alternating periods of teacher empowerment and disempowerment, reflecting shifting conceptions of what it means to be a professional educator.

The distinction between "profession" and "professional" is important to Ramokgotswa's (2016:12) definition of professionalism. One's "profession" is their "calling," and it usually requires formal training or schooling. One who exhibits the necessary skills and behaviour for their career is generally accepted as belonging to that profession. Members of a certain profession share a set of values known as "professionalism," which is a phrase used to characterise such values. Every employee, volunteer, and visitor must project a polished, exemplary image of the institution always. One of the most important aspects of keeping a level head in a classroom is showing respect for everyone present. A set of rules for proper behaviour within a profession.

When educators are disruptive in the classroom or demonstrate antisocial behaviour, they lose the respect of their pupils and the confidence of their parents. According to Amtaika (2013:108–116), teachers lost their cool during a strike in 2010 and began threatening other employees who showed up for work and destroyed school property. Preliminary examinations at certain institutions were postponed or cancelled altogether. Amtaika (2013:108–116) explains that in certain schools, teachers and students alike were stressed before finals. As a result, the argument that SADTU members' behaviour during the 2010 strike was radically different from the subdued professionalism demonstrated by teachers during the 1989 walkout has some foundation.

In observing the process of teacher redeployment, union representatives are required to conduct themselves professionally and keep focused on their observational tasks. When SADTU is successful in persuading the Department to replace empty jobs set aside for surplus educators with jobless skilled instructors, it places pressure on the system's Compensation of Workers budget. Again, the state's standpoint finds this to be unreasonable. The department reportedly spent R2 billion in March 2016, which is ten times the monthly budget of R200 million, prompting the standing committee for public accounts to challenge the department's leadership (The Daily Dispatch, 2017: 18). In March, the Department of Basic Education spent about R2 billion that had been donated. As a result, the Auditor General and the government will not stand for wasteful expenditure on recurring costs. Concerns about fairness emerge whenever SADTU calls for jobless teachers, known as "walk-ins", in the Eastern Cape, to be hired to fill open posts. Competence and fair play are at best questionable in such a volatile setting.

Very important questions are raised by Biesta (2015:75–87), including how teacher professionalism can be regained if it has been destroyed to such an unacceptable and horrific degree. Teacher professionalism has developed with time, as shown by previous research. There is a well-established professional development trajectory for teacher educators in the Netherlands, as stated by Lunenberg, Dengerink, and Korthagen (2014). Following this route usually means enrolling in a programme in the Netherlands that trains educators. Because it includes both university and school-based teacher educators, this route garners a lot of attention from academia and the working world. The lack of, or restricted concentration on, defined career routes for teacher educators makes this a welcome development.

Maxwell and Schwimmer (2016: 354–371) contend that an alternative solution to the issue of teacher professionalism can be found in the development of a historical community of practise, which includes a unique body of practical and theoretical knowledge as well as its own set of collective norms. Professionals have an obligation to base their judgements and actions on accepted standards rather than their own impressions of what is right or efficient in a specific situation. The authors use this rationale to argue that all pre-service teacher education programmes ought to include a core ethical framework for the teaching profession.

As such, it is imperative that all aspiring educators be exposed to and educated on the ethical concepts outlined in the teaching profession's code of ethical behaviour (Ungaretti, Dorsey, Freeman, & Bologna, 1997:271-280). Increased professionalism benefits everyone in the area when, for instance, individuals acquire the "cognitive strategies and interactional knowledge and abilities to detect ethical difficulties and reflect upon behaviour via a widely held code" (Ungaretti et al., 1997:278). This excerpt emphasises the need to cultivate both cognitive and dialogic abilities with an understanding of corporate norms of professional behaviour in order to enhance a community of practice's professional status. A teacher's ability to reflect on their own actions and provide justifications for their choices is greatly enhanced by coursework in ethics.

Teachers, as Boon and Maxwell (2016:1) point out, have historically been subjected to a very high level of morality. In the same way that they are seen in the rest of the industrialised world, teachers in Australia continue to be considered agents of moral transformation. The Australian Institute for Teaching and School Leadership has required training for teachers whose ethical dispositions are congruent with this concept, reflecting a long-held notion of teaching as an ethical and vocational profession. This group grants approval to educational institutions for their teacher preparation courses. The Australian Institute of Teaching and School Leadership bases its pre-service teacher (PST) training and higher education courses on the Australian Professional Standards. In order to be eligible for a teaching position, one must have completed a degree programme that has been granted accreditation. These standards ensure that those who will one day teach have a solid foundation in both pedagogy and their subject. The fact that a PST has finished an accredited programme strengthens the ethical characteristics and traits they must exhibit in the classroom and in their daily lives.

Teachers' ethical behaviour is highly correlated with the leadership culture they have internalised. Teachers who have trust in their administration, satisfaction with their workplace, and a strong sense of teamwork all contribute to what is called "teacher leadership culture" (Demir, 2014). When teachers conduct themselves professionally in the classroom, they focus on doing all they can to provide their pupils with the best possible learning experience. Teachers are becoming more professional as they strive to enhance their students' learning environments. In this respect, it may be crucial to provide teachers with a peaceful working environment in which they are trusted with autonomy over their work and encouraged to draw on the knowledge of their colleagues. Teachers' professional conduct is demonstrated to improve when the school's culture recognises and appreciates teachers who take on leadership roles.

Parlar, Cansoy, and Klnç (2017:13-25) used data from 254 teachers in the Üsküdar district of Istanbul's province to get this conclusion. Using data from the Teacher Leadership Culture Scale and the Teacher Professionalism Scale, we discovered that aspects of teacher leadership cultures, such as a favourable work atmosphere and collegial connections among colleagues, strongly predict teacher professionalism. The data was analysed using several mathematical tools, including multiple linear regression and the Pearson product-moment correlation coefficient. All three studies revealed that both teacher leadership cultures and teacher professionalism were above average. Positive correlations were also observed between teacher leadership culture, teacher professionalism, professional collaboration, and the availability of a supportive working environment. Factors such as a trustworthy connection between administrators and teachers and a positive school climate all contribute to a more professional atmosphere in the classroom (Cerit, 2012).

These words make it obvious that educators are held to the highest standards of professionalism whenever they are given the freedom to try out novel methods of teaching and participate in group studies and work projects. It seems to make sense that when teachers are given more autonomy, they will make some changes to their methods that will eventually benefit children, since in schools where professional behaviours are pervasive, difficulties and errors are recognised as learning resources. The interdepartmental cooperation is quite efficient. Forming mutually beneficial connections with other educators and sharing successful teaching practises is beneficial to everyone involved. Teachers may be more open to cooperating and supporting

one another in a stress-free environment, and they may take what they've learned and use it to enhance their teaching.

One main obstacle to the development of professional habits is said to be the prevalence of a strict, authoritarian, and challenging educational system (Yirci, 2017). Due to heavy workloads, an unsupportive work environment, and a lack of organizational structure, teachers have a difficult time improving their skills, efficiency, and professionalism. When teachers' opinions are considered during policymaking, schools improve as locations where students may study without disruption. Teachers have a deep and abiding respect for their students. Under this model, all teachers contribute to school management instead of just the administrator. According to Wood (2014), what he terms "teacher-led professional development," which makes use of social media, has provided new opportunities for professional discourse and debate within the framework of teacher professional development. They are essential for countering policy changes imposed from outside the field. As part of this plan, it is suggested that educators create new spaces for professional discourse and development if they want to be at the centre of the educational debate.

### **2.6.3 Demystifying trade union bureaucracy**

The phrase "union bureaucracy" is crucial in discussions of radical politics and the study of labour unions, but it is also very controversial. Worst-case scenario: left-wing activists use it to describe union officials whose actions or beliefs they find repugnant. Bureaucrat is a pejorative term that is used in this context to describe some union officials; however, it is not applied to those whose actions are seen as positive. In addition to its lighter meaning, the phrase may also be used in a more sombre sense. The existence of a permanent union administration has been called out by several critics, among them Graeber (2006) and Braverman (2007) (1998). Those in this segment, whom they refer to as "the trade union bureaucracy," are supposedly conservatives inside their unions, according to their arguments. Some versions of this critique of "the bureaucracy" are far more insightful than others. Despite this, there have been few efforts to develop and present a unified theory of union bureaucracy in the recent past.

Kelly (1988) stated over two decades ago that "rarely is the word "bureaucracy" defined or its usage justified on any theoretical basis, and it is typically unclear which of numerous meanings is being applied" in the study of unions. Despite this fact, it has been the case for almost two

decades (Kelly 1988:155). Theories of "the trade union bureaucracy" as a collective may also obscure a clear view of the nature of union activities. When we focus on official leadership, we run the danger of missing or dismissing the structure of connections between members and between members and officials, as well as the context in which union action takes place.

If one seeks to advance the state of theoretical thought on union bureaucracy to a level that will help us comprehend many unions as bureaucratic mass organisations, one needs to ask what bureaucracy really is. It is said that bureaucracy is best described as a way of life in which social ties are maintained via the organisation of people's activity (work) by means of formal rules that constrain their freedom to decide on their own personalities and life objectives and are difficult to change. Max Weber observed that the formal structure of rules is a defining element of bureaucracy as a social phenomenon, even though informal norms may also have comparable effects on people's activities (1952).

While prevalent in modern capitalist nations, this method of arranging social interactions has its roots elsewhere. The origins of bureaucracy may be traced back to pre-capitalist society. Graeber (2006:4-5), an anthropologist, says that bureaucracy arises wherever "social situations...founded on structural violence" (meaning "types of widespread social inequity that are ultimately underpinned by the fear of physical damage") are being administered. As Georg Lukács (1971:99) pointed out, the concern for predictability and calculability in the capitalist enterprise observed by Weber is part of a broader drive to subject various aspects of social life to "an increasingly formal and standardised treatment...in which there is ever-increasing remoteness from the qualitative and material essence of the "things" to which bureaucracy is applied".

The separation of intellectual and physical labour and the monopolisation of the former by a limited number of people is one of the "types of widespread social inequality" most pertinent to bureaucracy. According to Alfred Sohn-Rethel (1978:66), "the employment of non-empirical form abstractions, which may be represented by nothing other than non-empirical, "pure" conceptions," is what sets intellectual labour apart from physical labour. He argues that the emergence of philosophy in ancient Greece marked the beginning of intellectual labour in this sense, and that this was made possible by the 'non-empirical real abstraction' (p. 66) of a

"social synthesis' (p. 4), Sohn-term Rethel's for "the network of relations by which society forms a coherent whole" (p. 4).

As a result, "the generality inherent in the monetary commensuration of commodity values fostered by coinage" (p.102) enabled intellectual labour to be performed. According to historians, currency was first used "about 680 BC in Lydia or Phrygia, on the Ionian side of the Aegean" (p. 59).<sup>7</sup> Several concerns might be raised concerning Sohn-story. Rethel's point now is that intellectual labour has been a source of bureaucracy because it has been monopolised by privileged social groups with the authority to enforce restrictive formal norms that control the living activities of other people. Priests and other religious leaders, as well as scientists working for the state, are two examples of such groupings.

Separating the planning of human action from its actual carrying out is a similar but different kind of dominance that gives birth to bureaucracy. One may find early versions of this in the rule books of military organisations and state administrations, as well as in patriarchal laws that permit men's control over women's labour, both of which predate the rise of capitalism. With capitalism, however, there is an increasing gulf between planning and actual implementation. Cornelius (1988:273) noted in 1960 that the 'arbitrary aim' of "maximum output' is achieved by "ever-heightened separation of direction and execution, by lowering employees to the position of simple executants, and by moving the tasks of management outside the labour process".

More "labour, from which all conceptual aspects have been eliminated, along with most of the ability, knowledge, and understanding," as Braverman's (1998:319) more popular and somewhat later version of such an argument puts it, is a direct result of capitalist progress. Thompson (1989:243) acknowledges that competitive accumulation drives capital to reorganise production to reduce costs and that this "sets limits to the use of workers' creative capacities and constraints attempt to dispense with hierarchical relations," implying that the separation of conception and execution is not an essential feature of capitalism's organisation of labour processes.

Whether one agrees with the more extreme or more moderate assertion (or any intermediate stance in between) in the realm of paid labour in capitalist nations, there is a widespread

disconnection between ideation and actualization. This is a hallmark of capitalist societies in their early stages, and formal laws are often used to ensure that this practise is adhered to in the course of all subsequent work activities. While the expansion of the capitalist economy generates new forms of productive forces and patterns of workplace organisation, which in turn produce new forms of conceptual labour, employers have traditionally tried to partition these two stages of the work process. One industry where this tendency is most apparent is in the field of computer programming (Thompson, 1989:111-112).

It's important to note that the process of decoupling planning and doing is not confined to the realm of paid labour. Political life in capitalist democracies relies on this division as a foundational tenet. The political management of society takes shape in capitalist nations with liberal democratic forms of government, with a small number of elected politicians and unelected high-ranking civil servants making the major decisions while the rest of the population is left to carry them out. This partitioning is often achieved by structuring people's lives via the limiting laws of bureaucracy, whether in the interactions between employers and wage employees or between governmental authority and the governed.

According to the definition presented here, bureaucracy is not a collection of individuals but rather a system of organizing social life. This interpretation is both expansive and restrictive. Not all circumstances in which people's freedom to choose their own goals and actions is severely restricted may be classified as bureaucracy. Limitation exists when individuals are subject to formal restrictions that they cannot readily alter. For instance, a tiny firm owned by a dictator who "micro-manages" a staff of individuals doing highly unskilled labour and who goes to considerable measures to prevent employees from having access to knowledge about the enterprise's activities is not a case of bureaucracy. Instead, this is a prototypical example of what Edwards (1979) labels "basic control," an employer control method.

The notion also acknowledges that bureaucracy is not the only factor that might limit subaltern agency. Distinguishing the phenomenon of substitution from bureaucracy is essential. One or more individuals take the place of a larger group by doing the same tasks. Simply expressed, substitutions behaviour is that which does not encourage more initiative on the part of the individuals involved. Substitution is not always bureaucratic, although bureaucratic techniques of replacement are common, such as in union regulations that give rank-and-file members little

to no say in union operations and provide all the critical work to officers and staff, effectively replacing an active membership with an executive. For instance, employees' ability to take initiative may be hampered by a militant local union president who encourages members to "leave it to me" and strives to stifle or seize control of any idea that does not originate from himself. His activities are bureaucratic only if they require employees to follow a set of predetermined procedures that restrict their freedom to make decisions about their own jobs.

The framework presented here may shed light on the ways in which bureaucracy can seep into the union movement (Zengele 2013). Although the 'bureaucracy as officialdom' approach excludes certain occurrences, the definition is broad enough to include a wide range of activities observed in modern labour organisations. These mandates from the law force unionised employees to go through a structured procedure to air their grievances with the company. Whenever a grievance is filed with the union, the union is responsible for it, not the employees who are adversely impacted. Another kind of bureaucracy in the labour movement occurs when union bylaws permit the union leadership or negotiating team to hoard sensitive information. Members who lack this knowledge are less likely to take initiative.

Even though the members have democratically established the aims of the strike, they cannot guide its direction if the union's organizational structure is bureaucratic. It is also bureaucratic for a union to have a constitution that gives members who do not hold union office little or no opportunity to engage in the ongoing business of the organisation, such as by holding few general membership meetings. A small number of individuals in these unions come up with ideas and carry them out, leaving most union members with no real ability to contribute. It is also a form of bureaucracy when the union's rules of order for conducting meetings limit the voice of individual members. These examples are designed just to provide a taste of the many ways in which bureaucracy may be expressed inside union organisations; they also demonstrate how much is lost when a theory of union bureaucracy concentrates only or mostly on union full-time executives and personnel.

#### **2.6.4 Trade union bureaucracy and institutional performance**

When it comes to raising educational quality and standards, previous research (Ramphela 2009; Zengele 2013) offers conflicting perspectives on the importance of teachers' unions. Cowen and Strunk (2014) argue that teaching syndicates have political and legislative influence on education policy to the benefit of their members and the insight of the syndicate into education

challenges. In South Africa, for instance, the performance management development system (PMDS) was established with input from teachers' unions, and this has had a direct impact on the improvement of teachers' salaries. The teachers' unions have a limited influence on influencing educational change because of their bureaucratic structure. In contrast, the conventional wisdom in both historical and contemporary educational writing is that teachers' unions prioritise the interests of their members over those of students (Fullan, 1998). According to Bascia (2018), several academics argue that teacher unions are inflexible organisations that prioritise the interests of their members at the expense of students' learning. This, as noted by Vaillant (2015), implies that teacher unions care primarily about their members' economic and working situations. Yet, there are many who believe that unions' main goal is to boost teachers' professional reputations, and that pupils and school administration or management end up with simply a trickle-down of the advantages. For example, Bascia (2018) argues that unions for educators in both Canada and the United States have a dedication to administrative and professional concerns, such as expanding teachers' responsibilities, skillsets, and capacity to meet students' diverse learning requirements.

Moreover, the bureaucracy of teacher unions paints them as enemies of progress in the classroom. Under the context of educational reform, Carlson (1992) published research that was critical of teacher unions. According to the results of his research, local teachers' unions in the United States are hostile to contractual obligation elements that would help educators better grasp the curriculum and reach their full potential. That conduct is not limited to Carlson's educator group or the United States. In South Africa, teacher unions have fought against curriculum revisions (Masumbe & Cotzer, 2006) and other initiatives to improve the educational system. For instance, the National Curriculum Statement (NCS) adopted outcome-based education after including the Department of Education (DoE) (OBE). Nevertheless, SADTU said that instructors were unprepared for contemporary issues and unable to adopt the new teaching techniques, so they rejected the OBE for both practical and ideological grounds.

Hence, this creates a substantial barrier for teacher unions to play a meaningful role in the reform process. Teachers' contractual responsibilities to their professional organizations are often not satisfied due to the bureaucracy that prevents them from participating in the development of a new curriculum (Barber, 2016). And if educators don't take on more duty, it

slows down the implementation process (Fullan, 1998). This research will only consider the SADTU as it pertains to the Mzi-Mthembu area of Durban, Kwa Zulu-Natal.

### **2.6.5 The Social Roots of union Bureaucracy**

Human nature, as well as the complexity and scale of organizations like unions, are commonly cited as the primary reasons of bureaucracy, as Alvin Gouldner (1955:498-500). The need for unions to be administratively effective necessitates a hierarchical and bureaucratic structure, according to the Marxist author Darlington (2010:9). It is possible to find such "pessimism and fatalism" in the works of theorists like Max Weber, Michels, and Talcott Parsons, as argued by Gouldner (1955:498). In response to the view that huge organizations must necessarily be bureaucratic, Castoriadis (1988) argued that the need to organize centralization inside companies is an inherent and objective challenge. This was after some time had passed since the publication of Gouldner's critique of the then-prevailing sociological theories of bureaucracy.

Nonetheless, this is an issue that may be fixed by either representative government or direct democracy. Centralization is defined as "a general assembly of strikers, an elected strike committee, the commune, the soviet, the industrial council" (Castoriadis, 1988:207), or more accurately, as anti-bureaucratic answers developed by self-organized workers in battle to the issue of centralization. It seems that Castoriadis's argument that there are alternatives to a bureaucratic organization calls into question theories that derive union bureaucracy as merely the inevitable product of organizational growth. Instead of accepting things as they are, we should investigate the societal factors that inevitably lead to the development of union bureaucracy.

The core activity of unionism, bargaining for wages, is perhaps the most significant contributor to union bureaucracy. Wage earners' subjection to capital in the paid workplace arena motivates organized employees to negotiate collective agreements with their employers to control various areas of their working life. Workers want to codify salary levels and working conditions in contracts because of the imbalance of power between capital and labour. Wage earners will refrain from attempting to lock in pay and working conditions in contracts only when workers' collective strength and willingness to fight bosses makes it

unnecessary or even undesirable for companies to guarantee wages and working conditions. Because of the 'episodic and discontinuous nature of working-class struggle under capitalism,' (Post, 1999:122) situations in which wage earners enjoy such a highly favourable interplay of forces are both rare and usually short-lived. Unions that refuse to sign contracts have arisen under unusual circumstances, such as the formation of the Industrial Workers of the World in the early 20th century and the formation of several early locals of the Committee for Industrial Organisations/Congress of Industrial Organisations (CIO).

When contracts are in place, businesses that care about maintaining a steady flow of output have strong motivations to prohibit strikes throughout the agreement's term. They, too, have a vested interest in maintaining command over staff operations. Unions are under pressure to accept limits on strikes and to recognize managerial authority because the balance of class power in the paid workplace sphere in capitalist societies is rarely decisively in workers' favour — after all, this is the fundamental reason why workers fight for collective agreements in the first place. These compromises are inevitable results of the interdependence of capital and labor in the workplace. When procedures are codified, they become bureaucratic, stifling the initiative of employees, and making it harder for them to shape the nature and purpose of their job. So, this is where union bureaucracy originates; indeed, it's where unions get their power.

Although in modern capitalist countries, the separation of intellectual and physical labour is a major source of bureaucracy, notably in the social and scientific sciences, this is not the case with union bureaucracy. Following Sohn-Rethel (1978), it's hard to view abstract time, space, and motion as crucial to unionism if we consider intellectual labour to include "the use of non-empirical form-abstractions which may be represented by nothing other than non-empirical, 'pure' ideas" (p.66).

Separating planning and implementation are a far more significant causes of union bureaucracy. In later stages of capitalist society, this lack of worker influence over the manufacturing process, workplace structure, and the like is a defining feature of the alienation of labor (Rinehart, 2006). Workers prefer to create unions in ways that bureaucratically reflect and maintain this division in nations where this practice has been mainstream or even merely

usual. This kind of organization is congruent with the way many parts of their social life are organized, including as formal education, paid employment, state-citizen interactions, and, often, volunteer groups. Union regulations that grant substantial decision-making authority to staff and elected executives while treating the membership as passive executants are an illustration of the conceptual and operational divide. This is reflective of the way many businesses treat their workers, governments treat their people, and religious leaders treat their followers.

Yet, it is also important noting that there is a countertendency: workers may and do organize in directly democratic ways, in contrast to the propensity for workers to establish unions in ways that mirror this dominating aspect of capitalist society. This democratic inclination originates from employees' experiences with self-activity and self-organization, which shakes up the traditional divide between ideation and implementation. For example, in the most democratic modern unions like the recently formed National Union of Healthcare Workers in the United States (Early, 2011) or the unions affiliated with France's Union syndicate Solitaires federation (Coupé, 2007), workers make important decisions in mass meetings and elect recallable strike committees. This is especially evident in forms of collective action like strikes. Many labour organizations reflect the democratic countertrend of maintaining a wall between planning and implementation. The specific case's history determines the weight each one carries.

Union bureaucracy has deep roots in the capitalist state's ability to impose its will. It is not uncommon for states to adopt formal laws that affect the way in which unions are structured socially. Mark Neocleous (1996:88-92; 110-116) defines political administration as the "legal and administrative action of capitalist state power in civil society," and he uses instances like these norms to illustrate his point. To manage the working class, political administration creates legal people as subjects of rights and objects of administration and employs procedures that react to workers' conflicts but attempt to eliminate their disruptive potential. Once capitalist regimes recognize unions legally, they often utilize their legal and regulatory authorities to force unions to organize themselves in ways that restrict members' capacity to select the aims and tactics of activity. Strikes are banned or their time and type are limited most often. The Taft-Hartley Act of 1947 placed significant restrictions on strike action and was a major factor in the "gradual metamorphosis of grievance arbitration from a voluntary

and private mode of dispute resolution into a semi-compulsory, an institutional system for the management of complex enterprises" (Klare, 1978:377) in the United States (Green, 1980:198).

Canada's prohibition on strikes throughout the duration of a contract and the need for mandatory grievance arbitration both dates to the 1940s (Fudge & Tucker, 2001). It is important to remember, however, that the imposition of bureaucratic norms on these issues is not necessary since they may also emerge from inside capital-labour interactions in the production process and the market. Specifically, in the United States, the contract between General Motors and the United Auto Workers in 1937 "established a grievance procedure designed to circumvent the shop steward systems and prevent wildcat strikes," and the contract in 1940 "stipulated that the grievance procedure would be the only way that the union would challenge management actions" (Edsforth, 1987). This chapter has addressed three social bases of union bureaucracy: contracts emerging from the wage relation, the separation of conception from implementation, and the political management of unions by capitalist state power. It is time to circle back to the union leadership from where we came. Apart from being a potentially significant fourth contributor to union bureaucracy, this occurrence also warrants closer inspection for its own sake.

#### **2.6.6 The union bureaucracy and the international context**

There has been very little discussion of union officials in this alternate view of union bureaucracy. Some readers may interpret this as a defence of bureaucrats' justification for their actions. My aim has been only to highlight the aspect of "the trade union bureaucracy" that is sometimes overlooked: bureaucracy as a mode of societal interaction. This is no more an excuse for union leaders than Marx's theory of the capitalist mode of production is for business owners. If a union is particularly bureaucratic, its leaders will be equally so. Yet we need to be more cautious than some radical thinkers have been about drawing broad generalizations about union leaders.

On the other hand, there is substantial evidence from the past to suggest that unions tend to recruit (more) full-time officials and employees as collective bargaining contacts grow more entrenched, giving birth to or reinforcing union bureaucracy. Craft unions in the United States and Canada started using full-time "business agents" to manage local contracts with

employers at the tail end of the nineteenth century. According to Craig Heron (1996:32), these workers and the senior executives and organisers of the craft unions eventually formed an officialdom that became concerned with safeguarding the union's assets, processes, and contractual responsibilities as well as their own position and income. In other cases, these permanent administrators may calm agitated employees by cutting off their access to central strike funding or by forcing strikers back to work.

Half a century later, as collective bargaining between employers and industrial unions became more bureaucratic in the United States and Canada, union officialdom grew in response. This expansion was largely driven by the need to process grievances within the new mandatory grievance and arbitration systems (Heron, 1996:80; Green, 1980:187). The Congress of South African Trade Unions expanded its bureaucracy with the advent of a new layer of full-time shop stewards following the passing of the Labour Relations Act in 1995, which introduced a new paradigm of industrial legality in the country (Appolis & Sikwebu, 2003).

The success of a labour movement often hinges on how well organised the union bureaucracy becomes. The material circumstances of full-time officials (whether officers or union employees) are objectively different from those of the members they are expected to serve, regardless of the officials' ideological leanings or personal convictions (Zengele 2013). Employees' working circumstances are not something they discuss. They are paid far more than regular members and lay authorities. Employer assaults on pay and working conditions don't immediately impact full-time officials. Employers often try to hire full-time officials who communicate with management daily to reduce work stoppages, convince employees to accept administrative supervision in the workplace, urge workers to work harder, and achieve similar goals. Because of these material constraints, full-time officials are often less in touch with the reality of workers' lives on the job and more in tune with management's goals than regular employees. This is the case even if the union is weak, with few paid employees and minimal resources.

Serving as an elected or appointed official full-time may shape one's worldview in significant ways. Full-time officers become "trade unionists by trade," and their occupation requires specific rights, as noted in the Welsh radical book *The Miners' Next Step* (Zengele 2013).

For full-time officials who may consider working full-time for years, the union "constitutes a whole way of life: their day-to-day function, formative social relationships with peers and superiors on the organisational ladder, a potential career, and, in many cases, a social meaning, a *raison d'être*. The necessity of preserving this existence imposes certain demands:

All officials at every level need to keep their institutions running smoothly if they want to stay in power. It's easy to see how trade union officials could succumb to the irresistible temptation to put the interests of their organisations ahead of those they're supposed to be protecting — to confuse the interests of the institutions they rely on with those of the people they're supposed to be representing (Brenner, 1985:45). It is possible, though unlikely, that a given union representative would always prioritise protecting the interests of the people she represents above those of the union itself. It's hard not to think of Arthur Scargill, head of the National Union of Mineworkers during the 1984–1985 British miners' strike. Brenner is not arguing that all union leaders, full-time or otherwise, prioritise the long-term health of the union above the needs of individual members. Instead, it's the fact that officialdom is incapable of replenishing itself unless union institutions are maintained. There's more than one approach to this problem. Preserving union institutions typically goes hand in hand with an openly class-collaborationist philosophy, although this is not always the case.

Consider the political strikes organized by leaders of the Canadian Auto Workers (CAW) and most public sector unions during the Days of Action in the province of Ontario in the second half of the 1990s (Camfield, 2000), and the efforts by leaders of the British Columbia division of CUPE to organize sympathy strikes in support of striking teachers (Camfield, 2009). The core problem arises because union officialdoms, once they have solidified social layers, are wholly reliant on the stability of union structures to ensure their survival. As a result, the mission to protect these institutions will shape and, ultimately, direct the behaviour of full-time officials.

Due to this, we can identify union officialdom as a social layer and, hence, a fourth source of the union bureaucracy. Since their livelihoods depend on maintaining union structures, full-time union officials often structure union activities in ways that support their own self-serving interests. As a rule, officials choose organisational structures that provide them with extensive

discretionary authority at the expense of popular representation. To paraphrase *The Miners' Next Step*: "the greatest of these are plenary powers, demanded by trade unionists by trade"; "every inroad the rank and file make on this privilege lessens the power and prestige" (Anonymous, 1912:3–4). This gives full-time officials a reason to oppose such democratising moves. To sum up, permanent union leaders are more likely to shape union policy and practise in ways that increase their own influence. Bureaucratic procedures feature formal regulations that restrict the power of members to select the means and ends of union activity. In places where union officialdom has solidified as a social layer, this is a typical trend of official behaviour, but there are always outliers.

Active members dedicated to democratic techniques meant to restrict the authority of full-timers, like the radical Welsh miners who advocated *The Miners' Next Step* a century ago, may have considerable influence when such a practise emerges and successfully contests it. There are probably some full-time officials who feel so strongly about membership control that they want to expand it rather than limit it. But permanent government employees have a vested interest in fostering bureaucratic operations that serve their particular social stratum.

Unlike popular belief, officialdom does not always use its influence to quell militancy or radicalism. Unions with full-time officials may aim to promote either one or all these goals inside a bureaucratic structure. Examples of this include the radicalism of the Service Employees International Union's Justice for Janitors campaign (Tait, 2005) and the Communist Action of the Workers' (CAW) shift to the left in the latter part of the 1990s. Once union officialdom has formed as a distinct social stratum, however, we may make the broad theoretical assertion that this group will exhibit institutional conservatism. Union bureaucratization, union institutional security, the ferocity of the class conflict, and the ideology of the union all have a role in shaping the amount to which members are conservative.

Union officials' conservatism is not exclusive to the strong unions of the modern, capitalist world; it has also shown itself in much weaker, less bureaucratic organizations. Craft unions in late nineteenth-century South Africa, for instance, had limited access to the law, few elected leaders, and small budgets. As we've seen, however, the union's full-time officials are

increasingly focused on defending union institutions, fulfilling contractual commitments, and enjoying the privileges that come with their positions. We may draw the conclusion that full-time officials tend to favour their authority inside union organisations, which promote bureaucracy, and we can also observe that this conservatism is founded on the maintenance of union institutions.

### **2.6.7 Analyzing unions in South Africa today.**

Regarding the study of unions, where does this theory place our focus? As a first step, this method draws our attention to the two-sided nature of collective agreements and labour legislation by emphasising the significance of formal restrictions that restrict employees' capacity to define the character and purpose of their activities and which they are unable to readily modify. The two are often intertwined since they serve as bases for union rights and limits on collective activity, respectively.

For instance, several fundamental aspects of South African labor legislation might be categorized as bureaucratic. U.S. law strictly forbids "secondary" (or "sympathy") attacks (Lynd & Gross, 2008). Grievance arbitration is made "semi-compulsory," and negotiating over management choices "which sit at the heart of entrepreneurial control" is prohibited (Klare, 1978:337). The Canadian legal system imposes an even greater degree of red tape. It mandates management rights clauses in contracts and the Rand Formula for union security; it limits union recognition to only those unions certified by a labour board; it prohibits recognition strikes; and it mandates union security through the Rand Formula (Fudge & Tucker, 2001:302-315).

Since such bureaucracy is required by law, it is generally tolerated by unionists. "Integral to the law is a moral topography, a mapping of the social reality that normalises its favoured contours and, as crucially, excludes or at best marginalises alternative ways of seeing and behaving," Philip and Sayer (1981:33). Several legal and contractual provisions, including exclusive representation rights and the Randolph-Hearst Act, make it easier for employees to take collective action against their employers and governments than others.

Workers' authority is compounded by the formula's mandate that all employees covered by a union contract pay union dues. Second, this theoretical stance emphasises the relevance of

various types of formal regulations constraining the behaviour of unionised employees, particularly those included in union constitutions and other union bylaws. Unionised workers in South Africa have a hard time, if not impossible, determining the direction and strategy of their organisations due to the pervasiveness of bureaucracy in the form of organisational structures and practises at all levels, from the locals to the top labour controllers. This type of bureaucracy is not the result of political labour management by the state in these countries. There are several democratic rights guaranteed to union members in South African legislation (Benson, 1979), and the government places minimal restrictions on unions' ability to organise internally (Lynk, 2002).

In South Africa, the widespread practice of splitting planning and carrying out tasks has had a more profound impact on union organizational structures than any other single factor. The working-class movement is influenced by cultural norms that hold that organisations are best led by a limited group of managers and 'experts,' with little to no engagement from the general populace. None of the most powerful political traditions within South African unions have questioned this perspective. Mills (2001) notes that many post-war American union leaders shared the view of their Canadian counterparts, as described by Heron (1996:80), that "they had always stressed the significance of expertise and centralised bureaucratic management, rather than direct rank-and-file initiative". As unions and collective bargaining were made legal in South Africa the following decade, newly consolidated labour officialdoms left a more bureaucratic imprint on union structure.

This chapter provides a more nuanced picture of union bureaucracy thanks to the viewpoints it presents. A bureaucracy does not have a unified set of leaders. In addition, it is not an outside prison where unions are held captive. Rather, it is a key feature of unionism itself—more precisely, of types of union practise in certain historical and geographical contexts—as a mode of existence of social connections. When bureaucracy occurs inside unions, it is often embedded within the unions themselves as working-class movement groups. As there is no way to escape bureaucracy via the promotion of modes of action whose character and purposes are chosen by workers themselves, "revolutionary radicalism" at union meetings and conferences offers no such escape. Anti-bureaucratic unionism is based on workers' active engagement and control over their organisations, with self-activity, self-organization,

and democratic control from below at its core. It's important to investigate the causes and conditions that give rise to this kind of unionism.

### **2.6.8 Strengthening Review of Bureaucracy Theory**

Enhancing the conceptual framework that underlies the analysis could be achieved by delving further into seminal bureaucratic theory. Current scholarly analysis explores the inherent inconsistencies present in Weber's conceptualization of the ideal bureaucratic model, as it strives to eradicate human irrationality through rationalist principles, yet ultimately encounters obstacles in achieving this goal (Gonon, 2022). Weber aimed to address the dehumanising effects of modern logical systems by advocating bureaucracy as a solution. However, this contradiction highlights the limitations of technocratic ideas that fail to consider how informal social factors influence organisational dynamics (Lê, 2021).

Subsequent scholars such as Michel Crozier (1964) made significant contributions to the field by delving into intricate power relations and the emergence of informal structures inside bureaucratic settings. Crozier (Türk, 2021) identified a series of self-strengthening "vicious circles" in which the tight adherence to rules and regulations inside a bureaucracy leads to employee dissatisfaction while simultaneously reinforcing their reliance on formal processes. Bureaucratic dysfunction arises primarily from suboptimal organisational design, but it is also influenced by the social interactions and methods employed by individuals navigating within alienating systems (Kaufman, 2021).

Gouldner (1954) expanded the analysis to encompass the informal organisation that develops alongside the formalised framework of bureaucracy, characterised by emergent solidarities and unwritten norms that facilitate its survival (Cohen & Douai, 2022). Informal organisations inside bureaucratic systems employ various strategies to get necessary resources, exert influence, or attain autonomy (Paulet, 2020). The researchers in question have contributed to the advancement of study in public administration by examining the complexities of bureaucracy. Their work has shed light on the paradoxical nature of bureaucracies, which involves the tension between the officially stated functionalist principles and the underlying power dynamics that permeate organisational structures (Lê, 2021).

### **2.6.9 Current Perspectives on Union Bureaucracy**

The association of bureaucracy with oligarchic inclinations among union leadership has been noted by Michels (1962). However, contemporary perspectives highlight the sociopolitical nature of bureaucracy, emphasising its inseparable connection to capitalist state power (Camfield, 2022). The role of labour rules is significant in gradually reinforcing bureaucratization (Uetricht, 2022). According to Gall (2020), the implementation of formal leadership structures, limitations on unofficial labour action conducted outside designated channels, and the enforcement of standardised methods of negotiation with management have contributed to the increased bureaucratic inflexibility observed in the development of unions over the twentieth century.

These changes are inherently linked to the political decline of radical working-class groups, the construction of welfare states, and the implementation of business unionist agreements aimed at maintaining labour harmony (Zeilig, 2020). The regulations that granted majoritarian unions exclusive bargaining power and the authority to collect dues through check-off mechanisms were intended to bring about stability. However, these regulations also fostered a reliance on bureaucratic-legal structures, as leaders became committed to maintaining the organisational assets they had recently obtained (Anria, 2021). There is a growing consensus among researchers that it is important to analyse the underlying causes of bureaucratization within broader historical and sociopolitical frameworks, rather than just assigning responsibility to the personal inclinations of union leaders (Uetricht, 2022).

This statement aids in challenging the notion of bureaucracy as a reducible and abstract phenomenon, highlighting its socially constructed nature within certain configurations of state power and class compromise (Anria, 2020). The process of bureaucratization involved unanticipated compromises, as the implementation of hierarchical structures offered benefits in terms of resource allocation for serving the members, but also resulted in the concealment of a significant "social distance" between the higher-ranking individuals and the general membership (Chunn & Gavigan, 2020). Nevertheless, focusing solely on blaming individual officials runs the risk of overshadowing the underlying structural factors. This approach fails to acknowledge the pervasive influence of bureaucracy within contemporary capitalist institutions and the tendency to identify unions with traditional establishments (Camfield, 2022).

The study by Gall (2021) delves into the nuanced consequences of bureaucracy, examining its dualistic influence on organisational dynamics. Specifically, it investigates how the restricting nature of bureaucracy interacts with the opposing forces of workers' self-organizing endeavours. Scholars highlight the distinctive nature of unions as spaces that encompass both bureaucratic relationships and radical democratic practises, rather than assimilating them inside theoretical frameworks (Uetrict, 2022). This realignment facilitates the cultivation of intricate interpretations on the manifold ramifications of bureaucracy that emerge inside labour unions.

## **2.7 Knowledge Gaps**

While existing literature affords crucial insights on bureaucratization's economic, political, and social dimensions within unions, significant gaps persist regarding bureaucracy's impacts on teacher unions specifically and within localized South African contexts (Seidman, 2021). Global analysis predominately centred on industrial Western unions provides vital conceptual grounding, yet understandings remain limited examining bureaucracies evolving amidst post-colonial liberation movements now confronting unfulfilled socio-economic justice demands from below (Bramble, 2013).

Furthermore, scholarship frequently concentrates on bureaucratization's structural determinants like labour legislation or leadership patronage patterns, rather than equally probing informal cultures nurturing participation from below as countertendency (Gall, 2020). This skew focus upon bureaucracy as impediment rather than terrain of struggle. There remains need examining forms of everyday micro-mobilization and personalized engagement through which workers contest alienation - converting unions into schools for radical democracy against bureaucratization from above (Uetrict, 2022).

While existing case studies prove informative deductively confirming theoretical insights on oligarchic consolidation or dependency risks with professionalization, far less research adopts grounded inductive examination of bureaucracies' particular manifestations within specific unions towards unpacking nuances and contradictions (Chunn & Gavigan, 2020). Detailed ethnographic analysis of leadership-member negotiations, information control tactics, decision-making accessibility and dissent channel closure provides thicker descriptions of bureaucratization's multilayered functioning in situ.

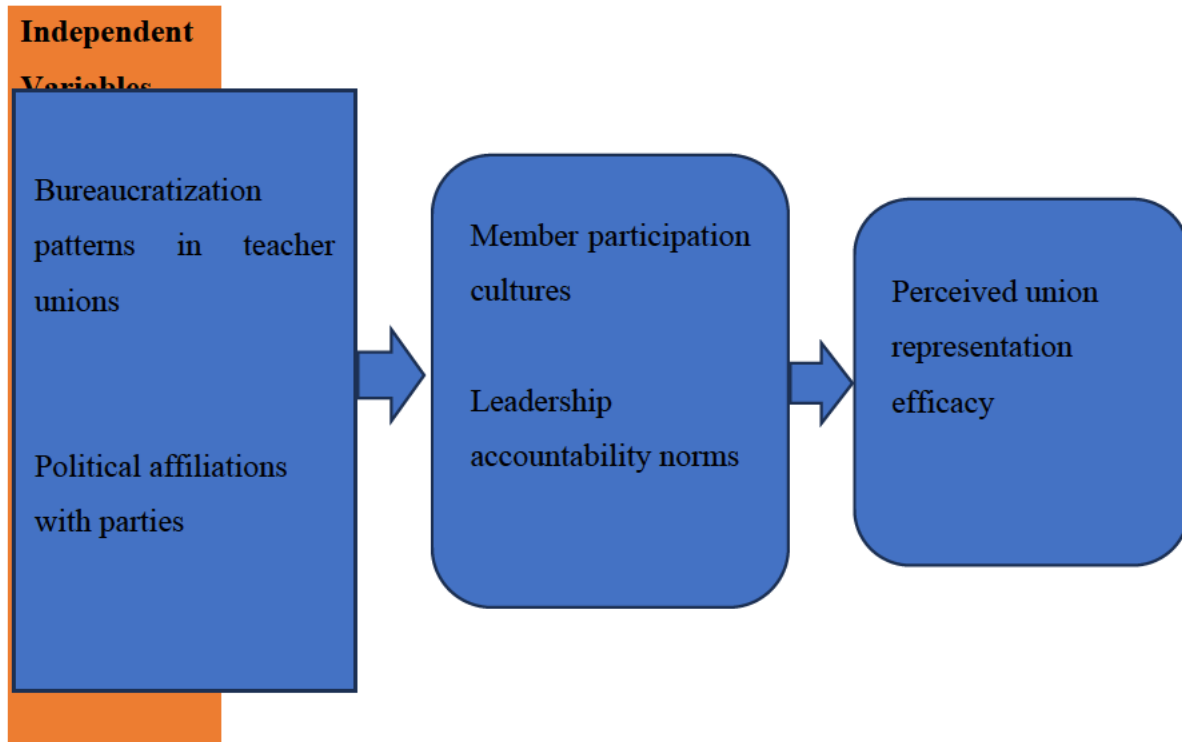
Such immersive internal perspective remains vital deepening understanding on disconnects fuelling disillusionments amidst South African teacher union rank-and-file, unpacking complex anxieties behind periodic eruptions of militancy like strikes expressing outrage against alienation (Mercea, 2021). There persists need examining localized cultures of solidarity on-the-ground interfacing with bureaucratic hierarchies, identifying everyday ruptures but equally gestures reweaving trust from below through substantive representation. The South African Democratic Teachers Union's positioning at thicket of progressive liberation movement history and current ruling party alliance invites unpacking unique institutional legacies shaping contemporary manifestations of bureaucracy. SADTU's trajectory as initiator of mass teacher strikes while equally integrated within policy machinery warrants exploration on such contradictory locations (Chinguno, 2013). Whether inherited structures that concentrate authority aid or obstruct union's representation capacity amidst current Juctures and socio-economic policy directions remains underexamined from multifaceted lenses attuned to dialectical complexities.

Thus, this study's immersive evaluation of teacher union members' standpoints and experiences in Mzi Mthembu offers rare below-the-surface insight on bureaucracy's concrete impacts within SADTU towards informing potential organizational reimagination. By spotlighting subaltern narratives frequently excluded from policy deliberations, findings can elucidate ground-up cultures fostering participation against perceptions of capture by remotest echelons. Thereby research illuminates everyday micro-ruptures and restoration practices reweaving trust from below through substantive representation - converting unions into schools for radical democracy against bureaucratization from above.

## 2.8 Conceptual Framework

The conceptual framework guiding analysis on the research problematic is represented through following diagram:

**Figure 2.1: Conceptual Framework**



This framework encapsulates key concepts from literature towards examining impacts of bureaucracy and partisan ties upon critical intermediary processes like member mobilization and leadership orientations that shape evaluation of unions' representation capacity amidst current South African education policy terrain.

### 2.8.1 Independent Variables

#### **Bureaucratization Patterns in Teacher Unions**

Literature highlights common forms bureaucratization assumes within teacher unions, frequenting generating perceived representation disconnects and member disillusionment (Seidman 2021; Doğan, 2022). Key aspects include centralized control of organizational assets and operational decisions by executive cadres or appointed professional staff rather than member-driven democratic processes (Chunn & Gavigan 2020). Such concentration of authority gets compounded through information control around policy matters, limiting wider deliberation (Mercea, 2021).

Furthermore, bureaucratization manifests via formalized contractual bargaining concentrating specialized expertise in expert negotiators coupled with close management partnerships. This compounds separation between broader membership from core representation activities that occur confined in elite representative spaces rather than mass mobilization (Uetricht, 2022). Such architecture breeds dependence upon remunerated leadership cliques for securing workplace improvements amidst education reforms, constraining self-organized participation.

### **Political Affiliations with Parties**

In contexts of national liberation movements transitioning into governance, teacher unions frequently became closely integrated within partisan alliance machinery given shared resistance legacies, hoping to leverage authority securing gains (Anner et al, 2020). However resultant leadership accommodation patterns risked fostering expectations of patronage dispensation for demonstrating party loyalty rather than bottom-up participation. Governmentality infiltration generated complex tensions for labor leaders balancing bureaucratic control, party proximity and rank-and-file representation (Doğan, 2021).

Literature suggests such long-term affiliations reshaped teacher union bureaucracies' internal configurations towards greater fixity control and heteronomy in place of autonomous workplace development. Unpacking complexity requires examining multiple mediating processes shaping cultures of engagement amidst inherited structures.

### **2.8.2 Mediating Variables**

#### **Member Participation Cultures**

Given bureaucracies' tendency encouraging dependency upon entrenched leadership cliques for representational needs, nurturing participatory cultures fostering self-mobilization capacities is vital for accountable governance (Chen & Xu, 2021). This requires analyzing informal processes below surface perceptions, probing subtle negotiations within constraints towards carving spaces for voice through personalized channels of trust, leveraging leadership access (Uetricht, 2022).

Sustaining bottom-up involvement remains imperative filling information gaps hierarchical insulation generates to enable collective, evidence-based goal formulation aligned with on-ground priorities (Anner et al, 2020). Equally significant is nurturing peer solidarities and grassroots development capabilities enabling communities impacted by decisions playing key

role shaping implementation trajectories (Ness, 2022). Counter-hegemonic perspectives must permeate such participatory ecosystems given bureaucratization's marginalizing effects.

### **Leadership Accountability Norms**

While certain visibility comes through formalized bureaucratic procedures, leadership accountability requires deeper cultural transformation towards internalization of member-driven oversight principles (Gumbrell-McCormick, 2020). Possibilities include institutionalizing independent monitoring mechanisms, setting ground-rules against unilateral elite changes, undertaking regular consensus-based policy reviews, and embedding anonymity protection for dissenters (Chen & Xu, 2021).

Leadership cultivation programs to expand field of representation and consistent workflows gathering wider, unfiltered feedback on organizational performance issues and suggestions remains vital transforming rigid self-referential mindsets (Chun, 2022). Nurturing leadership humility and transparency around failures invites inputs remedying gaps. Sustaining bottom-participation in shaping accountability processes seeds recursiveness of democratization.

### **2.8.3 Dependent Variable**

#### **Perceived Union Representation Efficacy**

The perceived effectiveness of teacher union representation depends upon amalgam of the above relational and cultural processes intersecting amidst South Africa's fluid education terrain undergoing frequent policy shifts and resource uncertainties (Mercea, 2021). As responsiveness and agility becomes imperative amidst growing precarity facing schools, routinized bureaucratic structures risk declining relevance unless counterbalanced through participatory cultures empowering situated adaptiveness (Chen & Xu, 2021).

Thus, analysing subjective evaluation of representation requires investigating subtle ruptures fuelling member discontents, diagnosing areas of divergence between hierarchies and classrooms, identifying blocked participation channels, and examining leadership miscues or workforce anxieties (Chinguno, 2013). Findings elucidate potentials and pitfalls within inherited configurations for guiding organizational reimagination towards teacher union bureaucracies becoming schools for democracy and laboratories nurturing self-empowerment (Uetricht, 2022). Thereby evaluation inspires reform rewiring mechanisms enabling effective voice for the vulnerable against marginalizing bureaucratization.

## **2.10 Conclusion**

This literature review has analysed key debates regarding bureaucracies within teacher unions, investigating structural determinants in labour regulations and leadership patronage patterns as well as everyday participation cultures enabling counter-hegemonic voice within constraints. Cases reveal bureaucracies' contradictory consequences - providing vital resources while potentially fostering dependence dynamics that manifest acutely during crises. Teacher unions' positioning at thicket of progressive history and current policy machinery in South Africa warrants examining unique institutional legacies shaping bureaucratization. Significant knowledge gaps persist exploring localized cultures fostering bottom-up involvement versus perceptions of capture by hierarchical echelons. There remains need probing everyday ruptures and restorative gestures reweaving trust from below through substantive representation – converting unions into schools for radical democracy against bureaucracies colonizing life worlds. This shapes the conceptual framework guiding further empirical examination.

## **CHAPTER 3: THEORETICAL FRAMEWORK**

### **3.1 Introduction**

This chapter centres around Max Weber, the German sociologist who coined the term bureaucracy at the end of the 19th century and who was the first to use and describe it. Other names for this include Max Weber's theories of bureaucracy, bureaucratic management, and bureaucratic theory of management. According to him, the best way to run an organisation and its administration was through the bureaucracy. Bureaucracy was Max Weber's preferred model of governance over more conventional structures. Organisational uniformity and clearly defined roles for all staff members are hallmarks of a well-run bureaucracy.

### **3.2 Foundations of Bureaucracy Theory and Education Governance**

The classical theory of Weberian bureaucracy exalted the virtues of hierarchical authority, technical expertise, and procedural consistency as the quintessential manifestations of rationality within the realm of contemporary governance (Gonon, 2022). Nevertheless, scholars are progressively scrutinising the underlying assumptions that posit the correlation between the establishment of administrative systems and the attainment of optimal efficiency and equitable outcomes (Lê, 2021). The potential hindrance of administrative rigidity in accommodating diverse contexts, the potential for power consolidation among elites to perpetuate paternalism and marginalise practitioner knowledge, and the tendency of proceduralism to become disconnected from on-the-ground realities have been highlighted by Kaufman (2021).

The critiques possess a heightened level of significance when examining the governance of education, as they consider the dynamic nature of the classroom environment and the imperative need for the exchange of knowledge, which surpasses mere procedural standardisation (Chan & Gok, 2022). The potential consequence of governance mechanisms that prioritise bureaucratic authority or technical cadres at the expense of practitioner voice is the potential devaluation of pedagogical creativity, collective development, and the specific needs of learners in their unique contexts (Compton & Weiner, 2020). The misalignment in question necessitates a thorough and nuanced analysis of the effects of bureaucracy on the fragmentation or promotion of democratisation within the realm of educational labour, particularly considering authoritarian policy changes (Seidman, 2021).

### **3.3 Theories and reflections**

Max Weber's theory of bureaucracy served as the basis for the study's conceptual framework. Bureaucracy, a book written by Max Weber that was translated into English in 1946, is often seen as a seminal contribution to the field of public administration literature. The combination of the terms "office" and "kratos" creates the word "bureaucracy." The Greek suffix "kratia" or "kratos" indicates authority and rule, yet the term "bureau" signifies office. As a result, the term "bureaucracy" is used to describe the authoritative structure of the office system (Weber, 1966). The bureaucracy dictates that all communications, whether written or electronic, originate at an office or central location before being sent to their respective recipients.

Similarities exist between the bureaucracy of public administration and the corporate procedures studied in business administration and economics. Weber's (1996a) theory proposes a kind of bureaucracy that is adaptable to both public and commercial organizations (Ang, 2016). It is apparent that rational-legal power, as proposed by Max Weber, has become a distinguishing element of modern organizational and political institutions. According to Weber, the scientific notion of administration is now ingrained in organizational structures, and the conventional method of public administration has the same foundations as the government's science reform (Ang, 2016).

German sociologist, political economist, and early twentieth-century administrator Max Weber  
Several of his works on bureaucracy and administration are considered classics in the field. Weber's publications contributed to the growth of the scientific school of thought on management, and he was an advocate of the classical school of management. Weber's understanding of bureaucracy reflects the culture of the Industrial Revolution. According to Weber, the spread of rational thought transformed society into a more bureaucratic organisation, which became especially evident during the nineteenth-century Industrial Revolution.

### **3.4 Max Weber's definition of bureaucracy**

Rules, standardization of processes and procedures, the number of desks in an organization, careful division of labor and responsibility, distinct organizational levels, and polite interactions among workers are all hallmarks of a bureaucracy. According to Max Weber's bureaucratic theory, such an organization structure was necessary in huge enterprises to guarantee that all duties were carried out methodically by a vast staff. What's more, in a

bureaucratic organisation, only technical capabilities matter when it comes to selection and advancement.

The term "bureaucracy" is often used to refer to the complex system of rules, regulations, routines, and procedures used to manage the day-to-day operations of large and/or complicated organizations. Income tax forms are a prime illustration of unnecessary complexity. Detailed knowledge and particular steps are required to finish them. Yet, the information that may and cannot be put on such forms is governed by a complex set of regulations. The tax-payment process is simplified by bureaucracy because it is codified inside a formulaic framework; nevertheless, this simplification is offset by the rules and regulations that come with it.

Bureaucracy, a notion proposed by Max Weber, is meant to combat the rising impersonality of social connections and the accompanying disillusionment as society rationalizes (Pollitt, 2008). Overindulgence, as defined by one expert, is the "phenomenon of confirming the rationalisation of the universe" (Paiva, 2014:439). Rationalisation helped modernity cope with uncertain circumstances and the inherent complexity they imply by allowing the application of universal principles of reason to the solving of human issues (Touraine, 1988; Clegg, 1990). In a world where one's actions have some impact on the outcome, people would behave logically to lessen their fear of the unknown. Weber offers two different interpretations of rationality. Goal setting that is both specific and quantifiable is a hallmark of formal rationality. The term "real rationality" is used to describe the growing theoretical pre-eminence of reality because of ever-more precise and abstract notions (Clegg, 1990). According to Pimentel (2012:34), the emergence of bureaucracy may be traced back to the contemporary financial system, the rationalisation of legislation, mass phenomena, centralization, governmental interventionism, and technical rationalisation.

To better manage and guide contemporary institutions, bureaucracy may be seen as intrinsic to the process of formalization, which involves altering, redefining, and reclassifying many aspects of reality. Formalisation uses the categorization "technique," which necessitates the development of ideas to represent certain features of reality, to classify and catalogue things in the actual world. Classification tasks create the parameters for what is and is not considered an option, and consequently, they shape the range of actions available to a person (Wagner, 1997). Although the spread of modernity is visible in the form of increased formalisation and

standardisation, it is also visible in the form of a series of social alterations that re-integrate people into the new order. Certain events, behaviours, and interpretations may be standardised to decrease ambiguity. To create a manageable social order, people must work together. Classifying social phenomena is an essential component of this since it aids people's ability to make sense of the social environment. Another facet is the imposition of categorizations on the populace at large.

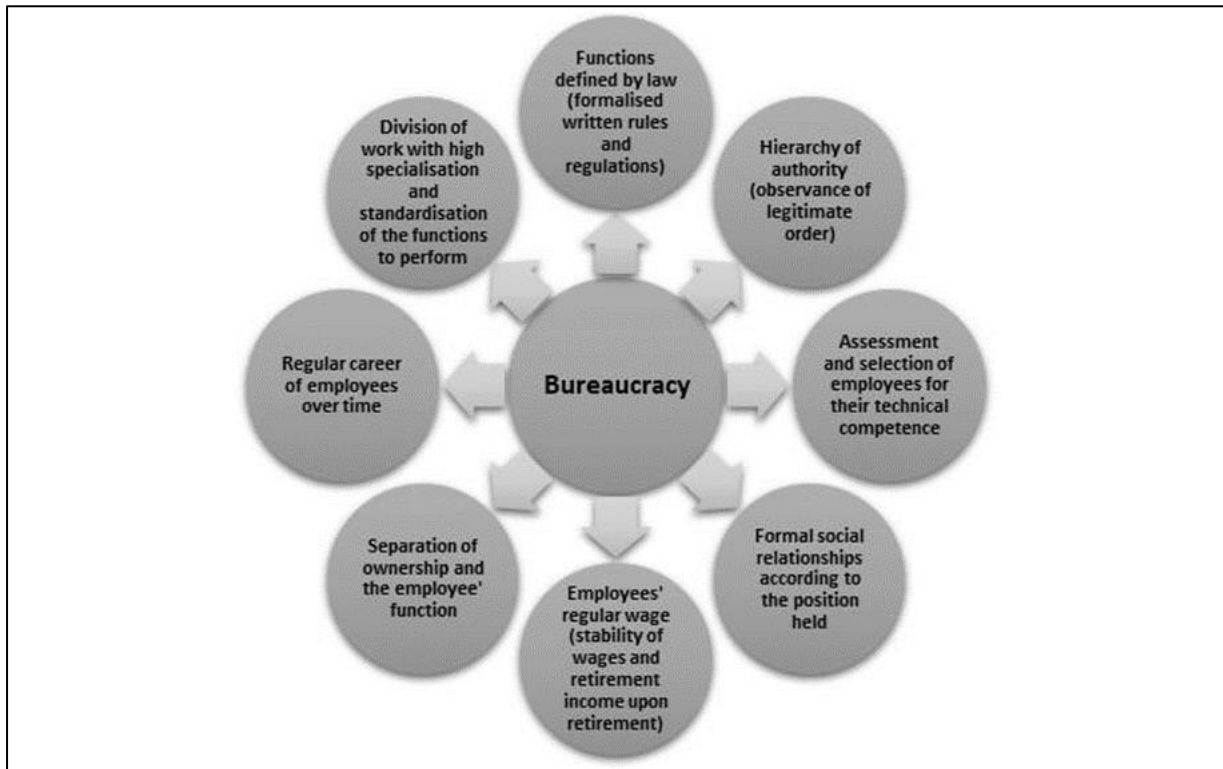
More regulation will be difficult so long as different stakeholder groups use different terms to describe the same social phenomenon. Homogenization favours standardization above diversity, enforcing order and doing away with ambiguity in the name of reason and bureaucratic control. To that end, it highlights the commonalities between the unpredictable and constrained environments in which contemporary institutions function and their shared forms and techniques for achieving legitimacy (Wagner, 1997).

Currently, Weber argues, legal legitimacy (authority based on rule, norm, and process) is increasing bureaucratic (Cruz 1995; Giddens 1997; Filleau and Marques-Ripoull 2002). Weber argues that "bureaucratic administration" is characterised by its "basic nature, notably rational," which entails "domination by the power of knowledge" (Cruz, 1995:689).

As businesses across all industries become more advanced, bureaucratic administration inevitably increases in size and scope. The strictest formalities and technicalities of bureaucratic administration are always adhered to maintain fairness and impartiality. The function of technical knowledge in bureaucratic administration has grown substantially due to the significance of contemporary technology and economic approaches to the creation of commodities. Expertise-based authority is the cornerstone of every bureaucratic administration. That's what makes it so logical and reasonable. On the one hand, the bureaucracy's immense authority may be ensured by technical competence alone. On the other hand, it's important to consider the expertise and judgement of individuals in authority who have built their careers inside bureaucratic structures (Weber, 1966:24-26).

Weber's bureaucracy is an ideal type because it is constructed from theoretical elements that can be compared to actual bureaucracies. Figure 1 depicts the bureaucratic rationality that serves as a paradigm for the functioning of organizations in capitalist countries (Branco, 2016).

**Figure 1: Characteristics of bureaucratic administration**



**Source: Adapted from Ferreira et al., 2004, pp. 24 and 25.**

Bureaucracy for Max Weber is defined thusly by Julien Freund (1996), who studied Weber's writings. The most common illustration of dominance is the bureaucracy follows the following foundations of the system:

- i. There must be a well-defined service, and therefore a clearly defined set of competencies, so that the functions may be split and distributed, as well as the decision-making abilities necessary to execute the related tasks.
- ii. Due to legislation, employees are protected while carrying out their duties (for example, the irremovability of judges). Civil employees are usually employed for the rest of their lives, making their service to the state their primary employment rather than a secondary one.
- iii. The administrative structure is highly hierarchical, with tiers of subordinate services and management, as well as an appeals process from lower to higher echelons.
- iv. in general, this structure is monocratic rather than collegial and has a tendency toward maximum centralization.
- v. As a result, candidates must have specialized training to qualify for recruitment by tender, exam, or diploma. Generally, an employee is appointed (rarely elected) based

on free choice and contractual obligation rather than election. After leaving government service, the employee will be entitled to a pension and fixed pay.

- vi. The pay scale is based on the administrative structure and the significance of the duties; the authority to organize a disciplinary committee to keep an eye on the activities of its subordinates.
- vii. The ability for employees to be promoted based on objective criteria rather than at the authority's whim.
- viii. The total separation between the function and the human who performs it, because no employee may be the owner of his or her job or the administration's resources (Aron, 1994, p. 550).

Weber argues that bureaucratic rationalization is necessary to prevent members of an organization from putting their own interests ahead of those of the whole (Godoi et al., 2017). The ability to treat circumstances rather than people and address them consistently regardless of who is involved is made possible by formality and impersonality (Cruz, 1995). The operational predictability of any company would also increase (Ferreira, 2004; Filleau & Marques-Ripoull, 2002). As a form of administration predicated on specialization and discipline, bureaucracy was crucial to the achievement of this objective. At its core, obedience is a means towards a goal, with the obedient individual acting in accordance with the norm at least in part due to personal sentiments about its appropriateness. The second part of the strategy is to instil obedience. One must obey the authority figure no matter how one feels about the rule or order (Gouldner, 1966:57). According to Gouldner (1966), Weber may have been alluding to a dichotomy between two forms of bureaucracy: the representative form of bureaucracy, in which norms are agreed upon, technically justified, and administered by experts, and the punitive form of bureaucracy, in which norms are imposed and simple obedience is required (Gouldner, 1966:58).

### **3.5 Weber's theories on workplace bureaucracy**

Weber's theories on bureaucracy addressed issues such as job specialisation, meritocracy, uniform standards, and workplace structure and hierarchy. Weber's writings centred on the idea of a bureaucracy, which differs from a traditional managerial organisation in that employees are judged according to objective criteria, such as compliance with established rules, and promotion is granted based on merit and performance rather than intangible qualities. In addition, Weberian bureaucracy is characterised by a hierarchical structure, clearly defined boundaries of power within a given area of operation, the use of written norms to guide and

record administrative action, and the need for specially trained administrative staff. Promotion opportunities in a bureaucracy are set by the organisation itself and not by its employees.

Weber's studies of bureaucracy influenced classical management theory by demonstrating the importance of establishing clear guidelines and authority to foster a productive workplace. Weber saw no alternative to bureaucracy and projected that this would result in an "iron cage," or a condition in which people would be unable to avoid bureaucracy, resulting in an increasingly rational society. Weber considered this a grim consequence that would have an adverse effect on individuals' happiness, as they would be compelled to perform within a highly logical society with rigorous rules and standards that they could not modify. Of course, the advent of the behaviour-management movement in the 1920s prevented this grim scenario from occurring.

### **3.6 Nuanced Perspectives on Bureaucratization of Teacher Unions**

The historical integration of South African teacher unions within the anti-apartheid liberation movement has resulted in the development of institutional structures that aim to achieve a delicate equilibrium between representation of the mobilised workforce, strategic policy influence, and the maintenance of professional stability (Oni & Matshabane, 2021). The integration of militant shop-floor cultures with formal bargaining and political alliance machinery resulted in the establishment of a delicate equilibrium between rank-and-file participation and bureaucracy, as observed by Chinguno (2013).

Nevertheless, it is imperative to acknowledge that in the present-day, there are critical evaluations of unions that shed light on the potential dangers associated with the consolidation of authority within a select group of entrenched leaders. This consolidation often leads to a disconnection between these leaders and the members they represent, as well as limitations on the internal diversity and varying perspectives within the union. These challenges are further exacerbated by the ever-changing landscape of education policies, which adds complexity to the overall context (Mercea, 2021). The process of analysis necessitates transcending the confines of bureaucratic deterministic assumptions to employ a situated dialectical approach that sheds light on the manifold consequences that arise from it - namely, stability, yet potentially accompanied by a sense of unease (Uetricht, 2022). The findings have the potential to provide valuable insights that can guide the process of reimagining organisations,

specifically teacher unions, as institutions that foster radical democracy to counteract the marginalisation caused by technocratic approaches.

### **3.7 The Daily Struggles of Educator Agency in Navigating an Alienating Bureaucratic System**

The prevailing paradigm in bureaucracy theory is centred around structural perspectives. However, recent ethnographic studies have delved into the realm of teacher agency, uncovering the ways in which educators navigate and subtly reshape the disempowering aspects of bureaucracy in their everyday professional lives (Shamatov, 2021; Lê, 2021). The presence of these imperceptible resistances serves to unveil potential fissures within the framework of bureaucratic determinism. The scholarly discourse surrounding the pedagogical practises of educators in relation to their contextualised environments suggests that teachers' adaptations to the intricacies of specific locales may serve as a means of fostering a sense of collective unity in opposition to feelings of estrangement (Paulet, 2020).

The emphasis placed on the intricate dynamics of daily negotiations between bureaucratic entities and the labour force bears resemblance to the theoretical framework of "teacher unionism from below" in the context of South Africa. This perspective places great importance on grassroots subcultures that enable members to assert their voices and foster personal growth within the confines of existing limitations (Chinguno, 2013). Research endeavours focused on the identification of commonplace disruptions, while concurrently exploring the implementation of humanising practises for restoration, possess the potential to contribute to the transformation of teacher unions into educational institutions that foster participatory democracy. Furthermore, these research efforts can serve as laboratories that cultivate a sense of solidarity, thereby countering the pervasive presence of anxiety.

### **3.8 Rationality of Weber's bureaucracy theory to trade union movements**

According to Lisboa et al. (2014), Weber perceived bureaucracy as a mechanism that facilitates the rationalisation of organisational tasks, a characteristic he considered to be indicative of modernity. According to Ang (2016), the author stated that bureaucracy facilitates the process of specialisation, consistency, and coordination of intricate duties among extensive collectives. According to Godoi et al. (2017), certain scholars have posited that Weber's concepts serve to strengthen hierarchical authority and undermine the significance of individual discernment within organisations. This is because bureaucracy places a strong emphasis on technical effectiveness, predictable results, and objective regulations.

Nevertheless, it is important for scholars to adopt a more balanced perspective when examining bureaucracy, as Weber himself acknowledged both its benefits and weaknesses (Serpa, 2018). The individual recognised the essential compromises that exist between the objectives of an organisation and the autonomy of its members. While Weber placed importance on valuing expertise and maintaining procedural consistency, it is important to note that his intention was not to diminish human activities by reducing them to detached and purely rational calculations, devoid of social contexts (Gonon, 2022).

To analyse teacher unions using Weber's framework, it is necessary to modify the vocabulary related to "outputs" and "control" to align with the educational setting, given that the process of learning cannot be easily quantified in a mechanistic manner. However, the concepts put out by the author emphasise the significant conflicts that teacher union bureaucracies must navigate as they balance their goals of systematisation with the need for ongoing educational improvement (Compton & Weiner, 2020). The presence of hierarchical systems that prioritise centralised authority or technical experts above the involvement of practitioners may impede the ability to effectively address the intricate dynamics present in the classroom. Nevertheless, the implementation of legal procedures also facilitates the acquisition of resources and the protection of worker rights (Seidman, 2021).

The teacher unions in South Africa have inherited organisational structures that combine participatory mobilisation with bureaucratic stability, which can be attributed to their historical association with the liberation movement (Chinguno, 2013). Nevertheless, current concerns surrounding limitations on internal democratic processes indicate the possibility of oligarchic consolidation over the collective interests of the organization's members (Mercea, 2021). This statement raises the question of whether the current forms of bureaucracy hinder or facilitate the revival of labour in the field of education, given the unpredictable nature of policy changes. The results of this study can provide insights on the restructuring of teacher unions, with a focus on achieving a balance between instrumental effectiveness and participatory empowerment.

### **3.8.1 The proposed theoretical framework**

The present study employs fundamental principles derived from Max Weber's theory of bureaucracy as a conceptual framework for conducting analysis. Weber's seminal scholarship elucidated the way contemporary organisations tend to incline towards rationalisation and formalisation as means to effectively manage intricate systems. This is made possible through the utilisation of hierarchical authority, procedural consistency, and specialised expertise (Ang, 2016).

Nevertheless, it is imperative for contemporary scholars to advocate for a more discerning and sophisticated analysis of Weber's seminal contributions, to circumvent the tendency to excessively prioritise the processes of bureaucratization or technocratic administration (Gonon, 2022). The objective of formalisation is to enhance efficiency and stability within organisational structures. However, it is important to acknowledge that bureaucracies often give rise to unanticipated tensions between the desire to systematise control and the subjective experiences of alienation (Lê, 2021). The potential consequences of an excessive focus on proceduralism include impeding the ability to adapt and innovate, reinforcing the dominance of privileged individuals, and cultivating a rigid institutional mindset that is disconnected from practical circumstances (Gouldner, 1954).

Given the imperative of education towards pedagogical creativity and knowledge development that surpasses procedural standardisation (Compton & Weiner, 2020), it is particularly salient to examine teacher unions. The implementation of governance structures that prioritise bureaucratic authority or technical cadres over practitioner participation has the potential to undermine the ability to effectively respond to the intricate dynamics of the classroom and hinder collective growth (Seidman, 2021).

The framework elucidates the intricate balance maintained by South African teacher unions, as they navigate the interplay between grassroots mobilisation practises and institutionalised bureaucratic structures. This delicate equilibrium is crucial in their endeavour to safeguard the rights of educators within a highly unpredictable policy landscape (Chinguno, 2013). The statement examines the manifestation of oligarchic constraints on internal democracy, the unmet demands for voice, and the disconnection of key representation functions from member priorities within current bureaucratic patterns (Mercea, 2021). It also contemplates the

possibility of participatory cultures that continue to thrive in this context. The framework employed in this analysis facilitates a nuanced interpretation of the multifaceted consequences of bureaucracy. It explores how bureaucracy can either fracture or enable the revitalization of education labour in response to perceived threats of authoritarian enclosure.

### **3.8.2 Bureaucracy's obstacles and challenges**

Weber believed that the rise of bureaucracy was inevitable due to the technical advantages it enjoyed over other organizational structures. He argued that in a strictly bureaucratic administration, especially a monocratic one, these advantages reached their full potential. Instances like this one are often cited as examples of why bureaucracy is a good thing (Weber, 1982 [1948], pp. 249–251). The closer a bureaucracy gets to some ideal form of rationality and science (Giddens, 1997; Ferreira, 2004), the more successful and efficient the organisation will be in its standardised functioning. This is especially true for the bureaucratic administration, which was the most efficient of organisations (Giddens, 1997). Efficiency, as described by Weber, is the quality of behaviour (such as speed or uniformity of action), the size of the field of action, and the efficacy of operating expenditures (Beetham, 1988:28). Weber argues that bureaucracies are most effective when they rely on the expertise of subject-matter experts to make decisions and carry out procedures, when they provide an average level of competence in the interpretation of the law through training, when they provide full-time compensation that reduces the temptation of corruption, and when they assess their employees through public exams (Giddens, 1997). (Godoi et al., 2017).

While Weber claimed otherwise, bureaucracy was ultimately doomed by its technological functioning, and people quickly lost control over it. You can apply rational computation to nearly any task today. With it, everyone becomes a cog in the machine, with the goal of becoming a bigger cog. It's depressing to think of a society filled with meaningless cogwheels-guys stuck in meaningless jobs who yearn for the immense (Clegg, 1990). This causes problems for the functioning of both formal and informal institutions and for the application of the law, which in turn increases the prevalence of alternative, unofficial methods of action (Filleau & Marques-Ripoull, 2002; Cour, 2018). In part, this is because informal adaptations to formal regulations are necessary to overcome the lack of flexibility (Giddens, 1997:355). Thus, the rule is an end. (Branco, 2017).

So, the organization will likely run into tension between its ideal of rationality (specific goals, efficient processes, regulated environments, and well-planned shifts) and the actual practices and functioning of its actors. Their sense of reason and coherence isn't destroyed, but it is confined by a number of factors, including preexisting logic, a preexisting worldview, and other constraints (Perrenoud, 1994:142). On the other hand, Weber provides a solution to the issues brought forth by bureaucracy. An employee "can and should object" to an improper directive, as stated by the author. Weber (1997:51) is cited in Godoi et al. (2017):436 as saying this. According to Weberian bureaucratic rationalisation, a higher level of professionalism inside an organisation is a strong indicator of good leadership. The literature pays little attention to this optimistic empowerment embraced by an organization's professionals (Godoi et al., 2017:442).

There are also several other problems, but bureaucracy is one of those things that can either be present or absent. Assuming that all organizations are either completely bureaucratic or non-bureaucratic, a reified understanding of the word argues that it is either present or absent (Hall, 1966). Find out which parts of your company are too bureaucratic by comparing them to the ideal bureaucracy. Even if Weber's rational bureaucracy may not be appropriate in certain situations, there are still situations in which a bureaucratic structure is the most reasonable way to accomplish a goal (Hall, 1966).

Mintzberg differentiates between "mechanistic" and "professional" bureaucratic structures. The mechanical bureaucracy arrangement is ideal in simple and stable workplaces due to its high complexity and formalisation, which emphasises standardised processes to govern highly divided and specialised activity. It consists of the whole structure, with special focus on the technological framework, the backbone of the organisation, and the weighty hierarchy. Its key method for coordination is the formalisation of previously unstandardized procedures. The techno structure is the backbone of every company since it is responsible for establishing the norms and policies that must be followed by all employees.

The configuration of the professional bureaucracy is characterized by a centrally focused operational hub, a short hierarchical line, a similarly modest technostructure, and extensive logistical backing. The standardisation of coordination makes use of qualifications that are often acquired outside of the organisation. They have a lot of control over their work since they

are professionals. It's like having the best of both worlds. When it comes to coordinating activities, the standardisation of credentials is the main instrument. Education, job-market horizontal specialisation, and organisational decentralisation also play significant roles in the design (Mintzberg, 1995).

In conclusion, Weber's ideal-typical bureaucracy is characterized by a hierarchical structure, clearly defined roles for specialists within a limited scope, a focus on following and documenting written rules, the requirement that administrators undergo specialized training, the use of neutral officials to enforce the rules, and the fact that professional advancement is based on technical experience as judged by the organization rather than on the merits of specific employees. Weber believed that bureaucracy was the most important and even necessary form of organization in the modern state; however, he also saw bureaucratization as a threat to individual autonomy and a precursor to a "polar night of icy darkness," where the increasing defence of human life trapped individuals in a bleak "iron cage" of bureaucratic, rule-based, rational control. In addition, he said that, in all of today's key social contexts, males were unable to take socially meaningful action outside of a large-scale organization, where they were paid for activities and only admitted to when they complained.

### **3.9 Conclusion**

This section has revisited seminal debates in bureaucracy theory to inform nuanced analysis of teacher unions. Classical Weberian approaches valorised formalized governance as epitomizing rationality yet overlooked resultant tensions marginalizing practitioner knowledge. Contemporary scholars urge more critical, dialectical interpretation emphasizing bureaucracies' contradictory consequences – stability yet potentially alienation (Lê, 2021). Analysing South African teacher unions requires examining complex straddling between inherited structures interweaving mobilizational participation with political alliances and policy bureaucracy. Critiques highlight oligarchic risks consolidating control whilst participatory cultures below surface remain overlooked, vital for voice (Uetricht, 2022). The framework guides unpacking multifaceted impacts of bureaucratization enabling or fracturing education labours' democratization. Beyond structural determinism, research on everyday negotiations, micro-mobilizations and solidarities hints possibility for accountability and democracy from below. Thus, bureaucracy theory evolution rescues nuance against bureaucratic colonization of consciousness – reshaping imaginations towards participatory, empowering institutional alternatives aligning governance with education's purposes.

## CHAPTER FOUR: RESEARCH METHODOLOGY

### 4.1. Introduction

This chapter explains and defends the study's methodology and research strategy. To that end, I will first describe the research paradigm that guided our work. Second, I outline and clarify the methodology I used to conduct the study. In the last section, I explain the research strategy. The methodology includes both the strategy I used to acquire access to the classrooms and the tools I used to collect the data. Finally, I will discuss the methods used to analyse the data. At the end, I talk about the study's limits, reliability, and ethical considerations.

The researcher's role is crucial in qualitative inquiry, and a more extensive examination of positionality can enhance transparency in relation to the interpretative lenses that influence the study (Merten & Wilson, 2019). As an educator aligned with teacher unions, my positionality shapes my perspective on the intricate effects of bureaucracy. With more than twenty years of experience in the classroom, the individual had a strong connection with grassroots subcultures. Additionally, their top administrative positions required them to effectively navigate the limitations imposed by institutions. This phenomenon posed a dual risk of both fostering vital intimacy and creating distance. To achieve equilibrium, I deliberately fostered self-reflexivity by engaging in reflective journaling to examine underlying assumptions. I engaged in conversations with colleagues to explore emerging inferences and conducted thorough research to expand existing frameworks. Additionally, during participant interviews, I actively sought evidence that contradicted my initial hypotheses.

The author highlights their positionality as both an insider and outsider, which requires them to navigate a dual awareness that encompasses both solidarity and marginalisation (Hessler, 2022). The process of mitigating dangers associated with a restricted view involves engaging in continuous self-interrogation to determine whether one has disregarded marginalised perspectives due to the privilege-fuelled ignorance. The presence of simultaneous tensions has served as a catalyst for the adoption of abolitionist, intersectional perspectives that are dedicated to amplifying marginalised viewpoints. Throughout the process of inquiry, it was crucial to prioritise the task of amplifying the voices of individuals who are typically

marginalised by bureaucratic systems. Additionally, it was important to employ a rigorous approach that grounds knowledge claims within the intricate lifeworld's of the participants. The inescapability of positionality has thus prompted a pursuit of critical intimacy that focuses on plurality.

#### **4.2. Research methodology**

The study used a qualitative design to obtain a better understanding of how the union's bureaucracy affects leaders and common members. Therefore, qualitative research methods were employed in this study (Creswell, 2014). According to Creswell (2014), qualitative research is social sciences research whose techniques enable researchers to delve deeper into respondents' responses before posing additional questions, so they can better understand respondents' motivations and feelings.

#### **4.3. Research Paradigm**

Research paradigm: Research paradigms broadly refer to traditions or world views in the social sciences. (Bryman, 2012). The interpretivism paradigm is concerned with gaining an in-depth understanding of what is meaningful and relevant to participants. This study used this worldview to interpret the meanings of the findings. Qualitative research methods are useful when understanding and exploring groups, individuals, and socio-economic phenomena. According to Creswell (2014), in the qualitative study, the researcher is viewed as the main instrument, which should be unbiased in their description and interpretation and needs to establish a rapport and gain trust with the participants. Qualitative research opts for focused interviews conducted transparently and honestly, which secures the trustworthiness and validity of the findings. Gay (1992) emphasises the value of interviews by noting that they are "most suitable for answering questions that cannot be effectively arranged in a multiple-choice format, such as personal questions."

#### **4.4. Population**

The population of this study included leaders and members of SADTU who teach in schools in the Mzi Mthembu Region in Durban, KwaZulu-Natal. Mzi Mthembu Region is made up of 12 branches. Most schools within this region are under-resourced township schools with challenges of overcrowding. From this population, a sample of 24 participants was selected and interviewed. The sample was selected on the basis that they have paid up SADTU active membership. Other criteria for their selection are that they are leaders within sites or schools and leaders at the branch and regional levels. An informed consent form was given to

participants before interviews to sign if they agreed to participate in the study. The sample was selected from three branches within the region. The selected branches from which participants were drawn are Andrew Zondo, Victoria Mxenge, and Vela Makhanya. These branches are closer to the researcher's residence, so it was easier to access them. The sample is broken down as follows: 3 regional leaders; 3 branch secretaries; 3 branch chairpersons; 5 site stewards; and 10 ordinary members.

#### **4.5. Sampling method and technique**

The analysis employed purposeful sampling, which is commonly used to classify and pick information-rich cases to make the most efficient use of available resources (Patton, 2012). This includes categorising and picking individuals or groups that are acutely aware of or familiar with a specific population of interest (Cresswell & Plano Clark, 2011). Neuman (2014) points out that, beyond the fact that people also matter to participation and the ability to express their feelings, experiences, and thoughts with articulateness, being prepared for discourse and fluency is vital. The purposive sampling technique involves looking at participants based on a set list of characteristics. (Neuman, 2014). To ensure the confidentiality and privacy of participants and the sites or branches they come from, participants were guaranteed that their identities would be kept private. The selection of this sample was based on the perception of purposefully selecting and querying key informants or well-situated people "who know a lot about..." (Patton, 2002) ensured that quality data were collected swiftly.

#### **4.6. Data Collection**

Interviews were conducted in a semi-structured format to gather primary data. Since semi-structured interviews allow for the development of research topics in advance, they proved to be an ideal method for this investigation. Union members have a reputation for being active and outspoken. So, such interview schedules create openness by encouraging participants to expand on their responses, which has the potential of creating new topics or themes (Creswell, 2014). Furthermore, the choice of this approach was based on the view that it gives the interviewer considerable room for flexibility when it comes to how the interviewee responds. If the interviewer perceives the person to be vague or hesitant, questions may be directed to help him clarify his response, and he can be allowed to qualify or provide alternative answers in the interview. Again, while gathering information, the subject's behaviour can be analysed, and his emotional state can be assessed for personal guidance.

To contain the spread of the COVID-19 virus, the South African government implemented what is known as "lock-down controls". These lockdown measures included safety measures such as maintaining social distance between individuals. These constraints necessitated the use of alternate methods to collect data from participants, such as social distancing and continuous face masking during the interviews, as recommended by COVID-19. Since that was acceptable, whenever an alternative is available, Zoom, Skype, and WhatsApp should be employed instead, and since they offer voice recording, the researcher reviewed all the data as well as the recordings of all interviews. Text and voice messages, as well as phone calls collected during interviews, may be used as a new tactic.

#### **4.6.1 Process of Data Collection**

Data collection occurred over a one-month period through semi-structured interviews with 19 SADTU members purposefully selected across leadership hierarchy. Semi-structured interviews enabled participant-guided expansiveness while checking personal assumptions, supported building trust, and afforded accessing multilayered nuances beyond surface descriptions through probing and follow-up questions (Ravitch & Carl, 2022). Each 30 minutes - 1 hour profile involved open-ended questions on experiences regarding union participation opportunities, leadership-member connections, organizational constraints, and localized cultures alongside navigating bureaucracy.

Interviews occurred at locations chosen by participants including schools, homes or public spaces conducive to unhurried dialogue. Visiting neighbourhood sites afforded glimpsing contextual dynamics shaping responses. Verbatim transcripts returned for participant confirmation augmented accuracy. Reflexive commentary was woven throughout to track evolving inferences, counter narrowness and uphold people's whole dignity beyond research extraction. This iterative meaning-making supported crystallizing key thematic patterns across interviews conveying composite insights on organizational impediments but equally humanizing restoration cultures below surface perceptions. Thereby collection enacted critical intimacy embracing dignity.

#### **4.7 Data analysis**

Thematic analysis was used in this research. This technique is often used in qualitative studies. Braun and Clarke (2006) describe this approach as one for identifying, analysing, and reporting trends contained within a set of data. Thematic analysis can be used to define, analyse, organise, explain, and report on topics inside a data set (Braun & Clarke, 2006) using the Nvivo version

13 programmes. About qualitative and quantitative researchers, Boyatzis (1998) described thematic analysis as a translator for researchers that helps those who use disparate methodologies to communicate with one another.

#### **4.8. Trustworthiness**

To ensure neutrality, useful knowledge necessitates the presence of validity and dependability. Alternatively, qualitative research must have the following features to be assessed (McMillan & Schumacher, 2006):

##### **i. Transferability**

Transferability refers to the extent to which qualitative research findings can be generalised or applied in different contexts or settings. The person generalising a qualitative standpoint bears the bulk of the responsibility for transferability. The researcher increased the study's transferability by outlining the background and key assumptions in advance (McMillan & Schumacher, 2006)

##### **ii. Dependability**

This question is being investigated to see if the same conclusions can be drawn if the same thing is seen twice. Because of this, researchers considered the constantly changing environment in which their work takes place when applying the dependability concept. To explain how changes in the study's approach and results were influenced by changes in the environment the researcher interacted with (Burn & Mutton, 2015).

##### **iii. Credibility**

The credibility of qualitative research findings is assessed by asking study participants if they believe the findings to be true. Using participant-centred methods, qualitative researchers seek to gain a deeper understanding by elucidating phenomena from the viewpoints of participants. The validity of the findings can only be judged by participants (Burn & Mutton, 2015).

##### **iv. Confirmability**

Confirmability refers to the degree to which the results can be verified or validated by others. Increasing there are numerous methods for achieving confirmability. The researcher needs to keep track of the methods used to examine and recheck the data throughout his or her investigation. Researchers may go out of their way to find and document negative examples that contradict their previous findings. A post-research audit of the gathered and analysed data, as well as any bias or distortion, can be carried out (Burn & Mutton, 2015).

To strengthen confirmability and afford crystallization, data gathering encompassed prolonged organizational observation across 18 months enabling gauging inferences from episodic interviews against everyday evolution in union activities (Cohen & Crabtree, 2008). Iterative member-checking occurred through informal follow-up conversations for clarifying, enhancing descriptions. Triangulation incorporated analysing minutes of leadership meetings, internal documents, statements, and media reports alongside interview accounts to contextualize standpoints and obtain multi-perspectival insights on tensions between bureaucracy and shopfloor. These strategies augmented rigor through layered fine-grained analysis substantiating thematic patterns on manifestations of oligarchic bureaucracies yet equally cultures stealthily sustaining participation against perceived threats of authoritarian organizational enclosure.

#### **4.9. Ethical considerations**

The following steps were taken to ensure ethical compliance:

Permission to conduct the study within Mzi Mthembu Region was sought from SADTU's provincial secretary.

An application for ethical review of research in the social sciences was filed with the relevant institutional review board. No data were collected until Ethical Approval was given.

Data collecting began after gaining the approval of SADTU gatekeepers in the area.

Participants were provided with a dissertation outlining the study's rationale, interview questions, and desired data collection dates, possible effect, and anticipated conclusion.

Subjects were briefed on the study's overall goals and provided with the consent form detailed in the Appendix.

The permission form was delivered orally and written in neutral language. The permission document prominently included the school's emblem, which added to its seeming legitimacy. Signing the forms was voluntary for all participants.

#### **4.10. Conclusion**

Every step, from research concept and technique to data collecting and analysis, in this work has been well defended. Discussion of the study's results begins in Chapter Five, and this chapter provides context for those findings.

## **CHAPTER FIVE: RESULTS AND DISCUSSION**

### **5.1. Introduction**

This chapter presents and discusses the data that was generated using semi-structured interviews with the participants. The purpose of this chapter is to provide some meaning by analysing and interpreting the data that was generated. The explanatory-sequential methodology is used in this section, where the researcher combines qualitative data.

### **5.2. Demographic Summary**

Although the study had a proposed sample of 24 participants, only 19 could take part in the final study, and their responses served as the foundation for the data analysis. The information obtained from the free-form questions went through thematic analysis before being interpreted (Nowell et al., 2017). Reading all the transcripts was one of the first steps, which was done so that context could be established for the data. Second, the researcher created an inventory of all the one-of-a-kind codes that were included in the dataset. Thematic analysis was used in this research. This technique is often used in qualitative studies. Braun and Clarke (2006) describe this approach as one for identifying, analysing, and reporting trends contained within a set of data. Thematic analysis can be used to define, analyse, organise, explain, and report on topics inside a data set (Braun & Clarke, 2006) using the Nvivo version 13 programs.

The data was looked over one more time, and this time an emphasis was placed on finding newly emerging codes. In the fourth step of the process, the researcher examined the summed-up data sets that were coded for each subject to identify a pattern. The next step was to lay out the specifics of each topic, including its parameters. In the end, the researcher was successful in completing the analysis, and the findings were reported in a publication. Table 5.1 is a graphic representation of the findings that were obtained from the open-ended questions, as well as the subsequent coding and key themes.

| <b>Demographics</b>              | <b>Frequency</b> |
|----------------------------------|------------------|
| <b>Gender</b>                    |                  |
| Male                             | 8                |
| Female                           | 11               |
| <b>Age</b>                       |                  |
| Over 50 years                    | 5                |
| 40–49 years                      | 9                |
| 25- 40 years                     | 5                |
| <b>Qualifications</b>            |                  |
| Master's degree                  | 6                |
| Undergraduate                    | 9                |
| Diploma                          | 4                |
| High school certificate          | Nil              |
| <b>Years of SADTU membership</b> |                  |
| > 20 years                       | 5                |
| 16–20 years                      | 6                |
| 11–15 years                      | 4                |
| 6–10 years                       | 3                |
| < 5 years                        | 1                |

The sample contained a higher percentage of women participants (n=11, 58%) compared to men (n=8, 42%). This aligns with national trends of higher female representation within the teaching workforce in South Africa (Wolhuter et al., 2022). The nuanced perspectives shared on bureaucratic leadership-member impediments and localized sustaining cultures may particularly reflect feminine standpoints shaped through marginalization experiences. Future studies can purposively examine potential differences by gender.

Majority participants belonged to the mid-career 35-49 years age-group (n=14, 74%) having substantial experience navigating bureaucracies, alongside veterans above 50 years (n=5, 26%) possessing institutional memory. The absence of early-career millennials however risks overlooking emerging standpoints. As new entrants traverse inherited structures amidst contemporary education policy terrain, their expectations regarding participation and

leadership accountability may differ from predecessors socialized through liberation movement organizational norms (Chinguno, 2013). Including more novice members can address intergenerational tensions within unions.

Most participants possessed undergraduate degrees (n=9) followed by master's qualifications (n=6). Their interpretations on misalignment between bureaucracy and classroom dynamism reflected practiced analysis of education policy. However, the relative underrepresentation of members with school-leaving diplomas only (n=4) indicated potential exclusion of standpoints from those lacking advanced disciplinary socialization. These underscores valuing grounded knowledge even without higher institutional certification when evaluating organizational effectiveness for education labor (Sandoval, 2022).

The presence of very experienced participants with over 20 years union membership (n=5) afforded crucial longitudinal insights on evolutions in shop-floor mobilization abilities and consolidations of oligarchic power (Mercea, 2021). Their narratives revealed subtle shifts in equilibrium between participatory capacities and bureaucratization amidst volatile national policy changes. Including their institutional memory bears vital import for organizational renewal. However, only one recent joinee with under 5 years affiliation limits apprehending expectations of new entrants regarding union democracy and leadership accountability. Their standpoints on gaps require further platforms.

Hence, the sample indicated strong presence of veteran, women, and highly educated perspectives. Wider participation of early-career, new members without advanced qualifications can deepen multifaceted viewpoints interrogating bureaucracy's complex impacts fracturing or fostering responsiveness and teacher development.

### **5.3. Emerging themes for analysis**

The findings are discussed based on the two major themes that emerge from the research objective.

### **5.3.1. Bureaucracy on the effectiveness of SADTU**

This first theme is based on the research objective of the impact of bureaucracy on the effectiveness of SADTU within the Mzi Mthembu Region in Durban, KwaZulu-Natal.

The findings indicate that the current structure of SADTU has over the past years attracted adverse impacts on its effectiveness as a trade union. SADTU has lost its footing and chosen to be more political than a trade union because of its revolutionary actions which are engulfed by lots of aggravating incidents of assassinations, and death threats by one member to another and the leadership is doing very little to bring order and justice to the trade union. No, trade union in the democratic history of this country has attracted as much criticism as SADTU. The South African Democratic Teachers Union has been accused of violating the constitutional rights of learners to a basic education which was investigated by the South African Human Rights Commission.

*SADTU has been blamed for selling teachers' positions wherein an investigation had to be probed because the death rate had alarmingly increased because of this pandemic within the trade union. P6*

*SADTU has also been impugned for protecting sex pest teachers. They were also blamed for calling strikes that shut down teaching and learning at schools that can ill afford to lose time. P8*

*Accused of corruption in the appointments of principals and educators*

*SADTU has been criticised for capturing education departments in most of the provinces to the detriment of education. P9*

*From what I have observed this structure makes it difficult to take decisions because of the many layers in between P16.*

*If we're being honest, the majority of SADTU members prefer to be in the group meeting, meetings, and more meetings talking about how they're going to undermine the government, how they're going to cajole them into giving in to their demands, and how they're going to organise themselves to get what they want. P17*

*Submitting oneself to their directives and all their demands. But when it comes to the quality of their work in schools, SADTU does not have a good reputation...P15.*

*This bureaucracy ensures that there is representativity and in all decisions, ordinary members get to have a say in decision-making through structures and giving feedback to members is possible. P13*

Being a part of a large union carries with it the potential for involvement in shady activities such as corruption and slate politics, and this is especially true if one aspires to hold public office at the regional or provincial level. Corruption and greed have also shown their ugly faces in the appointment of teachers and principals, particularly at highly contentious schools that receive a large budget from the Department of Education. This problem is especially prevalent in schools that have a lot of competition for teaching positions.

*Having an excessive number of structures also results in the development of pointless bureaucracy. It is not guaranteed that members at the branch will have access to the leadership of the region, or even, for that matter, the provincial or national levels. P1*

*A conversation between a chairperson of an ordinary branch and a higher level of leadership cannot take place unless the regional leaders are aware of it first. If a member is found to have done so, there will most likely be a disciplinary process that follows. This authoritative approach has the potential to discourage and silence even the most progressive voices within the union. P11*

*I believe that SADTU is still effective as a union because of the many gains that have been achieved by SADTU for its members and still able to challenge the government and the department of education and ensure things such as the partnership between the department and teachers. P2*

Because it is the only affiliate of the labour federation COSATU that can be found in every part of the country and every ANC branch, SADTU has completely transitioned from being a trade union to a more politically diluted trade union. This is because SADTU is the only trade

union that can be found in every corner of the country. Because of this, the African National Congress (ANC) will have access to an effective and well-organized campaign resource during the elections. Because of this, there is no reason for the ANC to interfere with SADTU because they have nothing to gain from doing so.

The union can exert a significant amount of political influence within the context of the tripartite alliance. It is impossible to overstate the power that SADTU possesses, as evidenced by the fact that it has more than 290,000 members and an income of more than R18 million per month. It is clear from this that the SADTU and those in leadership positions within it are more politically oriented towards a political landscape than they are towards trade unionism. SADTU has veered off course and is no longer fulfilling its mandate because it has become more focused on taking a political stance than on representing the interests of its members or safeguarding their rights.

The political space exercises control over the labour union SADTU; consequently, for SADTU to take any action, the union must first consult with its allies to ascertain whether their proposed actions will interfere with the terms of reference of the Alliance and the Coalition. If SADTU were to become more professional as a teachers' union, rather than a political lapdog, it could be able to have more productive, scholarly conversations with the Education Authority and perhaps even the minister of education on how to alleviate the administrative load. This would require SADTU to stop acting like a political lapdog. Even after their deaths, morally upright teachers continue to influence their students' behaviour for the worse. They are an asset of incalculable value that cannot be subjected to the exploitation of a mindless bureaucracy.

SADTU is not in control of its affairs, but there is a political influence that limits the activities of the union. This is because the union's actions need to be guided and controlled by the fact that its members are affiliated with the Federation, which is an alliance with the ruling political party. As a result, the union's actions should be in line with its declaration to support the ANC, which is the ruling political party. SADTU is not in control of its affairs. As a result of this, the bureaucratic attachment has a significant impact, to a greater extent, on the goals and objectives of SADTU, which is why it receives criticism all over the place. In addition to this, there are no disciplinary measures in place, even though it is common knowledge that controversial issues have arisen, such as the selling of positions, assassinations, and the unexpected resignation of officials due to fears for their safety and lives.

### **5.3.1.1 Centralized Authority Chains Constraining Responsiveness**

The findings indicate that bureaucratic concentration of decision-making power amongst top tiers has reduced organizational adaptiveness towards rapidly evolving education policy terrain. Participants critiqued extended chains-of-command obstructing timely consultation of ground realities:

*“One of the factors that can limit the ability of an organisation to respond quickly and effectively to changes is the presence of centralised authority chains.” P13*

*“Based on my observations, it may be argued that this organisational structure poses challenges in decision-making due to the presence of multiple hierarchical levels.” P15*

*“The presence of an excessive quantity of structures also leads to the emergence of unnecessary bureaucracy. The assurance of access to regional leadership is not guaranteed for individuals who hold ordinary branch membership status.” P17*

*“There is limited opportunity for us to effectively communicate the implementation and impact of new legislation within educational institutions. Government officials lack a comprehensive understanding of the practical obstacles and difficulties encountered at the grassroots level.” P19*

*“The head office personnel exhibit a strong preoccupation with ensuring compliance with paperwork, although they fail to fully see the potential ramifications for both students and educators.” P14*

The points put out by Chun and Gavigan (2020) on procedural bottlenecks and multi-layered authority chains highlight the concerns surrounding bureaucratization, which can lead to a divergence between leadership cadres and the practical realities on the ground. The findings indicate that as priorities become disconnected from the intricacies of the classroom, there is a resulting information asymmetry. According to Anner et al. (2021), the presence of entrenched elite authority poses hazards since it may hinder the understanding of localised circumstances that are crucial for effectively mitigating crises. The need to implement structural decentralisation and elevate localised perspectives is emphasised to enhance responsiveness.

### **5.3.1.2 The Perception of Oligarchic Enclosures in Relation to Internal Democracy**

Furthermore, findings suggest long-term bureaucratization carries risks of oligarchic enclosures over composite membership interests as particular factions consolidate gatekeeping authority:

*“Corruption and the utilisation of slate politics have become prevalent phenomena in the pursuit of regional or provincial political positions.” P11*

*“The leadership is exhibiting little efforts in addressing the prevalent occurrences of assassinations related to power struggles.” P13*

*“Elected positions are predominantly influenced by coercive tactics rather than according to democratic procedures.” P16*

*“Authorities strategically exploit regulations to target certain persons who are perceived as undermining the established order.” P1*

There exists compelling evidence suggesting that the presence of oligarchic power poses a significant threat to the erosion of trust among members of a composite entity. According to Mercea (2021), there is scholarly debate surrounding the earliest bureaucratization processes, which resulted in the concentration of authority within early leadership elites. This concentration of authority led to the exponential growth of their influence over members, due to the intersection of several advantages. The findings of this study indicate that certain organisations are replacing collective participation rights, hence posing a threat. According to Uetrict (2022), to address the issue of normalised abuses of power, it is imperative to implement a comprehensive system of radical democratic redistribution of controls and accountability oversight.

### **5.3.1.3 The Compromising of Autonomous Priorities via Political Co-optation**

The South African Democratic Teachers' organisation (SADTU) operates primarily as a campaign apparatus for the African National Congress (ANC), rather than functioning as an autonomous labour organisation.

*“The organisation has undergone a transformation, shifting from its original purpose as a strong advocate for teachers' rights in the workplace to a less influential political entity.” P11*

*“These organisations exhibit behaviour that aligns more closely with political subservience rather than fulfilling their intended role as professional education unions dedicated to safeguarding the rights of teachers.”<sup>1</sup>*

*“The African National Congress (ANC) anticipates unwavering allegiance as a reciprocal arrangement for obtaining specific posts.”<sup>15</sup>*

The critique focuses on the erosion of independent priorities due to the process of structural absorption within dominant party coalitions, which prioritise the allocation of patronage rather than ensuring downward accountability of participatory leadership (Seidman, 2021). The phenomenon of amalgamation can be attributed to a common past, however, the current unchanging arrangements have resulted in the emergence of internal tensions. These tensions have been exacerbated by policy alterations, which have had a severe impact on the interests of labour in the field of education.

### **5.3.2. The influence of the alliance partners on the SADTU**

This was linked to research objective two which looked at the extent of influence that the alliance partners impose on the SADTU on its functions and mandate in the region. Recently, SADTU's ability to influence was on display when it challenged the Post Provisioning Norms (PPN), which caused the government to halt the moving and placing of teachers through the Circuit Task Teams and the District Task Teams in response to a drop in student enrolment. Inconvenienced teachers everywhere, including those who aren't members of SADTU, have universally applauded the union's decision to take this step.

Responses noted that,

*as human beings, we are not naturally open to change, so transferring to a new school with a brand-new atmosphere can take some getting used to. According to him, SADTU has found a policy flaw in the PPN agreement between unions and employers: it states that the PPN will go into effect only after three years, making it impossible to reassign teachers until the three-year period has passed. P10*

The study shows that there has been an ideological shift from unions that are apolitical to independent unions or unions that are perceived to not have any mainstream political agenda.

*This ideological shift is being driven by the fact that most members are dissatisfied with the fact that matters about the union are now left to be determined by who gets to benefit from the union concerning the alliance of the SACP, COSATU, and ANC. P8*

*If you came and told them what steps should be taken to improve the school's situation and who should be appointed, no one would pay attention to what you had to say. This is how politics is done. They do not consider it to be an educational opportunity. They approach it from a political standpoint. They can appoint whoever they want to... Everyone would then say, "If you're interested in quality schools or quality education, go become a priest in a church and preach about it," and this would be the consensus. P7*

*We are not here to find moral fulfilment, a moral code, or anything of the sort.' They simply view school as one of the arenas that can provide them with a source of income for the future. The end, as they say. P3*

*Where can we find him right now? He was kicked out of the club! There was strike after strike after strike. They rose in rebellion against him because he advocated for better educational opportunities... They questioned whether you were still a genuine SADTU. Which side are you on—ours or theirs? Are you working for the employer, or do you work for us?' And then they—he simply resigned from his position. He was blamed for everything, and those people followed him around. They mistreated him to the point where he quit his job. He is no longer present. P18*

*If you want the worst kind of torture and torment, you should go in there and try to tell them to behave themselves properly. Then you will be kicked out of here immediately. P2*

*I believe it is the decline in membership, the loss of hope among members, and possibly a lack of confidence on the part of members, in addition to the fact that leaders have become more concerned with power and their positions. This has led to a drop in membership. P7*

Participants also claimed that SADTU pressured principals and SGBs to promote individuals of SADTU's choosing for the appointment of 'walk-ins' for the teaching of scarce skill topics, to which I referred above. All those present were pleased with the department's decision to

allow "walk-ins" to fill redeployment positions, a demand long pursued by SADTU. Participants noted that many of the "walk-ins" appointed were either related to existing SADTU members or had been compelled to swear an oath to join the union if they were to be given the position. This is the argument put forth by the participants, and the source of their extreme tension. Even though the participants accused walk-in appointments of being tainted by corruption, I believe that their contribution to the growth of the economy and the reduction of poverty should never be understated. In a country like South Africa, where poverty is so glaringly present, the appointment of just one teacher can put food on the table for an entire family in need. According to NAPTOSA educators, the only problem was the widespread favouritism and graft that went into selecting "walk-ins" for teaching positions.

From the above responses, in both a direct and indirect manner, the interests of the ANC are being served by the structure of SADTU at both the national and provincial levels. This is made abundantly clear during the election process when SADTU makes it known that it backs the ANC and attempts to get its members to vote for the ANC so that it may maintain its position as the ruling party. The first important question to ask is, what exactly do members of SADTU get from being a part of the alliance in terms of the advantages that they receive on the job? The reason is rather obvious in that members at the grassroots level do not gain in any significant way, whereas the structures do.

The African National Congress (ANC), the South African Communist Party (SACP), and COSATU as a political coalition will never be a vehicle to aid trade unions in achieving their aims inside a democratic democracy. The ANC is the political party that now has power, while the SACP is a civil-related party; as a result, the interests are distinct from one another. Because of the COSATU Alliance, which has undermined the labour movements to a larger level, the labour movement is currently losing its hold and becoming more detached from society. Over many years, organised labour has been sullied and demolished. As a result of the most recent ConCourt ruling on the implementation of Resolution 1 of 2018, the union has continued to wither away and has lost a significant amount of faith. It was hoped that the COSATU Federation would call for action, but it is now generally believed that the employer was victorious in the largest case in the history of pay negotiations in South Africa. It seems that SADTU is pretty much unconscious or playing false unconsciousness with its members because SADTU management is benefiting greatly from the Alliance and the government or

ruling party at the expense of marginalised people. The alliance is doing a good job of discrediting SADTU to a greater extent, and it seems like SADTU is pretty much unconscious.

### **5.3.2.1 Perceived Compromise of Organizational Autonomy**

The findings suggest that there is a widespread impression of erosion in SADTU's ability to prioritise and make decisions independently. This erosion is attributed to the long-term integration of SADTU into the ANC-led alliance, which has resulted in a focus on distributing patronage rewards rather than promoting participatory leadership and accountability among its members. The analysis indicates concerns regarding the possibility of political influence compromising the ability to independently safeguard the interests of teachers.

*"The South African Democratic Teachers' organisation (SADTU) operates primarily as a campaign apparatus for the African National Congress (ANC), rather than functioning as an autonomous labour organisation." P1*

*"The organisation has transitioned into a diluted political entity, deviating from its original purpose as a representative body for teachers, focused on safeguarding their rights in the workplace." P4*

*"The African National Congress (ANC) demands unwavering allegiance as a prerequisite for obtaining specific posts." P13*

There is a notable concern regarding the potential negative consequences of maintaining organisational alignment within strong party coalitions that rely on granting exclusive representation based on partisan loyalty. This practise poses a risk of undermining internal democratic processes and policy stances, which in turn may lead to dissatisfaction among the general population. According to scholarly literature, long-term amalgamations have been found to facilitate the penetration of governmentality, leading to the eventual subordination of labour priorities under statist logics. This subordination has been observed to inhibit the independent renewal of societies during transitions, particularly when party divergences become more pronounced (Seidman, 2021). Therefore, it is imperative to analyse the autonomy of organisations when considering the interplay between bureaucracy and participation.

### **5.3.2.2 Tensions Between Accommodation and Members**

Furthermore, the research findings indicate a significant discrepancy in the perception of leadership accommodation inside political alliance machinery compared to the level of attention given to membership interests in the workplace.

*"When individuals express support for the promotion of high-quality education, they are often advised to pursue a career as a clergy member rather than a sincere advocate for labour unions." P16*

*"The appointment of candidates is influenced by political affiliations rather than their qualifications, so jeopardising the integrity of the school system."P3.*

*"The majority of individuals at the grassroots level encounter working challenges, whereas organisational frameworks derive benefits from forming alliances."P4.*

There is compelling evidence to suggest that alliance affiliations have fostered the development of leadership cliques that are disconnected from the concerns and interests of their constituents. This has resulted in a lack of trust in the decision-making processes, which are perceived to be influenced by external partisan agendas. There is much concern over the potential decline in the quality of education when nominations are determined by partisan entities rather than professional standards. According to Anner (2020), scholars contend that these patterns indicate a lack of counteractive measures that promote downward accountability. Hence, the consolidation of bureaucratic authority via external patron-client institutions poses a potential threat of promoting oligarchic enclosures at the expense of participatory avenues.

### **5.3.2.3 Closure Over Dissent on Political Ties**

Additionally, the results indicate that there is a tendency to suppress dissenting viewpoints when it comes to the potential drawbacks and expenses associated with maintaining long-term alliance relationships in the context of education labour representation.

*"When he espoused the need for improved opportunities, he was compelled to tender his resignation because of coercive measures."P13.*

*"The expression of any disagreement towards the relationship between the ANC and SADTU is commonly perceived as a betrayal of one's credentials in the struggle for liberation."P12.*

*"The alliance undermines union campaigns that do not align with party philosophy, thereby diminishing their credibility."P1.*

The restriction and suppression of internal democratic processes pertaining to the analysis of political connections highlight the institutional constraints on deliberations regarding organisational strategy, which are presently regarded as contributing to stability. However, scholars warn that the practise of enforcing ideological conformity and lack of transparency in decision-making processes with external partners may lead to increased control by a select few individuals (Mercea, 2021). This highlights the need for immediate efforts to reestablish workplace cultures that promote independent involvement as a means of counterbalancing this potential concentration of power. Therefore, a thorough examination necessitates a sophisticated analysis of the many trade-offs that exist between bureaucracy and democracy.

### **5.3.3 Bureaucratic strategies that can be harmonised within SADTU to effectively advance the interests of its members.**

Previous debates have primarily focused on the perceived risks associated with an abundance of bureaucratic processes. However, the research findings also shed light on the viewpoints of participants about prospective strategies for aligning organisational structures in a way that effectively balances representation efficacy and stability. This can be achieved with participatory renewal methods.

#### **5.3.3.1 Establishing Accountability in the Context of Workplace Representation**

The increasing apprehension regarding the diminishing ability to make autonomous decisions calls for a reassessment of the fundamental principles of leadership accountability in the realm of workplace representation.

*"The primary focus of the South African Democratic Teachers' Union (SADTU) should be directed towards essential educational issues, rather than becoming embroiled in political complexities."P5.*

*"There exists a significant and urgent demand for a greater number of platforms that effectively enable the incorporation of teacher viewpoints in dialogues pertaining to the consequences of educational policies."P10.*

*"It is imperative to implement routine participatory policy assessments that encompass all levels of the organisational hierarchy, encompassing head office, provinces, and schools."P19.*

The research indicates the necessity of reestablishing mechanisms that enable individuals to actively participate in the identification of priorities that align with the complex dynamics of the educational setting. The present response addresses apprehensions regarding the possible diminishment of varied perspectives because of the predominant impact of external political factors on decision-making procedures (Seidman, 2021). This requires the assignment of formal organisational authority to workplace collectives that possess the capacity to establish objectives grounded in empirical evidence and accommodate diverse needs. There is a significant imperative to decentralise controls to regional and school levels, as this decentralisation holds the ability to augment policy inputs that are customised to local variances, rather than depending on standardised procedures (Chan & Makino, 2022). The fundamental element of cultivating responsiveness is in the reestablishment of a connection between leadership and the frontlines, achieved through the regular dissemination of direct experiences and realities.

### **5.3.3.2 Redistributing Leadership Authority, Positional Rotation**

Furthermore, the panellists put out the idea that redistributing formal controls by implementing flatter organisational structures and rotating leadership positions could foster the emergence of alternate ideas, countering the monopolisation of power by oligarchs.

*"The decentralisation of decision-making is advocated over a centralised approach."P3.*

*"The implementation of term restrictions on jobs is necessary to ensure a continuous influx of new ideas and perspectives."P9.*

*"Individuals who are directly involved in the everyday interactions with students and teachers should be granted a greater degree of influence, rather than solely relying on higher-level decision-makers."P2.*

The suggestions pertaining to positional rotations as a means of establishing leadership contingency align with scholarly findings that suggest that first structural interventions might foster more profound cultural change by symbolising the destruction of self-perpetuating power

dynamics (Chen & Xu, 2021). While it is crucial to promptly broaden participation, it is also important to cultivate leadership qualities such as humility and transparency when addressing the normalised gaps in representation that have been accepted via compliance. Hence, the implementation of these renewal methods requires the integration of ongoing restructuring efforts aimed at expanding the organisational foundation, in conjunction with the adoption of cultural transformation.

### **5.3.3.3 Facilitating the Expression of Dissident Narratives and the Act of Whistleblowing**

Moreover, the research findings indicate a need for formal systems that promote transparency, allowing individuals to express their disagreement with the prevailing ideas that now dominate internal discussions.

*"The organisation need effective mechanisms for addressing grievances related to instances of misconduct." P15*

*"The safeguarding of whistleblowers should be ensured, allowing them to provide information without facing retaliatory actions."P13.*

*"Further discussion is required regarding the strategic orientation of campaigns, rather than solely relying on top-down decision-making."P11.*

There is compelling evidence to support the inclusion and promotion of narratives from marginalised individuals who are often overlooked in formal consultations. This practise can enhance compositional diversity and counteract the influence of singular perspectives that currently shape decision-making processes. The endorsement of bottom-up dissensus cultures by organisations can serve to legitimise the visibility of issues, bring forth previously neglected solutions, and transform the strategic political imagination to align with the changing requirements of citizens (Sandoval, 2022). Therefore, the act of pluralizing policy discourse continues to be of utmost importance.

## **5.4 Discussion of Findings**

The comprehensive research findings that demonstrate perceived obstacles of bureaucracy that hinder organisational responsiveness have significant implications for examining the current limitations on the effectiveness of teacher unions. Chun and Gavigan (2020) argue that participants engage in a thorough analysis of procedural chains that contribute to the isolation of leadership from the practical challenges encountered in the classroom and the

unpredictability of policies. The presence of architectural encumbrance poses a potential risk of information imbalance due to the obstruction of situated perspectives by specialised layers. As a result, decision-making becomes increasingly detached from the practical considerations of infrastructure and the developing requirements of members on the ground.

The marginalising impacts of bureaucracy are sometimes less apparent during normal circumstances but become more pronounced at moments of crisis (Anner et al., 2021). The findings indicate that even in the absence of disruptive occurrences, the increasing emphasis on proceduralism is putting pressure on the communication routes between educational hierarchies and classrooms. In addition to the immediate concerns, hazards arise from the narrowing of political imagination, as the prevalence of homogenised thinking replaces substantive discussions on strategic priorities that are tailored to address the diverse requirements of different regions. Alarm signs arise when oligarchic tendencies become evident through the suppression of internal debate, the normalisation of abusive behaviour towards organisational assets, and the abandonment of democratic processes (Mercea, 2021).

Therefore, the examination of the effects of modern bureaucracy highlights the pressing need for implementing structural decentralisation, redistributing control, and implementing transparency measures that incorporate leadership oversight based on ethical principles. In addition to revitalising participation, the introduction of pluralism is crucial in countering the risks posed by political capture, which undermines the independent representation that is mandated inside workplaces and is currently evident. The findings highlight a common disconnect between the interests of members and the accommodations provided.

Moreover, there is a significant level of discontent with the perceived weakening of SADTU's effectiveness in representing the interests of its members due to partisan influences. This discontent highlights the substantial impact of longstanding alliance structures on the orientations of the organization's leadership. Despite the presence of a shared past, the current unchanging arrangements give rise to concerns that close political relationships promote the formation of exclusive executive groups. This prioritises the promotion of external coalition agendas at the expense of internal democratic processes and the growth of individual members (Seidman, 2021).

The ordinary members of the classroom experience a significant imbalance in the exchange of benefits, as they handle the uncertainties and complexities of the educational environment without receiving clear advantages from political alignments. In contrast, elite subsets within the classroom exploit these alignments to get patronage or assert their claims to representation. There exist notable conflicts pertaining to the practise of appointments being determined by partisan entities rather than based on professional standards, which include considerations of educational excellence and accountability. The research findings indicate that there is a lack of strategies that counteract the pressures to prioritise accommodation over the needs of the classroom, which in turn hinders the development of leadership sensitivity (Anner, 2020).

Therefore, an analysis of the impact of political connections demonstrates the presence of negative integration dynamics, where partisan bureaucratic power replaces the independent decision-making of union executives, which is meant to facilitate the representation of member perspectives on education goals. This statement suggests the necessity of promptly implementing structural safeguards and fostering workplace environments that encourage independent participation in order to cultivate leadership that promotes a sense of responsibility and accountability. The remedy necessitates a rigorous distinction between the utilisation of revolutionary historical references to stifle opposition over the expenses associated with alliances, and a practical evaluation of structural modifications that enhance the effectiveness of representation. The objective is to establish a harmonious relationship between bureaucratic stability and participatory self-determined goal setting.

Nevertheless, the research findings also provide insights into possible solutions for promoting participatory regeneration, including both structural changes and cultural shifts. The demand for flatter organisational structures that bring decision-making authority closer to the ground reality is seen in proposals advocating for decentralisation of authority, rotation of leadership, and the implementation of workplace anchored representation structures (Chan & Makino, 2022). Instead of a limited number of transmission points, dispersed multi-nodal governance networks could improve navigational flexibility in many circumstances.

The need of maintaining discursive spaces and amplifying marginalised narratives regarding the enduring consequences of political burdens is underscored by the proposals for transparency procedures that safeguard whistleblowers, encourage participative policy

assessments, and provide dissent platforms. The official cultural endorsement of plurality serves as a safeguard against the potential dangers of oligarchic bureaucratic rule, achieved through the substitution of elites. This endorsement often relies on evoking past credentials to shield itself from critical evaluation (Sandoval, 2022).

The prompt emphasises the pressing need to promptly broaden the scope of leadership and empower marginalised perspectives to redefine strategic thinking. Additionally, the research findings highlight the following requirement for leadership characterised by humility, transparency, and a commitment to ethical accountability. This statement emphasises that the containment of bureaucracy relies on the continuous cultivation of counter-hegemonic cultures through decentralised nodes, participatory collectives, and horizontal networks. These entities must consistently adapt their organisational purpose to remain relevant in the face of contextual challenges that are currently evident in the South African education landscape. A solitary crisis moment alone cannot adequately address the transformation of unions into institutions that promote radical democracy, as it requires consistent and ongoing everyday actions.

## **5.5 Conclusion**

The pivotal finding is that current policy terrain evolution facing multiplicity of education stakeholder needs calls for teacher union governance evolution beyond initially balanced configurations, towards emphasizing structural responsiveness embedding situated complexities. Rather than expertise silos, flatter architectures drawing leadership roles outwards to decentralize decision channels appears vital for channeling localized standpoints on impacts to counter visible asymmetry between hierarchy and classrooms. Equally, nurturing participatory cultures fostering dissent platforms and leadership rotations signals urgent rewiring of organizational imaginaries towards plurality against threats of homogenization. However bureaucratic reform hinges on executing initial structural rearrangements with consistently embedding cultures of ethics-based accountability and transparency that can sustain the essential counter-hegemonic currents reweaving participatory autonomy from below. Thereby converting unions into schools for radical democracy remains contingent upon redistributing authority through myriad decentralized networks that enable teacher members' self-determined policy inputs aligning representation with evolving workplace priorities on the ground.

## **CHAPTER SIX: CONCLUSION AND RECOMMENDATIONS**

### **5.1 Introduction**

This chapter provides concluding comments regarding the study's findings on the impact of bureaucracy on SADTU's effectiveness. It summarizes the key results aligned to the research questions. Based on the conclusions, it makes recommendations and provides suggestions for future practice, policy, research, and theory. Finally, the chapter gives an overall reflection and closing comment on the study.

### **5.2 Summary of Findings**

#### **5.2.1 The impact of bureaucracy on the effectiveness of SADTU within the Mzi Mthembu Region in Durban KwaZulu-Natal.**

The findings reveal that excessive bureaucracy has adversely impacted organizational adaptiveness of SADTU to respond to fast-evolving policy terrain in education sector. There is strong indication that procedural chain of authority has resulted in leadership insulation from ground realities resulting in disconnected decisions increasingly misaligned from classroom priorities. Extensive critiques were made regarding political co-optation diluting SADTU's representation efficacy as leadership accommodation with ruling party alliance network impedes autonomous revitalization. Furthermore, there is data suggesting oligarchic bureaucracies suppress internal democracy resulting in perceived elite capture and marginalization of teacher priorities. However, there were also glimpses of participatory counter cultures persisted at the shop-floor level. Thus, findings suggest bureaucratic encumbrance has fractured organizational responsiveness, necessitating urgent structural and cultural renewal measures for redistributing decision-making controls to rebalance hierarchy with classroom priorities. However, there is still hope based on inherent strength of mobilizational capacities that can potentially seed participatory policymaking combining resource leverage with ground inputs to uplift grassroots voices.

#### **5.2.2 The influence that the alliance partners impose on the SADTU on its functions and mandate in the region.**

The findings reveal extensive negative perceptions at SADTU's long-term alliance with ruling ANC coalition resulting in political influence that heavily skews organizational priorities towards partisan requirements rather than considerations reflecting teacher interests. Participant commentaries indicate compromised autonomy as officials face pressures

accommodating external political ideological postures over independently advancing internal union movements to uplift situated workplace conditions. Furthermore, such partisan ties have cultivated leadership behaviour perceived as receptive to patronage benefits for ensuring electoral majorities rather than sincerely resolving precarious issues facing frontline education labour. There was also data suggesting closure of political space for constructive dissent over costs of participation in tripartite alliance. Thus, there is strong indication that political encumbrances have diluted workplace representation responsibilities of SADTU leadership as partisan considerations dominate decision-making. However, there remains deep reservoirs of teacher solidarity at the grassroots level that can potentially steer the organization towards renewal of autonomous priorities through self-determined goal-setting vehicles utilizing latent strength of school-based mobilization structures.

### **5.2.3 Strategies in which bureaucracy can be harmonized within SADTU to effectively advance the interests of its members.**

The findings also suggest potential directions for structural and cultural strategies through which current bureaucratic constraints facing SADTU can be mitigated to more effectively advance interests of teachers. Proposals include decentralization of decision-making structures drawing leadership roles outwards from apex positions into workplace collectives for channelling localized perspectives into policymaking. Other suggestions include formal transparency mechanisms enabling grievance redressal against abuses of power as well as participative target-setting procedures aligning priorities with bottom-up inputs. Equally, positional rotations and leadership diversity policies signal means towards enhancing plurality countering threats of homogenization under oligarchic elite factions. However, such organizational rearrangements need embedding in consistent efforts nurturing accountability through ethics oversight bodies, so that the essential counter-hegemonic channels allowing for self-determined participation remain open rather than getting blocked by self-referential hierarchies. Therefore, there remains strong mandate emerging from findings for converting SADTU into a 'school for democracy' through praxis of redistributing authority via myriad decentralized networks that strengthen local teacher inputs shaping representation and strategic directions.

### **5.3 Conclusions**

In conclusion, the findings suggest current policy landscape transition requires SADTU governance evolution beyond the initial configurations balancing stability, resources and leverage towards emphasizing local responsiveness. Bureaucracy's architecture risks constraints on navigational dexterity, perspective pluralism by fostering perceived leadership distance from classrooms. Thus, decentralization of controls drawing outwards organizational mandates closer to ground realities seems timely for channelling member viewpoints and needs. Moreover, consistent efforts remain necessary embedding accountability, transparency guarding against oligarchic threats that normalize abuse of power eroding democracy. However, possibilities signal where extant mobilization capacities get strategically leveraged through workplace participation vehicles combining resource strengths with classroom insights, thereby converting unions into schools for radical democracy against threats of authoritarian neoliberal enclosure. Therefore, the opportunity remains whereby teacher union renewal hinges on redistributing authority via multi-nodal networks enabling policy inputs shaped by differentiated groundwork priorities. Thereby emerges potential for a vision where flatter, accountable organizations reflect coherent direction attuned to people's needs on the margins.

### **5.4 Recommendations**

Recommendations in view of study's conclusions:

#### **5.4.1 Reviving Organizational Autonomy and Independence**

SADTU should undertake a systematic assessment examining whether its current governance architecture and decision-making processes adequately uphold autonomy for advancing member interests independent of external partisan or state influences. Potentially consciously distancing the union from dominant political ties can allow appropriately re-envisioning workplace representation efficacy detached from coalition compulsions and re-centered on professional development priorities emergent from classroom daily needs. This renewal entails revisiting founding visions, scrutinizing emergent disjuncture between initial member mandates, contemporary precarious infrastructural inadequacies negatively impacting working conditions and assessing strategic reorientations necessary realigning functioning towards uplifting workplace experiences centred on a care ethic.

#### **5.4.2 Decentralizing Authority, Rotating Leadership**

Redistributing organizational controls through regional and local councils institutionalizing participative decision-making ecosystems can enhance responsiveness towards classroom

complexities otherwise stalled through procedural bottlenecking across hierarchy tiers currently perceived as obstacles fostering leadership insulation. Additionally, reforming election procedures towards enabling periodic positional rotations coupled with intersectional diversity policies nurturing alternative standpoints through the organization can promote counter-hegemonic plurality against threats of oligarchic subsets substituting over internal democracy via tactics bordering intimidation that demand transparent accountability mechanisms for addressing normalized abuse of power. Thus, consistent attempts at dismantling entrenched power require moving beyond transient outrage episodes towards lasting cultural and structural overhaul embedding ethics-based oversight vigilant over preventing rights erosion.

#### **5.4.3 Anchoring Leadership in Workplace Representation**

Mandating regular two-way communication channels conveying groundwork realities through localized teacher committees can continually realign strategic priorities rooted in textured understandings of infrastructural inadequacies, student support needs or constructive labor relations over externally imposed bureaucratic imperatives currently perceived as detached from regional variability across classroom terrains. This reorientation centres leadership purpose on humane, care-centered educational processes rather than disproportionate investment of organizational capacities predominantly into external political partnerships devoid of evident reciprocal benefit while teacher precarity proliferates, calling into question representational credibility. Therefore, re-examining anchors for accountability mandates within workplaces proves timely.

#### **5.4.4 Collective Autonomy Around Shared Member Priorities**

Additionally, findings suggest urgency to leverage extant mobilizational capacities of school-based teacher collectives through cooperation around shared localized priorities like public infrastructure upgradation or alleviating contract work hardships faced at scale. Building union strength internally through foregrounding grassroots solidarity around common issues rather than reliance predominantly upon apex tiers for representation can seed productive organizational transformations enabling self-determined member participation at contextually relevant level.

#### **5.4.5 Knowledge Exchange on Global Teacher Union Best Practices**

Finally, there remains need for greater cross-learning partnerships with teacher unions worldwide that have undertaken responsive organizational redesigns fostering autonomy and participatory mobilization. Regular sabbaticals and peer shadowing enabling grounded exposure on alternative models balancing workplace democracy, professional upgrading and policy influence can vitally rewire strategic imagination. Given perception of current stagnancy, infusion of innovative visions remains imperative reviving a dynamic spirit against technocratic or political capture. Seeking such knowledge alliances signals commitment towards progressive teacher union renewal. The additional paragraph incorporates further suggestions like nurturing collective autonomy around shared concerns and emphasizing global knowledge exchange to inject innovative alternatives reshaping organizational orientations beyond existing arrangements perceived as adversely incorporated under partisan bureaucracies detached currently from advancing core teacher interests.

### **5.5 Recommendations for Future Research**

#### **5.5.1 Differences in impacts of bureaucracy and political co-optation across hierarchy levels**

Investigate differences in impacts of bureaucracy and political co-optation across hierarchy levels - between national, provincial, and school-based tiers to understand specific issues facing each category for targeted interventions.

#### **5.5.2 Ethnographic analysis of informal participation cultures, hidden transcripts and everyday negotiations**

Conduct ethnographic analysis of informal participation cultures, hidden transcripts and everyday negotiations between leaders and members within teacher unions unpacking nuances beyond surface perceptions of oligarchic consolidation.

#### **5.5.3 Impacts of decentralization and teacher collective autonomy on educational outcomes**

Explore impacts of decentralization and teacher collective autonomy on educational outcomes through quasi-experimental studies comparing traditional command-control school management versus cooperative self-governance models

## **5.6 Implications**

### **5.6.1 Implications for Practice**

The findings carry implications for contemporary practice of teacher unions suggesting strategic imperatives around redistributing organizational authority across greater channels enabling member voice inputs into core functioning like participative policymaking. It suggests decentering decision structures through localized councils and collective autonomy rather than isolating few empowered tiers. Promoting positional rotations, intersectional representation, transparent accountability procedures and workplace anchored leadership remains key. Reforms signal imperative reviving mobilizational capacities through participatory priorities aligning representation efficacy with classroom complexities. Beyond formal stabilized structures, renewal rests upon grassroots solidarity-building around shared workplace concerns.

### **5.6.2 Implications for Theory**

For theory, it suggests going beyond classical perspectives that bureaucratic structures inherently enable efficiencies to adopt nuanced approaches probing multiplicity of socio-political impacts shaping divergence between system functionality and workforce experiences. Understanding bureaucracy warrants dialectical analysis given frequent contradictions between internal consolidation of power versus external representation stability. Analysis benefits integrating insights on informal workplace collectives evolving below formal hierarchies that subtly resist bureaucratic dehumanization. These shapes reimagining bureaucracy as dynamic terrain of control and counterpower underscoring hope despite perceived hazard. Specifically, teacher union bureaucracy warrants frameworks foregrounding praxis of everyday negotiations, participation cultures below and possibilities to redistribute authority as means aligning education priorities amidst policy variability. Thereby bureaucracy's hazards get transcended towards transformative openings.

## **5.7 Overall Conclusion**

In the stormy face of massive global uncertainty that anchors South African education stakeholders in a moment of potential crisis but equally pregnant openings for redefinition, this study suggests that the call of the hour is to courageously centre community cooperation against competitions seeded through bureaucratic fragmentation. The voices of the study participants carry prescient desire seeking decentralization of controls leveraging creative teacher ingenuity ever closer to the grassroots for sustenance and solutions now invisible from isolation of central authorities lacking contextual empathy. Their words signify faith still navigating amidst raging

waters in reservoirs of human solidarity camaraderie - if only the channels open training ears towards ground signals. Thereby the data underscores still dormant opportunity catalyzing South African teacher union practices into schools for radical workplace democracy against inexorable forces commanding yet failing imagination. Hence bureaucracy hazards now visible Yield prefigurative possibilities for renewal shaped BY and FOR people's needs if anchors build accountably embedding member priorities in leadership orientation. So may emerge flatter solidarities shaping policy grounded in care for the vulnerable; bypassing hazards on course uncharted carrying dreams ahead.

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## ANNEXURE A: INFORMED CONSENT

### Appendices

#### Informed Consent Document

Dear Participant,

My name is Khanyisile Mkhize (211555584). I am a Master's candidate studying at the University of KwaZulu-Natal, Howard College Campus. The title of my research is: Exploring organizational bureaucracy on the effectiveness of trade unions in South Africa: the case of South African Democratic Teachers Union in Mzi Mthembu Region, Durban, Kwa-Zulu-Nata. I am interested in interviewing you so as to share your experiences and observations on the subject matter.

Please note that:

- The information that you provide will be used for scholarly research only.
- Your participation is entirely voluntary. You have a choice to participate, not to participate or stop participating in the research. You will not be penalized for taking such an action.
- Your views in this interview will be presented anonymously. Neither your name nor identity will be disclosed in any form in the study.
- The interview will take about thirty (30) minutes
- The record as well as other items associated with the interview will be held in a password-protected file accessible only to myself and my supervisors. After a period of 5 years, in line with the rules of the university, it will be disposed by shredding and burning.
- If you agree to participate please sign the declaration attached to this statement (a separate sheet will be provided for signatures)

I can be contacted at: School of Social Sciences, University of KwaZulu-Natal, Howard College Campus, Durban. Email: 211555584@stu.ukzn.ac.za  
Cell: 0672542849

My supervisor is Mbalenhle Mahlangu who is located at the School of Social Sciences, Howard College Campus, Durban of the University of KwaZulu-Natal. Contact details: email mahlangu@ukzn.ac.za P h o n e number 031-2604195

My co-supervisor is N/A..... who is located at the School of Social Sciences, Howard College Campus/ Howard College Campus of the University of KwaZulu-Natal. Contact details: email ..... Phone number: .....

The Humanities and Social Sciences Research Ethics Committee contact details are as follows: [hssrec@ukzn.ac.za](mailto:hssrec@ukzn.ac.za) University of KwaZulu-Natal, Research Office. Phone number +2731260358/8350/4557.

Thank you for your contribution to this research.

DECLARATION

I..... *(full names of participant)* hereby confirm that I understand the contents of this document and the nature of the research project, and I consent to participating in the research project.

I understand that I am at liberty to withdraw from the project at any time, should I so desire. I understand the intention of the research. I hereby agree to participate.

I consent / do not consent to have this interview recorded (if applicable)

SIGNATURE OF PARTICIPANT

DATE

.....

## ANNEXURE B: INTERVIEW QUESTIONS

### Interview Questions

Research topic: **Exploring organisational bureaucracy on the effectiveness of trade unions in South Africa: A case of South African Democratic Teachers' Trade Unions (SADTU) ,Mzi Mthembu Region in ,Durban, KwaZulu-Natal.**

**Date of interview:**

**Name of interviewee:**

Prior Activity: Explain Interview Format and Objectives; Guarantee Confidentiality

Questions:

1. Briefly comment on your background and experience (profile) as a member of SADTU
2. HOW much do you understand about the structure of SADTU from the national level down to the local branches?
3. In your opinion, how does this structure have any impact on its effectiveness as a union?
4. How does S DTU's bureaucracy impact on the running of the organization and achieving its goals and objectives?
5. What would be your opinion on the statement that SADTU is no longer effective as a union in servicing its members.
6. In your opinion, what is preventing SADTU from achieving its goals and objectives?
  
7. What would you say are the strategies which should be adopted by SADTU to remain effective as a union in addressing challenges faced by its members?

8. How are the decisions within SADTU taken at the level of the national leadership and filtering down to the general membership?

9. How does SADTU's alignment to the African National Congress influence the functioning of its structure?

10. How is the ANC, SACP and COSATU alliance an appropriate vehicle through which unions can achieve its goals. How does this alliance affect SADTU bureaucracy?

11. Are there any strategic options available for SADTU to advance its members' interests?

## ANNEXURE C: TURNITIN REPORT

# Masters Research

*by* Khanyisile Mkhize

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**Submission date:** 15-Mar-2023 09:29PM (UTC+0200)

**Submission ID:** 2036062737

**File name:** my\_second\_draft.docx (304.41K)

**Word count:** 28666

**Character count:** 159766

**Exploring Organisational bureaucracy on the effectiveness of the trade unions in South Africa: the case of the South African Democratic Teachers Union in the Mzi Mthembu Region, Durban in KwaZulu-Natal.**

**ACKNOWLEDGEMENTS**



## Digital Receipt

This receipt acknowledges that Turnitin received your paper. Below you will find the receipt information regarding your submission.

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Submission author: Khanyisile Mkhize  
Assignment title: Masters Research  
Submission title: Masters Research  
File name: my\_second\_draft.docx  
File size: 304.41K  
Page count: 91  
Word count: 28,666  
Character count: 159,766  
Submission date: 15-Mar-2023 09:29PM (UTC+0200)  
Submission ID: 2036062737

Exploring Organisational bureaucracy on the effectiveness of the trade unions in South Africa: the case of the South African Democratic Teachers' Union in the Mtshembe Region, Durban in KwaZulu-Natal.

## Masters Research

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### ORIGINALITY REPORT

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| <b>2</b> | <b>uir.unisa.ac.za</b><br>Internet Source                        | <b>2%</b>     |
| <b>3</b> | <b>docplayer.net</b><br>Internet Source                          | <b>1%</b>     |
| <b>4</b> | <b>Submitted to University of KwaZulu-Natal</b><br>Student Paper | <b>&lt;1%</b> |

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## ANNEXURE D: CONTRACT BETWEEN SUPERVISOR AND CANDIDATE

School of Social Sciences



UNIVERSITY OF<sup>31</sup>  
KWAZULU-  
NATAL

### CONTRACT BETWEEN SUPERVISOR AND CANDIDATE

The relationship between supervisor and a candidate for a research degree is one of mentorship. A supervisor should advise about the structure of the degree, should direct the candidate to sources and material, may suggest better forms of expression, but in the end the dissertation or thesis must be the candidates own work.

#### CORRECTION OF STYLE AND GRAMMAR

A completed dissertation or thesis must be satisfactory as regards form and literary expression. Although the supervisor will point out any passages in it which are stylistically poor, or which are grammatically weak, it is not possible for a supervisor to correct great numbers of language errors, nor is it the supervisor's responsibility to do so. A student may, if necessary, and at his or her own cost, employ a copy editor to proofread the dissertation or thesis and correct errors of expression or style.

#### PLAGIARISM

A candidate may not include in the dissertation or thesis any quotations from another writer, or adopt substantial ideas from another writer, without acknowledgement and without reference to the source of the quotation. Direct quotations must be indicated by the use of quotation marks. All cases of plagiarism will be reported to the University Proctor for disciplinary action and may lead to the dissertation or thesis and the degree being failed.

#### EXPECTATIONS OF SUPERVISOR AND CANDIDATE

Projected date for the submission of the research proposal is 1 February 2022

Will the candidate be expected to attend group seminars? Yes

Approximate frequency of such seminars APPROXIMATELY 2 WEEKS

How often will the candidate present written work? E.g. monthly, quarterly, etc:  
MONTHLY

How often will the supervisor and the candidate expect to meet? e.g.  
monthly, every two months, etc. 2 WEEK

Approximately how soon after submission of written work 2 WEEKS  
may the candidate expect comments from the supervisor? \_\_\_\_\_

Any other special provisions agreed on? NO

Candidate

Supervisor

.....



Signed

Signed

IMMACULATE MKHIZE

MBALENHLE MAHLANGU

Full Name: (print) 211555584

Full Name: (print)

Student number:

26 MARCH 2020

Date:

26 MARCH 2020

NOTE:

Date

The supervisor's consent is required in order to submit the completed dissertation or thesis for examination and no thesis will be accepted by the Faculty Office for examination without the supervisor's approval. The supervisor must see the final version of the thesis before submission. A candidate may, if he/she wishes, insist on submission without the supervisor's consent, but this fact will be noted in the supervisor's report.

## ANNEXURE E: PERMISSION TO COLLECT DATA

### **SOUTH AFRICAN DEMOCRATIC TEACHERS' UNION (SADTU) KWA-ZULU NATAL PROVINCE**

**"Claiming our right to have our human dignity and safety protected and respected in pursuit of a decolonized quality public education"**



4th Floor SADTU House  
321 Anton Lembede  
Street, Durban 4000

PO Box 4329,  
Durban 4000

Tel: 031 305 1828  
Fax: 031 305 1847  
Email:  
[Nmaphasa@sadtu.org.za](mailto:Nmaphasa@sadtu.org.za)



@SADTUKZN



SADTU KZN



SADTU KZN



SADTU, the largest affiliate  
of Education International  
in South Africa

25 July 2022

To: Khanyisile Mkhize

The: The Provincial Secretary

Re: **PERMISSION TO COLLECT DATA FROM LEADERS  
AND MEMBERS AT MZI MTHEMBU REGION**

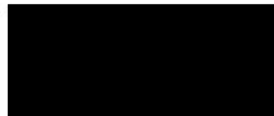
TO WHOM IT MAY CONCERN

Your letter dated 21 July 2022 has reference.

We hereby permit you to interview leaders of SADTU i.e. the Regional Secretary as we believe he is relevant for your study entitled: Exploring organisational bureaucracy on the effectiveness of trade unions in South Africa:the case of South African Democratic Teachers' Union (SADTU)in Mzi Mthembu Region in Durban,KZN

We hope you will find the above in order.

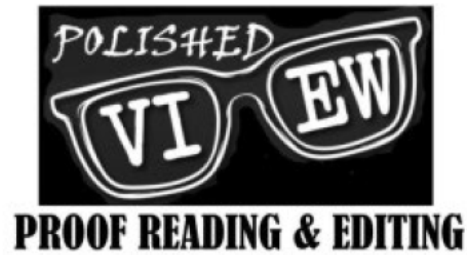
Comradely yours,



**Nomarashiya Caluza**  
Provincial Secretary  
0826117027  
[dcaluza@SADTU.org.za](mailto:dcaluza@SADTU.org.za)

## ANNEXURE F: PROOFREADING CERTIFICATE

### EDITORIAL & PROOF READING CERTIFICATE



**DATE:** 18 MARCH 2023

**DISSERTATION AUTHOR(S):** KHANYISILE MKHIZE

**DISSERTATION TITLE:** EXPLORING ORGANISATIONAL BUREAUCRACY ON THE EFFECTIVENESS OF THE TRADE UNIONS IN SOUTH AFRICA: THE CASE OF THE SOUTH AFRICAN DEMOCRATIC TEACHERS UNION IN THE MZI MTHEMBU REGION, DURBAN IN KWAZULU-NATAL

#### **To Whom It May Concern:**

This letter confirms that the thesis corresponding to the information detailed therein was edited by a professional, native English-speaking editor at PolishedVIEW Proof Reading & Editing Services.

We make no claims as to the substantive matter covered by the paper and have not altered the intent or research content drafted by the author(s).

The author(s) may accept or reject any of our comments or suggestions upon receipt of the document we edited.

Should you have any questions or concerns, please contact [assist.withediting@gmail.com](mailto:assist.withediting@gmail.com)

Sincerely,

**PolishedVIEW Proof Reading & Editing Services**

PolishedVIEW is a premier international English editing service. Our mission is to help researchers, scholars, and professional reach their full potential through clear communication in their writing. By providing premium English editing services at affordable rates to clients from around the world, PolishedVIEW seeks to tear down language barriers and contribute to the advancement of research and education.

**Signature**

**Managing Editor**

**Date: 18/03/2023**

## ANNEXURE F: FORM P2 UKZN INTELLECTUAL PROPERTY AGREEMENT EXPLANATORY NOTES

### Form IP2: UKZN Intellectual Property Agreement Explanatory Notes

#### CONTACT US

If you have any concerns about the Form IP2 please feel free to contact the IP & Technology Transfer Office ("IPTTO") for clarification. The Director's telephone number is (031) 260 3326 and you can also try (031) 260 8172 for an IP Consultant.

The Form IP2 should be signed in duplicate and all pages should be initialed. One of the signed originals(not a copy or scan) should be returned to:

The Director  
UKZN Intellectual Property & Technology Transfer Office ("IPTTO")  
8<sup>th</sup> Floor, Library Building, Westville Campus  
University of KwaZulu-Natal  
Private Bag X54001, Durban, 4000  
Republic of South Africa

If you will be submitting a thesis please retain the duplicate signed original and attach it (or a certified copy) to the master copy of your thesis when you submit it to the UKZN Libraries.

#### PURPOSE OF FORM IP2

The purpose of the UKZN IP Agreement (Form IP2) is to ensure that in cases where intellectual property is properly meant to belong to the University, documentation is put in place to reflect this position. The agreement also deals with related matters such as the need for research documentation to be kept and not discarded, the need for researchers to sign formal paperwork when patent applications are filed, the need to send copies of theses to the library, etc.

In many cases, the intellectual property in question will already belong to the University by operation of law, and in such cases the Form IP2 is really more of a *confirmation* of the existing position rather than an assignment of rights. For example, the IPR Act of 2008 automatically makes the University the owner of any intellectual property resulting from publicly financed R&D. By signing the Form IP2 in relation to such IP you are really just confirming the existing position and regularising it.

In other cases, such as where you are involved in a research contract, the University is obliged to get formal assignment of the IP from the researchers because, in many cases, it has contracted with the funding partner to assign all or part of the IP from the project to the funding partner. The University can only legally assign IP which it owns hence the need to get assignment first from the individual researchers and students working on the project.

One of the functions of the Form IP2 is therefore to ensure that the University can meet its obligations under the research contracts it signs. If a researcher or student is involved in research which is sponsored under a contract it is critical that any IP passes to the University first so that it can thereafter be transferred to the relevant company or other private funding partner. The "chain of title" must be established and should look like this: RESEARCHERS/STUDENTS to UKZN to PRIVATE FUNDING PARTNER.

#### CLAUSES IN THE AGREEMENT – EXPLANATORY NOTES

(NB: The following notes do NOT form part of the agreement.)

##### CLAUSE 1:

There is some latitude over when IP can be said to have been "identified." The IPR Act, No. 51 of 2008 does not define "identification." Researchers should exercise their judgment, keeping in mind that an element of novelty or originality is usually required to define something as intellectual property. For example, something is patentable only if it is new, non-obvious and useful. Researchers are asked to err on the side of caution and get a second opinion from their School or the IPTTO.

Regarding the benefit share, as of November 2010 this was set in a 40:40:20 ratio as follows: 40% to the

Researcher(s): 40% to the University; 20% to UKZN Innovation (Pty) Ltd. However, if there is co-ownership of IP between the University and a private entity or enterprise, the benefit sharing ratio will be amended accordingly.

Please check the IP Policy for any amendments and/or updates.

**CLAUSE 2:**

There is a need for researchers to sign a small number of formal documents when applications for legal protection of intellectual property are filed, e.g. when applications are filed for patents, registered designs, trade marks, domain names, plant breeders' rights, etc. The administrative burden on researchers is minimal (and takes a matter of minutes). In most cases the only "paper" which a researcher will be asked to sign is a Deed of Assignment, which is a formal requirement of any Patent Office when a patent or design application is filed; in some cases a Power of Attorney authorizing a firm of patent attorneys to work on the case will also be needed.

**CLAUSE 3:**

The necessity to maintain written records will not usually add to the documentary burden that already exists for projects. The notes on routes for exploitation, commercial or otherwise, will only become necessary in the event that IP protection is being sought, which can only happen after IP has already been identified and a project is being handled by the IPTTO or by NIPMO, the government agency. This clause is primarily aimed at ensuring that Researchers do not throw away existing written records for projects; Researchers are not being asked to generate extensive new and burdensome records.

**CLAUSE 4:**

This clause sounds more onerous than it actually is. The documents and Tangible Research Property mentioned do not have to be submitted frequently and the administrative burden will not be great. This clause only obliges Researchers to deliver documents when leaving the University or upon receiving a request from the University. Documents do not have to be submitted for every research project, and there is no need to submit them on an ongoing basis.

**CLAUSE 5:**

You should avoid using your own personal Intellectual Property (or that of previous employers) in your work at UKZN unless you first get agreement from UKZN in writing. The purpose of this clause is to avoid later disputes arising over the ownership of such IP, i.e. to avoid uncertainty over whether such IP is owned privately by the Researcher or by UKZN.

**CLAUSE 6:**

Sub-clause 6(a).The Fundamental Ownership Rules come into play in the following circumstances: where there has been significant use of UKZN resources, where the research was funded by UKZN, where the research was externally sponsored (including by public finances), where there was a written agreement with UKZN, and/or where the work was produced as a work for hire (i.e. during the course of the Researcher's employment with UKZN). Please refer to the UKZN Intellectual Property Policy for more information.

Sub-clause 6(b).The Researcher gives UKZN this limited pre-publication licence in recognition of the fact that UKZN has conferred the degree giving rise to the treatise, dissertation or thesis. In the event that a publisher (e.g. a journal) wishes to have this licence varied or cancelled, arrangements can be made with UKZN via the IPTTO.

Sub-clause 6(c).This provides for situations where the Researcher is the author of a thesis, etc.and is still the copyright holder but has left UKZN and can't be traced. The IP Steering Committee can only authorize use of the thesis in another publication if certain conditions are met. For example, the Committee must have been shown evidence that attempts were made to trace the Researcher.

Sub-clause 6(d).By signing up to this sub-clause the Researcher undertakes to forward the correct number of copies of their thesis, etc. to UKZN's Libraries.

Sub-clause 6(e).This sub-clause relates to *underlying* IP as opposed to copyright. There may be several different types of intellectual property associated with a thesis. Firstly there will be the copyright in the text of the document. Copyright relates to the copying or publishing of the text. However, there may be other types of intellectual property, such as inventions, described in the thesis or referred to from it. These are separate from the copyright in the thesis. What sub-clause 6(e) says is that such *underlying* IP will belong to UKZN if it was created in circumstances falling within the scope of the Fundamental Ownership Rules of UKZN's IP

Policy. As mentioned previously, these Rules apply where there has been significant use of UKZN resources, where the research was funded by UKZN, where the research was externally sponsored (including by public finances), where there was a written agreement with UKZN, and/or where the work was produced as a work for hire (i.e. during the course of the Researcher's employment with UKZN). The term "significant use" is prescribed by the University's Full Cost model. Information on the Full Cost model can be obtained from UKZN's Finance department.

#### CLAUSES 7 & 8:

These refer to the relationship between the Researcher and UKZN. The Form IP2 replaces any previous IP agreements signed between the Researcher and UKZN. Regarding other contractual relationships (with companies, etc), researchers and students signing the Form are unlikely to create conflicts by signing. Past rights which have already been signed over to external parties are unaffected. The Form IP2 will only have an effect on IP to which the Researcher is entitled; he or she can't transfer IP which does not belong to him or her. In the future the Form IP2 will, in fact, serve to facilitate external contracts with private funders. This is because such contracts are usually entered into between the University and the relevant companies, rather than between the individual researchers and the companies. The Form IP2 will ensure that IP rights move from individual researchers and get vested in the University so that they can then be transferred to the companies concerned.

However, if there are any other agreements to which you are party and which arguably conflict with the Form IP2, Clause 8 requires you to attach additional pages, identifying them, to the Form IP2.

#### WHO MUST SIGN FORM IP2?

Persons who fall into the following categories are expected to sign this Agreement:

1. Those in continuing or anticipated employment at the University of KwaZulu-Natal (UKZN).
2. Anyone performing research at UKZN.
3. Anyone with an opportunity to make significant use of UKZN administered funds and/or UKZN facilities.
4. Anyone with an opportunity to share in royalties as outlined in UKZN's Intellectual Property Policy.
5. Those who receive support from sponsored research (i.e. research contracts) or UKZN Council-funded projects.
6. Those who may be in a position to create inventions or technology in connection with sponsored research or UKZN Council-funded projects.
7. Those who may be in a position to create inventions or technology through the use of significant UKZN funds and/or facilities.
8. Anyone (including students) embarking on a research programme which will culminate in a treatise, dissertation or thesis must sign Form IP2 before commencing their research.
9. A *visiting Academic* must sign Form IP2, prior to the commencement of any work, if it is anticipated that IP may arise during the course of his or her research. The Form must be signed by the Academic and by any other persons involved in the Academic's research. The Academic may be excused from signing if the relevant School is satisfied that there is no prospect of IP resulting from the research.
10. An *Academic on sabbatical* must sign Form IP2, prior to the commencement of any work, if it is anticipated that IP may arise during the course of his or her research. The Form must be executed by the Academic and by any other persons involved in the Academic's research.

**IP**

**TTO**

THE UNIVERSITY OF KWAZULU-NATAL



**FormIP2**

**Intellectual Property Agreement**

Entered into by and between

**THE UNIVERSITY OF KWAZULU-NATAL**  
("UKZN")

a higher education institution and a juristic person in terms of the Higher Education Act 101 of 1997, as amended  
represented herein by **PROFESSOR NELSON MUTATINA IJUMBA** in his capacity as **DEPUTY VICE-CHANCELLOR: RESEARCH**, duly authorized,

and

**THE RESEARCHER**

Details of "the Researcher":

Legal Name: First, Middle & Last (please print or type)

\*Title (Prof./Dr./Mr., etc.-Miss ) \_\_\_\_\_

\*UKZN -Staff/Student No.:21155584 \_\_\_\_\_

\*E-mail address 21155584@ stu.ukz.ac.za \_\_\_\_\_ \*UKZN-Tel. Ext. \_\_\_\_\_

Cellphone: 0672452849 \_\_\_\_\_

\*Faculty, School and Department-Department Humanities ,School of Social Sciences  
\_\_\_\_\_

\*Please complete all items above in full before returning to the IP & Technology Transfer Office.

Initials Box:

## INTRODUCTION

This Agreement clarifies rights, obligations and relationships relating to Intellectual Property. These arise from law and policy set out in the *Intellectual Property Rights from Publicly Financed Research and Development Act*, No. 51 of 2008 and UKZN's *Policy on Intellectual Property*.

## DEFINITIONS

|                              |   |
|------------------------------|---|
| <b>Intellectual Property</b> | means any creation of the mind that is capable of being protected by law from use by any other person, whether in terms of South African law or foreign Intellectual Property law, including any <i>rights</i> in such creation. The term shall include the following (whether registrable or non-registrable): inventions, copyright works (i.e. works qualifying for copyright), computer software, drawings, designs, semiconductor mask works and topographies, expertise, trade secrets, trade & service marks, domain names, business names, goodwill and the style and presentation of goods or services, plant breeds & varieties and tangible research property (i.e. research results which are in a tangible form as distinct from an intangible form). Material distributed under a Materials Transfer Agreement is an example of tangible research property. |
| <b>IP</b>                    | means Intellectual Property.  |
| <b>IPR Act</b>               | means the <i>Intellectual Property Rights from Publicly Financed Research and Development Act</i> , No. 51 of 2008.   |
| <b>IPTTO</b>                 | means the Intellectual Property and Technology Transfer Office of the University of KwaZulu-Natal.  |
| <b>UKZN</b>                  | means the University of KwaZulu-Natal.  |
| <b>Invention</b>             | includes any discovery, invention or other development of a technical nature, whether or not patentable.  |
| <b>Inventor</b>              | is a creator of Intellectual Property, whether or not patentable. An inventor may be referred to as an "author" where the Intellectual Property in question is a copyrightable work.  |
| <b>Significant Use</b>       | The University's Full Cost Model prescribes what constitutes "significant use" and covers both direct and indirect costs.   |

## AGREEMENT

The Parties agree as follows:

1. The Researcher undertakes to disclose to UKZN any intellectual property created by him or her which falls into one or more of the following categories:
  - a. IP developed pursuant to a sponsored research or other agreement in which the Researcher participates;
  - b. IP which results from the significant use of UKZN administered funds or facilities the finance department of UKZN has the requisite skills to advise on whether significant use

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UKZN Libraries that were in effect at the time of creation of the treatise, dissertation and/or thesis concerned.

- e. The Researcher agrees that any software code, patentable subject matter and/or other underlying intellectual property contained in or referenced by any treatise, dissertation or thesis created by him or her is owned by UKZN subject to the Fundamental Ownership Rules set out in Paragraph 2.1.1 of UKZN's Intellectual Property Policy.
- 7. This Agreement replaces all previous agreements that the Researcher may have entered into with UKZN relating in whole or in part to the same or similar matters. It may not be modified or terminated, in whole or in part, except by agreement in writing signed by an authorised representative of UKZN. Discharge of the Researcher's undertakings in this Agreement will be an obligation of his or her executors, administrators or other legal representatives or assignees.
- 8. The Researcher represents that, except as identified on the pages attached hereto, he/she has no agreements with or obligations to others in conflict with the foregoing.

KIM  
Signature of Researcher (Please include full first name)

KHANYISILE IMMACULATE MKHIZE  
Print name

SIGNED AT (Place) Durban on this 1<sup>st</sup> day of April  
2021

Formatted: Superscript

FOR THE UNIVERSITY OF KWAZULU-NATAL

PROFESSOR NELSON MUTATINA IJUMBA in his capacity as DEPUTY VICE-CHANCELLOR:  
RESEARCH

SIGNED AT.....on this.....day of.....20....

**INSTRUCTIONS FOR SIGNING**

To the Researcher: Please sign this Form IP2 in duplicate and initial each page. The signing for UKZN will be arranged by the IPTTO.

Please return one signed original (not a copy or scan) to:

The Director  
UKZN Intellectual Property & Technology Transfer Office ("IPTTO")  
8<sup>th</sup> Floor, Library Building, Westville Campus  
University of KwaZulu-Natal  
Private Bag X54001, Durban, 4000  
Republic of South Africa



## ANNEXURE E: APPROVAL NOTIFICATION



15 September 2022

**Khanyisile Immaculate Mkhize (211555584)**  
School of Social Sciences  
Howard College Campus

Dear KI Mkhize,

**Protocol reference number:** HSSREC/00004403/2022

**Project title:** Exploring organisational bureaucracy on the effectiveness of trade unions in South Africa: The case of the South African Democratic Teachers' Union

**Degree:** Masters

### **Approval Notification – Expedited Application**

This letter serves to notify you that your application received on 03 May 2022 in connection with the above, was reviewed by the Humanities and Social Sciences Research Ethics Committee (HSSREC) and the protocol has been granted **FULL APPROVAL**.

**Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment/modification prior to its implementation. In case you have further queries, please quote the above reference number. PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.**

This approval is valid until 15 September 2023.

To ensure uninterrupted approval of this study beyond the approval expiry date, a progress report must be submitted to the Research Office on the appropriate form 2 - 3 months before the expiry date. A close-out report to be submitted when study is finished.

HSSREC is registered with the South African National Research Ethics Council (REC-040414-040).

Yours sincerely,



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**Professor Dipane Hlalele (Chair)**

/ms