

Inaugural lecture by Professor Thulani Zengele at the Senate Hall- University of South Africa: 10 November 2016-17h00

- 1. Acting Vice Chancellor and VP T& L, Prof Moche**
- 2. Acting Executive Dean and Director: School of Educational Studies-Prof Lebeloane**
- 3. My COD, Dr Machaisa**
- 4. The respondent to my lecture, Prof Smit**
- 5. My wife, Mrs Zengele**
- 6. Family, Colleagues and childhood friends who I will take my time to acknowledge you at the end of this lecture**

I greet you all this evening

On the topic: Is Marxism still relevant in critiquing South African Trade Unionism in the 21st Century? A Marxist and Althusian discourse on their past, present and future. I open my lecture as follows:

Trade unionism has a very long and rich history as its roots are traceable back to the 1850's. Most importantly, trade unions and the proletariat have a mutual and cordial relationship of all time. I open my lecture with a quote from The Communist Manifesto of 1848 by Karl Marx and Frederick Engels, the proponents of emancipator reasoning as they state, "of all the classes that stand face to face with the bourgeoisie today, the proletariat alone is a really revolutionary class. The other classes simply decay and eventually disappear in the face of modern industry because the proletariat is its special and essential product." They further contend that the clashes between individual workers and individual bourgeois take more of the form of clashes between two classes. Consequently, the workers begin to form trade unions against the bourgeois; they club together in order to maintain and protect their salaries; they also form permanent associations in order to make provisions ahead of time for these occasional revolts."

It is worth reminding this house that Marx, as a towering authority and a supergenius, once declared that the future task of trade unions was to reach out to the poor and the oppressed, the lowest paid, the unorganized and push forward political and social movements that will support the liberation of the working class as a whole. With this in mind, Acting Vice Chancellor, I argue that it is no coincidence that the levels of class inequality today mirror those of the laissez-faire capitalism of the Gilded Era of the late nineteenth century. While Marx has rebelled against Hegel's philosophy, he still maintains that the economic situation, which is the form of the productive system, is the most important determinant of all other aspects of society, such as its social institutions and ideas, the system of the law, morality and education. For Marx, capitalism tends to terminate almost all non-economic or non-profit-related values and substitutes these with just a mere "cash nexus". This contains forces and processes which cannot help but increase internal difficulties to the point where it inevitably collapses. Marx passionately holds the view that the dominant classes will not voluntarily give up power, wealth and privilege. He contends that the control by the Capitalist class has to be taken away from them, and this might have to involve violence as has previously happened in South Africa, prior to the end of the apartheid era.

Given the material challenges faced by South African trade unions, in particular, teacher unions which are the focal point of my lecture this evening, perhaps I should put the following questions on the table: (1) is Karl Marx and Louis Althusser still relevant in critiquing trade unionism in South Africa? (2) Why should readers care about what these two great thinkers of all time have written? and (3) what difference could this make to our reading of literature on trade unionism in the 21st Century. Notwithstanding the fact that teacher trade unions have been operating in South Africa since the 1980s, at first as illegal organisations, then later as legal entities under the protection of the Labour Relations Act 66 of 1996, much of what is wrong with South African trade unionism today is explicable in Marxist ideology. I

therefore maintain that to understand the material challenges faced by unionism, it is necessary that the course of trade unionism from its beginning to the present is traced and explored. For this reason, drawing upon Karl Marx and Louis Althusser, I critique the role of teacher unions in the liberation of the proletariat who, for the purpose of this lecture are the teachers. For me, after having gone through the work of these great Marxists, teacher unions' politics and processes of rationalization and the filling promotional posts in South African schools right up to the highest level of government go against the grain of Marxist doctrines. This lecture therefore (1) explores the theories of trade unionism and their behaviour; (2) explores the unions' politics and processes during rationalization and the filling of promotional posts (3) interrogates the transactional leadership theory and its application as a tool of political hegemony and lastly (4) provides Althusser's conceptual framework when unpacking operations by the Repressive State Apparatuses and Ideological State Apparatuses.

2. Theories on Teacher Trade Unionism

According to The Political Revolutionary Theory of Labour by Marx, trade unions exist in order to eliminate competition among the working class and to overthrow the capitalist class. In this theory, Marx also maintains that the working class has nothing to lose but their chains in order to be liberated. According to Webber's writings in (1958), trade unionism is another form of democracy which emanates from the political compass to the industrial compass. Marx contends that trade unionism is a class struggle and a modern capitalist state like South Africa in this case is in a transitional phase which will lead to democratic socialism if unions fully participate in the democratic process. He considers collective bargaining as a process, which strengthens labour rather than weakening it. In other words Marx contends that collective identity during negotiations is much more effective than individual bargaining.

The Darwinian Common's Environment Theory which originates from the Tragedy of

the Commons Theory describes a problem that occurs when individuals exploit a shared resource to the extent that demand overwhelms supply and the resource becomes unavailable to some or all. This theory is skeptical of generalisations and only believes that collective bargaining is an instrument of the class struggle, but it predictably summarises that, eventually there will be a partnership between employers and employees. Here at home, the African National Congress has been the ruling party since 1994 with the support of Cosatu, an amalgamation of major trade unions that include various unions like SADTU and the SA Communist Party. The partnership between Cosatu and the ANC therefore marks the relationship as already explained by the Common's Environmental Theory. It is such a relationship that unions seek not to be identified by the working class as collaborating with government in terms of Marxist principles of equal access to resources and privileges by all and not the few.

Acting Vice Chancellor, based on this theory I contend that the union leadership seems to enjoy the privileges of a partnership with government at the detriment of the ordinary teachers who are arguably the working class in terms of the deplorable conditions under which most of them work. The Commons Environmental Theory rightly predicts that the partnership between some teacher unions and the employer apparently exists, not only in the education sector but almost in all government departments in South Africa.

Mitchell's Economic Protection Theory of Trade Unionism on the other hand rejects individual bargaining on the basis that unions afford economic protection for the workers. Matuma Letsoalo of the Mail & Guardian states that this is eminent in the sense that most South African trade unions have established investment schemes such as the Naptosa Burial Scheme and the SADTU Investment Holdings (Pty) Ltd (SIHOLD) which is a BBBEE (Level 1 Contributor) and also Cosatu's Kopano Ke Matla (Unity is strength). These were meant to provide economic support for members in times of need such as bereavement, temporary economic deprivation,

car loan schemes and retirement. Just like these major South African teacher unions have done for their teacher members, the SACP document says “sadly, these investment schemes have often become entry points through which the capitalist class has inserted its DNA into the head offices of many unions.

It is quite clear that while unions are engaged in economic support for their working class members, I argue that they do so, not for their members, but for their individual benefits as they stand to gain dividends from the investments those teachers contribute towards their retirement, interests generated through car schemes and funeral policies. This has the potential and danger to lure the union leadership towards self-enrichment and ignore the plight of the working conditions of teachers. The union leadership is more at risk of losing focus of its responsibility and mandate to protect the rights of teachers because the administration and management of investments that have been accumulated through the sweat of teachers’ contributions still remains in the hands of the bourgeoisie capitalists. This relationship seems precarious and dangerous on the basis that once the working class realizes that the prime interest of their leaders is in the wealth that is created through their blood, sweat and tears; there is imminent likelihood of a revolution as alluded to by Marx. Looking at the writings of Marx and Althusser could assist in pointing out the dangers of capitalism to the emerging privileged union leadership in South Africa.

According to Perlman’s Theory of the “Scarcity Consciousness” of Manual Workers, working people in reality feel the urge towards the collective control of their employment opportunities, but hardly towards similar control of industry. Perlman claims that there is a historical continuity between the guilds and trade unions through their common fundamental psychology and the psychology of seeking a livelihood in the face of limited economic opportunity as explained by the Commons Environmental Theory. It is when workers become aware of the scarcity of opportunity that they gather into unions for the purpose of protecting their jobs,

equitably distributing employment opportunities among themselves and to subordinate the interests of the individual to the whole labour organism. This has become prevalent in South Africa in the sense that becoming unionised has become the norm for those seeking recognition during the filling of senior positions within the DBE hierarchy while using the union as their 'meal ticket' to access such positions. Madam Acting Vice Chancellor, I contend that some union leaders claim equality when teachers' rights are trampled upon by the employer and consequently use the huge membership to intimidate the employer. In the same breath, the same leadership uses the influence gained in the Education Labour Relations Chamber to access promotional posts when they become available as will soon be argued in this regard.

3. Types of trade unionism

Looking at the economic development of countries where teacher unionism is allowed by the state, the values of unionism have changed and so are types of teacher unionism that differ. In the following section, Singh (2008) explains the three major types of unionism.

3.1 Classical unionism: this is trade unionism whose main objective is to collectively protect the interests of its members in a given socio-economic-political system. According to this description, Trade Unions are the expressions of the "needs, aspirations and wishes of the working class" (Singh, 2008). They are the workers' mouthpiece in times of negotiation on the workers' conditions of employment because the workers are generally poorly equipped with negotiation skills. It is well-known that most of the workers do not have the social and cultural capital to engage in talks that have to do with the improvement of working conditions with the employer. In most parts of the world, teachers are unionized under such principles as they argue that they are workers and not professionals.

3.2 Neo-classical unionism: this type of unionism goes beyond the classical

objectives and tries to improve other wider issues such as tax-relief, saving, rates and investments, as Singh states. The major unions in South Africa get their members to engage in retirement and funeral schemes such as SIHOLD as earlier explained. The invested funds are also made accessible to teachers in the form of cash loans and car schemes that they will have to repay in small instalments until they are close to retirement since these unions are backed by major financial institutions that are run by the elite. These loans leave the workers indebted and bonded to the unions and their investment partners throughout their working lives. This indebtedness and bondage has the potential to strip the workers' freedom of association when looking for new memberships elsewhere, once they perceive their union to be compromising on their values.

3.3 Revolutionary unionism: this type unionism has to do with the change in the system of governance. Singh (2008) says it is about “establishing the rule of the working class even through violence and use of force, where necessary”. This is the type of unionism that was prevalent during the apartheid era in SA during the times of Mathew Goniwe, Fort Calatha who are no more, Myamezeli Ndevu, Mish Tshabalala, and the list is endless. These I regard as selfless liberators of the working class at that time because they did not form any bonds with the government of the time and were instead incarcerated by the state into prisons; some of these comrades are sitting in this auditorium this evening. These are the true heroes of the teacher struggle for equal education opportunities and the restoration of the dignity of the teaching profession prior to 1994. The radical stance adopted by the then Neusa which is today known as SADTU, was viewed by the younger teachers as the only answer in toppling the apartheid and oppressive regime in South Africa which they did. The same vigilant character of unions is still prevalent even after the democratic rule era where the employer is still viewed as intransigent whenever called upon to reconsider changing the appalling conditions under which some of the teachers have to work even to this day. Another side of vigilance can be seen when the employer refuses to honour the promotion of non-deserving key union members

because of a new culture of entitlement to key positions by certain union leaders as espoused by Pattillo (2012) in her study entitled 'Quiet Corruption'. Pattillo explains the circumstances around the Ntombela case, a former district manager in the KZN province who was promoted to the position of District Manager on the union's "ticket". Once promoted Ntombela was approached by comrades but refused to promote certain comrades in his district, which led to an attack, by comrades where his office furniture was slashed with knives and car tyres slashed in Umlazi Township near Durban. This act forced him to tender his resignation.

The South African teacher unionism profile therefore fits all three types as already explained. It is important to note that all trade unions are also liable and legally responsible for the maintenance of discipline among their members. The core purpose of unions is to ensure that proper relations are maintained between management and workers, as trade unions have an obligation to take disciplinary action against members who are guilty of misconduct by disturbing the peace and harmony in the workplace. This is the possible and likely reason that raises the interest of the employers to encourage partnerships with trade unions in the workplace. The employer concludes the deal with unions by affording them the benefit of using the salary administration system previously known as PERSAL to implement stop orders from the workers' salaries after which these contributions are paid into the union coffers to manage their tasks and pay office staff. It is for this reason that the employer has every reason to withdraw this benefit if unions find themselves on the wrong side of the law. The element of discipline by the union on its members stands the chance of being construed as the influence of the employer in subduing the efforts of the working class from fair representation. The following section develops a Marxist critique on the politics and processes of filling promotional posts.

The Politics and Processes of filling Promotional Posts: A Marxist Critique

In this section, I use the Marxist perspective on the unions' operational strategies.

Acting VC, I begin by postulating an indictment that the unions' processes of filling promotional posts using the transactional leadership style is fraught with, sometimes fraudulent and intimidating tactics that turn the union into an organization for the few elected leaders' needs rather than those of its membership as already explained by the Common's Environmental Theory. According to the findings of a study conducted in the North West Province by two SA researchers Diko and Letseka (2009), when promotional posts are advertised in the Government Gazette, there is behind the scenes campaigning by the union to have their comrades appointed to senior positions. Several authors and politicians such as Bloch and Manuel have even declared that the SA education system is, as a result "in tatters and in need of a revamp". The impending collapse of the South African Education system has been cited by the various researchers who describe education as in a state of collapse because of "cadre deployment" that is echoed by Pattillo (2012) on the study 'Quiet Corruption'.

Findings from the research conducted by Fleisch (2010), myself, Coetzer and Letseka et al. (2012) reveal that the union has used intimidation tactics on School Governing Bodies (SGB) to influence the promotion of their loyalists. Diko and Letseka (2009) allege that there are sufficient teachers with Honours, Master's and Doctoral degrees in educational leadership and management that have been overlooked during the selection processes to management positions. The former Minister in the Presidency Trevor Manuel (2011) has criticized the union for causing disruptions in education by calling this "jostling for promotions". Fleisch and Christie (2004) state that union affiliated teachers spend little time in the classroom due to disruptions. I therefore posit that there is a potential brain drain threat posed by some highly qualified and politically unaffiliated post level one teachers who may feel that they, rather than their union and political counterparts, deserve management positions. The study on teacher attrition in the North West Province is testimony to the sidelining of highly qualified teachers during the short listing process, interviews and appointments.

Recent research on teacher unionism confirms that in unionist language, doing well in the education sector means carrying out the will of the union and not of the Department of Basic Education. In my view, there is an urgent problem that needs to be addressed. The Ministerial review on school governance has resonated to the fact that there is a drive to transform school management by means of both decentralization and transactional leadership traits. I therefore contend that such a process tends to benefit certain dominant groups because of the reasons I have already cited earlier during this lecture when explaining theories on trade unionism. In the SA context, the dominant group that stands to benefit from decentralization is the union leadership because of its stake within the ruling party and the transactional form of leadership that has transcended through the ranks within the DBE and government as a whole. The transactional leadership theory becomes relevant in this lecture on the basis that the current trends in educational leadership seem to focus on loyalty rather than merit.

Although there are critical roles played by teacher unions, more specifically the South African Democratic Teachers Union in the post-apartheid education transformation, their influence in teacher redeployment and filling of promotional posts cannot be underestimated and taken for granted. Outstandingly, among others, the core values of democracy are not embedded in the current filling of promotional posts. With the devolution of management to the individual school site, I argue that the implementation of teacher redeployment policies and the filling of promotional post are both riddled with corrupt practice and favouritism as maintained by the researchers I have already referred to. Both processes are void of the democratic values and a substance of meritocracy which is also known 'as a social system that gives opportunities and advantages to people on the basis of their ability to negotiate positions, demonstrate and dance in the streets rather than demonstrate professional expertise. The same researchers also contend that the officials that have to take disciplinary action against offenders are usually union

deployed officials who are thus unable to discipline their members for fear of reprisals as already mentioned in the Ntombela case. This is identical to Greece and the USA due to events that led to the forced resignations of four Education Ministers in Greece and the USA who were unionists before, for supporting performance related pay principles for teachers once they were in positions of power. This section leads to the profound question, is Marxism is still relevant in critiquing teacher unionism in South Africa?

A conceptual framework on Ideology and Ideological State Apparatuses

It is quite appropriate to state that Althusser, a French Marxist philosopher, better known as a structural Marxist and a theorist of philosophy, differentiates between what he terms the Repressive State Apparatus (RSA) which in normal terms could be government, the army, police, courts and prisons. Althusser differentiates these against the Ideological State Apparatus (ISA) which could be education, religion, family, law, politics and trade unions. For Althusser, the ISA's operate primarily through ideology and dogma while promoting the values and attitudes that are utilised by the Repressive State Apparatus capitalists. Althusser makes an assertion that an ideology is always present in any form of an apparatus. He further argues that since there is no history attached to any apparatus, the specific philosophies and ideologies do have relative histories and origins. Althusser (1971) further states that apart from the individual practices by particular societies, ideologies originate from those practices. The subjective experiences of individuals are formed by the cognizance of such individuals. He argues that despite the differences among the ISA's, there is a common ideology that is formed because of the influence by the RSA's or the government in place. This is deliberately done to ensure that the government in place is able to entrench its position within society for continuity. Remember the positioning of churches next to the schools in townships and rural communities during the apartheid era by the then town planners.

In terms of the explanation of the operations of the RSA's and the ISA's in concert, trade unions fit the profile of a political ISA. Within this context, unions have been immensely successful in ensuring that the ruling party is entrenched by dominating the working class according to Althusser. In this manner, the union is in the process of normalizing an enormously bureaucratic structure of government.

The transactional leadership style as an Ideological State Apparatus

It is important to go through this dizzying excursus in the origins of the rationalization process by means of implementing the teacher redeployment policy practice within the South African context. Transactional leadership can be explained as an instrument of power, a social system to effect that power and is used as a tool of political domination by the unions and the state. Burns (1978) states that, transactional leadership involves an exchange of rewards for positive and supportive behaviour. Bass (1985) on the other hand posits that there are two types of transactional leadership behaviour, the contingent reward behaviour and the contingent punishment by others behaviour. The contingent reward behaviorist theory is the type of behavior that followers adopt when giving the expected support to their union and political leaders known as interpellation by Althusser. They do this because there are rewards that are at stake for loyalty. The contingent reward behaviour becomes relevant to this lecture on grounds that the reward for loyalty becomes the redeployment to a promotional post. In simple terms, during the rationalization process and identification of a teacher in excess, the choice of the candidate is influenced by the nature of the vacant post to be filled. If it is an ordinary teaching post, anyone is identifiable, should the vacant post be a promotional one, a key member is identified according to a study conducted by Zengele and Coetzer in 2009 and again in 2014. The promotional posts translate to a higher status that is accompanied by higher salaries and perks as Diko and Letseka (2009) posit in their study on teacher attrition. They state that the applications of teachers for management positions are driven by the high salary packages rather than the motivation to lead schools effectively (ibid).

This form of reward for loyalty does not augur well with suitably qualified and devoted teachers that aspire to fill the same promotional positions. When suitably qualified teachers refuse to honour union leaders in the form of interpellation and hailing by sticking to the official procedures for the redeployment process, they are ignored when key positions are filled. This is what Bass (1985) calls the contingent punishment behaviour theory which comes into play. Jansen (Natal Mercury, 2014) and Masondo (City Press, 2014) have also reported about a new and huge scam where promotional posts have been sold for up to R80k by certain union officials in five of the nine provinces in SA. The Minister of Basic Education Angie Motshekga appointed the Volmink Commission to investigate these reported acts of corruption while those identified in the process were placed on suspension. A full report was released late in 2015 but no action has been taken against the perpetrators to this day, as the union has maintained that this is the work of corrupt individuals within SADTU and not the organisation. The behaviour of certain individuals within unions in this manner raises concerns from all sectors of society about the nature of leadership principles that are driven by a self-centered desire for self-fulfillment rather than fulfillment of sound educational values.

On the positive side of teacher unionism Mulkeen (2010) argues that while teacher unions have been severely criticized for their activism role for better pay and conditions for teachers, unions are responsible for engaging teachers in other activities such as policy analysis and advocacy for improved educational quality and global education campaigns. This role prevails within SADTU and Naptosa as they organize workshops for their members in terms of interpreting and implementing policy which they have done exceptionally well. They also engage with the DBE when it comes to policies that are not viewed in a positive light by other stakeholders. Both SADTU and Naptosa have assisted in workshopping their members during the implementation of curriculum related policies where some DBE officials have not managed because some of them were appointed prematurely to

these positions.

In conclusion

Madam Acting VC, in conclusion, I do not allege that all management positions are occupied by unionists, but it is true that most of them are. In the same vein, I do not allege that all union activists appointed to key positions are not suitably qualified, experienced or hard working because some of them are indeed hardworking and deserve the positions they occupy. However, it is a fact that there are some poorly qualified and less experienced managers who have somehow managed to sneak through a tiny hole that even they, do not know how they managed. Such managers occupy senior positions within the entire bureaucratic structure of the DBE. The big question is, who will take control of Basic Education in South Africa when some of all those appointed to management positions got there on the “meal ticket”?

While the good strides by unions in education transformation have been acknowledged and appreciated by all, I maintain that trade unions as politicized subjects, through transactional leadership, still perpetuate the reproduction of the relations of production by reference to aspects of ideological and political practice. I also argue that trade unions have been enormously successful in securing the capitalist hegemony in the education system and continue to make a major contribution to the ideological role of the State in that they ‘normalise’ an immensely categorized society. I then identify transactional leadership as an instrument of power, a social system to influence that power, and a tool of political hegemony and yes, in Karl Marx’s exact words around 1850, he once professed that “the oppressed are allowed once every few years to decide which particular representatives of the oppressing class are to represent and repress them.” Acting VC allow me to profess that both Karl Marx and Louis Althusser are still very relevant in critiquing trade unionism in South Africa in the past, present and the future.

Thank you.