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Social movement unionism: the case of South Africa

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ABSTRACT
In the context of renewed international debates about the significance of social movement unionism, this article undertakes a detailed analysis of social movement unionism in a South African steelworks. The study investigates the importance to union formation of political, racial, migrant and ethnic identities forged beyond the workplace, and assesses the impact of the transition from apartheid to democracy on union social structure. It argues that the prevalence of both popular political and premodern identities, and of intense internal contestation, coercion and violent conflict, contradicts what are frequently regarded as core features of social movement unionism. With the transition to democracy and processes of elite formation in postcolonial South Africa, social movement unionism has undergone an erosion, as solidarity has fractured along new and old lines. The article argues that the term social movement unionism has become ambiguous through too broad an application, and concludes that, rather than attempting to define a specific model of social movement unionism, analysis should focus on understanding the movement dimension of trade unionism, its relation to the institutional dimension, and how this changes historically and varies in different sociopolitical contexts. Claims about the transferability of union strategies across national frontiers must be regarded with scepticism.

KEY WORDS
migrant workers / transition / union strategy / violence / worker identity

The concept of social movement unionism (SMU) has re-emerged in recent debates about the increasingly difficult challenges facing labour movements in the industrialized countries, and the potential for revitalizing

these movements. Some scholars, as well as trade union activists, have begun to identify new and innovative union strategies as a form of SMU, and to suggest that both scholars and unionists in the North could learn from innovations in the South (Adler and Webster, 2000; Moody, 1997; Waterman, 1993, 2001; Webster and Lipzig-Mumme, 2000). Moody and Waterman, in particular, argue that globalization creates the conditions for the spread of SMU (although they advocate different models), and indeed for a global SMU.

The concept of SMU was originally developed by progressive scholars in an effort to understand the militant, mobilized industrial unions emerging in the newly industrializing countries, such as Brazil, South Africa, South Korea and the Philippines, in the 1980s (Lambert, 1990; Lambert and Webster, 1988; Munck, 1987; Scipes, 1992; Seidman, 1994; Waterman, 1984; Webster, 1988). These scholars turned to social movement theory to develop a conceptual framework for the study of what they regarded as new and innovative forms of unionism, which revealed the limits of metropolitan industrial sociology with its focus on the institutionalized trade unions of the industrialized societies. It is this concept that Moody, Waterman and others (Lopez, 2000; Robinson, 2000) borrow and apply to new forms of unionism in the industrial world. In this context, it is appropriate to develop a more considered analysis of the experience and trajectory of SMU in the South, and its theoretical implications. This is particularly so because these movements are themselves facing new difficulties – even crisis – in the face of changing political, economic and workplace conditions which are undermining the very conditions that gave birth to them (Adler and Webster, 2000).

This article analyses the nature and characteristics of SMU in South Africa, on the basis of an in-depth ethnographic case study of workplace trade unionism at Highveld Steel, a South African steelworks in the town of Witbank, 150km from Johannesburg. Highveld Steel is an integrated steelworks, established in the mid-1960s, which produces some one million tonnes of structural and rolled steel per annum. It is South Africa's second biggest steel producer and is owned by what was, at the time of the research, the country's biggest conglomerate, the Anglo-American Corporation. Together with its satellite plants around Witbank, Highveld Steel employs 5000–6000 employees. The unions at the company are divided along racial lines. The National Union of Metalworkers of South Africa (NUMSA) is by far the majority union, with some 3000 black members. In NUMSA, as in most of the black trade union movement, the shop steward committee is a formal structure at the core of the union constitution. The workplace is divided into constituencies, each of which elects a shop steward representative to the committee.

Highveld Steel was selected for this study because of its history of militant workplace struggles, and because NUMSA identified it as a pilot project for its new strategy in the early 1990s. NUMSA, an industrial union with over 200,000 members and one of the largest affiliates to the Congress of South African Trade Unions (COSATU), was a key member of the group of new unions that began organizing black workers in the early 1970s, and is known both for strategic innovation and militancy.

The primary source of data collection for the study was 63 in-depth interviews with 31 trade unionists and former trade unionists, including both shop stewards and rank and file activists representative of major constituencies, interests and currents among workers, and selected as key informants through a snowball technique. Interviews took between one and three hours to conduct, covered both historical and current events, and informants were interviewed anywhere between one and five times over a three-year period starting in 1993. Interviews were supplemented with observation of union meetings, informal conversations with trade unionists, and union and management documents provided by NUMSA. Highveld Steel management refused to cooperate with the study.

This research methodology facilitated an extended discussion of core themes with key activists over a long period, and created the opportunity to identify complex processes and subtle changes in relationships and attitudes during a period of profound political change. The arguments presented in this article are supported by extensive interview material quoted in my PhD thesis (von Holdt, 2000).

The concept of SMU: ambiguities and omissions

Not surprisingly, with analysis focused on a diversity of national realities, different scholars have emphasized different aspects of SMU. What I take to be the core definition – and the one most relevant to South Africa – describes SMU as a highly mobilized form of unionism which emerges in opposition to authoritarian regimes and repressive workplaces in newly industrializing countries of the developing world, and which is based in a significant expansion of semi-skilled manufacturing work. SMU is embedded in a network of community and political alliances, and demonstrates a commitment both to internal democratic practices as well as to the broader democratic and socialist transformation of authoritarian societies (Lambert, 1990; Lambert and Webster, 1988; Scipes, 1992; Seidman, 1994; Webster, 1988). The South African scholars focused on the forging of popular alliances with the highly politicized community organizations and the national liberation movement, as its definitive feature. Seidman, comparing Brazil and South Africa, defines SMU as a struggle to raise the living standards of the working class as a whole, in the context of authoritarian industrialization. Moody (1997) also focuses on class, but extends SMU to the advanced industrial countries – the US in particular. Like Moody, Waterman (1993, 2001) adopts a more prescriptive and global approach, but emphasizes the qualities associated with 'new social movements' such as grassroots activities, non-hierarchical relationships and the articulation with non-class movements. The result of this wide variety of applications is a high degree of ambiguity in the use of the term SMU, and a lack of clarity about what exactly it is that constitutes this form of unionism – an issue which the conclusion of this article will return to.

The term SMU has been used widely in South Africa in an attempt to distinguish quite sharply between trade union practices and goals there and those prevalent in advanced industrial society (Cooper, 1991; Lambert and Webster, 1988; Seidman, 1994; Webster, 1988). However, the analysis of SMU in South Africa has its weaknesses and should be regarded as incomplete.

First, it has tended to focus attention on external relations – with the state, the communities, political movements – rather than on internal relations and contestations. Was the solidarity and democracy of the new unions as unproblematic and uncontested as the unions themselves claimed? Second, and as a consequence of this, it has paid insufficient attention to the ways in which identities forged beyond the workplace shape the collective identity and practices of the unions. In the South African literature, richly suggestive studies (Bonnin, 1987; Sitas, 1983) from the early 1980s, which explored the interaction between cultural solidarities and meanings forged outside the workplace among migrant workers with strong traditional cultural formations, and the solidarity constituted by the newly emerging unions, were not fully incorporated into SMU analysis. Indeed, much of this analysis has tended to assume that SMU reflects a new class consciousness (Lambert and Webster, 1988; Seidman, 1994: 2–3, 39; an approach followed for the USA by Moody, 1997: 208–10), thus ignoring the impact of non-class collective identities on strategies, practices and internal conflict. In the South African case, when internal conflicts over collective identity could not be ignored, they were treated as incidental and external disruptions rather than as phenomena integral to the experience of South African trade unionism (see, for example, Maller, 1992; Moodie and Ndatshe, 1994). Third, SMU analysis has tended to assume that the distinctiveness of SMU lies in its political and community alliances, and has neglected to investigate whether it might also demonstrate distinctive workplace practices. When workplace dynamics were discussed there was a heavy dependence on the British sociology of shop stewards (Beynon, 1973; Cressey and MacInnes, 1980; Hyman, 1975; Lane, 1974; Nichols and Beynon, 1977; Thompson and Bannon, 1985) and on the assumption that South African shop stewards were subject to identical pressures (see Pityana and Orkin, 1992: 2–6; Webster, 1998). When the behaviour of shop stewards and workers did not conform to these expectations, again they were treated as incidental anomalies with external causes, rather than as distinctive features (see, for example, Maller, 1992).

This case study identifies internal conflict – often violent in nature – and contestation over practices, strategies and meaning as central to an understanding of militant black trade unionism in South Africa. Collective identities formed in traditional rural communities, urban communities and in the national political struggle against apartheid are crucial to understanding both the internal contestations and the strategies and practices of the trade union movement. Furthermore, the workplace practices of the South African form of SMU are quite different from those characteristic of labour movements in industrialized countries.

The concept of union social structure used in this article includes the formal institutional girders of the union – its constitution, its offices and resources, the rules and procedures that govern shop steward elections and roles, and so on – and the informal relationships, codes, practices and meanings that cohere around them. Union social structure is permeable to processes of identity formation beyond the workplace, in addition to those that arise within the workplace itself. It is historically constructed; it consists not only of current structures and practices, but also of values and meanings, discourses and repertoires of action, that have been collectively engendered in the past and continue to shape current activities and responses. The social structure of the union governs the distribution of power between members, shop stewards, officials and its various structures, and it defines the practices, processes of decision making, strategies, goals and organizational culture of the union.

The centrality of politics

Previous SMU analysis has placed the building of alliances with other social movements and community organizations at the centre of the concept of SMU. However, it has tended to regard this as an external alliance between autonomous organizations or movements, and therefore has not investigated the impact of alliance politics on the union movement itself. The Highveld Steel case study demonstrates the central importance of political and racial identity to the collective identity of the South African trade union movement: the relationship between trade unions and political and community organizations was not so much an alliance between autonomous organizations with specific common interests as an interpenetration of movements, a complex and dynamic network of political, community and workplace struggles woven together by a discourse of national liberation struggle.

It is important, first, to note how profoundly workplace relations themselves were structured by apartheid. The occupational structure was racially defined, with whites occupying skilled and managerial positions and blacks occupying unskilled and semi-skilled positions. Virtually all supervisors were white, and supervisory practices were characterized by an aggressive culture of racial insults and racial assault. All facilities were explicitly racially segregated, in accordance with apartheid legislation. Taken together, these structures and practices constituted what may be called an *apartheid workplace regime*. In this context, the trade union struggle of black workers took the form of a struggle against white power in the workplace, and the link to broader apartheid structures – and the national liberation struggle against these – was easily made. The trade unions were part of a broader counter-hegemonic movement with insurrectionary strands.

The links were practical too. Both shop stewards and ordinary members were active in community and youth organizations, creating a web of formal and informal linkages. As the popular uprising of the mid-1980s escalated, with

frequent violent clashes between police and community activists, the political temperature within the trade union rose as well. Many shop stewards and active union members regarded their trade union activities as intrinsically political. In the words of shop stewards and workers:

> The aim was political. It was simply to overthrow the government of the day.
>
> One way of resisting was through industrial action. We wanted to see this economy in South Africa suffering because it had no significance for us other than keeping the system of apartheid alive.
>
> The idea was that the struggle does not stop in the township, it should be taken further into the factories, you must just make this country ungovernable.
>
> We never negotiated. We would just go into the bush and when asked why, we would tell them to release Mandela first.[1]

The result was a continual contestation of workplace order, a rejection of the apartheid workplace regime. Instead of the trade union becoming an agent for the negotiation of workplace order, it became the means for extending contestation to every aspect of workplace relations. The generation of disorder was more characteristic than the 'negotiation of order' (Hyman, 1975), the 'manufacture of consent' (Burawoy, 1979) or the 'regulation of labour' (Edwards et al., 1994).

The unity of the oppressed black people, forged over decades of national struggle against colonialism and apartheid, became a central component in the collective identity of the trade union. Indeed, the union was characterized as much, if not more, by *popular* consciousness than by *class* consciousness. This interplay between political and trade union struggle accounts for the intensity of solidarity among black workers and their militancy during the 1980s. The social structure of SMU was deeply shaped by the predominant political cleavage in South African society – that between white colonizers and black colonially oppressed – and by the form that political struggle against this took – that of a national liberation movement.

Migrant workers and urban workers

In 1980, more than half of the 4000–5000 black workers employed by Highveld Steel were migrant workers accommodated in hostels in nearby townships.[2] The great majority of them were employed as labourers in the toughest and lowest-paid jobs, such as tapping the furnaces, while township residents were employed in 'softer' and more skilled jobs.

A complex range of factors combined to produce an experience of difference between township residents and migrant workers.[3] Migrant workers faced different labour market opportunities and constraints, frequently had different jobs in the workplace, and were segregated in strictly controlled hostels in the community. Many retained links to rural productive resources, and their

engagement in the urban economy was a strategy to preserve their 'rural integrities' (Moodie, 1994), which entailed different family structures and a different relationship to traditional (albeit changing) cultural practices and social institutions. This increased the salience of ethnic divisions between predominantly Zulu locals and Pedi migrants. Apartheid policies sought to freeze, institutionalize and deepen these differences.

The result was a history of tension between township communities and hostel communities located in their midst or on their periphery. While, most of the time, the contours of this tension were submerged in the language, attitudes and practices of daily interaction, in times of heightened political and social activism they frequently emerged in open conflict.

Pedi migrant workers brought their own cultural practices and notions of male discipline and collective solidarity, deeply rooted in their rural communities, to bear on the construction of union solidarity.[4] In Witbank and elsewhere, they referred to the hostels as *kgoro*. Kgoro was a Pedi word referring to a meeting place for men, at neighbourhood, village or district level, where problems were discussed and disputes resolved. The most common forms of punishment meted out by the kgoro to those found guilty of repeated offences were beating with a *sjambok*[5] or payment of a fine in the form of livestock.

The hostels were also places for men. The habit of referring to the hostels as kgoro had significant implications for the social structure of the trade union. The kgoro was a place of men, where men acted, debated and took decisions according to the codes of discipline, honesty, trust and bravery of men. Township men were different; they would go home and discuss issues with their wives, thus subverting the clarity and discipline of the kgoro, and were therefore not really to be trusted with the leadership of the union. The traditional notions of manhood that Pedi migrants brought with them and reproduced within the hostels, and by extension in the union, became a source of tension between them and urban workers resident in the township.

The Pedi migrant workers took their traditional form of collective discipline and punishment – the sjambok – and their traditional notions of collective solidarity – that it is not voluntary, but applies to everyone in the community – and applied these to their new form of collective organization in the workplace. The sjambok became a means for building black solidarity in the union. Again, these practices tended to distinguish migrant workers from local urban workers, and became a source of conflict within the social structure of black workers.[6]

Migrants tended to regard the township residents as unreliable, as people who lacked the resolve to stand firm in struggle. Thus, during stayaways, company buses had to be burnt in the township – mostly by militant youths – to prevent residents from going to work; it was unnecessary to burn buses at the hostels because the hostel dwellers would stand firm. Township residents, on the other hand, became susceptible to the argument that hostel dwellers' willingness to strike sprang from their 'lack of responsibilities' – the pressure to pay rent, bonds and hire-purchase contracts, which made township residents

count the cost of every stoppage. And so the union social structure reproduced the conflict between locals and migrants, and confirmed their mutual prejudices: township residents were cunning, sly, untrustworthy, unreliable and weak; migrants were mindless, rough, uncivilized, illiterate and impervious to reason.

Contesting order, contesting meaning

Inscribed in NUMSA's social structure from its inception – the union began organizing in hostels, and union meetings were held there throughout the 1980s – was the tension between the different places of residence and the different lives led by the workers in these different places; a difference reflected also in the occupational structure in the workplace. This gave rise to an internal contestation, played out over the following decade and a half, over the *meaning* and *ownership* of the union.

> Some of the workers who lived in the hostel perceived the union as their own organization that is there to defend their own interests as the hostel dwellers, because it started in the hostels. They wanted the leadership to come from the hostels. There was a word that was used – kgoro – and choosing someone from outside would be taking the union outside the kgoro.

The above comment by a shop steward office-bearer complements the view of an active trade unionist from the hostels: 'Those from the township were saying "we won't be run by somebody from the rural areas". That shows that they knew nothing about the union, how it functions.' For the migrant workers, NUMSA was a powerful movement, not only for protecting them from managerial oppression, but also for collectively asserting their interests in an urban society that disempowered and demeaned them. When more articulate and sophisticated shop stewards from the township came to dominate the shop steward committee, an informal strike committee became an alternative power base through which migrant workers in the hostels could re-empower themselves and assert their notion of social order within the union. Township residents, on the other hand, often felt they had no place in the union, that it was controlled from the hostels and that their views were suppressed.

The strike committee was formed in the mid-1980s by a group of shopfloor activists (with the support of the shop stewards) with the aim of reinforcing shop stewards in their union activities and maintaining discipline among workers, particularly during strikes. However, fairly rapidly the strike committee became a vehicle for the expression of migrant worker solidarity; simultaneously, it came to embody the political aspirations and practices of the popular movement in the township. These developments brought it into a relationship of explicit antagonism with the shop steward committee.

The hostel activists preferred direct militant action as a way of contesting managerial practices to the complex processes of negotiation, compromise

and procedure in which the shop steward committee was involved. Increasingly, the strike committee mobilized wildcat strikes, without reference to internal union procedures of democratic discussion and decision making. Those who were reluctant to participate in such actions were threatened with sjambokking. Suspicious that the shop stewards were selling out, the strike committee demanded that the shop stewards be accountable to them, rather than vice versa. The increasing levels of intimidation and erosion of democratic decision making in turn alienated many of the workers who were township residents.

At the same time, beyond the factory and the community, the confrontation between the apartheid security forces and the community and youth organizations linked to the United Democratic Front was escalating and becoming more violent. The popular movement adopted a strategy of confrontation with the goal of making South African society ungovernable. There were parallels between the migrant practices and the practices and culture that evolved among the militant youth of the township; a notion of community solidarity defined by an ethos of war against the oppressor and girded with coercive discipline. The militant youth were capable of an extreme and almost ritualistic brutality directed at *impimpis* (traitors) – the enemy within (as demonstrated in the killing of two black policemen in Witbank township) – which served to reinforce the unity and solidarity of 'the community'.[7] These cultures and practices provided the basis for an alliance – the 'singing togetherness' – between militant township youth and the migrant workers in the hostels, where the youth found shelter from police raids.[8]

Inside Highveld Steel, the strike committee, with its emphasis on militant direct action, became a focus for migrant workers and young workers who wanted to import the confrontational tactics of the popular struggle into the workplace in an effort to make the entire apartheid system ungovernable, and who were impatient with the procedures and processes of negotiation in which the shop stewards were embedded. The result was a high level of tension, as the shop steward chairperson at the time commented: 'Eventually we saw a very big giant that was uncontrollable, coming and attacking us viciously. Can you imagine 800 people coming from one side with sticks? If one person talks and the 800 clap hands they scare the shit out of you, sure.' While the shop stewards interpreted the rise of the strike committee and its tactics as something 'uncontrollable' – a breakdown in the order of the union – it was actually an expression of competing notions of union social structure among workers. The members of the strike committee saw themselves not as an opposition to the union, but as the upholders of the 'real' union and the union 'law' against the shop stewards who were unaccountable, untrustworthy and too close to management. The strike committee was regarded as a legitimate structure for maintaining order, unity and discipline among the workers (i.e. for maintaining their social structure), and for ensuring that the shop stewards did not sell the workers out. Their notion of the union law drew on rurally-based communal culture and Pedi notions of battle discipline, as well as on the ideas and practices of black solidarity in the liberation struggle against white oppression. For the

strike committee, the sjambok was a means for building solidarity and building the union. In the words of one of its activists:

> During those days people were having punishment for disobeying the instructions of NUMSA. The strike committee was elected by the shop stewards, it builds the organization. If you sit down when the others are fighting you get punished, very severely. To us blacks it builds us, knowing that if you do such, you are going to get punishment. That's our agreement.

For the shop steward leadership, on the other hand, the sjambok threatened to destroy the union. 'Democracy', according to the shop steward office-bearers, 'is not about sjambok, it is about negotiation and talking.' In order to introduce democracy, 'the first task was to destroy that strike committee and do away with the sjambok'. Their ideas and practices were structured by the union constitution and their own election as representatives of worker constituencies, by the exigencies of negotiation and compromise with management, and by notions of worker unity forged through democratic procedures.

The escalating violence within the union was a signal that the union social structure was breaking down, undermined by profoundly incompatible and competing notions of social order, legitimate practice and leadership. Eventually, in 1990, the group in the hostels declared that the shop steward leadership had been suspended and elected new office-bearers. To those who pointed out that this was 'unconstitutional', they responded that the union constitution had been 'suspended' because 'there was a state of emergency at Highveld Steel' – a telling adoption of the rhetoric of the apartheid regime when the social order of apartheid was under attack. This signified a complete breakdown in the social structure of the union. The struggle between the different notions of the meaning and social order of the union could no longer be regulated by the constitution, and NUMSA at Highveld Steel was effectively split in two: 'a union of the township and a union of the hostel'.

The split was only resolved when the union head office intervened and organized new shop steward elections. However, the legacy of division and contestation, and a repertoire of antagonistic practices, lived on in the social structure of the union at Highveld Steel.

This section of the article has demonstrated how union social structure was continuously contested and reconstructed, and how solidarities and practices forged outside the union profoundly affected the social structure of SMU. The conflict between the strike committee and the shop steward committee was shaped by underlying tensions between migrant and local residents, by the structural contradictions of trade unionism in a quasi-insurrectionary context, and by political and personal disputes. While overlapping political, community, worker and ethnic identities could reinforce each other in the forging of a formidable solidarity, they could also define faultlines in the social structure of the union, along which bitter and sometimes violent conflicts could rage.

This article argues that such a contested social structure was integral to SMU in South Africa, both in its political role and in its role in forging solidarity out of the disparate experiences and origins of different groups of workers.[9]

The transition to postcolonial democracy

In 1990, under growing international and domestic pressure from the anti-apartheid movement, the apartheid regime officially recognized the ANC and other banned political organizations and entered into negotiations on the future of South Africa. By 1994, a new democratic constitution had been adopted and South Africa's first democratic elections were held and won by the ANC.

The transition to democracy fundamentally changed the position of the black trade unions in society. Their members were now citizens with the right to vote, and their allies in the popular resistance movement now constituted the governing political party. After 340 years, the era of colonialism and apartheid had ended and an era of democratic postcolonial reconstruction had begun.

This itself had an impact on SMU, which had emerged as an important actor in the national liberation struggle. Although the workplace regime had barely changed, the political terrain had. The government was now democratically elected and included a number of unionists from COSATU, to which NUMSA was affiliated. The network of community alliances withered as community organizations were absorbed into the ANC and into local and national government.

Just as political cleavages and struggles had shaped the union social structure in the 1980s, so the democratic incorporation of the working class had a profound effect on SMU. Workers who were newly enfranchised citizens regarded their union activities in a different way. In sentiments repeated by many workers, a migrant rank and file activist said: 'It's different now because the government is ours. If I *toyi-toyi* while the government is mine it seems I am not intelligent.'[10]

The disaggregation of political and trade union struggle diluted the militancy and solidarity of workers. To the extent that workers' political identity as supporters of the national liberation movement and their identity as trade unionists continued to overlap, this implied a more muted activism and a concern with economic development, rather than bringing down apartheid. Attendance at union meetings fell off and militancy declined.

Class formation and the fragmentation of solidarity

The transition to democracy had a subtle but profound impact on the role of the shop stewards and the meaning of the shop steward committee, both to the shop stewards themselves and to the union membership. The end of apartheid and processes of decolonization created scope for the rapid formation of a

black elite within which new class forces were crystallizing: a nascent bourgeoisie, a political elite, and a managerial and professional middle-classes. Talented shop stewards with skills and experience were swept up in this process. The shop steward leadership demonstrated their political commitment in their dedication to building ANC branches, preparing for the first democratic elections and working for the transformation of local government institutions – but inevitably this activism opened up opportunities for new political careers. Others found opportunities for promotion into the ranks of supervisors and management at work.

This loss of the most experienced shop stewards and officials had a devastating impact on workplace organization at Highveld Steel, not only because of the loss of skills, but also because of the impact it had on collective solidarity in the workplace. A shop steward who held out for longer than others described the union as dying, because everyone was leaving:

> The politics of today is about how much money you have, how beautiful your car is. It's no longer about how you develop the economy and how you look at the interests of the poorest. It's about yourself. I also want to be myself. I've been a shop steward for a long time and I have gained nothing from it except the politics and experience that I have.

The social identity of shop stewards was coming under pressure. Among shop stewards, the ethos of collective solidarity, service to workers and commitment to struggle was dissolving. Increasingly, the shop steward committee was seen as a stepping stone to opportunities for promotion or careers outside the factory, which undermined its traditional role as representative of the workers.

Thus, the broader process of class formation reached deep into the social structure of the union, undermining solidarity by recasting relationships, introducing new identities and imbuing the shop steward committee with a different meaning. It became a platform for new aspirations and ambitions, which undermined its role as the accountable representative of workers in the workplace.

This process also produced a differentiation and fragmentation of workers' interests. In 1994, the year of the first democratic elections, there was a spate of wildcat strikes at Highveld Steel, during which strikers rejected the leadership of the shop stewards and expressed a lack of confidence in them. New informal workers' structures emerged to lead these actions: migrant workers with little prospect of advancing in the new workplace order formed militant autonomous structures to bypass shop stewards and protect themselves; some more skilled workers who did have prospects engaged in disruptive and opportunistic struggles to become shop stewards themselves; and others who were potential shop stewards refused election in the belief that they could better pursue their workplace careers by avoiding the conflict with managers that was inseparable from a shop steward's activities. Many of these initiatives drew on the antagonisms and practices founded in earlier contestations. It was these diverse processes of fragmentation, fracturing and weakening the social struc-

ture of the union in a deep process of organizational decomposition, which underlay the wildcat strikes.

The exceptionally intense solidarity reinforced by political, class, community and even ethnic identities, and the network of alliances through which SMU was forged in the context of the class compression and racial oppression of apartheid, gave way to fragmented interests and identities in the altered conditions of class mobility and democratic government. The social structure of the union was fundamentally altered by the changed sociopolitical conditions, whose advent it had done so much to ensure.[11]

Grafting 'Northern' strategies onto SMU?

COSATU did not respond passively to the advent of democracy, but developed a new strategy of reconstruction through which it hoped to secure a central role in the newly emerging democratic society.

It is ironic – in the light of scholarly and activist discussions about the merits of 'declining' labour movements in the North learning from innovative SMU in the South – that the South African trade union movement, finding itself in a newly established democracy with a left-leaning government in power, chose to adopt strategies and policies developed by labour movements in the industrial countries, particularly those with a long history of influencing and participating in the construction of social democratic states. This in itself illustrates the importance of political context to the strategies that unions adopt.

The new strategy of reconstruction was crystallized in the Reconstruction and Development Programme (RDP) that was initiated by COSATU and modified and finally adopted by the ANC. The RDP had three aspects: a set of national developmental policies, union participation in building new institutions, and workplace transformation. The last aspect is important for this case study of SMU at a local level.

With regard to workplace transformation, NUMSA developed a comprehensive programme for this aspect of the reconstruction strategy. The goal of the union programme was the transformation of the apartheid workplace regime and the construction of a new, non-racial order in the workplace, based on workplace democracy and skill rather than 'lean production'. In the vision of the shop stewards at Highveld Steel, this implied a form of radical democracy which would extend worker power within the company, devolve responsibility and decision making to the shopfloor, replace authoritarian supervision with collective control of production by workers, and enhance workers' skills, career prospects and pay.

The adoption of this 'strategic unionism' (Joffe et al., 1995; 'Strategic Unionism', 1989) owed much to extensive study tours and exchanges with European and particularly Australian trade unions. All of the shop stewards saw this as a *new* strategy, sharply distinguished from the strategies forged during the period of resistance to apartheid. It required a new organizational

culture and practices, increased expertise and access to research on the part of trade unionists, and replaced resistance with a more complex engagement with management. It redistributed power within the union at all levels – both national and local – to those with expertise.

Since union strategy is embedded in and defined by social structure, a change of strategy was likely to have a significant impact on the social structure of the union itself. Shop stewards were acutely aware of this, as the following comment by one of the shop steward office-bearers indicated:

> Our economy has been devastated by the system of apartheid, and we need to rebuild it now. So I believe that the culture definitely has to change from the culture of resistance and ungovernability to the culture of productivity. It is difficult for the workers to change from that culture, the workers still believe that they must always resist anything that comes with management, be it right or wrong. A culture of resistance is inherent in the heart and mind of the workers.

The new strategy failed at Highveld Steel for several reasons. The technical complexity of the strategy contributed to a growing gap between shop stewards and members, as well as between the small minority of shop stewards who were able to implement the new strategy and the majority who were not. In addition, the national and regional structures of the union were unable to provide any technical or strategic support, as all the officials who had initiated the new strategy departed for government. Strategic unionism also had an impact on the democratic practices of the union, which were core values of its social structure, by adopting a strategy that the majority of officials, shop stewards and members did not understand, and which they felt had been insufficiently discussed (see also von Holdt, 1993, 1995).

Management intransigence at this particular company played its part in the strategy's failure, but the new strategy itself, by fragmenting and eroding the values and practices central to the union social structure, played an important part in weakening the union and rendering its new strategy ineffective. This failure itself further demoralized the shop stewards and contributed to their sense that they had lost their direction.

The attempt to graft 'strategic unionism' – developed in the more institutionalized and well-resourced social democratic unions of industrial society – onto SMU contributed to the demobilization of the latter. Ironically, the Australian attempt to transfer strategic unionism from Sweden also failed, in the view of some proponents, because of its incompatibility with the 'labourist' traditions of Australian unions (Ewer et al., 1991).

Conclusion

This article describes a more complex ethnographic study of SMU in South Africa than has been attempted before, in an effort to answer questions about the relationship between the sociopolitical context of that unionism and its internal organizational life.

The study demonstrates that the primary political cleavages and contestations of South African society were deeply inscribed within the social structure of the union, shaping its internal practices and meanings as well as its workplace strategies and broader alliances. Union collective identity was not determined solely by the structures and contradictions of production, but was permeable to identities forged beyond the workplace. This was true not only of the collective identity of the black oppressed people forged in the national liberation struggle, but also of more traditional rural identities forged in the villages and urban hostels of the migrant workers. Not only this, but the layers of different collective identity that made up the trade union also generated intense and sometimes violent conflict between different constituencies over the internal distribution of power and the practices and strategies of SMU.

While the collective class identity forged in SMU was, as SMU analysts argue, something new, it simultaneously drew on, incorporated and was shaped by other collective identities with their own histories and relations to colonial oppression. SMU in South Africa was not simply the class organization of a modern proletariat, but also a popular movement incorporating and shaped by premodern and non-class solidarities – from which, indeed, it gained much of its vitality.

This article has also argued that radically changed sociopolitical conditions – the transition from apartheid to democracy and the rapid postcolonial processes of class formation – account for the erosion of SMU in South Africa.[12] The fragmentation of the social structure forged by SMU in response to apartheid has profoundly weakened trade union organization. The attempt to implement a form of 'strategic unionism' borrowed and adapted from the labour movements of the North has thus far failed, and indeed has contributed to the erosion of SMU in NUMSA. It is not yet clear what form or forms of unionism will finally emerge from the South African transition.

The ambiguities noted earlier in the varied usage of the term SMU are reinforced by the focus of this article on the specificities of black trade unionism in South Africa. The prevalence of both popular political and premodern identities, and of intense internal contestation, coercion and violent conflict, contradicts what are frequently regarded as core features of SMU. Erosion of SMU in postcolonial South Africa likewise challenges the prescriptions of those who propose a general model of SMU. If, as Seidman argued, SMU was a response to conditions in industrializing countries with authoritarian regimes, what would happen to SMU once these regimes were replaced with democracy?

We may need to think differently about the concept of SMU. Instead of trying to develop it into a model of a particular ('progressive') form of trade unionism appropriate to contesting globalization, as Moody (1997) and Waterman (2001) seek to do, it could be regarded as an endeavour to understand the reassertion of the *movement* dimension of trade unionism under varying conditions. Drawing from social movement theory, this movement dimension may be characterized as 'contentious challenge', which is 'based on common

purposes and social solidarities, in sustained interaction with elites, opponents, and authorities' (Tarrow, 1998: 4–5).

Movement is integral to trade unionism. Many, if not most, trade unions arise out of highly contentious challenges to oppressive workplace and political regimes. Even when highly institutionalized, trade unions tend to retain an element of social movement in their ability to undertake industrial action or mobilize support for collective bargaining and social proposals. Nor is institutionalization a one-way process: trade unions, like other social movements, tend to go through 'cycles of contention' (Tarrow, 1998) when their movement dimensions are revitalized in response to changing historical conditions.

Trade unionism is characterized by a constant tension between movement and the institutionalization and routinization of industrial relations. Indeed, the really interesting questions are: how do trade unions with different histories and traditions combine, as most of them do, movement dimensions (mobilization for contentious politics) with institutional dimensions (participation in industrial relations machinery and the negotiation of order); how is the tension between these dimensions manifested; and how do they change in response to changing historical conditions and vary in different national (or other) contexts? Under what conditions is there a revival of the social movement dimension of unionism? What form does this take? What are its implications for the more institutional practices of the trade union? What is the relative effectiveness of movement challenge and institutional contestation in protecting or advancing workers' interests and broader social change? Such questions go to the heart of trade unionism as a contradictory set of practices and goals, and are likely to be more fruitful in illuminating its transformative potential and constraints than attempting to prescribe a model of SMU, as Moody and Waterman tend to do. Answering such questions requires detailed research and concrete analysis, rather than sweeping generalization.

By way of example, a focus on the tension between contentious movement and institutionalization over changing historical conditions is richly illuminating in the South African case. Militant black trade unionism in the 1980s was probably the most extreme form of movement unionism that can be imagined, yet elements of institutionalization also existed, for example in the existence of the shop steward committee as a constitutional union structure embedded in a negotiating relationship with management. The conflict between the shop steward structure and the unconstitutional strike committee described in this article was but one aspect of the tension between contentious movement and institutionalized practices. With the transition from apartheid, a much more institutionally engaged strategy was adopted – a strategy that did not renounce contentious politics, but sought to combine it with participation. The strategy failed, but whatever form or forms of unionism finally emerge in a democratic South Africa, they are likely to draw on these experiences and traditions as they combine movement and contention, institution building and negotiation, in response to the processes of political and workplace incorporation which the transition from apartheid represents.[13]

A further implication of this argument is to question the transferability of strategies between labour movements located in very different sociopolitical realities. By using a sociological understanding of strategy as a set of practices embedded in social structure, this article demonstrates that the adoption of a new strategy is not simply a technical matter, but has profound implications for internal relationships, procedures and values[14] – which, in turn, are shaped by, and are a response to, broader sociopolitical relations. Borrowing or learning from others has to take these realities into account, and modify lessons accordingly, or run the risk not only of failure, but of undermining the organizational resources and capacity of the borrowing organization. Just as the attempt to transfer strategic unionism to NUMSA appears to have failed, so it is difficult to imagine the kind of union practices that emerged in the struggle against apartheid being transferred to Europe or the USA, with their long established democracy and political incorporation of the working class. This argument implies that globalization is unlikely to produce the conditions for a globalized SMU as advocated by Moody and Waterman. National reality counts.

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Notes

1 The reference to *the bush* conjures up long historical associations with struggle against colonialism: the anticolonial wars were fought in the bush, and the activists who became guerrillas or 'freedom fighters' in the 1960s, 1970s and 1980s were described as having *gone to the bush*. Mandela was the imprisoned leader of the African National Congress.

2 Migrant labour has been a central feature in the evolution of labour supply in the South African economy. It took shape in the diamond and gold mines in the 19th century when taxation and land dispossession forced Africans into wage employment in the mines and on farms and in urban industrial and service sectors, while pass laws prevented the majority from settling in the urban areas. A series of rural bantustans emerged, governed indirectly through traditional (albeit often restructured by the colonial powers) tribal authorities,

as impoverished labour reservoirs for cheap labour sectors of the economy. Migrant labour was enshrined as the cornerstone of apartheid's labour policy by the National Party government, elected in 1948, and was regulated by means of the influx control system and government housing policy, specifically the hostel system. By the 1960s and 1970s, a differentiated African working-class was in existence. This differentiated recruiting strategy was related to control, discipline and cost in the workplace. Workers who did not have rights to live in urban areas could only get access to jobs through the rural labour bureaus, and the only jobs they had access to there were heavy, unpleasant and low-paid. At the end of their 12-month contracts, the migrants were given 'call in cards' which allowed them to automatically renew their contracts. Urban residents, on the other hand, had access to a wider range of jobs and could afford to avoid such work.

3 Mamdani (1996), Sitas (1983) and Webster (1985) all discuss the difference and tension between township residents and migrant workers in the context of trade unionism.

4 I am indebted for the insights discussed in the following three paragraphs to a series of discussions with William Matlala, Pedi migrant worker, labour photographer and cultural activist, and a former shop steward and hostel dweller.

5 *Sjambok*: a long stiff whip; to flog with such a whip.

6 Beinart has pointed out the importance of fighting and displays of violence as a form of sport in precolonial rural society, where men were 'expected to be militarily capable'. Urban associations and gangs – such as the Pedi Amalaita, prevalent in the first half of this century – drew on these traditions of masculine identity and 'the enjoyment of fighting' (Beinart, 1992: 473–80). Interviews with some of the migrant workers at Highveld Steel suggest that traditions of fighting and military prowess could be valuable cultural resources in building trade unionism in the struggle against employers, as well as mobilizing in the liberation 'war' against apartheid.

7 Beinart also points out that in a context of social dislocation and family breakdown, violence may be a means for young men to forge male identity and carve out social space, especially where they can draw on precolonial traditions with 'deep cultural markers which justify and shape the form of violence' (Beinart, 1992: 481). The violence of the youth 'comrades' was as often directed towards the 'purification' and unification of a fragmented community as against the apartheid system (1992: 483–4).

8 The political traditions of the Pedi migrants were a critical factor in this alliance: their historical role in linking the urban-based ANC to the rural areas, building ANC-linked organization there in the 1950s, and the absence of a rival political movement mobilizing rural identities in opposition to the ANC (such as Inkatha in KwaZulu-Natal, which mobilized Zulu ethnic identity against the ANC), predisposed them to sympathy rather than antagonism towards the politically militant and ANC-supporting youth (Delius, 1996).

9 Supporting evidence for both the politicization and disorder of shopfloor relations and for heated contestation that at times broke out into violence and even deadly conflict between, variously: shop stewards and militant youth; different ethnic groups; migrants and politically militant township residents; and between rival trade union factions, is provided by the studies of both Maller (1992) and Moodie and Ndatshe (1994), and by the events of the Mercedes

Benz sit-in strike in 1990 (von Holdt, 1990). There is no major study of the trade unionism of this period that provides contrary evidence.

10 *Toyi-toyi*: a kind of war dance accompanied by a chanting that characterized mass action during the anti-apartheid years.

11 There is a growing body of evidence for the erosion of SMU in the transition. Buhlungu (2001) has systematically surveyed the negative impact of the upward mobility of union officials on organizational culture and the emergence of new fracture lines in internal solidarity in four COSATU affiliates. A random sample of episodes of 'ungovernability' in the South African trade unions over the transition is also suggestive. In 1994, 2000 truck drivers surprised their union by organizing the blockade of a major transport route, under the name of a new rank and file movement (Mtshelwane, 1994). In 1996, the NUM was sidelined at Rustenburg Platinum by a non-union 'Workers' Committee' which led a wildcat strike over pensions. The result was mass dismissals, division and a continuing violent conflict that has claimed several lives (*SA Labour Bulletin*, 1996). In 1997, 7000 workers at Harmony gold mine went on strike against a productivity agreement signed by the NUM, forcibly evicted the NUM shaft stewards and announced the formation of an alternative union branch (*Business Day*, 21 November 1997). In 1999, workers at Volkswagen SA downed tools, demanding that the union reinstate eight shop stewards who had been expelled from the union (*Business Day*, 20 July 1999). This has since led to a split, dismissals and the formation of a rival union (Buhlungu, 2001). Wood and Psoulis (2001) come to a somewhat different conclusion on the basis of a national survey of COSATU members: that COSATU has 'reaffirmed its social movement role'. However, this conclusion is weakened both by a rather loose usage of the term SMU, and by the limitations of quantitative methodology in capturing organizational culture and dynamics.

12 Extensive workplace restructuring, in the forms of retrenchment, outsourcing and casualization, has undoubtedly also played a role, but the argument of this article is that sociopolitical conditions have been primary.

13 See my PhD thesis (von Holdt, 2000) for an extended discussion of these issues.

14 This is the weakness of Adler and Webster's (1995) analysis of COSATU in the South African transition. They assume an overarching continuity in the union movement's strategy before, during and after the political transition, and are thus unable to take into account the impact of the transition and the adoption of new strategies on COSATU. The result is an overoptimistic view of COSATU's ability to influence reconstruction.

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