Factors influencing the future existence of trade unions in South Africa

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Dissertation submitted in fulfilment of the requirements of the degree Magister Artium in Industrial Sociology at the North-West University, Potchefstroom Campus

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Potchefstroom
Mei 2011
The reader is reminded of the following:

The reference as well as editorial style as prescribed by the American Psychology Association (APA) was used in this dissertation – unless otherwise indicated. This practice is in line with the policy of the Programme in Industrial Psychology of the North-West University (Potchefstroom Campus) to use APA style in all scientific documents as from January 1999.

For chapters 1, 3 and 4 the American Psychological Association (APA) reference and editorial style is used. Chapter 2 is in accordance to the prescribed editorial and reference style of the South African Journal of Labour Relations as it will be submitted to this journal for revision and possible publication.

The dissertation is submitted in the form of two research articles.
ACKNOWLEDGEMENTS:
I wish to thank every individual who supported me throughout the completion of this dissertation, but would like to take this opportunity to give special thanks to:

- Jehovah Jireh – God is truly my Provider. I am so grateful for His countless blessings in my life. He gave me the strength, opportunity and ability to complete this research.

- To my supervisor, Dr. Herman M. Linde for his guidance, support, patience and the never ending encouragement he gave me to achieve more.

- The staff of the Ferdinand Postma Library, in particular Hester Lombard. Without her support this study would not have been possible.

- To the late Dr. Derrick C.R. Hurlin who partially conducted the language editing, but sadly passed away before the completion of the project. I will forever be deeply moved to know I had the privilege to be this great man’s last student.

- To Michele van Loggerenberg who was incredibly understanding, for her willingness to assist me and for the professional manner in which she conducted the language editing.

- To every individual who represented a trade union which participated in this research. Your willingness to support this project did not go unnoticed.

- To my parents, I am so privileged to have such wonderful, loving and supportive parents. Mom and Dad thank you for being so patient and understanding throughout the entire research project.

- To my family and friends. Having people in your life who believe in you and your abilities is worth much more than what I am able to communicate in words.

- To René Swart, who supported me and gave me wonderful guidance for a big part of this study. I will forever be grateful to you.
DECLARATION

I, Marié Uys, hereby declare that “Factors influencing the future of trade unions as organisations in South Africa” is my own work and that the observations, views and opinions expressed in this study are those of the author and the relevant literature references as shown in the references.

I further declare that the content of this research will not be submitted for any other qualification at any other tertiary institution.

MARIÉ UYS

MAY 2011
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INTRODUCTION
This dissertation focuses on the future of trade unions as organisations in South Africa, particularly on the factors which may influence the continued existence of unions. In this section the problem statement will be discussed, after which the objectives that have been identified will be set out. Thereafter the research method will be explained and the division of the chapters will be provided.

PROBLEM STATEMENT
It is accepted in most countries, and also in terms of international labour standards, that mechanisms should be implemented to protect the individual employee against exploitation (Barker, 2007). In simple terms, trade union representation is an accepted fact of industrial practice (Anon, 2008a). According to the Labour Relations Act (66 of 1995), (LRA) Section 213, a trade union is defined as an “association of employees whose principal purpose is to regulate relations between employees and employers, including any employers’ organisation”. Thus, by definition, the main function of a trade union is to represent the interests of its members towards the employer(s) and thereby seek to regulate the relationship between the two parties (Bendix, 2000).

Trade unions originally arose from the power play between employers and employees (Bendix, 2000). According to Frawley, as cited in Rust (2001), the most important function of trade unions is to level the playing fields for management and the workforce. Bezuidenhout, Garbers and Potgieter (1998) state that “when the employees of an establishment are represented by a union, policies and practices affecting the employment relationship that were formerly decided on by management alone now become subject to joint determination” (p. 276).

Trade unions have the potential to mobilise labour in a collective unit and, in doing so, to decrease the extent of the decision-making autonomy of the employer (Rust, 2001). Their primary role, however, is to engage in collective bargaining with their members’ employers, and to represent their members in grievance and disciplinary matters (Grogan, 2003). This means the inclusion of checks and balances in the decision-making process, the creation of a culture of legitimacy and fairness, and the acceptance of co-dependence on and respect for each other (Rust).
Originally unions were formed when industrialisation forced workers into positions of dependency in which their earnings, working conditions and job security were largely beyond their control as individuals (Barker, 2007). As a result workers increasingly bonded together to prevent exploitation and promote their interests (Barker). Today, however, most trade unions play a societal role as well (Bendix, 2000). They represent the interests of the workers not only towards the employers but also towards the state. This happens particularly where like-minded unions come together to form federations (Bendix). These establishments of union federations, where a number of unions speak with one voice, allows those unions to have a significant societal presence and, as such, to exert pressure in the socio-political sphere (Bendix). In some instances unions may even try to improve the lives of their members by investing funds, providing benefits such as bursaries and sick pay, and engaging in educational, upliftment and social programmes (Bendix).

In a number of transitional economies, such as Brazil, South Africa and South Korea, trade unions played a key role in the process leading to democratisation (Wood, 2002). To fully comprehend the importance of trade unions and the role they have played in the transition of South Africa, an overview will be given. It should be noted, however, that the development and the history of employment relations in every country of the world is unique (Nel, Swanepoel, Kirsten, Erasmus, & Tsabadi, 2005). South Africa is no exception and it should be understood that any attempt to outline a brief history of the labour relations of this country would be difficult (Finnemore & van Rensburg, 2001).

According to Venter (2003):

> South African labour relations has a long and sordid history. The policy of separate development, which resulted in the massive political, economic, and social inequalities among citizens of the country during much of its early development, was entrenched in the apartheid government’s labour market policies for the greater part of the twentieth century. (p. 33)

The history and the development of South African labour relations can be broadly classified into five phases (Bendix, 2000).
1. Early industrialisation (1870-1923)

The discovery of diamonds and gold led to an urgent need for skilled workers (Nel et al., 2005). South Africa’s first unions were organised by immigrant white craft workers (Buhlungu et al., 2008). The skilled workers, from the United Kingdom, brought with them British trade unionism, which provided them with the power base in the work environment when interacting with their employers (Nel et al.). All these unions emphasised the colour bar and the identity of the English worker, thus excluding Afrikaans-speaking and black workers (Nel et al.).

In 1911 the Mines and Works Act was passed, which essentially sought to exclude non-whites from certain work and it further ensured that the movement of black workers in and out of the diamond fields and gold mines was restricted through the system of passes (Venter, 2003). Although whites in skilled positions were protected by the 1911 Act, the white unskilled and semi-skilled labour was easily substituted by black labour simply because black labour was cheaper (Venter). With the depression and the crash of the gold price, mines sought drastic measures to cut costs (Venter). The white mine workers believed that the mine owners were attempting to replace them with cheaper labour, and in January 1922, 25 000 white mineworkers went out on strike (Bendix, 2000).

This action became known as the Rand Rebellion or the Red Revolt (Venter, 2003). By March 1922, the strikers had the Witwatersrand under siege and on 10 March General Smuts called in some 7 000 troops, bomber aircraft, and artillery (Venter). What had started as a general strike ended in a rebellion, where 200 people were killed and 534 were wounded (Venter). Five thousand people were arrested and four were hanged for treason (Bendix, 2000). As a result of the early conflicts, and especially the 1922 Rand Rebellion, the government gave urgent attention to labour relations (Finnemore & van Rensburg, 2001).

2. The Industrial Conciliation Act and the effects afterwards (1924-1948)

The Industrial Conciliation Act No. 11 was passed in March 1924, shortly before the defeat of the Smuts government (Finnemore & van Rensburg, 2001; Nel et al., 2005). The next election brought a swing towards the Labour Party and the Afrikaner National Party, which formed an alliance known as the Pact Government (Bendix, 2000). It was this government that implemented the Industrial Conciliation Act. The main purpose of this Act was to
prevent industrial unrest by providing for collective bargaining between employers’ associations and unions on bargaining bodies known as Industrial Councils, and by providing conciliation mechanisms if and when disputes arose (Bendix). The most far-reaching implication of the Act was that black workers were formally excluded from the definition of employee (Venter, 2003). This Act had a profound effect on the South African industrial relations system for 55 years, since it effectively meant that black people were excluded from union membership (Bendix; Venter).

White workers’ trade unions were granted statutory recognition, but their right to strike was limited by the dispute-settling provisions of the industrial council (Finnemore & van Rensburg, 2001). While promoting the image of collective bargaining between employer and employee, the Act aimed to incorporate white labour into state-sanctioned structures (Finnemore & van Rensburg). Between 1931 and 1935 it became clear that the Industrial Conciliation Act No. 11 of 1924 needed updating and subsequently the Industrial Conciliation Act No. 36 of 1937 was promulgated (Nel et al., 2005). The prime objective of this new Act was to create industrial peace between employers and white workers on the basis of self-government and through the mechanisms of negotiation between employers and workers, i.e. arbitration, conciliation and mediation (Nel et al.).

In 1947 the Industrial Conciliation (Natives) Bill was proposed for the formal recognition of black African employees, but in bodies separate from the existing Industrial Councils. However, owing to the political changes that followed, the Bill was never passed (Bendix, 2000).

3. The apartheid era in full swing (1948-1973)

The National Party (NP) came to power in 1948, with the policy of apartheid, separate development and racial divisions in industrial relations (Venter, 2003). The repressive policies of the apartheid government undoubtedly constituted the darkest period of South African history (Venter).

In 1950 the government passed the Suppression of Communism Act and introduced the Group Areas Act as well as a new Influx Control Act (Bendix, 2000). The Suppression of Communism Act of 1950, as well as other Acts, effectively led to the banning of several
political organisations and trade unions (Bendix; Venter, 2003). In 1945 there were approximately 200 black unions with 158 000 members, but by 1961 there were only 60 unions with a membership of 64 000 (Finnemore & van Rensburg, 2001). Civil unrest in response to the government’s repressive policies forced it to appoint the Botha Commission in 1953 (Venter). In the same year the Public Safety Act was passed enabling the government to declare a state of emergency (Finnemore & van Rensburg).

As a result of the Botha Commission, the Bantu Labour (Settlement of Disputes) Act 48 of 1953 and the Industrial Conciliation Act 28 of 1956 were passed (Venter). However, the government chose to ignore most of the recommendations of the Botha Commission, especially those relating to freedom of association and trade union rights (Venter). By the 1960s black trade union activity virtually disappeared, and government and employer controls ensured a period of industrial peace and economic growth, which in retrospect was deceptively calm (Finnemore & van Rensburg, 2001).

4. The end of the apartheid regime era and the emergence of the “new” union movements (1973-1990)

The 1970s was marked by violent protests, as black militant opposition renewed its struggle against the repressive policies of the NP government (Venter, 2003). In 1973 widespread strikes by black workers over wages erupted in Durban, which spread to other parts of the country and nearly brought industry to a standstill (Finnemore & van Rensburg, 2001). Since no trade union was involved and employers could not identify with whom to negotiate, the shortcomings of labour legislation were brought home (Finnemore & van Rensburg; Bendix, 2000).

The Government reacted by passing the Black Labour Relations Regulation Act of 1973 which provided for the establishment of Liaison Committees, consisting of equal representation by management and black employees (Bendix, 2000). The purpose of this Act was to enable blacks to negotiate with their employers (Finnemore & van Rensburg, 2001). However black unionism continued to expand, and it appeared that the Act was not serving its purpose (Nel et al., 2005). The years 1973-1977 saw the growth of a dualistic system where blacks, because of their lack of a power base, were confined to a structure of mainly employer-initiated committees, with little if any bargaining power (Finnemore & van
Rensburg). As this system caused such frustration, there was a renewed pressure for change both from within and outside South Africa (Bendix).

A complete updating of the country’s labour legislation was therefore long overdue, especially since the dual system was no longer serving its purpose and was, in fact, creating labour unrest and conflict (Nel et al., 2005). The government thus wisely decided to appoint the Wiehahn Commission in 1977, to launch an investigation into existing labour legislation (Bendix, 2000). The Wiehahn Commission proved to be the turning point for South African labour relations (Venter, 2003). Its mandate was to investigate the inadequacies of the existing labour legislative structures and propose possible solutions (Venter). The commission made a number of recommendations but the most important one was that black workers should be included in the definition of what constitute an employee (Venter).

After the granting of trade union rights for black workers, there was a rapid growth in the number and size of unions representing this group of workers (Finnemore & van Rensburg, 2001). By the late seventies, the independent unions had established a firm presence in many South African workplaces and by the mid-1980s, most had coalesced into two federations, the Federation of South African Trade Unions (FOSATU) and the Council of Unions of South Africa (CUSA) (Wood, 2002). Extended unity talks led to the formation of a super-federation, the Congress of South African Trade Unions (COSATU) in 1985 (Wood).

The eighties were the height of the struggle against apartheid and in 1986 a state of emergency was declared and restrictions were imposed on various political and labour organisations, including the union federation COSATU, as the apartheid government made desperate efforts to retain power (Venter, 2003). However, strikes, boycotts, increasing levels of crime in the townships, the costs of enforcing apartheid and funding police actions all took their toll in conquering an already crumbling government system (Venter). The beginning of the new decade thus highlighted the need for radical socio-political transformation.

5. Moving towards democracy (1990 onwards)

The unbanning of previously banned political parties and the release of Nelson Mandela marked the beginning of new political dispensation which culminated the first democratic elections of 1994 (Bendix, 2000). The relationship between employers and unions became
more settled, although strike actions still occurred at frequent intervals (Bendix). The transition through the apartheid years to democracy is often described as a miracle (Finnemore & van Rensburg, 2001). During the first phase of the new South Africa, unions also entered a new era, which was no longer focused primarily on the liberation struggle (Nel et al., 2005). They did not need to focus on fighting the government and could start initiating and formulating policy within the government vision (Nel et al.). This is not to say that the labour movement does not still face many challenges (Ryklicf, 2007). In fact, many of the new challenges facing trade unions are the direct consequence of socio-political change in South Africa (Ryklicf).

Given the turbulent history of trade unions, specifically in South Africa, it is of exceptional importance to know what the role of unions is in the labour market in current times. In any modern economy, trade unions are protected through legislation because trade unions are important mechanisms to protect individual workers, and to help reduce the possible negative impact of market forces on the most vulnerable workers (Barker, 2007). Though the trade union movement is popularly perceived to be the friend of the proletariat and defender of the poor, there is a school of thought that places at least some of the blame for South Africa’s mass unemployment squarely on the shoulders of the trade unions (Theunissen, 2005).

The 2008 financial meltdown, the worst in living memory according to experts, has given rise to union public speaking and overstatement of the problem (Matlala, 2008). Trade union leaders have engaged in disparate forms of posturing, claiming “capitalism” is on its knees and that trade unions will fight to the “bitter end” to save jobs that will be lost as a result of financial turmoil in the world markets (Matlala). The question remains, however, as to how the trade unions can avert job losses resulting from the crisis, which has seen major economies in the world slip into recession (Matlala). According to Bratton and Gold (2003) all earlier evidence suggests that the strike pattern is strongly cyclical; the propensity to strike rises during an economic boom and falls during recession. Thus the claims made by unions to fight to the bitter end, is echoed only by silence because of the economic downturn in the current markets.

As mentioned previously there is a school of thought that suggests that trade unions, and the power they exercise through mobilising collectively, can have a negative impact on the
labour market. The current labour legislation protects the interests of unionised workers to such a degree that it “protects” at the expense of the unemployed (Kransdorff & Tupy, 2009). The more difficult the unions make it to replace workers and to compensate them at a market rate, the more difficult it is for the unemployed to enter the job market (Kransdorff & Tupy).

Even if some parts of this argument are true, there are also counter-arguments to be weighed up first. The fairly recent changes that can influence trade unions, involve the increase of extraordinary work categories, for example part-time workers, the use of sub-contractors and the increase of labour brokers (Grawitsky, 2003). All of these factors, and the high level of dismissals and unemployment, undermine the actual power of trade unions and their ability to organise and to act as representatives for the workers in their interests (Grawitsky). Also, competition from foreign labour reduces union bargaining power and can lead to the loss of jobs (Fossum, 2006).

To know the stance of trade unions or trade unionism in this country, a comparison should be drawn between a number of different countries and South Africa. In the 1970s, British trade unions were considered to be powerful social institutions that merited close study (Bratton & Gold, 2003). Between 1968 and 1979, trade union membership increased from 3.2 million to 13.2 million, and the union density (the population of the workforce belonging to trade unions) exceeded 50 per cent (Bratton & Gold). By contrast, between 1979 and 2000, trade union membership in Britain dropped sharply; in 1979, 53 per cent of workers belonged to unions but by 2000, this percentage had fallen to 29 (Bratton & Gold). Also in the United States the proportion of employees that were represented by unions has decreased over the past two decades (Fossum, 2006). In 1997 the International Labour Organisation (ILO) pointed out that, worldwide, trade union membership dropped sharply during the last decade, with declines in all but about twenty countries. Membership fell to less than 20% of workers in 48 out of 92 countries surveyed (Barker, 2007). Many countries have experienced profound changes in the political and economic environment and in some instances this had a negative effect on the position and influence of trade unions (Barker, 2007). Some of the factors that threaten trade unions across the world are highlighted by Jose (1999) and Webster (2006). These factors can be summarised as follows:
Globalisation
Globalisation has led to intense competitive pressure in product markets, accelerated the mobility of capital, and added to the vulnerability of labour.

More insecure employment
Flexible labour market policies have been gaining greater legitimacy and political support than before, because of factors such as globalisation, technological change and, in some cases, worker preferences. Practices such as subcontracting, outsourcing and hiring of temporary and part-time workers, long considered as atypical employment, are becoming more common, especially at the lower end of the labour market.

Small business
Technological changes have made it possible to reshape production through new forms of industrial organisation. The larger number of production units makes it more difficult for unions to organise workers and to bargain collectively.

Geographic dispersion of production
Technological changes have also resulted in production being geographically dispersed even outside the boundaries of urban labour markets. The geographic dispersion within a country makes it more difficult for unions to gain access to every workplace. However, the bigger threat is the ease with which employers can move production to other countries.

Skills composition
The skills composition of the workforce is changing and workers are increasingly being differentiated by their competence. Employees with higher skill levels often have incentive pay and thus have less need for unions.

Women workers
The large-scale entry of women into labour markets has changed the priorities and agendas of many unions. Women often have a greater need for flexible working arrangements, and owing to family commitments after hours, may be less interested in union activities.

Increased unemployment
The lack of decent work in the formal economy in many developing counties, and in South Africa in particular, has placed the burden of poverty firmly on the household. Unemployed individuals are thus so anxious to find work that they undermine union solidarity, thereby weakening the labour movement.
In spite of the threats mentioned to the trade union movement, unions in South Africa are relatively strong (Barker, 2007). In fact, times have never been better in terms of legislative protection for trade union activity (Ryklief, 2007). By comparison with the years before 1994, when trade union members were frequently detained and tortured, and union leaders banned and jailed, or forced into exile; the post-apartheid period has seen trade unions integrated into a political and labour-relations dispensation with a democratically elected government (Ryklief).

South Africa’s trade union movement, the largest and most disciplined on the continent, has played an influential role in determining labour-market and industrial relation policies in the country in the past (Anon, 2008b). Trade union growth in South Africa since 1979 has been phenomenal, especially as it occurred during a period when trade unions in other countries were largely on the decline (Finnemore & van Rensburg, 2001). This can be ascribed to a number of factors, including the highlighted awareness of political and worker rights and the registration of trade unions that were previously not registered (Barker). According to Barker, “union membership in South Africa has been increasing for a number of years, in contrast with many other countries that have shown sharp declines in union membership figures” (p. 93). South Africa was reputed to have the fastest growing union movement in the world during the 1980s (Finnemore & van Rensburg). In fact, Barker states that, “even though the role of unions in preventing the exploitation of workers is generally accepted, there is discomfort in some quarters about unions getting too strong” (p. 85). This becomes more apparent if the relatively recent behaviour of COSATU, the largest and most powerful trade union federation in South Africa, is taken into consideration.

When Jacob Zuma, the current State President of South Africa, came to power, it was with the explicit backing of the ANC’s alliance partners, COSATU and the South African Communist Party (SACP) (Duncan, 2009). Although no one has clarified what the agreement between Zuma and his supporters was, it was clear that the SACP and COSATU had certain expectations of what Zuma should do once in power (Duncan). What did become apparent however was that trade unions gained even more power in the new government (Kransdorff & Tupy, 2009). At least seven of the current Cabinet members are former trade union leaders and the COSATU secretary-general Zwelinzima Vavi has even declared that “we are the policy makers, and the government implements. The government doesn’t lead any more”
(Kransdorff & Tupy). According to Diana Geddes, the South African correspondent of the Economist magazine, the main fear remains as to whether COSATU is trying to guide the government’s policy during a period of recession (Duncan). She continued by saying that what worries her the most is the way in which COSATU implies that it can dictate policy to the government, and that is very serious (Duncan).

Many factors contribute to the questions surrounding the future of trade unions as organisations. As already mentioned, trade union membership around the world is on the decline and, even though trade unionism in South Africa is still relatively strong, one cannot help but question whether trade union membership in South Africa is really growing and whether trade union membership will also drop in the future? Will South Africa follow the worldwide trend of declining trade union membership numbers? When acknowledging the fact that trade unionism in South Africa is still relatively strong, one must also acknowledge that certain factors may be contributing to the current and future stance of trade unionism. If trade unions are to continue having proactive and productive meaning in the lives of working men and women, they will need to recognise and adapt to the challenges facing them (Ryklief, 2007). It is because of these challenges that trade unions are being faced with the importance of identifying what factors may influence the future of unions in South Africa. By identifying these factors, trade unions can adapt and grow to meet the requirements needed to be successful trade union organisations.

From the above mentioned problem statement the primary research question arises:

- What factors will influence the future of trade unions as organisations in South Africa?

Subsequently the following research questions have been identified:

- Do the same reasons for joining trade unions still apply or has there been a shift in the motivation for employees?
- Are the structures of trade unions in South Africa sufficient to deal with an ever changing working environment?
- Is the legislation governing labour relations in South Africa sufficient to protect trade unions as organisations?
- Does the level of unemployment and job insecurity influence trade union membership?
● Is globalisation affecting trade unions in South Africa?
● Do technological changes and advancements play a role in trade unions’ abilities to organise?
● What are the possible differences between trade unions in developing countries in comparison with already developed countries?
● What can trade unions as organisations do to ensure their future as powerful role players in the labour market?

RESEARCH OBJECTIVES
The aim of this research can be divided into a general objective and specific objectives.

General objective
The general objective of this study is to determine what factors influence the future existence of trade unions in South Africa.

Specific objectives
The specific objectives aim to answer the research questions, which became apparent from the problem statement. The specific objectives of this research project are listed below, but it should be noted that a number of outcomes sought after will be reached in Chapter 2 (Article 1), while the rest will be reached in Chapter 3 (Article 2). The reader should thus note that all the objectives will be reached only when reading the different chapters in a combined form. These objectives are:

● To determine if the same reasons for joining trade unions still apply or whether there has been a shift in the motivation for employees.
● To establish if the structures of trade unions in South Africa are sufficient to deal with an ever-changing working environment.
● To determine if the legislation governing labour relations in South Africa is sufficient to protect trade unions as organisations.
● To establish if the level of unemployment and job insecurity influence trade union membership.
● To determine if globalisation affects trade unions in South Africa.
● To determine if technological changes and advancements play a role in trade unions’ abilities to organise.
To establish what the possible differences between trade unions in developing countries and developed countries might be.

To determine what trade unions as organisations can do to ensure their future as powerful role players in the labour market.

RESEARCH METHOD
The research method consists of a combination of a literature study as well as an empirical study. The results obtained from the research will be presented in article format (two separate articles). Chapter 2 will be a detailed literature study, without an empirical component, while Chapter 3 will have an empirical component. The reason for omitting an empirical component in Chapter 2 will be explained below.

Literature review
One of the most important early steps in a research project is the conducting of a literature review (Trochim & Donnelly, 2007). A literature study will be done on the following topics to gain a clear perspective of the subject studied:

- The definition of what a trade union is will be provided and the role that trade unions play in the labour relationship will be explained.
- Reasons will be identified as to why employees join trade unions.
- A historical overview of trade union development in South Africa will be given.
- The role of trade unions in the labour market in South Africa will be explained.
- The level of trade union activities in South Africa will briefly be compared with that in other countries.

To conduct this research study, different literature resources will be used. This will include text books, journal articles and accredited magazine articles, search engines on the internet, the relevant legislation, recent newspaper reports and dissertations of different research scholars.

Empirical study
The empirical study for Chapter 3 consists of the research design, participants, procedures followed to collect data and the analysis of this data, in order to achieve the research objectives.
Research design
A qualitative research approach will be used in Chapter 3. To achieve the research objectives semi-structured face-to-face interviews will be held with each participant.

Qualitative research can be defined as the study of the complexities of human behaviour (Polkinghorne, 2005). A qualitative research method will help the researcher to gain a clear and deep understanding of the phenomenon being studied (Trochim & Donnelly, 2007). When qualitative research is used, the individuals who participate in the study have the opportunity to describe in their own words what they see as meaningful or significant to them and they are not limited to prearranged or predetermined categories. Van Maanen as cited in Easterby-Smith, Thorpe, & Lowe (2004) defines qualitative techniques as an array of interpretative techniques which seek to describe, decode, translate and otherwise come to terms with the meaning, not the frequency, of certain more or less naturally occurring phenomena in the social world.

Participants and procedure
The participants in this study will be representatives of several registered trade unions within South Africa. In Research Article 2 the sample group will consist of the management (e.g. general secretaries, deputy general secretaries and heads of industries) of the different trade unions that will be participating. Purposive voluntary sampling will be used to conduct the study of Article 2. The data collection (interviewing) will continue till data is saturated.

The following selection criteria will be used to determine which participants will be included in the sample:

- The participants have to be employees of registered trade unions within South Africa.
- They must be in managerial positions within the trade union and they must be willing to be recorded on an audio voice recording device during the interview.
- Participation will be strictly voluntary.
- No effort will be made to control the race, socio-economic status, gender or age of participants.

Participants will stay anonymous throughout the study and will be guaranteed confidentiality by the researcher. A confidentiality agreement will also be concluded with each participant at
the time of the interview. Field notes will be taken and criteria for judging the soundness or trustworthiness of the study will at all times be considered.

**Measuring instruments**
For Chapter 3 a semi-structured interview will be held with each of the participants. The interview will consist of open-ended questions. The open-ended questions that will be asked will focus on the perceptions of trade union representatives as to what factors may influence trade unions as organisations in the future, in their opinion. The interview will be recorded and afterwards be documented to be analysed.

**Data analysis**
Data that the researcher has collected during the interviews will be analysed. Each of the interviews will be transcribed by an independent transcriber. With the transcribed interviews, structural coding will be done by the researcher. To ensure that the themes that have been identified during the coding process by the researcher are trustworthy, the researcher will make use of a co-coder. The co-coder will extract themes separately from the researcher and afterwards these themes will be compared. After comparisons have been made the common themes that have been identified will be used for further discussion.

**DIVISION OF CHAPTERS**
**Chapter 1: Research proposal**
In Chapter 1 the research proposal will be done. This includes the problem statement, the research questions, the research objectives, the proposed research methodology and the division of the different chapters.

**Chapter 2: Research Article 1**
a) Introduction

b) An in-depth literature study
Chapter 2 of this dissertation will be an in-depth literature study. This Chapter will not have an empirical component. The reason for this will become clear when considering the focus of this Chapter.
The initial focus of this Chapter is to identify factors that are influencing trade unions as organisations in both the European Union and South Africa. The level of trade unionism will also be considered in both the European Union and South Africa. The objective of the initial focus is that it will enable the researcher to compare the levels of trade unionism of developed countries, specifically the European Union, with a developing country — specifically South Africa. Comparing the levels of trade unionism of developed countries with those of a developing country (South Africa), will enable the researcher to identify the possible factors that may contribute to the future of trade unions as organisations in South Africa.

Consulting much academic literature on these subjects will thus be the most logical way to reach the objective of this study.

c) Conclusions, limitations and recommendations for further research.

**Chapter 3: Research Article 2**

a) Introduction

b) Qualitative empirical study

Chapter 3 of this dissertation will be an empirical study that will specifically focus on factors in South Africa which may contribute to the continued existence of trade unions as organisations.

c) Discussion and findings

d) Conclusions, limitations and recommendations for further research.

**Chapter 4: Conclusions, recommendations and limitations of the study**

In the final chapter, conclusions are made about the findings that were represented in the preceding chapters. Limitations to the study will be discussed and recommendations for further research will be made.
LIST OF REFERENCES:
Anonymous. (2008a). SA ken nog nie die R-woord nie: Voorspoed met hulpbronne pleister die kraak toe. [SA does not know the R-word yet: Success with resources plasters the crack.] Finweek, July 10, 15.


Grawitsky, R. (2003, May 16). Daar’s baie werk wat wag: Veranderings in die mark is ’n uitdaging, en vakbonde sal moet slaag as hulle wil oorleef. [There’s a lot of work waiting: Changes in the market are a challenge and trade unions will have to succeed if they want to survive] *Finansies en Tegniek*, 52-53.


CHAPTER 2: CURRENT TRADE UNION TRENDS IN THE EUROPEAN UNION COMPARED WITH THOSE OF SOUTH AFRICA

Chapter 2 (Article 1) will be submitted for revision and possible publication to the South African Journal of Labour Relations and the editorial and reference style was adapted in accordance with the editorial policy and guidelines for the submission of papers to this journal. For this reason, the “Editorial policy and guidelines for contributors” of the South African Journal of Labour Relations, has been included for reference (see Addendum 1).
Abstract
The primary objective of this study was to establish what factors currently influence trade unions as organisations in South Africa and the European Union and then to compare these factors. To conduct this study a pure literature examination was done. Firstly the levels of trade unionism were established and thereafter the factors contributing to the levels of trade unionism were identified. The difference between a developing country and already developed countries was explained before comparisons were made between South Africa and the European Union. Common factors that influence trade unions as organisations in both the European Union and South Africa include unemployment levels and job insecurity, changes in the employment relationship, work relationships outside the traditional employment relationship and finally the reasons why people join trade unions. Lastly, an interesting finding that emerged was that certain factors influencing trade unions as organisations are unique to specific countries.

Opsomming
Die primêre doelwit van hierdie studie was om te bepaal deur watter faktore vakbonde as organisasies in Suid-Afrika en die Europese Unie tans beïnvloed word en om dan hierdie faktore te vergelyk. Om hierdie studie uit te voer, is ’n suier literatuurstudie gedoen. Eerstens is die vlakke van vakbondwese bepaal en daarna is die faktore wat bydraend is tot hierdie vlakke geïdentifiseer. Die verskil tussen ’n ontwikkelende land en reeds ontwikkelde lande is verduidelik voordat Suid-Afrika en die Europese Unie met mekaar vergelyk is. Gemeenskaplike faktore wat vakbonde as organisasies in Suid-Afrika sowel as die Europese Unie beïnvloed, sluit die volgende in: werkloosheidsvlakke en werksonsekerheid, veranderinge in die worksverhouding, arbeidsverhoudinge buite die tradisionele worksverhouding, en laastens die redes hoekom werknemers by vakbonde aansluit. ’n Interessante bevinding wat na vore gekom het, is dat sekere faktore wat vakbonde as organisasies beïnvloed, uniek is aan spesifieke lande.
INTRODUCTION

When considering the levels of trade unionism, a key starting point is to view the level of trade union density, defined as the proportion of employees who are union members (Fulton 2007). Trade union density or trade union membership has fallen in most European countries in the last twenty to thirty years (Jensen 2005). There has also been a decline of trade union membership in South Africa in recent years (Department of Labour 2010b).

When these facts are considered, the question that arises is whether union decline should be a cause for general concern. Historically, unions have provided significant services to workers at enterprise and national level (D’Art & Turner 2008). However, what trade unions did in the past is by no means an indication of what they will do in the future. Bibby (2004) therefore justly comments that trade unions do not have a “divine right” to exist. While several have asked whether this decline can be attributed to specific economic, social, or institutional causes, few have provided concrete suggestions about how cross-national studies in this genre can offer information on efforts that seek to reverse this decline (Sano & Williamson 2008). If the trends and tendencies of trade unions in first-world countries could be compared with those of third-world countries, it could provide meaningful insight into the future of trade unions as organisations.

For these reasons, it is of the utmost importance to establish the factors that contribute to the level of trade unionism in both first-world countries and third-world countries. In this article, a comparison will be made between the European Union (EU), which will represent first-world countries and South Africa, which will represent a third-world country. If it were possible to identify similarities and differences of the factors contributing to the level of trade unionism, one may be able to identify the factors that can be a cause for concern. By identifying these factors, it could help to develop much-needed suggestions on how to reverse the tendency of declining union membership numbers or, stated differently, the declining levels of trade unionism in South Africa.

This article specifically aims to provide a comprehensive insight into the level of trade unionism in both the EU and South Africa, respectively. This research is unique in its field and, because of its unique nature, the paramount way to conduct such a study was to do an in-depth literature study. The literature that was studied specifically focused on the factors
contributing to the level of trade unionism in those particular countries. Given the fact that this research is one of a kind in many aspects, the literature relating to the topic was in many instances rather limited. For this reason, specific works from a number of professionals and experts received a great deal of attention, since these works were very conducive to this research.

The main objective of this study was to first identify the specific factors that may influence the level of trade unionism in the respective countries and then to draw comparisons between first-world countries (the EU) and a third-world country (South Africa). The layout of this article is as follows. First, the level of trade unionism in the EU was established. Thereafter, the factors that contributed to the level of trade unionism in the different countries of the EU were determined. The section that follows explains the differences between developing and developed countries and how this phenomenon may influence the comparison of trade unions in the EU and South Africa. Subsequently, the focus shifted to South Africa where the levels of trade unionism in this country were determined and subsequently, factors that contribute to the level of trade unionism in South Africa were discussed. Following this section, comparisons were drawn between the EU and South Africa, specifically focusing on the level of trade unionism in these countries and the factors contributing to these levels of trade unionism. In the conclusion of this article, the most pressing issues for trade unions were highlighted, the limitations of this research were considered, and suggestions for further research were made.

**LEVEL OF TRADE UNIONISM IN THE EUROPEAN UNION**

Towards the end of the 1970s, various social, economic and political changes combined to create a colder climate for trade unions (D’Art & Turner 2008). Consequently, over the last twenty years, there has been a distinct decline in trade union membership throughout most of Europe (FedEE 2009; Fulton 2007; Sano & Williamson 2008; D’Art & Turner 2008; Waddington 2005; Rust 2001).

The union membership losses are seen clearest in Central and Eastern Europe where, since the fall of the Iron Curtain in 1989, there were industrial restructuring and other fundamental changes in the role of trade unions. This had a major impact on its numbers (FedEE 2009; Fulton 2007). Furthermore, in Western Europe, major membership declines are evident in
most of the countries (Fulton 2007). To be able to comprehend what the level of trade unionism is in the EU countries, numerous examples of trade union levels in the EU should be examined. These statistics will provide insight into the levels of trade unionism and the influence the unions have as organisations in the respective counties.

The average level of union membership across the whole of the EU, weighted by the numbers employed in the different member states, was 25% in 2007 (Fulton 2007). This is a clear indication that membership numbers are declining, if it is considered that estimates show that union density fell from 32.6% in 1995 to 26.4% in 2001 in the then EU states (Waddington 2005). The Federation of European Employers (FedEE) (2009) estimated that, in the medium term, the average level of unionisation across the EU will have fallen even further to just under 20% by 2010.

In Germany, for example, the main union confederation, the Deutscher Gewerkschaftsbund (DGB), has lost 43% of its membership since its peak in 1991 (Fulton 2007). Also, in Poland, the recent low levels of unionisation, at only 14%, is in marked contrast to that of the Soviet-controlled era, when almost all workplaces were unionised (FedEE 2009). Most of the employees who remain trade union members in Poland work for former state-owned companies (FedEE 2009). In the United Kingdom, trade unions suffered major losses in the 1980s and in the first half of the 1990s. It would seem that membership numbers have stabilised, although the figures for 2006 show a slight fall in union density (Fulton 2007).

In only eight out of the current 27 member states of the EU, more than half of the employed population are members of a trade union (FedEE 2009). In fact, the European Unions’ four most populated states all have modest levels of unionisation, with Italy at 30%, the United Kingdom at 29%, Germany at 22% and France at only 8% (Fulton 2007; FedEE, 2009). As a consequence, three out of every four people employed in the EU are now not members of a trade union (FedEE, 2009).

It should be noticed, however, that levels of union density vary widely across the EU, from 80% in Denmark to 8% in France (Fulton 2007). Therefore, while trade union density has fallen in some European countries in the past two decades, for example in Germany, United Kingdom, Holland and Italy, in other countries – especially in the Nordic countries – the
density level has been quite stable on a much higher level (Jensen 2005). In most countries, union membership has been falling, but even where it is growing, it has not generally kept pace with the rise in the numbers of people employed (Fulton 2007). In the EU, only seven states out of the 27 – Belgium, Cyprus, Ireland, Italy, Luxembourg, Malta and Spain – have seen a gain in union members among the employed in recent years and, in most of these countries, this growth has not kept pace with the overall growth in employment, meaning that union density has drifted downwards (Fulton 2007). According to Verma and Kochan (2004) as cited in D’Art & Turner 2008, it is thus important to understand that even though density levels may vary across membership states, trade unions now represent a smaller proportion of the employed labour force in Europe than at any time since 1950.

FACTORS CONTRIBUTING TO THE LEVEL OF TRADE UNIONISM SPECIFICALLY IN THE EUROPEAN UNION

As can be seen from the statistics that were explained and discussed in the previous section, there is no doubt that trade union membership in the EU is declining. In most literature available on this topic, a distinction is made between external threats to the trade unions and internal inadequacies of trade unions to adapt to a changing world. In this research article, the decline of trade union membership numbers in the EU, considering all these factors in a combined form, will be examined, since all of these factors contribute to the decline of trade union membership in the EU.

1. Labour force composition
The first issue is the changing composition of the labour force. Increased problems to recruit union members and the changing composition of its potential and actual membership pose major challenges to union movements in Europe (Ebbinghaus 2002). Employment is shifting from industry – where unionisation rates tend to be relatively high – to private sector services – where unionisation rates are lower (Waddington 2005). Notably, greater union strength in the public than in the private sector is a common factor across Europe, both east and west (Fulton 2007). Therefore, even though most union members are employed in the public sector, this sector represents a relatively small proportion of the labour force in most EU countries (Waddington 2005). In Poland, for example, a survey in 2005 found that 67% of respondents from the public sector reported that there was a union in their workplace, while in the private sector the figure was only 9%. In the Netherlands union density is highest in
public administration – at 39% (Fulton 2007). There is thus a remarkable difference between the public sector and private sector union representation.

2. Unemployment
The second factor that contributes to declining union membership is that unemployment figures are on the rise. Rising unemployment has had a negative influence on trade union membership numbers (Waddington 2005). In most countries, trade unions offer relatively few services to the unemployed and the consequence is that most trade unionists who become unemployed abandon their union membership (Waddington 2005). However, in the Nordic countries of Denmark, Sweden and Finland, where approximately three-quarters or more of all employees are in unions, these high numbers are a reflection of an approach that sees union membership as a natural part of employment (Fulton 2007). In these countries, retired and unemployed people form an increasing proportion of union membership numbers (Waddington 2005). This is because, as in Belgium – which also has above-average levels of union density – unemployment and other social benefits are normally paid out through the union (Fulton 2007). According to Carley (2004) as cited in Waddington 2005, the data that was supplied by the European industrial relations observatory suggests that between 15 and 20 per cent of trade union members in the EU are either unemployed or retired.

3. Age of trade union members
Another cause for concern about future levels of trade unionism is the low membership numbers among young workers (Ebbinghaus 2002). Since the early 1980s, there has been a substantial rise in the percentage of employees who have never been union members (Bryson & Gomez 2005). The tendency not to become a union member can be caused by a number of factors *inter alia* that trade union practices are seen as too formal and old-fashioned and as such they put potential members off, particularly the young. Young people perceive trade unions as being dominated by middle-aged men and in some countries trade unionists are still seen as primarily male and employed in manual occupations (Waddington 2005).

4. Skill levels of the labour force
The next factor that became apparent is that a rising proportion of trade union members are employed in managerial, professional or associate professional occupations (Waddington 2005). To organise professional workers successfully and appropriately, unions need to
understand their needs and concerns (Bibby 2004). Numerous scholars believe that collectivist attitudes among workers have been replaced by individualistic leanings (Furåker & Berglund 2003). However, the problem is that with the general individualisation of society (Beck 2000 as cited in Jensen 2005), potential members are less likely to join trade unions. The evidence on the extent of individualisation is mixed, but it is clear that potential members are more individualistic than in the past, which means that trade unions have to be seen to deliver “value for money” if they are to recruit members (Waddington 2005). Unions must be able to handle the consequences of the alleged individualisation process, for if they are not able to do so, they are likely to run into problems keeping and recruiting members (Furåker & Berglund 2003). Professionals expect unions themselves to be professional, and to deliver the services members need in an efficient way (Bibby 2004). In order to do this, several of the unions and confederations that represent members from these occupations tend to highlight individual rather than collective membership identities, particularly on the issue of pay (Waddington 2005). The sense of collective solidarity is likely to be weaker than for other groups of workers, and there may be less of a tradition of union organisation on which unions can build (Bibby 2004).

5. Changing employment relationships
Another tendency emerging in the labour market is that employment relationships are changing (Bibby 2004). A study that examined why members leave unions was conducted in the UK. It considered the results of three large trade unions and found that the majority of leavers from each of the unions left because of changes in their employment circumstances (Waddington 2006). These changes in organisations caused hierarchical power disparities to be removed and thus reduce conflict between employees and managers (Hodgson 1999 as cited in D’Art & Turner 2008). Even where the legal employer/employee relationship remains unchanged, the implicit contract between company and worker – by which an individual could expect to be offered security and reward in exchange for his or her corporate loyalty – has certainly changed (Bibby 2004). Previously, or rather in the traditional employment relationship, a trade union’s function was to engage in collective bargaining with its members’ employers, and to represent its members in grievance and disciplinary matters (Grogan 2003). A large number of potential union members now feel that they can best deal with their manager directly, rather than rely on a union representative as an intermediary, and thus also remain apart from unions (Waddington 2005).
A further problem arising in the changing employment relations is the new forms of contractual relationships that are developing outside the traditional employer/employee contract on which so much employment legislation and social insurance protection, particularly in Europe, are based (Bibby 2004). This includes, for example, agency working and corporate outsourcing to nominally independent freelance contractors (Bibby 2004).

A growing number of employers are resisting unionisation to a greater extent than in the past (Waddington 2005). While this tendency is often linked with United States employers setting up operations within the EU, there is increasing evidence of European-based employers questioning the need for a union presence, particularly in the new member states (Waddington 2005). Attempts by employers to decentralise collective bargaining have also required trade unions to establish new co-ordination mechanisms, which several have failed to do, with the consequence that members may feel isolated from the union while at the workplace (Waddington 2005).

6. An increase in the number of women entering the workforce

An interesting tendency emerging in the labour force of the EU in recent years is that union membership is becoming increasingly feminised (Waddington 2005). Trade unionism in the 20th century was mainly a man’s business (Mac Shane 2001). This has of course been related to the fact that male workers in the greater part of the 20th century dominated (in numbers) the workforce (Jensen 2005). The growing participation of women in the labour market since the end of the Second World War has meant that the female share of the membership base in the trade unions has been growing (Jensen 2005). In Sweden, for example, union density among women is 81% as compared with only 75% for men (Fulton 2007). The trade union density in the rest of the Nordic countries, including Norway, Denmark and Finland, is also higher among the female workers compared with the male workers (Jensen 2005). However, in some countries, such as Germany, Italy and Austria, the level of male unionisation is higher than the level of female unionisation (Jensen 2005). In this day and age, women demand an equal presence in the labour market, but have different priorities from male workers (Mac Shane 2001). It is important to notice that, even though union movements have become more inclusive, the representation of women’s interests in union decision-making, particularly in collective bargaining policy, still lag behind (Ebbinghaus 2002). Although this
tendency has received some attention, as was apparent from the literature studied, it remains unclear what influence it will have on the level of trade unionism.

Numerous factors may contribute to the declining figures of trade union members or the level of trade unionism experienced in the EU. The factors that were highlighted and discussed in the preceding section received a great deal of attention in the large amount of literature examined. This was a clear indication that these were the most pressing issues when considering the declining trade union membership figures in the EU.

DEVELOPED COUNTRIES VERSUS DEVELOPING COUNTRIES
The next section of this article will focus specifically on the level of trade unionism and the factors contributing to these levels of trade unionism in South Africa. Thereafter, a comparison of the levels of trade unionism will be drawn between South Africa and the EU. However, before a comparison can be drawn between South Africa and the EU, it is important to consider and to understand that, while the EU consists only of already developed counties (Adams 2002), also known as industrialised counties, South Africa is still classified (broadly considered) as a developing country or developing economy. How does one distinguish between developed and developing countries? Generally, terms such as rich and poor, advanced and backward, high income and low income and industrial and agricultural are used to differentiate between developed and developing countries (Adams 2002).

Developing economies are sometimes also referred to as low-income and middle-income economies, and developed economies as high-income economies (The World Bank 2011). When classifying economies the main criterion used is the gross national income of a country (The World Bank 2011). This term was previously referred to as the gross national product (The World Bank 2011). Based on its gross national income per capita, every economy or country is classified as low income, middle income (subdivided into lower middle and upper middle), or high income (African Development Bank Group 2010; The World Bank 2011).

The term first world – industrialised or developed countries – refers to the fact that these countries are the nations in the world with the most advanced economies, highest standards of living, the most advanced technology and have the greatest influence in the world (Nations online 2010). They have extensive infrastructure, a largely urban population, an educated
labour force and, frequently, competence in high tech and science (Adams 2002). They tend on the whole to be wealthy, they have a higher income per capita than most other countries and they are oriented towards a free market economy (Bothma 2010). Many of these countries are mature, and consequently, are growing only slowly (Adams 2002). Population growth is often stagnant and the population tends to be an ageing one (Bothma 2010). The developed countries of the world include, in North America, the United States and Canada; in Europe, the countries of the European Union; and in the Pacific, Japan, Australia and New Zealand (Adams 2002; Bothma 2010).

South Africa, on the other hand, is still a developing country. According to the country classification of the World Bank, South Africa is an upper-middle-income country (The World Bank 2011). Other countries in Africa, apart from South Africa, that also fall under the upper-middle-income category, include Algeria, Botswana, Gabon, Namibia, Equatorial Guinea, Seychelles, Mauritius and Libya (African Development Bank Group 2010). All of the middle-income countries face significant development challenges, but the nature of these challenges varies substantially within the group (Fallon, Hon, Qureshi & Ratha 2001). The middle-income countries vary from countries that are still very poor, to better-off transition economies with relatively sophisticated emerging markets. Progress with integration into the global economy varies greatly from one middle-income country to the other (Fallon et al 2001).

However, in a continent where over 70% of the countries fall under the low-income category (African Development Bank Group 2010) South Africa, with its upper-middle-income status, is an anomaly among the developing countries. South Africa has a two-tiered economy; it is both a developed country with good infrastructure, but also a country with huge social and economic problems associated with a developing country (U.S. Department of State 2010; Layne 1998; Bothma 2010). This implies that, even though South Africa is developed in many aspects, it still has a productive and industrialised economy that exhibits many characteristics associated with developing countries, including a division of labour between formal and informal sectors and uneven distribution of wealth and income (U.S. Department of State 2010; Bothma 2010).
After South Africa’s re-acceptance into the international community following the many years of isolation under the apartheid government, it is understandable that it has only recently become a fully fledged member of the global community (Venter 2003). To illustrate how keen South Africa as a country is to develop and to be part of the global community the following example is provided. In 2010 the State President of South Africa, Jacob Zuma, expressed the desire and willingness of South Africa to be considered among the leaders of the developing world by joining the rest of the BRIC countries (Wong 2010; Volkhonsky 2010; Olesen 2010; Blanchard 2010). The BRIC nations (the informal grouping of Brazil, Russia, India and China) are all developing counties, but they are unique in the sense that all of these countries are fast-growing economies.

As a result of this aspiration of South Africa, voiced by the State President, the country was invited to join the BRIC group in December of the same year (All Africa.com 2011; BUA news 2011). Early in 2011 during the state of the nation address by the State President, he reconfirmed that South Africa would be joining the “important bloc of emerging economies” (The Herald online 2011; IOL news 2011). South Africa was officially incorporated into BRIC at the heads-of-state summit held in China in April 2011 (All Africa.com 2011; BUA news 2011). The inclusion of South Africa – the first African country to be admitted to the group – saw the acronym changed to BRICS (All Africa.com 2011; Inessa 2011). The BRICS group is regarded as the fastest emerging market in the world (All Africa.com 2011). Studies show that by the year 2050, the combined economies of BRICS could eclipse the combined economies of the current richest countries of the world (All Africa.com 2011).

The fact that South Africa has joined this group implies that the political and economic clout of the country will rise and its trade position in the world will be improved (Olesen 2010; All Africa.com 2011). Additionally, South Africa as an important emerging economy would serve as a gateway to other African markets (South Africa: Economy Overview 2008) and offer opportunities for the whole of Africa to strengthen its ties with the group (All Africa.com 2011).

Even though the members of BRIC voiced their support for South Africa to join the informal grouping (Radyuhin 2010; BUA news 2011), some experts remain doubtful about the strategic feasibility of this move. It is predicted that by the year 2050 Brazil, Russia, India
and China will be the most dominant economies in the world (Volkhonsky 2010; Kulkarni 2010). South Africa on the other hand can hardly be considered a country with a strong economic potential (Inessa 2011). South Africa’s GDP is only one fourth of that of Russia, which is the most modest within BRIC (Inessa 2011). South Africa looks even more out of its depth when compared with China, which recently became the world’s second largest economy only after the United States of America (Inessa 2011). Both chains of thought carry valid arguments and only time will tell whether South Africa has the ability and capacity to associate itself with these fast-growing economies.

Nevertheless there may be some logic to include South Africa in this group, when considering that South Africa has abundant natural resources. The formal sector of the country is well developed when taking into account the manufacturing, services, mining, agricultural, financial, communications, energy and transport sectors. Furthermore, the country’s stock exchange is ranked among the top 20 in the world (US Department of State 2010; South Africa: Economy Overview 2008). South Africa also has a world-class and progressive legal framework and the legislation governing commerce, labour and maritime issues are particularly well developed (South Africa: Economy Overview 2008).

South Africa is unique in so many aspects and the developmental status of the country is no exception. South Africa has moved further down the developmental path than numerous other developing countries and shows many characteristics of already developed countries, but it is important to remember that it is still classified as a developing country. The reason why this phenomenon should be brought into consideration is that it may influence the factors that can contribute to the level of trade unionism in the respective countries.

For this reason, much attention was given to the research already done by Jose (1999), for the International Institute for Labour Studies, which focused on the future of the labour movement, with specific reference to developing countries. The observations made by Jose (1999) were used as guidelines for identifying possible factors that may influence, contribute to, or even threaten unions as organisations in South Africa. In addition to that, the report compiled by Webster (2006) for COSATU, the largest and one of the most influential trade union federations in South Africa, was taken into consideration. The information that was provided by Webster (2006) at COSATU’s twentieth anniversary celebration was also very
significant to this research, since that academic insight specifically focused on the future of trade unions as organisations in South Africa. Even though much-deserved attention was given to the above-mentioned literature, it was by no means the only resource consulted. In the following section, some of the findings made by Jose (1999) and Webster (2006) might be confirmed, but rich insight from other literature is also provided. Some of these factors, which are discussed in the following section, may be unique to developing counties or in some instances even only to South Africa as a country.

**LEVEL OF TRADE UNIONISM IN SOUTH AFRICA**

In South Africa, the membership of registered trade unions increased quite sharply in the period between 1980 and 2000, from 782 000 in 1980 to the current 3 million, which represents an annual increase of nearly 6% (Barker 2007). Notably, the number of unions increased sharply after 1995, which was probably as a result of the changes to the Labour Relations Act (LRA), which made trade union registration easier (Barker 2007). In fact, the number of registered unions rose from 302 in 1995 to some 499 in 1999. (Venter 2003:83). Union membership increased almost continuously up to 2002 (Barker 2007). However, this changed from 2002, and there has been a clear downward trend in union membership since then (Barker 2007:93)

In 2005, approximately 259 employers’ organisations and some 345 trade unions were registered with the Department of Labour, cited in Grobler, Kirsten & Wärnich 2005:39. The latest statistics available, supplied by the Labour Department, show that South Africa currently has 202 registered trade unions and 166 registered employers’ organisations (Department of Labour 2010a; Department of Labour 2010b). This is a clear indication of the declining figures of both trade unions and employers’ organisations. However, the union density in South Africa, compared with international standards, is still relatively high because almost 40% of all workers with jobs belong to trade unions (Grobler, Wänich, Carrell, Elbert & Hatfield 2006; Barker 2007).

Nevertheless, even if trade unions in South Africa still have relatively high membership numbers in comparison with other countries, the statistics gave a clear indication of the downward trend of union membership numbers. Considering this, it becomes all the more
apparent that much-needed attention should be given to factors that may contribute to the future existence of registered trade unions in South Africa.

**FACTORS CONTRIBUTING TO THE LEVEL OF TRADE UNIONISM IN SOUTH AFRICA**

The labour relationship is essentially a relationship between employer and employee, as well as between employer/employee and the state, thus making it a tripartite relationship (Venter 2003:9). South African labour legislation is supportive of trade unions in that it underpins a tripartite system of labour relations (Vettori 2005). The most important role players in the South African labour market are the state, employer associations, and trade unions or trade union federations (Vettori 2005; Venter 2003).

The first question to be asked then, is how does the Government protect unions and what frameworks are set in place by this institution, which plays such a major role in the regulation of the labour relations of South Africa? The role of the state is to create, by means of policy and legislation, a framework within which the other parties can conduct their relationship (Nel, Swanepoel, Kirsten, Erasmux & Tsabadi 2005). Legislation on, for example, the right to associate (i.e. to form labour unions), the right to collective bargaining and the right to strike fundamentally influence the balance of power in employment relations (Nel et al 2005).

1. **Legislation governing labour relations**

To demonstrate the extent of support given by Government, by means of implementation of specific labour legislation, the following paragraphs will exclusively deal with all the provisions made by these laws. South Africa, as a country, has seen phenomenal changes in our labour dispensation, commencing with the enactment of the LRA (Raju & Stilwell 2007). The LRA introduced an equality-based industrial relations system that actively promotes the formation of trade unions and that creates an environment so conducive to collective bargaining that some staff associations have chosen to become trade unions to reap the benefits (Raju & Stilwell 2007). The South African legislature has adopted several strategies to maintain union strength (Vettori 2005).
1.1. Provision for both agency-shop and closed-shop agreements

The first example of the protection of trade unions that becomes apparent is that the LRA provides for both agency-shop (Section 25) and closed-shop (Section 26) agreements for trade unions in the workplace. In Section 26(1), the LRA provides that a representative trade union and an employer or employers’ organisation may conclude a collective agreement, known as a closed-shop agreement, which requires all employees covered by the agreement to be members of the trade union. Furthermore, the LRA also states in Section 25(1) that a representative and an employer or employers’ organisation may conclude a collective agreement, known as an agency-shop agreement, which requires the employer to deduct an agreed agency fee from the wages of employees identified in the agreement who are not members of the trade union but are eligible for membership thereof. What this essentially means is that non-members of the trade union may be obliged either to pay trade union fees or to become trade union members (Vettori 2005). These agreements are generally referred to as “union security arrangements” (Vettori 2005).

1.2. Rights regarding strike actions.

The second case in point comes to light with regard to the right to strike. In this regard, the LRA also made certain provisions to promote unionism. The right to strike is one of the fundamental rights of employees and this is recognised by the South African law in both the LRA (Section 64(1)) and the Constitution (S 23(2)(c); (Vettori 2005). However, the same is not true of secondary strikes (Vettori 2005). In many countries it is unlawful to go on secondary strikes, as for example in New Zealand (Forsyth 2001), while legislation in others countries, for instance the United Kingdom, has placed severe restrictions on secondary labour action (Vettori 2005). In contrast, the LRA provides for the legitimacy of secondary strikes in Section 66, and even though there are some restrictions in place, it should nevertheless be argued that provisions for such actions were provided for by the LRA (Vettori 2005).

1.3. The question of whether a worker is an employee or not

The third example of the protection of trade unions by the South African labour legislation is in the issue of whether a worker is an employee or not. Most forms of atypical employment, such as part-time work, contract work, temporary work, home-based work and leased work, do not readily lend themselves to unionisation (Vettori 2005). Employers may find it
attractive to classify their workers as atypical employees to avoid the provisions of labour legislation and collective agreements, tax payments, social security payments, and the provision of fringe benefits (Vettori 2005). In this regard, South African legislation once again comes to the rescue of trade unions (Vettori 2005). The Labour Relations Amendment Act (12/2002) and the Basic Conditions of Employment Act (75/1997) create a rebuttable presumption that a person is an employee if one or more conditions exist (Basson, Christianson, Garbers, le Roux, Pak, Mischke & Strydom 2005). Section 200A of the LRA specifies the conditions to be considered when dealing with this specific issue (Basson et al 2005). When the section is read, it is clear that the legislation shifts the burden of proof to the employer (Vettori 2005). The employer will therefore have to prove that the person is not an employee before it is legally binding (Vettori 2005).

1.4. Transfer of business ownership

The next example is one where a business that had previously recognised a union is transferred to another employer. In this case, the union would run the risk that the new employer will not recognise it and that any collective agreements entered into with the previous employer will not be observed by the new employer (Vettori 2005). A scenario such as this could pose a problem for all employees and their trade unions if there is no form of protection from government set in place. Fortunately, provisions and even amendments were made by the LRA to protect trade unions.

The original section 197 of the LRA, dealing with the transfer of ownership, applied when the whole or part of a business, trade or undertaking was transferred from one employer to another “as a going concern”, whether in circumstances of solvency or insolvency (Grogan 2003). The original version of that section was not happily drafted, and was replaced in its entirety in 2002 (Grogan 2003). The amendments made to the LRA foresee this problem, which can arise with a transfer and the amended Act provides in Section 197(5)(b) that, unless otherwise agreed between the union or employees, the terms and conditions of collective agreements and arbitration awards are transferred to the new employer (Basson et al 2005:173).
1.5. *Trade union membership fees*

Another example of trade-union protection by the State is the legislation regulating trade-union fees. The legality of the organisational right of stop-order facilities for the collection of trade-union dues, as well as that to establish agency shops, has been questioned the world over (Vettori 2005). Nevertheless, they are provided for in terms of our legislation and provide trade unions with huge administrative and financial advantages (Vettori 2005). These stop-order facilities, which are supported by government, enable unions to deduct monies from employees and as such ensure financial security (Vettori 2005).

1.6. *Disclosure of information*

The final example in which the State has improved or at least secured the position of unions as negotiating parties in the workplace, is by legislation addressing disclosure of information. In dealing with their employers, employees regard access to business information as essential in order for them to gauge the employer’s financial position, as well as the employer’s ability to meet with their demands (Van der Walt 2007:26). Information disclosure is a vital element in joint decision-making and in labour relations processes, such as dispute resolution, collective bargaining and consultation (Van der Walt 2003:543).

Apart from the Promotion of Access to Information Act (2/2000), legislation that specifically deals with access to information, particularly in the work situation, is section 16 of the LRA (Van der Walt 2007:25). These Acts have paved the way for the creation of a culture of uncoerced disclosure of information in South African organisations (Van der Walt 2007:25). The support of unions by government, by means of this legislation, is very clear, since it unmistakably provides for the right of unions to negotiate and bargain with employers and employers’ organisations in an informed manner.

When considering the legislation governing employment relations, especially legislation regarding trade unions, it would seem as if government is in fact supportive of the notion of protecting unions. In fact, South Africa does more than most other countries to protect trade unions (Vettori 2005). Considering the support provided by the legislation governing labour matters such as the protection of trade unions in South Africa, one needs to consider what trade unions themselves do as organisations to protect themselves. According to Jose (1999), the role of trade unions as organisations is influenced by the extent to which unions have
developed appropriate structures and capacity to deal with labour issues arising at local, regional and global level.

2. Focus shift and change within trade unions

Even though labour unions originated and grew because of the industrial era, the leaders of these institutions could not predict what the consequences would be of the post-industrial era, the globalisation factor and everything that this would entail (Ceronie 2007). In first-world countries, unions have not been able to maintain their position in the last two decades (Rust 2001). In 2007, Solidarity’s president, Steve Scott, said in his presidential address, that trade unions may end up on the list of endangered species and may even become extinct if they do not undergo radical changes to adapt to the new economy (Hermann 2007).

Labour unions are confronted with the necessity to change and to adapt and are exposed to problems of economical puzzles, legal requirements, technology and financial issues (Ceronie 2007). Unions must keep up with changes, such as increasing diversity in the workplace, more women in the working environment, a focus shift to competence and capability, productivity, growing socio-economical puzzles, responsibilities, training and development (Ceronie 2007). Furthermore, unions must face challenges such as shrinking membership numbers, financial obligations and the outflow or “brain drain” of our knowledge base (Ceronie 2007).

Considering the possible need for a focus shift or a need to change, one of the leading trade unions in South Africa, Solidarity, announced an eight-point plan at its annual conference in 2007. This plan was formulated with the sole purpose of providing trade unions with guidelines for how to approach the future (Anon 2007).

- Unions must globalise in order to reduce the negative influence that multi-national companies have on regular employees across the world.
- Unions must compel governments to recognise the international conventions that protect the rights of employees across the globe.
- Unions must do more to train their members in order to make them employable.
- Unions must mobilise the public’s opinion in order to get the support of the community for their actions.
Unions must be the leaders in the knowledge debate and must be able to provide solutions for problems in the labour market.

- Unions must gear themselves to use modern technology more effectively in order to improve and speed up their service delivery to their members.

- Unions must start to organise individuals and not only groups of employees.

- Unions must let their protection of their members be recognised through being the collective agent. (Anon 2007).

Unions have to be innovative and pro-active in the way that they support their members. To support this statement, Bibby (2004) states that many unions are actively engaged in valuable pioneering work in a number of areas. These advancements of unions extend the traditional support offered through the processes of social dialogue and collective bargaining into a range of other, innovative services, in many cases specifically tailored to the needs of professionals and managers. Some examples are (Bibby 2004):

- Support in undertaking needs analyses and also in career development;
- Direct help in finding new and better employment;
- Direct help in training and lifelong learning;
- Support for workers working as freelancers or independent contractors;
- Support for staff working abroad;
- Innovative uses of new technology in communicating with professional and managerial staff.

Considering this information, one gets the impression that trade unions are in fact aware of the challenges that face them and of the necessity to change and adapt. Evidently, unions as organisations are trying to reform themselves to accommodate the changes that the work environment offers. However, if a trade union should fail to comply with the “new rules” of an ever-changing work environment, such a union may have trouble surviving in the future.

3. Changes in the work environment and globalisation

The next issue that became apparent when studying different literature was the possible influence that globalisation may have on the level of trade unionism. The world of work is changing rapidly (Bibby 2004). The assumptions that individuals and societies could hold about the nature of jobs and employment just a generation ago no longer seem to apply today.
Globalisation has had an impact on workers and their organisations in developing countries (Jose 1999). Under the impact of work restructuring caused by globalisation, the labour market has become increasingly fragmented (Webster 2006). The new global economies have brought competitive changes unequalled in South African history (Grobler et al 2006). Because of the economic and political isolation of South Africa until 1994, many unions in South Africa concentrated largely on their own affairs (Grobler et al 2006:425). However, now in the post-apartheid era international relations have become very important to unions because of the globalisation of the world economy (Grobler et al 2006). However, a problem that has been identified by Solidarity is that trade unions are not keeping up with the global revolution (Hermann 2007). Trade unions continue to behave as if they still find themselves in the industrial era (Hermann 2007). Unions regard mass mobilisation as the be-all and end-all of trade unionism (Hermann 2007). In research conducted on the effect of globalisation on unions, Sano and Williamson (2008) found that globalisation has significant effects regarding workplace access and the centralisation of collective bargaining. It is thus critical to consider what changes within unions, as organisations, should be made in order to meet the challenges presented by the new economy. Hermann (2007) is of the opinion that a much more sophisticated approach to trade unionism is needed in the new economy.

Considering this, the question of Thobile (2000) becomes all the more important. Does economic globalisation offer any positive opportunities to trade unions? Pessimists within unions point to the decline in labour standards, erosion of worker rights, job insecurity, threats to collective bargaining and the changing nature of the work (Thobile 2000). Optimists argue that prospects for international worker solidarity have become brighter (Thobile 2000). According to Grobler et al (2006:24), “globalisation brings new opportunities, such as joint ventures, but also puts increasing pressure on South African workers and management to meet the challenge presented by foreign competition”.

Nowhere in the world is it possible for a union to be completely sheltered from the forces of globalisation (Wood 2001). An increasingly globalised economy is resulting in the rapid growth in international trade, in services as well as in goods (Bibby 2004). With the accent now placed on speed and quality, the demand for the traditional worker has virtually been eliminated (Rust 2001:59). Through the interlinking of product markets and the high mobility
of skills, labour markets have also become closely linked with those of other countries and this applies to both skilled and unskilled labour (Barker 2007:146). In addition to the mobility of labour between countries, jobs may in many cases also be quite mobile (Barker 2007). Employers may, for instance, move their businesses to neighbouring countries should the prospect of profits be better in the light of wage levels, taxation, political stability and other factors (Barker 2007). This puts workers in different countries in competition with each other, which opens up the danger of a “levelling down” in wages and working conditions (Bezuidenhout 2000). As workers across the globe are becoming more closely linked through common employers, or through the threat of factories relocating to areas where labour is docile and cheap, trade unions have increasingly become aware of the need for a different approach to their campaigns (Bezuidenhout 2000).

According to Hermann (2007) the deputy general secretary of the trade union Solidarity, their union president Steve Scott, said in his presidential address in 2007 that trade unions will have to join forces across national borders. According to Scott, multi-national companies have grown so large that their turnover is sometimes larger than that of many countries (Hermann 2007). He continues by saying that, if trade unions are to provide effective protection to their members in the global era, they will have to be very powerful forces (Hermann 2007). Consequently, Solidarity announced a programme for trade unionism in 2007 to confront the challenges of the new economy (Hermann 2007). This programme includes workers’ training, mobilisation of the capital of labour, international trade union ties, national enforcement of international labour conventions and new trade union service delivery methods (Hermann 2007).

4. Reasons for joining a trade union

With so much focus on the changing work environment, for example the changes in the relationship between the employee and employer, technological changes or globalisation, the reasons why employees join unions should be reconsidered. Do the same reasons for joining unions still apply or has there been a shift in the motivation for employees? From a historical perspective, unions were formed when industrialisation forced workers into positions of dependency in which their earnings, working conditions and job security were largely beyond their control as individuals (Barker 2007). As a result, workers increasingly bonded together to prevent exploitation and to promote their interests (Barker 2007:87). The challenge facing
labour in the seventies and eighties was thus to build shop-floor-based industrial unions (Webster 2006). Apart from the challenges workers faced during the industrial era, South African workers had the unique struggle of fighting apartheid. The South African labour movement, including unions, was instrumental in campaigns to end apartheid (Bezuidenhout 2000). However, since South Africa became a democracy, public opinion about the labour movement has changed considerably (Bezuidenhout 2000). As explained by Webster (2006), today’s challenge requires new organisational forms, new alliances and new strategies.

According to Ceronie (2007), there has been a loss of ideological support for unions since South Africa became a democratic society. The establishment of the democracy had the effect that a huge driving gear to belong to a union was lost. He further states that the so-called survival struggle for rectification of the labour market has reached its end with the first democratic elections of the new government. This no longer meant that much to workers who supported the struggle to belong to unions, and the desire to be a trade union member declined.

Nevertheless, the goals of unions, internationally as well as in South Africa, have not changed significantly over the years (Grobler et al 2006:418). They point out that in a broad sense, the primary goal of any union is to promote the interests of its members. So why, they ask, do employees choose to join a union? They believe that a great deal of time and effort has been devoted to asking that exact question. Studies have failed to find a list of reasons that apply to all organising efforts, but there is general agreement among labour experts that certain issues are likely to lead to an organising drive by employees (Grobler et al 2006). According to Fanaroff (2003) as cited in Grobler et al (2006), employees may be motivated to join a union for inter alia job security, negotiating better wages and benefits, better working conditions, fair and just supervision, mechanism to be heard and the need to belong. Through collective bargaining and lobbying for labour legislation, union leaders enhance their members’ standard of living and improve many conditions that surround their work (Grobler et al 2006:419).

Different opinions therefore exist among labour experts as to whether there has been a shift in the motivation of employees to join a trade union or not. However, regardless of employees’ motives for joining trade unions, what is clear is that employees join unions for specific
reasons and trade unions should provide these services to their members to prevent an even further decline in membership numbers.

5. **Technological changes and advancements**

The next factor that influences the strength and impact of trade unions and their ability to organise that became apparent, was technological changes and advancements. There is little doubt that technology is reshaping the way business is conducted in today’s society (Ramlall 2003). There is a discernible trend towards enterprise downsizing and a shift in industrial employment away from large enterprises (Jose 1999). This trend, he states, is connected with technological changes.

Improvements in technology, and particularly information technology, have had a fundamental impact on the employment relationship (Venter 2003). Technology also impacts on the design, location, and nature of work itself (Venter 2003:22). The goal of a business remains an organised effort of individuals to produce and sell, for a profit, products and services that satisfy society’s needs, but with greater utilisation of technology to effectively compete in the global economy (Ramlall 2003).

A prime example of changes that took place in organisations is the concept of the virtual office place, and telecommuting, where workers are able to interface with the central office by means of information and telecommunications technology and thus work from home instead of commuting to work (Venter 2003:22). It is of paramount importance to ensure that an organisation’s structure is designed in a manner that supports the creation of new ideas and maximises the use of available technology (Ramlall 2003). Utilising available technology, he says, is a necessary component of any forward-thinking organisation in the global economy.

Many organisations have changed or adapted their organisational structures in recent years. Coupled with this, there are many smaller enterprises, flatter structures in workplaces, declines in trade union presence and influence, and corporate quests for flexibility and competitiveness (Vettori 2007). Vettori (p.16) continues by saying that “the huge shift in organisational structures has also resulted in trade unions becoming weaker, not only though loss of trade union members, but also through the difficulty of organising and maintaining
members”. As the scale of enterprise diminishes, so it becomes more difficult for trade unions to organise, causing the potential harm or damage that a trade union can wield in a huge organisation to dissipate in smaller enterprises (Vettori 2007).

6. Job insecurity and unemployment

The final factor that became apparent with this study was the influence of unemployment and job insecurity on union membership and subsequently on the level of trade unionism in South Africa. Too many South Africans are unemployed (Banerjee, Galiani, Levinsohn, McLaren & Woolard 2007). South Africa’s unemployment figure is one of the most alarming features of its labour market (Venter 2003:114). In 2009, the unemployment figure released by Statistics South Africa (StatsSA) showed that unemployment rose to 23,5% during the first quarter of the previous year and, according to the trade union Solidarity, unemployment is probably much higher (Kleynhans 2009). Just how many people are unemployed depends on how one defines unemployment (Banerjee et al 2007). According to Kleynhans (2009), the problem with SA’s unemployment figures is that discouraged job seekers are not included in their definition of unemployment. Discouraged job seekers, he says, can be defined as unemployed people who are not actively looking for work. The individuals who had not actively looked for work in the period of four weeks preceding the research were thus excluded.

High unemployment figures in South Africa complicate matters in the labour environment for the country and in the opportunity for trade unions to organise effectively (Nel et al 2005). The bargaining power of trade unions in times of high unemployment, combined with the new structure of organisations and the predominance of small organisations, has been severely eroded (Vettori 2007:17). According to Venter (2003) and (Nel et al 2005), employees join unions for a number of reasons, including job security issues. Venter (2003:71) stated that “unions intervene to protect the members against unfair dismissals. This is particularly true for South Africa, where retrenchments are commonplace, and levels of job insecurity are particularly high”. Visser (1995) as cited in De Witte et al (2007) confirms this by saying that the threat of unemployment has motivated many employees to take the precaution of becoming a union member or to remain one (Visser 1995: 60).

Research on the effects of job insecurity has focused almost exclusively on consequences for the individual employee and the company (De Witte et al 2007). They say that little research
has been conducted on the effects of job insecurity for unions and for union participation. They advise that, for the labour movement, it is therefore crucial to find out whether there is an association between job insecurity and union membership, since a change (rise or fall) in the number of members as a consequence of job insecurity has important implications for the future of the union movement and its strength.

Practices such as subcontracting, outsourcing and the hiring of temporary and part-time workers, long considered as atypical employment, are becoming more common, especially at the lower end of the labour market (Jose 1999). Employers increasingly appear to be less inclined to employ workers on a full-time, permanent basis (Barker 2007). Therefore, three categories for workers, namely the core of relatively secure workers enjoying full-time work and benefits, the non-core of increasingly insecure part-time, contract and out-sourced workers, and a growing periphery of informal workers and the unemployed, are emerging (Webster 2006). With the research that was done in South Africa by the Department of Labour, it was found that the increasing use of non-standard employment is eroding labour standards in a number of ways (Barker 2007). With regard to atypical employment, the following observations were summarised by Barker (2007:134): “even though such employees enjoy the same rights in theory, in practice it is very difficult for a union to organise workers whose workplace and hours of work are frequently changed”. A disturbing realisation is that unions are still fighting for stable jobs that no longer exist (Vettori 2007).

In some quarters of South Africa’s labour movement, there is thus the perceived higher level of job insecurity in recent years, but other opinions also exist. Some argue that there has been an increase in job security in South Africa over the last few years, through the measures in the LRA preventing unfair dismissals and discouraging retrenchments, which can be seen as an important social advance (Barker 2007). Even though different viewpoints exist regarding job security or insecurity for employees in South Africa and how this will influence the level of trade unionism, there is certainly no doubt that unemployment has a negative influence on trade union membership numbers.

**COMPARISONS BETWEEN THE EUROPEAN UNION AND SOUTH AFRICA**

In the section that follows, a comparison was drawn between the common factors influencing the level of trade unionism in the EU and South Africa.
The first common factor that became apparent was the influence of unemployment on unions. Rising unemployment has had a negative influence on union membership numbers in the EU. Unemployment and job insecurity are also factors influencing unions in South Africa. South Africa’s unemployment figure is one of the most alarming features of its labour market (Venter 2003:114). As in the EU, high unemployment figures in South Africa also complicate matters in the labour environment and the opportunity for unions to organise effectively. The bargaining power of trade unions is weakened in times of high unemployment (Vettori 2007). In most countries of the EU, trade unions offer relatively few services to the unemployed and the consequence is that most trade unionists who become unemployed abandon their union membership. However, in some of the countries of the EU (for example the Nordic countries), union membership remains high irrespective of unemployment figures. This is because unemployment and other social benefits are normally paid out through the unions (Fulton 2007). In South Africa, trade unions do not have this responsibility and trade union members will normally abandon their union membership when unemployed.

Secondly, in both the EU and South Africa, employment relationships are changing. This tendency was brought about by numerous factors, including globalisation and advancements in technology. The hierarchical power disparities changed between management and employees. For this reason, it became clear in both the EU and SA that union structures need to change to adapt to a new economy, workplace diversity, women entering into the workplace, and a focus shift to competence and capability. Because of the changed work environment, it would seem that employees do not join unions because they feel they can better deal with managers on their own. In the past, the traditional task or function of a union was to express and resolve employment conflict, but it would seem that unions should become more pro-active and provide more than just traditional support to retain members. With the shift in the employment relationship and changes that took place in organisational structures, unions became weaker because of the losses in membership. The reason for this is that it becomes all the more difficult to organise and maintain trade union members. This problem becomes even worse when the effect of globalisation is brought into account. Globalisation makes it more difficult for unions to maintain or receive workplace access and weakens the centralisation of collective bargaining.
The third factor identified was the development of other work relationships outside the traditional employment relationship. In the EU, there has been substantial development outside the traditional employer/employee relationship and contract, upon which a lot of legislation is based. Therefore, unions are unable to provide protection for these workers. In South Africa, on the other hand, legislation protects trade unions to a great extent. The LRA and the Basic Conditions of Employment Act create a rebuttable presumption that a person is an employee unless the employer can provide information to prove otherwise (Basson et al 2005).

Another example of the protection provided by the legislation of South Africa becomes evident when considering “union security agreements”. In South Africa, agency-shop agreements and closed-shop agreements, also known as “union security agreements”, are an accepted part of employment relations. These agreements are not acceptable in the European Union. The provision of closed-shop agreements is also contrary to national legislation in many of these countries (Vettori 2005). According to Olivier and Potgieter (1994) as cited in Vettori 2005, the right of freedom not to associate is protected in numerous countries. Kahn-Freund, Davies and Friedland (1983) as cited in Vettori 2005 state that closed-shop agreements have been specifically outlawed in as many of the countries. In Germany and Belgium, for example, closed shops and other forms of union security have been interpreted as being contrary to the freedom of association; that freedom having been interpreted to include the freedom not to associate (Olivier & Potgieter 1994, as cited in Vettori 2005). Furthermore, in the United Kingdom, closed shops are specifically outlawed (Vettori 2005).

Subsequently, the disclosure of information was identified as a factor that influences trade unions in both the EU and SA. Disclosure of information plays a crucial role in labour relations in most industrialised countries (Van der Walt 2007). As a developing and newly industrialised country, South Africa has securely anchored democratic ideals in its constitution as well as in its labour legislation (Van der Walt 2007:28). Trade unions view information disclosure as a means of furthering their objectives by extending negotiations and joint regulations into areas that were previously the exclusive domain of management (Van der Walt 2007:26). The purpose of this is to enable the union to bargain intelligently, to understand and discuss issues raised by the employer’s opposition to the union’s demands, and to administer a contract (Van der Walt 2007:27). As in South Africa, European trade
unions also regard disclosure of information as a means of broadening industrial democracy (Ballace & Gospel 1983 as cited in Van der Walt 2007). Most European countries have a works council system with statutory provisions for disclosure of information (Van der Walt 2003; Van der Walt 2007:26). In South Africa, disclosure of information is also regulated by statutory provisions with both the Promotion of Access to Information Act and section 16 of the LRA (Van der Walt, 2007).

The final aspect identified as a common factor in both the EU and South Africa is the reasons why people join trade unions. The reasons why employees join unions or stay apart from unions vary widely, irrespective of the country they are in. Some labour relation specialists argue that the motivation to become a trade union member in South Africa was in the past politically motivated and now, with a democratic society, the need to belong to a trade union subsided. From the literature studied it seems as if different reasons or motivational factors currently influence trade union membership in South Africa when compared with the hearty times of apartheid. Furthermore, in the EU, various social, economic and political changes during the 1970s and 1980s (including the fall of the Iron Curtain in 1989) caused insecurity for trade unions and decline in membership over the past two decades. Still, some countries in the EU have high union membership numbers. A possible reason for this may be that employees of these countries (Denmark, Sweden and Finland) see union membership as a natural part of employment combined with the knowledge that unemployment and other social benefits are normally paid out through the unions.

As can be gathered from the previous sections, these are not the only reasons contributing to the level of trade unionism in the different countries studied. The reason why this section focused only on certain factors was because these factors were common to both the EU and South Africa. It should be stated, however, that these factors are by no means more important or less important to trade union trends and all the different factors contribute to the current stance of unions in both the EU and SA.

**CONCLUSION**

This article aimed to provide a comprehensive insight into the level of trade unionism of both the EU and South Africa. The reason why the levels of trade unionism were examined was to establish which factors influence these levels of trade unionism in South Africa and the EU.
respectively. By identifying these factors, comparisons could be drawn between the EU and South Africa regarding trade unionism. These comparisons gave some insight into common factors and factors unique to South Africa.

Numerous factors were identified in both South Africa and the EU. Some of the factors that influence the level of trade unionism, which became apparent during the study, included the influence of:

- globalisation
- technological changes and advancements
- changes in the working environment
- legislation or statutory influence on the labour relationship
- unemployment and job insecurity
- employees' perceptions of the role of trade unions
- resistance of some employers to trade unions in the workplace

The comparisons that were drawn concerning the factors influencing trade unions of the EU and South Africa dealt exclusively with common factors of both the EU and SA. Even though similar factors exist in both the European Union and South Africa and these factors have similar influences on trade-union levels, the literature also indicated unique influential factors for both developed countries, such as the EU countries, and a developing country such as South Africa.

An interesting occurrence that emerged in the literature was that different labour relations experts have conflicting viewpoints of the influence of certain factors on the level of trade unionism in a country. One example of this was the influence of globalisation on trade unions. Some optimistic experts believe that globalisation holds numerous opportunities for trade unions, while more pessimistic experts believe that it could threaten the future of trade unions as organisations. Moreover, certain factors that were highlighted in the literature indicated recent tendencies in the trade union movement, but it remains unclear what the influences were or will be on the level of trade unionism.

This study does contain some limitations, however, which need to be highlighted, because these limitations can offer insight for possible future research. Even though thorough
comparisons were drawn between the EU and South Africa and definite influential factors were identified that gave significant insight into the level of trade unionism in both developed countries and a developing one, it may not be enough. To ultimately establish what factors are the most critical in South Africa, one should also compare this country, which is a developing one, to other developed countries besides the European Union countries, for example the United States of America. Another possible study could be between countries with similar developmental status or political background to South Africa. This may provide other perspectives of influential factors on the levels of trade unionism, which did not become apparent during this research study.
LIST OF REFERENCES

Acts see SOUTH AFRICA.


Department of Labour see South Africa. Department of Labour.


CHAPTER 3: THE FUTURE OF TRADE UNIONS AS ORGANISATIONS IN SOUTH AFRICA: VIEWPOINTS OF TRADE UNION LEADERS

In Chapter 3 (Article 2) the APA style of referencing will continue, since the journal for publication considered have not been identified at time of presentation for examination.
Abstract

The primary objective of this study was to establish what the viewpoints of trade union leaders are regarding the future of trade unions as organisations in South Africa. To conduct this study an empirical study was done. A purposive, voluntary non-probability sample (N=10) was taken of trade union officials in managerial positions of registered trade unions in South Africa. The data collection method used in this study was semi-structured interviews. Data analysis was done through structural coding. Results obtained were organised in two phases. The first phase focused on the factors that have an influence on trade unions as organisations, as identified by trade union leaders. Literature highlights specific factors as having an influence on trade unions as organisations. Phase 2 focused on the perceptions of trade union leaders of these specific factors. These findings were then discussed jointly.

Opsomming

Die algemene doelstelling van hierdie studie was om te bepaal wat die beskouinge van vakbondleiers is rakende die toekoms van vakbonde as organisasies in Suid-Afrika. Om hierdie studie uit te voer is 'n empiriese ondersoek gedoen. 'n Doelgerigte, vrywillige niewaarskynlikheidsteekproef (N=10) is geneem onder vakbondamptenare in bestuursposisies van geregistreerde vakbonde in Suid-Afrika. Data vir hierdie studie is ingesamel deur middel van semigestrukturerde onderhoude. Data-analise is gedoen deur gestrukturerde kodering. Die resultate is in twee fases verdeel. Die eerste fase het gefokus op die faktore wat deur vakbondleiers geïdentificeer is wat 'n invloed het op vakbonde as organisasies. Literatuur beklemtone spesifieke faktore wat vakbonde as organisasies beïnvloed. Fase 2 het gefokus op die persepsies van vakbondleiers oor hierdie spesifieke faktore. Die bevindinge is daarna gesamentlik bespreek.
INTRODUCTION
This research study focused on the viewpoints and perceptions of trade union leaders regarding factors which could influence trade unions as organisations in South Africa in the future. In this chapter the problem statement was stated, the objectives were identified and an empirical study was carried out. Results were discussed and in the closure of this chapter the recommendations and limitations to the study were highlighted.

PROBLEM STATEMENT
It is generally accepted that the development and, by implication, the history of employment relations in every country is unique, since innumerable variables will have contributed to the evolution thereof (Nel, Swanepoel, Kirsten, Erasmus, & Tsabadi, 2005). Nel et al. explain the term “employment relations” by providing this comprehensive definition:

Employment relations refers to a complex, open system of formal and informal as well as individual and collective relationships and interactions between employers, employees and the state, and the representatives of these primary role-playing parties, together with their related institutions, considering aspects that emanate from, relate to or may impact on the contemporary employment relationship in its organisational and broader societal context where the satisfaction of the needs of all members of society is a primary concern. The “employment relationship” is acknowledged to have built-in common ground as well as conflict, and a central feature of this field of theory and practice is in the notion of fairness and justice in balancing, integrating and reconciling the partly common and partly divergent interests of the parties. (p. 9)

From this definition it is clear that employee representation (trade unions) form part of these employment relations. Also, according to the international labour standards, it is acknowledged and accepted that mechanisms should be implemented to protect the individual employee against exploitation (Barker, 2007). Trade unions were originally formed when industrialisation forced workers into positions of dependency in which their earnings, working conditions and job security were largely beyond their control as individuals (Barker). As a result workers increasingly bonded together to prevent exploitation and to promote their interests (Barker). Since then, these organisations have played an important role in employment relationships. It is important to note, however, that trade unions are
membership organisations (Nel et al., 2005). They exist because of their members, they are made up of members, they serve their members’ interests and they are governed by the members themselves (Nel et al.). In South Africa trade unions are relatively strong, since union membership numbers are high, compared with international standards and they are very high in comparison with developing countries (Barker).

Recent decades have seen profound changes in the political and economic environment in many countries (Barker, 2007). In many developed countries these changes have had a very negative impact on trade unions as organisations, because the membership numbers were severely eroded. A key example of this erosion is seen in the decrease in trade union density in the European Union (EU) (all developed countries) where membership fell from 32.6% in 1995 to 26.4% in 2001 in the then EU states (Waddington, 2005).

Factors which, according to literature, influence trade union organisations in South Africa, include but are not limited to, globalisation, more insecure employment, women entering the workforce, high levels of unemployment and the skill levels of employees (Barker, 2007). Every organisation is affected by the environment in which it operates (Venter, 2003). The mark of a good organisation, however, is its ability to anticipate change and respond accordingly (Venter). An understanding of the impact of both internal and external influences on every component of an organisation is hence critical to sound management (Venter). This is true for trade union organisations as well.

Many factors contribute to the questions surrounding the future of trade unions as organisations. Trade union membership around the world is on the decline and even though trade unions, and their membership numbers, in South Africa are still relatively strong, the question is whether trade unions in South Africa have reason to believe that their trade union membership numbers are being threatened in any manner. Do the factors influencing trade unions in developed countries influence trade unions in developing countries as well? If not, what are these factors and how will trade union organisations respond to these threats or adapt to these factors? To get these answers, one should ask these utterly important questions to individuals in practice who deal with these factors every day.
OBJECTIVES OF THIS STUDY
This study has the primary objective of determining what factors will, according to trade union leaders, influence the future of trade unions as organisations in South Africa.
To achieve this, specific objectives were identified that will enable the researcher to achieve the primary objective. These are:

1. To identify what factors, according to trade union leaders in South Africa, influence trade unions as organisations currently and possibly in future.
2. To determine to what extent trade union leaders in South Africa agree with or differ from the literature on proposed important phenomena influencing trade unions as organisations.

METHOD
Research design
For the purpose of this study, a qualitative research method was followed. Semi-structured interviews were used for data collection. A qualitative research method was chosen, because this method enabled the researcher to gain a clear and deep understanding of the phenomena being studied (Trochim & Donnelly, 2007). This method gave the participants the opportunity to describe and explain in their own words what they see as meaningful or significant to them and they were not limited to prearranged or predetermined categories. Van Maanen (1983) as cited in Easterby-Smith, Thorpe, and Lowe (2004) defines qualitative techniques as an array of interpretative techniques that seek to describe, decode, translate and otherwise come to terms with the meaning, not the frequency, of certain more-or-less naturally occurring phenomena in the social world.

Participants and procedure
Different non-probability sampling techniques were used to establish first contact with the trade union officials. The primary sampling technique was purposive voluntary sampling. This sampling method was chosen for the study to ensure that participants were knowledgeable about the relevant concepts that were the focus of the study. Purposive voluntary sampling, also known as judgemental sampling, is an example of non-probability sampling, where the researcher selects members from a difficult-to-reach, specialised population (Neuman, 2000). This sampling method is not intended to be statistically representative; in fact the characteristics of the population are used as the basis of selection.
(Strydom, 2008). For this reason registered trade unions within South Africa were invited for participation. The population group consisted of trade union officials in managerial positions of the different trade unions. These trade union officials included general secretaries; deputy general secretaries; division managers and presidents of registered trade unions.

The second sampling technique, known as the snowball technique, emerged only later, when the interviewing process had already started. Snowball sampling (also known as network, chain referral, or reputational sampling) happens when participants refer the researchers to other potential participants in a network (Neuman, 2000). After certain interviews some of the participants indicated that they were willing to help the researcher to identify more trade union officials who would be willing to participate in the research project. These trade union officials were contacted and they agreed to participate.

Data was collected until data saturation was reached. Data saturation occurred after 10 interviews. The following selection criteria were used to determine which participants were included in the sample. The participant had to:

- be an employee of a registered trade union within South Africa
- be in a managerial position within the trade union
- be willing to participate in the study
- be willing to be interviewed while being recorded on an audio voice recording device

However, no effort was made to control the race, socio-economic status, gender or age of participants.

Audio voice recorders were used with the permission of the participants to ensure that no data was lost during interviews. Every participant was set at ease before the start of an interview. The researcher introduced herself at the beginning of each interview and also explained the context of the interview. An independent transcriber transcribed the audio voice recordings verbatim. The interviews were transcribed to enable the researcher to analyse the information.
Table 1: Participants’ organisational positions

<table>
<thead>
<tr>
<th>Trade union official</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presidents</td>
<td>1</td>
</tr>
<tr>
<td>General Secretaries</td>
<td>5</td>
</tr>
<tr>
<td>Deputy General Secretaries</td>
<td>2</td>
</tr>
<tr>
<td>Secretaries</td>
<td></td>
</tr>
<tr>
<td>Division Managers</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>10</strong></td>
</tr>
</tbody>
</table>

Data collection

The data collection procedure for this research involved establishing first contact, conducting semi-structured interviews and taking field notes. The trustworthiness of the study and the data was also taken into consideration.

**Establishing first contact**

Request letters were sent to numerous registered trade unions to enquire whether they would be interested to participate in this research study. The written information also included the objectives and aim of the study. Contact details of the researcher were made available to the recipients of the letters, to enable them to contact the researcher if they were interested to participate. Telephonic appointments were made with trade union officials willing to participate and an electronic mail was sent to confirm appointments.

**Interviews**

The measuring instrument used in this study was semi-structured interviews. All of the interviews were face-to-face interviews. Interviews were scheduled on the dates that best suited each of the participants. The interviews took place either in the offices of the participant or in the conference facilities of the trade union, where the participant felt at ease. On the day of the interview the participant was provided with a confidentiality agreement. This agreement stated the aim of the research and guaranteed autonomy and confidentiality of the interview. Before every interview the participant was put at ease. The researcher introduced herself in a friendly manner and also explained the context of the interview. During interviews, the researcher faced the participant squarely in a relaxed way and had an
open body posture to ensure that the participants were comfortable. The researcher also kept 
eye contact with the participant at all times. All the interviews were recorded with an audio 
voice recorder after permission was granted by the participant, to ensure that no information 
got lost during the interview. In most qualitative research traditions it is strongly preferable, if 
not essential, to have a full record of each interview (King & Horrocks, 2010).

All the interviews lasted between 20 and 30 minutes. Seventeen questions formed the basis of 
the interviews. Every participant was asked the standard questions and these questions served 
as a guide to ensure that all themes were covered. The interview guideline was derived from 
research questions that became apparent through numerous literature resources consulted 
about the subject of trade union trends globally and nationally. Special attention was thus 
devoted to the subjects covered extensively in the literature. The primary objective of the 
study was to identify what factors, according to trade union leaders, will influence the future 
of trade unions as organisations in South Africa. However, the researcher was also keen on 
establishing whether leaders in the trade union industry would verify or contradict academic 
literature available on the subject.

Field notes

Directly after each of the interviews, field notes regarding that interview were written down. 
Field notes are a written account of the things the researcher hears, sees, experiences and 
thinks in the course of the interview.

Trustworthiness

judging the soundness or trustworthiness of a qualitative research. These four criteria are 
credibility, transferability, dependability and confirmability.

Credibility criteria involve establishing that the results are credible and believable from the 
perspective of the participant in the study (Trochim & Donnelly, 2007). The following was 
thus done to ensure credibility:

- The researcher was supervised in conducting the research.
- Anonymity and confidentiality were guaranteed to all participants.
A trust relationship was built with participants by explaining the objective of the study, the role of the researcher and by clarifying uncertainties and faulty perceptions.

Transferability refers to the degree to which the results can be generalised or transferred to other contexts or settings (Trochim & Donnelly, 2007). The following was thus done to ensure transferability:

- A detailed description of the methodology of the study was given.
- The context of the research was described thoroughly.
- Clear selection criteria were used to identify and recruit possible participants in the study.
- Participation in the study was voluntary.
- After the data gathering, data analysis was performed and a literature control was done.

Reliability is concerned with whether a researcher would be able to obtain the same results if one could observe the same thing twice (Trochim & Donnelly, 2007). However, in the qualitative research world the researcher is aware of the ever-changing environment but nevertheless tries to ensure that the study is reliable (Trochim & Donnelly). This is done by taking dependability into account. To ensure that dependability was taken into account by the researcher, the following was done:

- Interviews were conducted until data saturation became apparent.
- Participation was voluntary, but selection criteria and a purposive sampling method ensured that potential participants were knowledgeable about the subject studied.

Confirmability refers to the degree to which others can confirm or corroborate the results. The following was thus done to ensure confirmability:

- A co-coder independently analysed the data and a consensus discussion was held to confirm the results.
- Thorough field notes were taken directly after each interview to support the results.

**Data analysis**

Data analysis is the route that is followed to bring order, structure and meaning to all the collected data. The first step in data analysis was to transcribe all the data. Each of the
interviews was transcribed by an independent transcriber. Transcription is the process of converting recorded material into text and, as such, is usually a necessary precursor to commencing the analysis of interview data (King & Horrocks, 2010). Transcription is a time-consuming, demanding task (King & Horrocks) and for this reason it was contracted out to an individual with the essential skills. Transcribers have experience in working with confidential data (King & Horrocks). Nevertheless the researcher ensured that the transcriber understood and respected the confidentiality of the data.

Data analysis was done in accordance with the technique of structural coding as described by MacQueen, McLellan-Lemal, Bartholow, and Milstein (2008) as cited in Saldaña (2009). This entails reading transcripts intensively, identifying underlying themes relating to the research questions, writing these themes down, investigating these themes and identifying categories and sub-categories from the themes, and translating these themes and sub-themes into scientific descriptions. A co-coder was used to ensure the trustworthiness of the study. The co-coder extracted themes separately from the researcher using the same technique. A consensus discussion was held between the co-coder and researcher to finalise the categories and sub-categories.

**Ethical aspects**

The following ethical considerations, outlined by King and Horrocks (2010) were taken into consideration throughout the entire study:

1. *Informed consent:* The researcher ensured that the participants were fully informed about the research procedure and gave their consent to participate in the research before data collection took place. Participation in this study was thus strictly voluntary.
2. *No deception:* Deception of participants was avoided altogether.
3. *Right to withdraw:* The researcher ensured that participants knew that they were free to withdraw from the research and that they would not be penalised in any way if they decided to do so.
4. *Debriefing:* The researcher ensured that, after data collection, the participants were informed about the full aims of the study. Each participant was also assured that they would receive a copy of the dissertation resulting from this research study.
5. Confidentiality: The researcher assured and maintained complete confidentiality regarding any information about the participants acquired during the research process. The participants’ names as well as the names of the trade unions were known only to the researcher and the transcriber, and these were replaced by codes.

Furthermore, the researcher conducted the research in a professional, respectful manner and attempted to give an accurate description of the data.

RESULTS
The primary objective of the study was to identify what factors, according to trade union leaders, will influence the future of trade unions as organisations in South Africa. However, as explained in the preceding paragraphs, special attention was also devoted to subjects that received a great deal of attention in the literature. The findings of this study were thus organised in two phases, the first being the factors identified by trade union leaders in South Africa, which influence trade unions as organisations currently and most probably in future as well. In the second phase of the findings the focus shifted to the perceptions of trade union leaders regarding factors which were already identified in the literature as important phenomena influencing trade unions as organisations.

Phase 1
The findings for Phase 1 of this study were organised into eight major themes and various sub-themes. The results of Phase 1 of the study specifically focused on the factors trade union officials identified as having an influence on trade unions as organisations. Table 2 sets out the identified themes and sub-themes, as well as the frequency of the responses.
Table 2: Themes identified in Phase 1

<table>
<thead>
<tr>
<th>Theme</th>
<th>Description of the theme</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Quality of service delivered</td>
<td>7</td>
</tr>
<tr>
<td>2</td>
<td>Economic state of South Africa</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sub-theme 2.1.</td>
<td>Changing economy</td>
</tr>
<tr>
<td></td>
<td>Sub-theme 2.2.</td>
<td>Unemployment</td>
</tr>
<tr>
<td></td>
<td>Sub-theme 2.3.</td>
<td>Atypical employment</td>
</tr>
<tr>
<td></td>
<td>Sub-theme 2.4.</td>
<td>Recession</td>
</tr>
<tr>
<td>3</td>
<td>Employers’ attitude</td>
<td>4</td>
</tr>
<tr>
<td>4</td>
<td>Trade union federations</td>
<td>5</td>
</tr>
<tr>
<td>5</td>
<td>Perceptions of trade unions</td>
<td>4</td>
</tr>
<tr>
<td>6</td>
<td>Legislation governing labour relations</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Focus shift for trade unions</td>
<td>6</td>
</tr>
<tr>
<td>8</td>
<td>Political and economic theories and perspectives</td>
<td>3</td>
</tr>
</tbody>
</table>

**Theme 1: Quality of service delivered**

One of the first themes that became apparent from the responses of the participants was the quality of services delivered by trade unions to their members. According to trade union officials, good service delivery to members is a vital factor to ensure their future as organisations. The following quotations underscore this finding:

“... the ability to deliver good service and good service delivery in the eyes of the member. In other words, even if we think it is good, but the member does not think it is good, it must be good in his eyes.”; “... he comes to you because he wants to. Because he thinks you deliver a service to him ...”; “... the trade union deliver services a lot of the time which people want ...”; “... members join merely because they are interested in the services ...” Respondents elaborated on the topic by explaining why it is important for trade unions as organisations to focus on delivering a quality service.

“We deliver a service to the public, we deliver a service to our clients and our clients are our members ...”; “If there is a number of trade unions that provide good services, why would
you then go buy at a shop where your first experience was not nice? You will find another one ...” (compares service delivered by trade unions to a shop where you can buy products); “So if we do not deliver what we expect or she expects then we know we are going to lose her ...”; “... if we really act on behalf of our members. Because if you do not act on behalf of the members and you drive whatever agenda, it will have an impact on the continued existence of the trade unions.”; “... the key issue is the relevance to the members’ interests. The trade union should at all material times in my view be relevant or to the interest of members ...”

**Theme 2: The economic state of South Africa**

Given the economic state of the world at present and more specifically the economic situation of South Africa, trade unions identified numerous aspects that influence these organisations. The factors that were determined or highlighted by the economic state of the country were so wide that they were divided into sub-themes. Each of these sub-themes is explained below.

**Sub-theme 2.1: Changing economy**

Three of the respondents indicated that changes in the economy brought about enormous challenges for trade unions to survive. Their explanations for the changes in the economy are presented in the quotations from the respondents:

“... the biggest factor at this stage that threatens the continued existence of trade unions in South Africa but also in the rest of the world is the changing economy.”; “... there started a new economic revolution in the world ... named the information revolution ... and the information revolution changed the world of work and economy totally and completely.”; “... with the arrival of the internet the economy actually changed radically and it now is characterised as the information era. And the information era will change the world of trade unions forever.”; “The information revolution has replaced the industrial era as the dominant economic paradigm in the world.”

**Sub-theme 2.2: Unemployment**

An enormous financial burden on the economy is the high level of unemployment in South Africa. Those who listed unemployment as a concern or threat to trade unions stated the following to explain their views:

“... challenges of South Africa lay in the crisis of the unemployment dilemma where about 50% of the employees in South Africa do not have access to work. This naturally means that
the trade union, also because they have 50% of the people, cannot be organised.”; “...because of the unemployment problem there is so much pressure on the economy that there is such a small part of the economy which is productive”; “...the severe unemployment and inequalities in South Africa...”; “... it definitely places trade unions under pressure – the fact that there is so much jobless people and that trade unions actually only do something for employees.”

Sub-theme 2.3: Atypical employment
With regard to atypical employment five of the respondents indicated that this is a factor that was a concern to them, because this type of employment can cause serious damage to trade unions as organisations. Responses included major concerns about outsourcing, sub-contracting and the difficulty of recruiting and collectively negotiating for members in the changed work environment. The following quotations are a reflection of these findings:

“...big companies are sub-divided into smaller units. And where trade unions were previously organised in big companies, they suddenly face a crisis because big companies are now divided in numerous small components and their activities are contracted out.”; “So there is a lot of little contract companies which deliver a service to the big company and the big companies’ employees divide in half. But suddenly there where the trade union is traditionally organised there is only half the people.”; “...factor which also played role is that companies said that I focus on my core business, the rest I contract out. So that means that a big part of the labour force is just contract workers... So the result is that the permanent employees where the trade union was traditionally organised, is no longer there, a lot of them is contract workers.”; “...types of subcontracting and outsourcing. You know where companies began to say their core business is to mine. And not to be catering or security function or administration function, but more about mining.”

Sub-theme 2.4: Recession
An added financial pressure further threatening the continued existence of trade unions, is the worldwide economic recession. The following comment summarised the perceptions of most of the respondents:

“But I must say that in the past few years, one, two years in particular, when we had this global economical meltdown, 2008, 2009, trade unions was effected.”
One of the major threats that was a direct result caused by the recession, was the operational pressure placed on organisations. In order to survive, numerous employers had to retrench some of their employees during this financial crisis. This in turn had an influence on trade unions. Some of the responses in this regard included the following:

“... there is a limit to what we can do. And that limit is not always acceptable for members and it becomes a challenge for a union to take his members along in these extremely difficult economic circumstances wherein we operate ... another factor which then sets in of course with this, is the operational environment of the sectors in which you operate, in case your circumstances become so that ... the sector in which you operate will have to decide because of this we will have to start to lay off workers.”; “This is becoming a very big headache in the whole of South Africa, the lay-offs of workers.”; “That sort of thing have a very negative impact on the trade union movement. Because you have to fight it, but how do you fight it? The only way how you can fight it, is to say, is there not methods where we can have fewer lay-offs?”; “... your economic circumstances, your circumstances of the country, which is affected by the recession and your general financial stance determine to a large extent the measure, the way in which trade unions in this country will have to operate in the future.”

**Theme 3: Employers’ attitudes**

An interesting theme that emerged was that trade union officials were convinced that the attitude of employers can play a role in the continued existence of trade unions as organisations. While some focused on the assumption that bad employers will ensure that employees keep joining unions, others acknowledged that when employment conditions are so good and employers so accommodating, trade unions could become irrelevant. But regardless of the reason provided by the participants, it became clear that trade union officials feel that employers play an important role in the continued existence of trade unions. Some of the remarks made by participants are listed below:

“... one of the things which makes us survive as unions is the arrogance of employers ...”;
“...as long as the employer is arrogant, they want to exploit at all material times, it gives the trade union reason to exist. That its members have reason why to join trade unions. But if the employer can then give everything and be open and give everything, then the union will become irrelevant ...”; “... as long as you have an arrogant employer you will have us, more and more people joining the unions ...”; “... members are exploited down there, like nobody’s business and workers don’t know how to respond to this. So there’s a role for the trade union
to work on that ...”; “... if you get a working environment, which is stable, where little discipline takes place, where guys get good salaries, where guys get good benefits, they do not notice that there is a need for a trade union ...” ;“... employer which actually treats his employees so good that they do not see the need for it ...”; “... the individual cannot today in this modern life negotiate with an employer ... if you have a very strong trade union then the employer must talk to you. The employer must listen ...”

**Theme 4: Trade union federations**

A lot of registered trade unions in South Africa belong to trade union federations. Respondents who indicated that trade union federations play an important role in the continued existence of trade unions as organisations had the following motivations for their opinions:

“... the federation to which we belong – Z ... look most of us trade unions belong to strong trade union federations. Now you have X (referring to a trade union federation) on the one side and you have us on the other side and then you also have Y which is another trade union federation ... these trade union federations play a enormous role in the country’s global business and also for the individual.”; “... and I think we will always play a fundamental role in the country’s business by means of our federations, for the foreseeable future.”; “... we think there are benefits if trade unions can do what X (referring to a trade union federation) did – associating themselves with forming some kind of alliances, to influence the policy of government.”

However, even though some of the respondents were able to acknowledge the value of trade union federations and the role they can play to ensure the future of trade unions as organisations, they had concerns as well. Some of the respondents felt that alliance between a trade union federation and the Government ruling party could have negative implications in the future. They stated that:

“... for as long as there is still rapport, this alliance between X (referring to a trade union federation) and the ruling party, the trade union movement is likely to be sustained so to speak ... but once that element can disappear ... that is obviously a threat ...”; “... I think trade unions that are too much politically orientated and lean over too much to a particular political party; they will have problems at some stage, because you cannot serve two gods, you cannot serve your members and the political party.”

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Theme 5: Perceptions of trade unions
Some of the respondents indicated that perceptions individuals may have of trade unions as organisations may have an impact on the continued existence of the organisation. The respondents expressed their concerns with the following remarks:

“... even when we think our service is good, but our members do not think so ... trade union service must be good from member’s perspective.”; “... I think one of the biggest contributing factors is the perceptions of people with society’s perceptions about trade unions, especially in South Africa.”; “... the way in which trade unions handle themselves, reinforce those perceptions. Whether it is a positive perception or negative. Our behaviour as trade unions determine in which direction we drive those perceptions.”

Theme 6: Legislation governing labour relations
Six of the respondents listed some aspect of legislation as an important contributing factor to the continued existence of trade unions as organisations. Some of the roles of labour legislation are captured by this statement from one respondent:

“... the labour relations act makes sure that all organised workers can form a union and it is protected, every union is protected by that, against employers and against other sister unions ... they are protected by that.”

Other respondents mentioned that:

“... there could be certain legislation ... employers can overlook certain aspects of the act and there is no monitoring, tight monitoring mechanism to ensure that each and every employer do comply with the act.”; “... it is our role as the trade unions to ensure that the legislation is followed to the letter.”

Several have also indicated that trade unions should have impeccable knowledge of the relevant legislation to be able to assist their members in a timely manner. This was captured in the following statements:

“... our knowledge of the labour relations Act and to keep up-to-date with it... I think it is very important because we have to advise you. So the guy wants the right advice at the right time and without delay. In other words, immediately.”; “... the knowledge level of guys. Honestly they will have to become knowledgeable to be able to help their members, different than just to strike and shout and to make a noise.”; “My problem is that I do not think that trade unions have the know-how to use what the act gives them to its full extent. They look at one
thing and say I may, again I may strike, I have certain rights. But there is a lot of other stuff which the legislation gives them, which they do not really understand...”

Some of the trade union officials also expressed their concerns about certain aspects of the Labour Relations Act (LRA) that they perceived to be unjust. The first was Section 18 of the LRA where the typical response was similar to this one:
“... article 18 which specifically protects industrial trade unions. And remember the whole one industry, one unit idea.”

The second aspect is, with regard to Sections 27 and 29 of the LRA, which address bargaining councils. The respondent made the following statement:
“... there is a very big threat in the bargaining council where the threshold for recognition to this bargaining council is being increased continuously. And it would seem that the increase is because of the state itself but also certain trade unions, to eventually reach the situation of one sector, one union.”

Theme 7: Focus shift for trade unions
A definite theme that emerged was that trade union leaders felt that trade unions as organisations need to change and adapt, in order to survive. The majority of the participants indicated the need for a shift in the focus of trade unions. Some of the statements made by trade union officials include:
“... they will have to adapt to the new labour market, to the new economy and they will have to adapt to South Africa itself.”; “Because you cannot simply continue to exist just because you do exist. You do not have an automatic right to exist, you have to stay relevant, you must stay meaningful. And I think they will have to adapt, adapt or die.”; “... if a trade union cannot adapt to its changing circumstances, that one that cannot or do not want to adapt to the changing circumstances, will not survive. It is as simple as that.”; “The trade union which adapts to the changing circumstances, to other demands, to other members, members with a different viewpoint, that trade union will survive and it will become bigger and stronger. So I cannot generalise but in my opinion the one that do not adapt, well he will not make it. He simply will not survive.”; “And the labour market is our business, it is the place where we do business and if you do not adapt there, well then you will not make it.”; “... trade unions were always collective establishments. So they made collective agreements.
Nowadays employees do more; employees increasingly enter into individual contracts with companies ... so if trade unions cannot provide individual services, they will be destroyed.”

Theme 8: Political and economical theories and perspectives
From the interviews it became clear that there are two distinct approaches to the trade union movements within South Africa. The one is the socialist and the other is the capitalist. These two schools of thought have conflicting opinions and viewpoints in some aspects.

One of the respondents in favour of capitalism made the following observation:
“Now this viewpoint is exactly the opposite of X (referring to a trade union federation) which is in the socialism tradition ... and on this matter we differ radically from X.” (referring to economical decisions of the government, for example social grants).
It is important to notice that the specific subject on which their opinions differ, is of less importance for the explanation of the event, than the incident itself. The quotation was merely used to illustrate their acknowledged differences.

Another quotation is provided below to illustrate the different viewpoints of the two schools of thought.
“And I think the socialistic era they are fighting against a tide of history. You know they are not going to win that battle ... They can win here and there at a tactical level, but the more they win at a tactical level, the more they will lose on a strategic level. In other words if they get their way this morning, the government gives them their way, with all labour legislation and the increased government employment, and that stuff, it will affect economy so negatively that at the end of the day trade unions is going to have fewer members, less work and smaller salaries.”; “... that is why I very, very strongly believe in the market economy. I do not think socialism has the solution”. This respondent also stated that “... in South Africa the socialism is still very strong in classes and in race awareness.”

Trade union officials who belong to a trade union that supports socialism stated that:
“... we are operating under a very high complex and influential economic system called capitalism ... But in real term the enemy is one and therefore exploitation is one from the capitalist system.”
Interestingly, one of the respondents supporting capitalism made the following comment about the behaviour of trade unions supporting and practising socialism:

“... the difference between our model and their model is that they will try to use their political power to force the government to get more welfare. While we will rather invest in training...”

While this participant’s comment was accurate (if the subsequent quotation is also read) regarding the approach of socialist trade unions, it was clear from the statement that the trade union official disapproved of the approach followed.

On the other hand, if one reads the quotation of the participant supporting the socialist trade union movement, it becomes clear that the trade union official was convinced of the constructive behaviour of the socialist approach followed by the trade union he represents.

“... there are benefits if trade unions can do what X (referring to a trade union federation) did associating themselves with forming some kind of alliances to influence the policy of government ... So we think there is a need for trade unions to work closely in influencing policy. Yes.” (The trade union that he represented is an affiliate of trade union federation X, mentioned above).

**Phase 2**

As this phase specifically dealt with already identified phenomena influencing trade unions as organisations, the factors identified in the literature served as the super-ordinate themes. Thus, using the literature as a guideline, the researcher was able to address specific themes to obtain a better understanding. From the responses of the participants, definite themes could be derived from the super-ordinate themes. Table 3 sets out the super-ordinate themes and the identified themes, extracted from the responses of the participants. Verbatim extracts were also included in the table.
<table>
<thead>
<tr>
<th>Number</th>
<th>Super-ordinate theme</th>
<th>Theme</th>
<th>Verbatim extracts from raw data</th>
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<tbody>
<tr>
<td>1</td>
<td>Legislation governing labour relations</td>
<td>Insufficient protection for minority trade unions</td>
<td>“… article 18 of the labour relations Act then it says that a majority trade union can determine the entry level for recognition … that is permitted …”</td>
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<td>Threat of possible amendments to the Labour Relations Act</td>
<td>“… now the newest amendments to the Labour Relations Act, and one cannot speculate about it, because it is not through parliament yet.”</td>
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<td>2</td>
<td>Globalisation</td>
<td>Threat to trade unions</td>
<td>“Globalisation is the biggest destroyer of trade unions.”</td>
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<td>Threat to employment opportunities</td>
<td>“… with the approach they have in terms of your atypical employment practises. Your contract workers, your temporary workers, that type of stuff undermine the continued existence of trade unions.”</td>
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<td>Establishment of international relationships</td>
<td>“… the strengthening of relationships between the unions across-across the countries has helped us to respond very well to this globalised …”</td>
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<td>3</td>
<td>Age of trade union members</td>
<td>Challenge to attract young employees</td>
<td>“Your younger members is, what we experience, do not join immediately … first want to see what this unions means to him, what is it going to mean to him … do not join immediately.”</td>
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<td>Rising age of members is troublesome</td>
<td>“… a union that has got people who are, that have, at the age of exiting, exiting the system, we’ll having the situation where that this union has got no future.”</td>
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<td>Older people more concerned with trade unions</td>
<td>“… older people still do the trade union thing and the younger people are not interested at the moment …”</td>
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<td></td>
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<td>Young people important for continuity of trade union movement</td>
<td>“Because sometimes as we grow older we tend to be diplomatic. And the young people are militant, they can engage, they’ve got power, they’ve got energy. And as a result they are promoting the existence of a union amongst the young people.”</td>
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<td>4</td>
<td>Levels of unemployment in South Africa</td>
<td>High unemployment levels threatens trade unions</td>
<td>“Obviously … if you don’t have people employed you don’t have trade union members.”</td>
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<td>False perceptions that trade unions do not care for the unemployed</td>
<td>“The perception is that trade unions do not care for the unemployed, which is not the case.”</td>
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<td>5</td>
<td>Skill levels of employees</td>
<td>Improved skill levels through collaboration between trade unions and employers</td>
<td>“… one of the things that starts to play a big role in trade, trade unions, but it is also together with the employers and our new acts on skills development and all that stuff.”</td>
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<td>6</td>
<td>Women entering the workforce</td>
<td>Different needs as members</td>
<td>“If you look at a woman then her needs frequently go a bit further and she says I have the requirement to maybe work hours that are not from eight to four.”</td>
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<tr>
<td><strong>Sub-theme: Stereotypes that need to be addressed</strong></td>
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<tr>
<td>a) Women are inferior to men</td>
<td>“... due to inequalities in the country ... the women have a lot in front of them to struggle for and they would definitely need a vehicle which will assist in putting their women rights forwards within the workplace. And the trade union happens to be that vehicle.”</td>
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<td>b) Trade unions are for men</td>
<td>“...because trade unions are seen as a men’s thing a lot of the time, they still have a men’s image and a lot of the women was not so know pro-trade-union-orientated.”</td>
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<td>7</td>
<td>Reasons for joining trade unions</td>
<td>Paradigm shift for joining since South Africa became a democratic society</td>
<td>“... at that stage ... it was purely for the liberation struggle ... The only vehicle then that were available to us to fight the struggle ... And they played the role effectively at that stage. But now it is a completely different ball game.”</td>
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<td>Protection</td>
<td>“… they do not want to get caught alone in the workplace ...”</td>
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<td>Services provided by trade unions</td>
<td>“… the guys will a lot of the time for example join us purely because they are interested in the services ... for example study bursaries for your child.”</td>
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<td>Improvement of employment conditions</td>
<td>“… the people that now join in general, in South Africa, is exactly for this factor, how do I improve my circumstances?”</td>
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<td>8</td>
<td>Trade unions in developed and developing countries</td>
<td>Different roles played by trade unions</td>
<td>“… the role that trade unions plays there (referring to a developed country) is totally different to the role which we play ... the reason is simply that they have passed the bread and butter issues.”</td>
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<td>9</td>
<td>Technology and changing work environment</td>
<td>Changing work environment undermines collective bargaining</td>
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<td>“Employers have the tendency to not follow the collective route, because it the collective route brings the power balance in equilibrium. And if they can talk to the employees more individually then they can undermine that productive power balance.”</td>
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<td>Sub-theme: Threats of changing work environment</td>
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<td></td>
<td>a) Outsourcing</td>
<td>“So there is a lot of little contract companies which deliver a service to the big company and the big companies’ employees divide in half.”</td>
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<td></td>
<td>b) Employees are more sophisticated</td>
<td>“A large part of the labour force has become so sophisticated ... he says I do not have to belong to a union because my skills is so high in this country I can negotiate without a union.”</td>
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<td>c) Technology can replace employees</td>
<td>“So the higher the technology, the fewer people, the smaller the trade union influence.”</td>
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<td>Improved communication systems (technology) are beneficial</td>
<td>“For trade unions it is very important to be in contact with their members ... the new technology makes it a lot easier and quicker to be in contact with our members on a regular basis.”</td>
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<th>10</th>
<th>Job insecurity</th>
<th>Increase of trade union membership</th>
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<td></td>
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<td>“… last year, the year before that when the economic circumstances started to weaken, there was a large increase of people who became members of a trade union.”</td>
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<tr>
<th>11</th>
<th>Level of trade union membership in South Africa</th>
<th>Decrease</th>
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<tr>
<td></td>
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<td>“I think right across the world there is a decline in the trade union industry ... Now the same tendency is in South Africa. There is a decline in the trade union industry everywhere.”</td>
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<td>Increase</td>
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<td>“Trade union membership in South Africa, and I can only talk about us and the trade unions with which I have contact, is growing. For the simple reason that South Africa is still developing.”</td>
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<td>Fluctuating</td>
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<td>“We think it’s fluctuating. Yes we think it is fluctuating. Because if you can look at X (referring to a trade union federation) membership for example. For the past 10 years it has been either 2 million, 1.8 million, 2 million, 1.8 million and so on and so on.”</td>
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</table>
Theme 1: Legislation governing labour relations
Most of the respondents indicated that the legislation governing labour relations in South Africa was sufficient to protect trade unions as organisations in general. However, a number of them also said that, even though they were content in general, the possible amendments were threatening and that the legislation was not protecting minority trade unions with regard to section 18 of the LRA.

Insufficient protection for minority trade unions
The trade unions participants explained how they felt about the legislation governing labour relations and also gave their opinion of the shortcomings of the legislation. The following quotations are examples of the responses from participants:
“... article 18 of the labour relations Act then it says that a majority trade union can determine the entry level for recognition ... that is permitted ...”; “... in the broad except for article 18 which specifically protects majority trade unions.”; “... the labour relations act is written very friendly towards trade unions From our perspective the act is written too friendly for the majority trade union industry. So for institutions or for trade unions which have fewer, which represents fewer members, or the smaller trade unions in South Africa, are severely adversely affected. We think it is undemocratic ...”; “... because there is certain legislation that does not protect them. If you look at for example article 18 of the labour relations Act then it says that a majority trade union can determine the entry level for recognition.”

Threat of possible amendments to the Labour Relations Act
Some of the participants were also concerned with the possible amendments to the LRA. Even though no one stated exactly what part of the amendment is considered, it alarmed them. It was clear from their remarks that, in their opinion, the possible changes will influence trade unions as organisations. They mentioned the following:
“... now the newest amendments to the Labour Relations Act, and one cannot speculate about it, because it is not through parliament yet.”; “there is now possibilities for amendments of the legislation. A person can debate about it for a long time ...”
Theme 2: Globalisation
On the topic of globalisation the representatives indicated that it does play a role in the existence of the trade union as organisations. From the replies it became clear that most of the trade union officials experience globalisation as threatening to their organisations. Also, the influence that globalisation has on the traditional employment relationship was a cause for concern for most of them. However, a number of the respondents did state that the influence of globalisation on the trade union movement could be better understood and managed by having improved relationships with international organisations and trade unions from other countries.

Threat to trade unions
With regard to the perceived threat of globalisation on trade unions, as experienced by respondents, the following comments provided insight into their thoughts:
“Globalisation is the biggest destroyer of trade unions.”; “Globalisation is just another way of exploiting people ... I have no doubt that it will have an impact on the continued existence of trade unions, especially in your developing countries.”; “And that is having a negative impact on jobs and the service. And the jobs are, there is no jobs, there is no trade union memberships. It is as simple as that.”; “... because of globalisation that production process improve so quick and that more are produced with less and less people. And that is deadly for trade unions.”

Threat to employment opportunities
The responses from the officials included their concern about the role globalisation has on the employment relationship as well. The main concern was that the employment relationship was changing. In atypical employment scenarios the traditional employment relationship is destroyed and that is where trade unions traditionally organise. The effect or indirect impact on the strength of trade unions as organisations is thus negative. The responses from the trade union officials included the following:
“... with the approach they have in terms of your atypical employment practices. Your contract workers, your temporary workers, that type of stuff undermine the continued existence of trade unions.”; “It does have an effect. Because sometimes employers in one country develop certain systems of regulating the relationship with their employees. And if that works they will then take that system to another country and another country and all of a
sudden you will have the system applied throughout the globe. For example the issue of subcontracting or outsourcing. It is a phenomenon that started in the U.K ...”; “...globalisation has the effect that if an international organisation comes into a country and local organisation wants to get involved with the international organisation ... because of globalisation the international organisation says I do not need so many workers. I only want to deal with half of them.”

Establishment of international relationships
An interesting response to the topic of globalisation was that most of the trade unions felt that their probability of continued existence improves through the building of relationships with international organisations and trade unions. It became clear from their responses that they perceive the mutual influence that these trade unions have on each other as positive. This was deduced from the following statements:
“... the strengthening of relationships between the unions across the countries has helped us to respond very well to this globalised ...”; “Of course the fact that we sign agreements with trade unions which sit in other countries enables them to come in and add a certain value to us and we add a certain value to them. So that definitely plays a role.”; “... the strengthening of relationships between the unions across the countries has helped us to respond very well to this globalised system ...”; “... and that is why many trade unions, and we are one of them, get a lot more involved with international organisations and international trade unions to enable us to properly handle this globalisation aspect.”

Theme 3: Age of trade union members
When considering the average age of trade union members the responses included; concerns about challenges to enlist young employees as members; concerns of the rising age of trade union members and the interest level towards trade unions from the different age levels.

Challenge to attract young employees
The trade union officials felt that it is challenging to attract young people to join trade unions because young employees seem to be less inclined to join trade unions immediately when entering the workforce. Combined with this, it seems as if young people are less accessible since they are employed in sectors where trade unions do not usually organise. The following statements support these findings:
“Your younger members, what we experience, do not join immediately ... first want to see what this unions means to him, what is it going to mean to him ... do not join immediately.”; “... a lot of young people who enter into the economy, do not enter the economy in the old industrial sectors and that is where trade unions are organised. So you have less access to some young people ...”; “... we have suddenly awaken to the fact that the youth of today are not really into the union. We are now trying some strategies to attract the youth into the trade union.”

Rising age of members is troublesome
The majority of the respondents indicated that they find the rising age of trade union members to be troublesome. One or two participants did indicate that they do have young people joining their unions, but the bulk of the responses were similar to these ones:
“... a union that has got people, who are at the age of exiting the system, will have a situation where this union has got no future. Because five years down the line there is a possibility that that union might be very weak or stop existing at all.”; “... the average age of the craftsmen in South Africa is 55. Now it not only has a radical impact for the artisans in the skills supply in South Africa, but obviously for the trade union as well.”; “the more members who reach retirement age and so forththen it has an effect, your membership numbers gets less.”

Older people more concerned with trade unions
From the responses of the trade union officials it became clear that older employees are more concerned with trade unions than younger employees. It would seem as if the older employees feel devoted towards a trade union while young employees are not that concerned with the trade union movement. Some of their comments included the following:
“... older people still do the trade union thing and the younger people are not interested at the moment ...”; “There is still old people who are loyal to the unions ...”; “... a lot of your established, more senior people for example in our union, they are members of our trade union.”

Young people important for continuity of trade union movement
It could be seen from the findings that all the participants agreed that it is important for the continuity of the trade union movement to have young people in the trade union. The following quotations support this finding:
“Because sometimes as we grow older we tend to be diplomatic. And the young people are militant, they can engage, they’ve got power, uh they’ve got energy. And as a result they are promoting the existence of a union amongst the young people.”; “You know the old people are shy to strike where the young bloods they go onto the streets.”; “... your younger guys have to come in and strengthen the union. And the other thing is also that you want new, fresh, young blood to take over the reins and to provide the union with driving power.”; “For us this is very important because it means continuity. There will be a handover of information, handover of certain experience to the young people who are joining the union.”

Theme 4: Levels of unemployment in South Africa

On the subject of the high unemployment levels in South Africa the trade unions representative all indicated that it has a negative impact on trade unions and that it places trade unions as organisations under a lot of pressure. Furthermore a number of the participants also indicated that trade unions are concerned with the welfare of the unemployed contrary to perception that some individuals might have.

High unemployment levels threaten trade unions

The high unemployment levels in South Africa are a concern for all the participants. Their responses indicated that the continued existence of trade unions is threatened by the high levels of unemployment. The reason for this is that individuals can be trade union members only if they are employed. The statements listed below confirm this finding:

“... per definition, we can only represent employees. So obviously the fewer the employees the less the members will be.”; “Obviously ... if you don’t have people employed you don’t have trade union members.”; “... remember employment means more membership and unemployment means there are no new members coming in. So unemployment definitely has got a negative impact on the growth and the existence of unions.”; “... remember when people are employed, there is prospects for trade unions to grow. And if they are not employed then that will affect trade unions.”

False perceptions that trade unions do not care for the unemployed

Trade union officials expressed concerns about individuals who might have the wrong perceptions of trade unions and their attitudes towards unemployment in South Africa. The respondents indicated that they are concerned and do care for the unemployed and those who
perceive them as organisations who care only for their members, are mistaken. The following quotations proved this concern:

“The perception is that trade unions do not care for the unemployed, which is not the case.”;

“... trade unions are guilty in my opinion because they do not do enough for the unemployed and they only fight for the employed ... that is why we have A (a service within the specific trade union, which provides support in numerous aspects for less fortunate communities) with training colleges and stuff like that.”

Theme 5: Skill levels of employees

When it came to the skill levels of employees, the responses of the participants differed somewhat. While some were convinced that the skill levels of employees are on the increase, some were of the opinion that even though there is an increase in skill levels it is not with the right skills. There were also some participants who said that the skill levels of employees are not on the increase at all.

Improved skill levels through collaboration between trade unions and employers

The participants who were of the opinion that skill levels of employees are on the increase stated that it was because of the collaboration between trade unions and employers. Also the Skills Development Act (1998) and other relevant legislations were mentioned as reasons for this improved skill levels of employees. Respondents mentioned that:

“... I definitely think it has improved ... one of the things that starts to play a big role is trade unions, but it is also together with the employers and our new acts on skills development and all that stuff.”; “... the level of skills is increasing because of certain campaigns from the Y (specific trade union) side, from the unions. To force companies to provide Z (referring to specific classes) classes and other skills programmes in terms of the skills development act.”

Skills-mismatch

While the participants agreed that the skill levels of employees are on the increase, they were concerned with the skills-mismatch of employees. They were concerned that even though individuals did receive training or other forms of skills development initiatives, it is not in the fields where employees are needed. The following statements summarise their concerns:

“... the worry at this stage is that there is an increase in skills of employees especially under young people ... but in the wrong study fields. And that causes a skills-mismatch.”; “... you
will find that they do not give unions or employees the necessary skills that are needed by this country.”

**Unemployability**
The respondents were convinced that the skill levels of employees did not increase. They were of the opinion that the lack of skills makes it difficult for such individuals to find employment. Their statements included the following:
“... the big problem is not unemployment, its unemployability. I mean you just can’t take these people in employment, because the guys just don’t have the skills.”; “You will find that the skills are not so sufficient. So as such we realise that the skill, the level of skill still leaves much to be desired.”

**Theme 6: Women entering the workforce**
Trade union officials perceive the increase of women entering the workforce as a positive challenge for trade unions. Most of the respondents indicated that they were positive about women joining unions, but stated that it did present the union with different challenges, since these members have unique needs. Officials also mentioned that certain stereotype attitudes need to be addressed regarding trade unions and females.

**Different needs as members**
The respondents indicated that they perceive female trade union members as individuals with needs unlike those of men or stated differently, their needs were different in comparison with those of male trade union members. Some of the quotations in this regard were:
“If you look at a woman then her needs frequently go a bit further and she says I have the requirement to maybe work hours that are not from eight to four.”; “… we all know that a woman worker, and this has been proven, is a lot more vulnerable in the working environment than men. You know ladies work hard, they have families that they must take care of, they sometimes feel that they are threatened ... but if she has a union then she knows she can go to them.”

**Sub-theme: Stereotype notions that needs to be addressed**
A number of the respondents were concerned about certain stereotype notions regarding trade unions and women. The first is that women are not equal to men and the second is that trade
unions as organisations are for men. All of these respondents stated that these stereotype notions need to be addressed and these misconceptions should be rectified. Quotations from the respondents indicated the misconceptions and proved their concerns as trade union leaders regarding these aspects:

a) Women are inferior to men

“... due to inequalities in the country ... the women have a lot in front of them to struggle for and they would definitely need a vehicle which will assist in putting their women’s rights forwards within the workplace. And the trade union happens to be that vehicle.”; “... it still happens in this country that they are discriminated on grounds of being a female with regards to promotions, and that a male colleague is promoted before a female is promoted.”; “Women are still regarded as inferior and they are also still regarded as kitchen people and not being exposed to very high paying jobs and so forth and so on.”

b) Trade unions are for men

“... because trade unions are seen as a men’s thing a lot of the time, they still have a men’s image and a lot of the women was not so pro trade union orientated.”; “A few years back they (referring to trade unions) were still seen as old gentlemen’s clubs. So you had a number of middle-aged old men which made the decisions ...”; “... trade unions will not be able to function on their old traditional men’s way and then expect that there must be women joining ... they were actually never institutions for women in the past ...”

Theme 7: Reasons for joining trade unions

Trade union representatives agreed on numerous aspects as to why individuals join trade unions, which included protection, services provided by the trade union and improvement of their employment conditions. It also became clear that, according to trade union officials, people do not join trade unions for the same reasons as before South Africa became a democratic society.

Paradigm shift for joining since South Africa became a democratic society

From the responses of the trade union officials it was clear that they believe there has been a paradigm shift for joining unions. Most of the respondents were convinced that people join for different reasons now than they did before South Africa became a democracy. Their comments regarding this matter included the following:
“... at that stage ... it was purely for the liberation struggle ... the only vehicle then that were available to us to fight the struggle ... and they played the role effectively at that stage. But now it is a completely different ball game.”; “... unions were politicised in that they were assisting other parties that were fighting for freedom. But nowadays because we are in the new dispensation, the roles are no longer the same.”; “... before South Africa got full democracy there was trade unions which were very politicised and they had a political agenda as well. And that agenda is now busy fading away.”

**Protection**

Employees join trade union for protection. Most of the participants were convinced that this is one of the primary reasons for joining a trade union. The responses from the participants indicated that they were convinced that employees who are members of trade unions feel protected from exploitation in the workplace. The following quotations illustrate these beliefs:

“... they do not want to get caught alone in the workplace ...”; “... they are joining in order to protect themselves basically. In order to protect their jobs.”; “... joins a union for the protection which the trade union offers them.”; “You do get your problem children who are always in a dispute with their employers so you do get those as well who join purely for that protection.”; “... they say trade unions must protect us at employment ...”.

**Services provided by trade unions**

Trade union officials also listed services provided by the trade union as a motivation for employees to join trade unions. This could clearly be seen from the following remarks:

“... the guys will a lot of the time for example join us purely because they are interested in the services ... for example study bursaries for your child.”; “... because the trade union provides services a lot of the time which the people want.”; “... people want more from trade unions movement ... they want more services, they want more individual services and the individual support.”.

**Improvement of employment conditions**

Closely related to the motivation of joining a trade union for protection provided, is seeking to better your employment conditions. According to participants, employees are also
motivated to join trade unions to better their conditions of employment. Statements that reflected this finding were:

“... the people that now join in general, in South Africa, is exactly for this factor, how do I improve my circumstances?”; “People join because they realise that the trade union act on their behalf. And it does not only apply to when they have a problem, it also applies for their employment conditions ...”; “One is that they see trade unions as systems or organisations that improve their conditions where they live and their income.”; “... the conditions under which workers work and live calls for the involvement of trade union to improve such conditions and their income.”.

Theme 8: Trade unions in developed and developing countries

The trade union leaders all agreed that the roles played by trade unions in developed counties differ dramatically from the roles played by trade unions in developing countries.

Different roles played by trade unions

The trade union representatives indicated that trade unions in already-developed countries did not face the same challenges as trade unions in developing countries. Furthermore most of the issues experienced by trade unions in developing countries are no longer issues in developed countries. Some of the comments made in this regard by the participants are:

“... the role that trade unions play there (referring to a developed country) is totally different to the role which we play ... the reason is simply that they have passed the bread and butter issues.”; “In the developed countries the systems and the relationships between the three-party alliance between the government and the trade union and the trade union and the employer is a lot more mature and developed. So there is a lot less activism in developed countries. So in the developing countries trade unions still play a very big role in the changing. There is a lot more activism and a lot of the relationships are a lot more immature.”

Theme 9: Technology and changing work environment

The participants perceived changing work environments and an increase in technology as major threats to the trade union movement. Some respondents did, however, also indicate that there are also benefits to certain forms of technology available.
Changing work environment undermines collective bargaining

With regard to collective bargaining in the workplace, trade union representatives felt that the changing work environment is undermining this form of influence used by trade unions. Some of the responses of the participants included the following:

“Employers have the tendency to not follow the collective route, because the collective route brings the power balance in equilibrium. And if they can talk to the employees more individually then they can undermine that productive power balance.”; “Trade unions used to represent workers collectively ... which was easy in the industrial era because there were mass posts ... uniform employment clauses and conditions ... now that labour power is a lot more complicated and also crumbled ... not one large factory where you have members. For example, in Van Der Bijl we have the same number of members in 115 organisations as what we had in one organisation earlier ...”

Sub-theme: Threats of changing work environment

Different threats are caused by the changing work environment and were identified by the participants. These threats include outsourcing, employees becoming more sophisticated and technology that replaces employees. Quotations from the respondents are given below to support the findings.

a) Outsourcing

“So there is a lot of little contract companies which deliver a service to the big company and the big company’s employees are divided in half.”; “Bigger units are divided into smaller units ...”

b) Employees are becoming more sophisticated

“A large part of the labour force has become so sophisticated ... he says I do not have to belong to a union because my skills are so high in this country, I can negotiate without a union.”; “… they identify themselves with their occupation and their careers and with their organisations.”

c) Technology can replace employees

“So the higher the technology, the fewer people, the smaller the trade union influence.”; “Technological development in most cases leads to less people being employed.”

“... it has replaced thousands of jobs.”; “… yes ... it is that stuff about jobless production ...”
**Improved communication systems (technology) are beneficial**

Responses that were more positive were related to technology, specifically communication systems. They indicated that these systems were assisting the trade unions as organisations to stay in contact with every union member on a regular basis. Furthermore, one participant suggested that if trade unions do not use and embrace the technology it would be to their own disadvantage. The following two quotations support this finding:

“For trade unions it is very important to be in contact with their members ... the new technology makes it a lot easier and quicker to be in contact with our members on a regular basis.”; “How do you communicate with 220 000 members if you do not use the electronic media or the electronics, the computer, if you do not use a cell phone?... a trade union is a business ... if you do not use the electronics then you will close your doors.”

**Theme 10: Job insecurity**

In response to questions asked about the influence of job insecurity and the influence it might have on trade unions, all respondents confirmed that it does play a role when employees consider whether they should join a trade union or not.

**Increase of trade union membership**

There was definite consensus on the topic of job insecurity, since all respondents were convinced that there is an increase in employees joining trade unions when they experience a lack of security in the workplace. This observation is confirmed by the following quotations:

“... last year, the year before that when the economic circumstances started to weaken, there was a large increase of people who became members of a trade union.”; “We had record years for joining last year and the year before that. The reason is insecurity.”; “And that is when people join the union, when that insecurity starts creeping in.”; “... when you have job insecurity, you have the perception, which is what I am convinced of, you have the perception that the trade union will help you to eliminate your insecurity ...”

**Theme 11: Level of trade union membership in South Africa**

Trade union representatives have conflicting views regarding the level of trade unions in South Africa and no definite consensus could be reached. While some were convinced that trade union membership numbers are growing in South Africa, others seemed to believe that
there is a decline of trade union membership. Yet another opinion from some respondents was that there is neither definite growth nor decline.

**Decrease**

Some of the responses of trade union officials who are of the opinion that trade union membership numbers are decreasing, include the following:

“I think right across the world there is a decline in the trade union industry ... Now the same tendency is in South Africa. There is a decline in the trade union industry everywhere.”; “I think it is busy declining ... trade union membership has drastically declined in South Africa ...”; “Yes, like I said, the number, the membership is declining ...”.

**Increase**

The respondents who believe trade union membership numbers are growing made the following comments:

“Trade union membership in South Africa, and I can only talk about us and the trade unions with which I have contact, is growing. For the simple reason that South Africa is still developing.”; “I think it is growing ... decline in Europe ... in developed countries because there is a smaller degree of threat to job security and unjust handling, unfair handling in the workplace ... there is a smaller need for it, here with us, definitely not.”; “… guys think that because trade unions is busy declining in certain countries overseas ... it is not something that is happening here ... So I think the myth that exists that trade unions are busy declining, is not true. To tell you the truth the good trade unions are busy growing.”

**Fluctuating**

Those who were convinced that the trade union membership numbers are merely fluctuating, with no definite growth or decline, supported their viewpoints with the following statements:

“We think it’s fluctuating. Yes we think it is fluctuating. Because if you can look at X (referring to a trade union federation) membership for example. For the past 10 years it has been either 2 million, 1,8 million, 2 million, 1,8 million and so on and so on.”; “I think in general we are just treading water ... the, membership density is staying the same at this stage. So I don’t think there is a definite positive growth or a definite decline ...”; “… it is stabilising. They have stabilised so to speak because we still have the same X (referring to...
DISCUSSION

Labour relations around the world and also in South Africa are complicated and complex and are characterised by an ever-changing environment with various factors influencing these relationships. The International Labour Organisation defines a trade union as an organisation based on membership of employees in various trades, occupations and professions, of which the main focus is the representation of its members at the workplace and in the wider society (ILO, n.d.). Trade unions have played an important role in the past in labour relations. However, having been influential and an important role player in the past, does not guarantee your future, especially not in such a volatile world of work as we experience in this day and age. The general objective of this study was to determine what factors will influence the future of trade unions as organisations in South Africa, according to trade union leaders. In Phase 1 eight themes were identified that relate to the overall perceptions of trade union leaders about factors influencing trade unions as organisations. In Phase 2 representatives were also queried about factors that are considered to be important in literature. Some of these factors agree with the themes identified in Phase 1. However, there are a number of themes in addition to the eight themes identified in Phase 1. The implication is that a total of sixteen themes are discussed in the subsequent session.

Quality of service delivered

The first theme that was clearly identifiable was the importance of a high quality of service. Trade union leaders were of the opinion that providing a high quality service to trade union members would increase the probability that employees would remain members of the trade union. Furthermore it would increase the chance that employees who are not involved with the trade union currently, would join the union. Crucial to this is that the members should perceive the service as sufficient and satisfactory. They should feel assured that the trade union is acting in their best interest.
The economic state of South Africa

A number of factors contributed to this identified theme, including the changing economy of the country, unemployment of individuals, work relationships outside the traditional employment relationship, the economic recession and job insecurity of employees.

Changes in the economy were perceived as a threat to the continued existence of trade unions as organisations. Respondents identified the focus shift from the industrial era to the information era as the reason for this threat. The information era, also known as the information age, new economy and information society, is characterised by a dramatic and rapid improvement in information and communication technology (Finnis, 2003). The reason why trade unions leaders perceive this as a threat is because trade unions came into existence in the previous era with the perceived injustices that were brought about by the industrial revolution (Nel, Swanepoel, Kirsten, Erasmus, & Tsabadi, 2005). Trade unions emerged as organisations that protected employees from exploitation. Trade union leaders stated that this change places trade unions before a crisis, since their relevance to labour relationships is in the balance.

The high unemployment rate was another cause for the concern identified by the participants of this study. Most of the respondents expressed concern with the impact that high unemployment levels have on the country’s economy. Apart from the pressure caused by the high levels of unemployment on the economy, trade unions also explained that when there are fewer people in employment, the opportunity to enlist new members also decrease. One respondent summarised this problem by explaining that per definition trade unions are only allowed to represent employees. The indirect implication is thus, if unemployment should increase further, it could be very damaging to trade unions as organisations, since according to the respondents, less members signify less power. In addition to the concerns trade union leaders indicated about the economic pressure and the lessened opportunity to recruit members, they were also concerned about how individuals perceived them as organisations. They repeatedly expressed that they do care for the unemployed and that even though their first priority remains with their members, they are concerned about the unemployed.

Work relationships outside the traditional employment relationship are also a cause for concern for trade union organisations. Trade unions can only provide protection to
employees. Work relationships outside the traditional employment relationship are often referred to as atypical employment. According to the International Labour Organisation atypical employment includes, but is not limited to, part-time work, fixed-term contracts of employment and the so-called triangular employment relationships, i.e. arrangements whereby workers are taken on by an employer with the purpose of being posted with a third party known as a user enterprise (ILO, 2007). Increasing numbers of individuals in the workforce are not employed in the traditional employment relationship and this has a very negative impact on trade unions.

With the global economic meltdown or the worldwide economic recession South Africa did not escape unscathed. Many jobs were lost and this affected trade unions as well. One of the indirect implications of an economic recession is that many organisations have to retrench employees in order to survive. Retrenchments are dismissals based on the operational requirements. Operational requirements are defined by the Labour Relations Act (66 of 1995) as the “requirements based on the economic, technological, structural or similar needs of an employer” (LRA, Section 213). The Code of Good Practice Based on Operational Requirements passed in terms of Section 203 of the Labour Relations Act, expands on this definition and reads as follows: “It is difficult to define all the circumstances that might legitimately form the basis of a dismissal for this reason. As a general rule, economic reasons are those that relate to the financial management of the enterprise ...” (The Code then moves on to explain the technological and structural needs). It is important to notice that this type of dismissal is classified as a no-fault dismissal, which means that the reason for dismissal originates in the employer’s needs and requirements (Basson et al., 2005).

The recession placed immense financial pressure on many organisations and in these unfortunate circumstances one should acknowledge that the employer is not in a position to change the situation either. Seen in this light it is very difficult for trade unions to fight the resulting dismissals. Trade unions can thus only facilitate the process to minimise job losses and negotiate severance pay and other forms of compensation. It is therefore clear that the recession influenced trade unions as organisations negatively, because of membership losses.

The flipside of this unsure economic state of the country is that trade union membership numbers increase when employees experience job insecurity. Trade union leaders indicated
that the membership numbers increased over the last few years specifically for this reason. According to the respondents employees join trade unions when they experience job insecurity, since these employees believe that trade unions will be able to better protect them than they would be able to protect themselves.

**Employers’ attitudes**

The approach with which employers manage their workforces, as well as their attitude towards trade unions will have an influence on the continued existence of trade unions. A number have stated that employers who have positive attitudes towards their employees could have a negative impact on trade unions. The reason for this is that employees of such organisations cannot see or comprehend the value of a trade union while they experience such favourable circumstances. Such employees are thus difficult to attract to the union.

On the other hand, employers who do not comply with legislation and exploit employees are to the advantage of trade unions. Employees who work for employers who cause their work experience to be negative are more likely to join unions. Such employees believe that trade unions will provide the necessary protection and enable them to negotiate with the employer on more equal grounds.

**Trade union federations**

As a trade union it can be highly beneficial and favourable to belong to a trade union federation. When individual trade unions combine their resources with other trade unions at local and national level and they unite and stand together, a trade union federation is formed (Venter, 2003; Nel et al., 2005). By uniting within a single federation, unions are able to negotiate more effectively and also have a better chance of achieving more broadly based political and economic goals (Venter). Many unions affiliate to national trade union federations such as Cosatu, Nactu or Fedusa (Nel et al.). Trade union affiliation is a key method whereby trade unions leverage power in order to better serve the interests of their constituencies (Nel et al.).

However, there were also some of the respondents who stated that certain trade unions together with their federations were too politically orientated. They said that such alliances
between political parties and trade unions are not healthy, because if it should be threatened or broken, it could have a very negative impact on the trade union movement.

**Perceptions of trade unions**

Trade union leaders were concerned that individuals and societies in general have the wrong perception of them, and therefore might have a negative outlook towards trade unions. A few stated that they were more than just organisations causing labour unrest through striking or other forms of demonstrating. Nevertheless, they did seem to realise that it is trade unions themselves who reinforce these perceptions, whether positive or negative, through their own behaviour.

**Legislation governing labour relations**

It is generally accepted that the legislation governing labour relations in South Africa is very favourable for trade unions as organisations. Nevertheless, trade union leaders seem to be concerned about certain provisions made in the legislation. Section 18 of the Labour Relations Act regulates the right to establish thresholds of representativeness and reads as follows:

(1) An employer and a registered trade union whose members are a majority of the employees employed by the employer in a workplace, or the parties to the bargaining council, may conclude a collective agreement establishing a threshold of representativeness required in respect of one or more of the organisational rights referred to in sections 12, 13 and 15 (LRA, section 18(1)).

In simple terms, an employer together with the trade union with the highest membership in the organisation (or the parties to the bargaining council) have the right to exclude minority trade unions, by simply making the threshold of representativeness higher than what the membership numbers are (in that organisation) for the minority trade union by a collective agreement. Trade union leaders were very concerned about this aspect of the Labour Relations Act. Some even said that it was undemocratic.
A further concern was the possible amendments to the Labour Relations Act. The respondents did not specifically indicate which considered amendments concerned them and stated that it was not worth speculating, since the amendments were not passed yet.

**Focus shift for trade unions**

There has to be a definite shift in how trade unions operate and they will have to adapt in order to survive. To ensure their future in South Africa they need to change to meet the challenges of the changed labour market. Trade unions should adapt to a new type of employee with different demands and different viewpoints. All of the participants agreed that if these organisations were not able to adapt and change they would not survive in future.

**Globalisation**

The globalised world of work is perceived as a definite threat to trade unions as organisations. Globalisation had a definite effect on the traditional employment relationship and this is a major source of concern. Globalisation has brought about different types of work relationships, for example outsourcing and atypical employment. This is alarming to trade union leaders, because the areas where trade unions traditionally organise, are eroding as a result of these other forms of employment.

However, trade union leaders did indicate that they were responding to this crisis in a very constructive manner. Most of the respondents indicated that they were establishing ties with trade unions in other countries. This helps them to address the challenges presented by globalisation in a positive and practical manner.

**Age of trade union members**

With regard to the average age of trade union members, the trade union leaders had a number of concerns. The first major concern was the challenge to attract young employees. There are two reasons for this, one being that the individuals who are absorbed into the labour market enter the workforce or sectors where trade unions are not traditionally organised. The second reason for the difficulty experienced by trade unions to enlist young employees is that they are apparently less interested in the trade union movement than older employees and seem to be less inclined to join a trade union directly after entering the labour market.
The second concern relates to the rising age of trade union members and the necessity of young people to continue the trade union movement. Trade union leaders stated that it appears that older employees are more involved in the trade union movement. For continuity of these organisations, young members are needed. As one trade union leader stated, “Young members should take over the reins and provide the union with driving power”.

At this stage the average age of the membership base is rising and this is a major concern for trade unions as organisations. The implication is that when these employees exit the labour sector though retirement, the membership base becomes eroded. Participants did, however, point out that they were addressing this problem and that they were implementing a number of strategies to attract new and young members.

**Skill levels of employees**

The skill levels were also considered among the factors influencing the future of trade unions. According to Basson et al. (2005) “the future development of the South African economy will, to a significant extent depend on the availability and appropriately qualified persons to perform the wide variety of tasks associated with a modern and competitive economy” (p. 371). The legislative framework regulating the skills development of the labour force in South Africa is primarily received from the Skills Development Act (97 of 1998) and The Skills Development Levies Act (9 of 1999). The Skills Development Act (97 of 1998) provides for an institutional framework for skills development and it is also this framework that encourages employers to develop the skills of their employers (Basson et al.). Some of the respondents said that skill levels of employees did improve and that this improvement was caused by the collaboration between trade unions and employers. This can be understood when one considers that trade unions will do everything within their power to ensure employers comply with legislation.

Other respondents agreed that the skill levels of employees did increase, but these respondents were of the opinion that these skills are not in the needed areas. This causes an over-supply of skilled labours in one sector, but skill shortages still remain in other sectors. One of the respondents referred to this as a skills-mismatch. Skills-mismatch occurs when employees have qualifications, but do not have the qualifications required to take up the available positions (Anon, 2009). This means that even though there might be
unemployment, jobs cannot be filled since employees do not have the right skills to meet the needs of modern businesses (Anon, 2009).

Some of the respondents, however, disagreed with the others and were convinced that the skill levels of employees are unfortunately not on the increase. Unemployability, on the other hand, occurs when individuals cannot find employment simply because they have no skills. The South African economy has been generating jobs with the majority requiring semi-skilled and skilled labour, and only a small percentage requiring labour at the low-skilled level (Anon, 2007). Therefore the labour demand is for intermediate to high-end skill levels. Unfortunately 80% of the population is largely unskilled, or, at best, trained at the lower end of the skills pipeline (Anon, 2007). The implication of this is that these individuals are seen as unemployable.

**Women entering the workforce**

Women who are entering the workforce are seen as a positive challenge for trade unions as organisations. Even though trade union leaders stated that female employees had different needs compared to those of men, the different and unique needs of these members give trade unions the opportunity to adapt and change to meet these demands. Trade unions are also challenged to provide services that would benefit women in the workforce as well.

Besides the positive perception trade union leaders demonstrated towards women entering the workforce and joining trade unions, these officials voiced some concerns about stereotypes and perceptions that need to be addressed regarding trade unions and females. The first is that women are not equal to men and the second that trade unions as organisations are for men - both completely false and misleading. All of these respondents stated that these stereotypes need to be addressed and these misconceptions should be rectified.

Section 6(1) of the Employment Equity Act (55 of 1998) prohibits unfair discrimination by stating that:

(1) No person may unfairly discriminate, directly or indirectly, against an employee, in any employment policy or practice, on one or more grounds, including race, gender, sex, pregnancy, marital status, family responsibility, ethnic or social origin, colour, sexual
orientation, age, disability, religion, HIV status, conscience, belief, political opinion, culture, language and birth.

This provision in the EEA (55 of 1998) clearly stipulates that no one is allowed to discriminate against women in the workforce and any discrimination on this ground is clearly outlawed. The perception that trade unions are organisations just for men is also completely false according to the respondents. Some of the respondents did say that these organisations were seen as “old gentlemen’s clubs” in the past but that this misconception was receiving a great deal of attention.

**Reasons for joining trade unions**

According to trade union leaders the reason why employees join trade unions at the moment is the protection provided to the employee, the services provided to the member on an individual basis and the improvement of the employment conditions of the employee. Trade union leaders also made it clear that people do not join trade unions for the same reasons as before South Africa became a democratic society.

Employees join trade union for protection. Trade unions ultimately exist to protect both the work- and non-work-related interests of their members, whether these be economic, social, political, or environmental (Venter, 2003). Closely related to the motivation of joining a trade union for protection provided, is seeking assistance to improve employment conditions. Unions actively seek to influence their members’ working conditions and issues surrounding safety, health and welfare will be specifically targeted (Venter).

Trade union leaders also listed services provided by the trade union as a motivation for employees to join trade unions. A number of the respondents stated that members sometimes join trade unions to benefit from the services provided by the trade unions. Examples of such services include retirement plans, bursaries available to dependants of the trade union members, financial services and many more.

**Trade unions in developed and developing countries**

The roles of trade unions in developing countries are very different to their roles in already developed countries. The reason for this is that trade unions in developing countries, such as
South Africa, still have to deal with issues that are no longer important to trade unions in developed countries. The financial state of those countries is better and the levels of unemployment are very low compared to South Africa.

**Technology and changing work environment**

The changing work environment and an increase in technology are threats to the trade union movement. The changing work environment is undermining collective bargaining. The first reason for this is that more individual employment contracts are negotiated between employees and employers. The second reason is that the structure of the organisation itself has dramatically changed. Numerous organisations have restructured and now only focus on their core business. The rest of the functions are contracted out. The effect on the trade union is that the number of employees that trade unions can enrol within one organisation is severely eroded. Furthermore, a number of the functions that are contracted out are done by contract workers, not employees.

The second threat for trade unions caused by the changing work environment is that a lot of employees are more sophisticated in this modern economy. These employees feel assured in their employment, since they have high skill levels and assume that this will enable them to negotiate on their own. These employees also identify themselves with their jobs, their careers and with their organisations.

Finally, a major concern was that technology replaces thousands of employees’ jobs. Production processes keep on improving and less and less people are used in these production processes. The implication is that the less people in employment, the smaller the influence of trade unions. Responses that were more positive regarding technology were focused specifically on communication systems. These systems can assist trade unions as organisations to stay in contact with every union member on a regular basis.

**Political and economical theories and perspectives**

A very interesting theme that became apparent was the political and economic perspectives of trade unions and how this played a considerable role in their opinions and responses to the questions asked. Two very distinct and opposing perspectives are noticeable in trade unions as organisations in South Africa, the one being socialist and the other capitalist.
For the purpose of understanding the two chains of thought a brief explanation was provided for each, but no effort was made to identify a “right” or “wrong” theory or perspective.

Socialism strives to preserve individual freedom and to promote peaceful constitutional change, social equity and the need to alleviate capitalism’s negative effects (Jackson & Jackson, 1997). Socialists believes that public ownership as the means of production and exchange is necessary to create social justice and they want to nationalise at least the significant sectors of the economy, for example banking (Jackson & Jackson).

In a capitalist system the major means of production are owned by individuals and not by the state (Jackson & Jackson, 1997). The economic philosophy which underlies capitalism emphasises private ownership and a laissez-faire market economy that is little regulated by governments (Jackson & Jackson). It also emphasises individualism and promotes the right of individuals to seek their own economic self-interest (Jackson & Jackson).

These two economic and political perspectives clearly differ dramatically, and it is not surprising that their approaches to labour relations also hold opposing views. What is very interesting is that even though the South African society is governed under capitalism (Venter, 2001), the ruling party has strong ties with specific trade unions and trade union federations that strive for social democracy.

**Level of trade union membership in South Africa**

The viewpoints of trade unions representatives differed regarding the level of trade unionism in South Africa and no definite consensus could be reached. Some were convinced that trade union membership numbers are growing in South Africa and supported their argument by saying that this is still a developing country and trade unions therefore still play an important role in labour relations. Others believe there is a decline of trade union membership. Their argument was that trade unions around the world are on the decline because of the changing economy, and the same tendency is evident in South Africa. Yet another opinion from some respondents was that trade union growth is at a standstill and there is neither definite growth nor decline. Their argument was that trade union membership numbers of a trade union federation were basically standing still.
RECOMMENDATIONS AND LIMITATIONS

The recommendations for this research are divided into two sections. The first section deals with the recommendations made to ensure the future of trade unions as influential role players in the South African labour market. These recommendations were directly derived from the information received from trade union leaders in the industry. The second section deals with recommendations for further research and the limitations of this research.

Recommendations linking to the problem statement

The collective approach of trade unions should shift and they should focus on individual member support. They have to realise that members are clients, so providing high quality service to each individual is essential.

Trade unions should change their approach as to how they assist their members. Apart from just supporting their members in the workplace, trade unions should prepare employees for the workplace.

Trade unions should assist in the training and development of employees. This assistance should go beyond just ensuring that employers comply with the relevant legislation governing the skills development of employees. Establishing training facilities and carrying the obligation of full or partial financial costs involved for developing these facilities should be part of their responsibilities. The obligation of the trade union should shift to more than just protecting their members.

Trade unions should provide additional benefits to members, which could include the availability of bursaries to dependants of the trade union member, training and developing programmes, providing opportunities for members to get involved in helping poor communities, and providing financial services, pension funds and funeral plans.

Trade unions should address negative perceptions that might exist around the role of trade unions as organisations. Members should also be convinced that they are always acting in their best interest.
Trade unions should get directly involved in job creation and helping workers to find decent, permanent and sustainable employment.

The obligation of the trade union should reach beyond just addressing labour matters. They should be involved in other matters that are important to their members. This could include providing services to the poor and protecting minority groups and their interests, for example, taking up the struggle to ensure that minors receive education in the language of their choice.

Trade union federations are important role players in the labour dispensation of South Africa and trade unions can ensure their role in the labour market by affiliation to such a federation.

Trade unions should give attention to the recruiting of groups beyond their traditional member base, for example young employees and women.

**Recommendations for further research and limitations of this research**

In this study, interviews (including field notes) were the only method used for data collection. Other data gathering methods, for example group interviews, might provide additional information regarding the viewpoints of trade union leaders about factors influencing trade unions as organisations.

Afrikaans and English were the only languages used during the interviewing process and this may present a further limitation. Future research might benefit from interviewing all participants in their home language, since participants could probably express themselves better in their mother tongue.

This qualitative study can serve as the basis for future quantitative studies. The themes identified in this study can be used to formulate hypotheses for quantitative research regarding the future of trade unions as organisations.

No effort was made to control the race, socio-economic status, gender or age of participants, but coincidentally all the participants in this research study were males. This made comparisons between male and female responses impossible. Even though the responses and
viewpoints of females might differ, it could not be portrayed in the findings and this could be a limitation to the study.

There is a possibility that some of the research participants might have been concerned about the confidentiality of the interviews, especially since the interviews were recorded with an audio voice recorder. Nevertheless, it should be noted that the researcher did inform the participants that the interviews would be recorded. Participants were assured that their identity and the identity of the trade union that they represented during the interview would be treated with confidentiality. Furthermore, participation was strictly voluntary. Nevertheless, this might have had an influence on the outcome of the results.
LIST OF REFERENCES


CHAPTER 4: CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS
In this chapter, the conclusions of this research study are given in accordance with its objectives. Subsequently the limitations of the research are discussed together with the recommendations and suggestions offered to registered trade union organisations and for future research.

CONCLUSIONS

The first objective was to determine if the same reasons for joining trade unions still apply or whether there has been a shift in the motivation of employees. Apart from the challenges employees faced during the industrial era, employees in South Africa also had the unique struggle of fighting the apartheid regime and trade unions played an instrumental role in that regard. When South Africa became a democratic country the huge driving gear to belong to a trade union was lost. Trade union officials indicated that most people currently join trade unions for protection, services provided by trade unions and the improvement of their employment conditions.

The second objective was to establish if the structures of trade unions in South Africa are sufficient to deal with an ever-changing working environment. Even though trade unions listed a number of reasons why they felt that changes to the work environment are threatening the continued existence of trade unions as organisations, they also gave numerous suggestions of how they were adapting to these changes to overcome this challenge and threat.

The third objective was to determine if the legislation governing labour relations in South Africa is sufficient to protect trade unions as organisations. From literature it became apparent that the legislation in South Africa does in fact protect registered trade unions to a great extent. Readers are kindly referred to Chapter 2 for supporting literature in this regard. However, despite all these protective measures provided for by the legislation governing labour relations, trade union officials did show certain concerns. They felt that the possible amendments to the Labour Relations Act (66/1995) could threaten them in certain ways. Section 18 of the Labour Relations Act was seen as over-protective with regard to the majority of trade unions and, as such, a threat to minority trade unions.
The fourth objective was to establish if the level of unemployment and job insecurity influences trade union membership. The high unemployment level in the South African labour market has a very negative influence on trade unions. Even though the high level of job insecurity was seen as unfortunate, trade union officials indicated that it has a positive influence on trade union membership numbers. The respondents indicated that people are more inclined to join trade unions if they experience low levels of job security.

The fifth objective of this research was to determine if globalisation affects trade unions in South Africa. The literature that addresses this phenomenon indicates that different schools of thought exist about the topic. While there was a chain of thought that stated that globalisation offered new opportunities to trade unions, others felt that it was a threat to trade unions as organisations. The respondents gave a clear indication that globalisation was a threatening tendency in the labour market, but stated that this threat could be minimised with the establishment of relationships with trade unions and organisations internationally.

The sixth objective of this study was to determine if technological changes and advancements play a role in trade unions’ ability to organise. Technology was perceived as very threatening by trade union officials, since it has a negative influence on the ability of trade unions to organise. Furthermore, because of technological advancements, numerous job opportunities are lost since production processes are more developed. However, improved technological systems especially in communication does help trade unions to communicate better and more regularly with their members.

The final objective of this study was to establish what the possible differences between trade unions in developing countries and already developed countries might be. In Chapter 3 it became apparent that trade union officials were convinced that trade unions in developed countries have different functions as organisations in comparison with trade unions in developing countries. The reason for this is that trade union members of the different countries have different needs and require different forms of support from trade unions.
RECOMMENDATIONS AND LIMITATIONS
The recommendations for this research are divided into two sections. The first section focuses on the recommendations made to ensure the future of trade unions as influential role players in the South African labour market, which is directly linked to achieving an objective for this research. The second section deals with recommendations for further research and the limitations of this research.

Recommendations linking to the problem statement
The recommendations listed below are all focused on action steps trade unions can take to ensure their future as organisations.

- Trade unions should rethink their approach. They should not only focus on their traditional collective approach but also focus on individual member support.
- Trade unions should not only assist their members in the workplace, but should also prepare employees for the workplace and provide assistance in this regard.
- Trade unions should assist in the training and development of employees. By establishing training facilities they will be directly involved with the empowerment of their members.
- Trade unions should provide additional benefits to members. A number of examples were set out in Chapter 3.
- Trade unions should address negative perceptions that might exist around the role of trade unions as organisations.
- Trade unions should get directly involved in job creation and helping workers to find decent, permanent and sustainable employment.
- The obligation of the trade union should reach beyond just addressing labour matters. They should be involved in the matters that are important to their members.
- Trade union federations are important role players in labour dispensation of South Africa and trade unions can ensure their role in labour market by affiliation to such federations.
- Trade unions should give attention to recruiting groups beyond the traditional member base, for example young employees and women.
Recommendations for further research and limitations of this research

The first limitation of this study is that the comparison was only drawn between the European Union and South Africa to establish what factors influence trade union membership levels in both developed and developing countries. Comparing South Africa with other developed countries, for example the United States of America, Canada or New Zealand might provide other perspectives or highlight different factors.

Another possibility is a research study comparing countries with similar developmental status or political background as South Africa. This might provide other perspectives of the factors influencing the levels of trade unionism.

The only data collection method used during the empirical study of this research project was interviews. Other data gathering methods, for example group interviews, might provide additional information regarding the viewpoints of trade union leaders about factors influencing trade unions as organisations. Future studies should consider a wider range of data collecting methods, since other forms of data collection could lead to different results.

Afrikaans and English were the only languages used for empirical data collection and this may present a further limitation. Future research might benefit from interviewing all participants in their home language. It ought to be acknowledged that participants could probably express themselves better in their mother tongue.

This qualitative research project can serve as the foundation for future quantitative studies. The themes identified in this research could be used to formulate hypotheses for quantitative research regarding the future of trade unions as organisations.

No effort was made to control the race, socio-economic status, gender or age of participants. Coincidentally all the participants in this research study were males. The limitation lies therein that no comparisons could be made between male and female responses. Consequently, even though the responses and viewpoints of females could have been different, it could not be portrayed in the findings.
All participants were informed beforehand that the interviews would be recorded. They were assured that their identity and the identity of the trade union that they represented would be treated with confidentiality. Furthermore, participation was strictly voluntary. Nevertheless the possibility does exist that some of the research participants could have been concerned about the confidentiality of the interviews, which were recorded. This might have had an influence on the outcome of the results.
ADDENDUM 1: EDITORIAL POLICY AND GUIDELINES FOR CONTRIBUTORS

Editorial mission
It is the purpose of the journal to promote and facilitate the understanding and development of theories and practices concerned with people in relation to employment in its broadest sense, by providing a forum for constructive debate, discussion, analysis, reporting and commentary.

Scope of the journal
Apart from articles of an academic nature, which are research based, the journal will publish commentaries, analyses, overviews, case studies, survey results and reports on aspects related to employment relations (in the broadest sense) in South and southern Africa. Articles on any relevant international issues as they relate to current ideas, theory building and developments in practice will also be considered. While interested authors from any country are invited to submit their work for possible publication, Africa-related themes are especially encouraged in the context of the dire need to develop indigenous theory and understanding of people management in the African context. “Employment relations” is a term which is broadly considered to include the following: work, employment and unemployment; labour and trade unionism; organisational behaviour, change and development; education, training and management development; labour law; collective bargaining, direct and indirect forms of worker participation and industrial democracy at all levels from the shop floor to the national level of tripartism; labour economics and labour market developments; forms of industrial conflict; organisational and cross-cultural communication; national labour policy trends and developments; human resource management topics, including, but not limited to, equal opportunities, affirmative action, discrimination, diversified and multicultural workforces, human resource planning, job and work design, recruitment and selection, organisation entry, performance management, career and succession management, health, safety and employee well-being, motivation, leadership, remuneration and reward management; broader environmental trends as they relate to employment; and international comparative employment relations and themes related to people management strategies and practices in general. The journal will therefore be of interest to practitioners, researchers, academics, trainers and educators as well as to policy makers in the private, public and semi-public sectors of South Africa and other countries.
Nature of contributions
The journal welcomes the submission of manuscripts by policymakers, practitioners, academics and researchers. Contributions for the Academic section (accredited) are especially welcome. The criteria for acceptance are based on the soundness of the research base and/or the academic rigour of the arguments provided. Contributions for the Forum section (non-accredited) could include comments and/or reports on interesting and relevant developments and/or case studies with significant practical value but without the necessary theoretical or academic underpinning. As far as possible, manuscripts should display a fine balance between well-attested facts and well-informed opinion and argument and a writing style which is intelligible to specialists and non-specialists.
Dear Sir/Madam

**Request for Masters Research – Labour Relations.**

Limited research studies have been done of trade unions as organisations in South Africa. A research study of the trade union as an organisation will provide our study field with some insight of trade unions and will empower unions to air their views of labour relations in South Africa in the academic field.

The school of human resources at the North West University (Potchefstroom campus) is currently engaged in a comprehensive research project regarding the factors which could influence the future of trade unions as organisations in South Africa. We depend however, on the input from people in practice in order to ensure that the results will be both insightful and reliable.

If the union is willing to participate, we would like to interview union representatives, specifically senior officials, to determine what factors according to them will influence the future of trade unions as organisations in South Africa.

All the information obtained during interviews will be handled with great caution to ensure confidentiality. No specific union will be identifiable from the results of our research.

Should you require further information please do not hesitate to contact:

Miss Uys at 072 063 9057 or mari_uys@yahoo.co.uk

Yours sincerely

Dr H.M. Linde
Programme leader in Business Sociology: Labour Relations
ADDENDUM 3: EXAMPLE OF APPOINTMENT CONFIRMATION ELECTRONIC MAIL

Dear <name>

Thank you for making the time to participate in this research project of the North West University. Our interview time is confirmed for <time> on the <date>.

Please note that the confidentiality agreement will be handed to you on the date of the interview. This document confirms that comments made during the interview will not be published in such a way that content can be linked to you, the interviewee.

I look forward to hearing your views.

Kind regards,
Marié Uys

Researcher: NWU
e-mail: mari_uys@yahoo.co.uk
Contact number: 072 063 9057
ADDENDUM 4: EXAMPLE OF APPOINTMENT CONFIRMATION ELECTRONIC MAIL (AFRIKAANS)

Geagte <naam>

Baie dankie dat u die tyd maak om deel te neem aan hierdie navorsingsprojek van die Noord Wes Universiteit. Ons onderhoud tyd is bevestig vir <tyd> op die <datum>.

Let asseblief daarop dat die vertrouensverhouding kontrak aan u oorhandig sal word op die dag van die onderhoud. Hierdie dokument bevestig dat die terugvoering wat gegee word tydens die onderhoud nie op so ‘n wyse gepubliseer sal word dat die inhoudelike met u, die persoon met wie die onderhoud gevoer is, verbind kan word nie.

Ek sien uit daarna om na u standpunt te luister.

Vriendelike groete,
Marié Uys
Navorser: NWU
epos: mari_uys@yahoo.co.uk
Kontak nommer: 072 063 9057
ADDENDUM 5: EXAMPLE OF CONFIDENTIALITY AGREEMENT

This agreement is made as of the __________________________________________________________________________ (date) by and between:

MARIÉ UYS (the Researcher) and
___________________________________________________________________________________________________________ (the Interviewee), of _____________________________________________________________________________________________________________ (the Trade Union).

This Agreement shall govern the conditions of disclosure by the Researcher of any information provided by the Interviewee during the course of this research project conducted by the School of Human Resources at the North West University.

With regard to the above stated information, the Researcher hereby agrees:
1. To submit a transcript of the interview to the Interviewee for scrutiny and comment on content of the above mentioned interview, on request.
2. Not to publish any of the interview content in such a way that that content can be related to the interviewee (either in their personal capacity, or as a representative of the trade union) without prior written consent of both the Interviewee and the Trade Union.

The Researcher reserves the right to:
1. Publish the interview content as part of bulked statistical data or as anonymous quotes that can in no way be linked to the Interviewee or to the Trade Union, without prior written consent of either the Interviewee or the Trade Union.

The Researcher agrees to the conditions of this Agreement as of the day and year first above written.

_______________________________________
Marié Uys
Researcher: School of Human Resources, North West University.