

Universally Comprehensible,  
Arrogantly Local



# Universally Comprehensible, Arrogantly Local

South African Labour Studies  
from the Apartheid Era into the New Millennium

**Wiebke Keim**

éditions des archives contemporaines



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Éditions des archives contemporaines  
41, rue Barrault  
75013 Paris (France)  
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ISBN 9782813001825



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## Acknowledgements

This book is a revised version of the German publication “Vermessene Disziplin. Zum konterhegemonialen Potential afrikanischer und lateinamerikanischer Soziologien” (Bielefeld, transcript 2008). The translation of this work was funded by Geisteswissenschaften International – Translation Funding for Humanities and Social Sciences from Germany, a joint initiative of Fritz Thyssen Foundation, the German Federal Foreign Office, the collective society VG Wort, and the Börsenverein des Deutschen Buchhandels (German Publishers & Booksellers Association). I am extremely grateful for the prize money for the translation, and am delighted to now finally be able to present the full version of my results to my colleagues in South Africa, who made such a significant contribution to this volume’s successful completion.

The German book is based on the revised version of my PhD thesis, “Vermessene Disziplin – nordatlantische Dominanz und konterhegemoniale Strömungen in der Entwicklung afrikanischer und lateinamerikanischer Soziologien” (University of Freiburg/Paris IV-Sorbonne, 2006). Although writing a PhD is for the most part a solitary endeavour, a work such as the present one needed the support and collaboration of many other individuals, who were directly involved to a greater or lesser degree and to whom I am thus deeply indebted.

Special thanks are due to my supervisors: Prof. Dr. Wolfgang Eßbach, who was willing to take on a project that initially seemed somewhat risky, thought me capable of carrying it out, and for four years provided me with advice that was always insightful, supportive and reassuring. Prof. Dr. Jean-Michel Berthelot (†), my teacher in Paris, who sadly was unable to see the completion of this project, which he inspired in a conversation following the completion of my Maîtrise. I hope I have been able to live up as much as possible to his standards of rigorous argumentation and explanation, which he was such a master of himself. Most of the text was prepared in the anticipation that it would be subjected to his critical gaze. My thanks also go to Dr. Terry Shinn, who unreservedly agreed to supervise me and my project following Berthelot’s death. Only thanks to him was I able to keep my supervision franco-german until the end. Furthermore, my gratitude is due to Prof. Ari Sitas, who immediately realised my project’s relevance to the sociologies of the South and the ongoing debates there. His comments on the still somewhat precarious project proposal encouraged me to carry it out. He kindled my interest in the sociology of work and industrial sociology

in South Africa, welcomed me at his department and established the first contacts to other institutions there. Furthermore, two conversations during the project's initial stage with Dr. Roland Waast at the "Institut de Recherche pour le Développement" in Paris were a great help in problematising its theoretical framework. This is where my idea of counterhegemoniality in science first emerged. PD Dr. Axel Paul leapt in at very short notice to complete the panel for the PhD viva, which was held in French.

Now to all those individuals who supported me in carrying out the case study in South Africa: many, many thanks! A great number of people were willing to share their knowledge, experiences and opinions in long conversations, and this book would not have been possible without these extensive interviews. My thanks go to Sthembiso Bhengu, Andries Bezuidenhout, Debby Bonnin, Belinda Bozzoli, Sakhela Buhlungu, David Cooper, Shane Godfrey, Jay Govender, Jonathan Grossman, Judith Head, Hlengiwe Hlela, Karl von Holdt, David Jarvis, Ken Jubber, Dave Kaplan, Ian Macun, Neva Makgetla, Tessa Marcus, Simon Mapadimeng, Gerhard Maré, Johann Maree, Bethuel Maserumule, Tanya van Meelis, Mvusi Mgeyane (†), Sarah Mosoetsa, Rajen Naidoo, Blade Nzimande, Lungisile Ntsebeza, Devan Pillay, Andiziwe Zenande Tingo and Eddie Webster. With his great organisational talent, Jay Govender had already sorted out all local practical issues before I even arrived. He provided a place for me to work in the IOLS-Research office, and our many conversations and activities gave me a closer understanding of the realities of his country and his university. Khayaat Fakier and Shameen Singh, the SWOP secretaries, made their infrastructure available and helped me to navigate the administration of their university. Sheetal Dullabh and her mother provided both creature comforts and emotional balance. The creativity and energy of the students of the Wits Drama School, particularly Michael Matsie, brightened up the final stage of my stay in South Africa.

Lenin Matthias Riedel proofread the entire German version of the present work. The work involved in qualitative social research across different languages – transcribing, translating and editing – was assisted by Aurélie Clément Tainsa, Sheetal Dullabh, Bastian Hermisson, Silén Ingendahl, Moritz Keim, Michael Matsie and Manuel Quinon as well as my dear friend Anna Schnitzer. Pratiyan Morgenthaler reliably solved all computer-related issues.

Annette Ehinger, working in the examination office of the Joint Committee of Freiburg University, was able to provide competent and reliable solutions to all of the specific problems arising from the joint supervision. Thanks also go to Martine Brient, Annie Devinant, Regina Klingenberg and Doris Seitz, the departmental secretaries in Freiburg and Paris, who cheerfully dealt with administrative issues.

Margaret Hiley provided the English translation in a quality that merits great thanks. I am also indebted to Anja Löbert of textworks translations for her professional management of the translation project. Stefanie Hanneken at transcript has been extremely supportive in finding a suitable publisher for the English version of this book and in managing the legal aspects of the task. Lastly, a final proofreading of the book was carried out by Jean-Yves Bart thanks to support from the Excellence Initiative of

the University of Strasbourg, funded by the French government's Future Investments program.

My family and friends were a great support. Thanks go to: My father, Eris Johannes Keim (†), without whose moral support and intellectual encouragement this work could not have been produced. Over the entire period, he provided advice on the content, corrections to the text and suggestions on how to organise the work, contributing to the project's success; he was also involved in creating the first printed version. My grandfather, Werner Mittrücker (†), who has been a role model for my own life in his indestructible confidence and optimism. This work is dedicated to both of them. My partner of many years, Ergün Bulut, who patiently tolerated my absences, sometimes mental and sometimes physical. He was prepared to put his personal interests aside for my academic ones, and always supported me in both emotional and practical matters. My mother, Renate Mittrücker, and my brother, Moritz Keim, who always provided me with places and moments of peace and recovery far away from sociology, and whose pragmatism was able to alleviate both intellectual and organisational problems. My flatmates: Henry Anthonipillai, Almila Akça, Erhan Gencer (†), Ezgi and Helma Haselberger, Anika Meckesheimer, Helmut Meinel and Angelika Schiesser, who created an environment in which even the most impossible of projects would be able to flourish. Claude Vérynaud, who supported me during my visits to Paris and was willing to sort out administrative issues that I was unable to deal with from afar. During the most intensive phase of analysis and writing, Lascoux was a veritable heaven on earth. There I was also looked after by Jacques and Madeleine Vérynaud and Marie-Hélène Ausanneau, for which I am hugely grateful.

Finally, several organisations provided financial backing for this project. Besides the above-mentioned support for the translation, these were: the German Academic Exchange Service, the Landesgraduiertenförderung Baden-Württemberg, the Rosa Luxemburg Foundation, the Wissenschaftliche Gesellschaft der Universität Freiburg and the Franco-German University. They provided the material foundations on which social-scientific research depends. My gratitude goes to all of them. The revision of the manuscript for the English translation took part during the time I was leading the project "Universalität und Akzeptanzpotential von Gesellschaftswissen" at the University of Freiburg, which was supported by the Federal Ministry of Education and Research (BMBF). I also thank the BMBF for its support of my academic work.

Wiebke Keim  
Istanbul, April 2014



## List of abbreviations

ACTU	Australia Council of Trade Unions
AfSA	African Sociological Association
ANC	African National Congress
ARCWS	Australian Research Centre on Work and Society
ASSA	Association for Sociology in Southern Africa
AZACTU	Azanian Confederation of Trade Unions
CALS	Centre for Applied Legal Studies
CCAWUSA	Commercial, Catering and Allied Workers' Union of South Africa (became the SACCAWU in 1989)
CCMA	Commission for Conciliation, Mediation and Arbitration
CEPAL	Comisión Económica para América Latina
CEPPWAWU	Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union
CHRP	Community Health Research Project
CLACSO	Consejo Latinoamericano de Ciencias Sociales
CNETU	Council of Non-European Trade Unions
CNRS	Centre National de la Recherche Scientifique
CODESRIA	Council for the Development of Social Science Research in Africa
COSATU	Congress of South African Trade Unions
CPSA	Communist Party of South Africa (from 1921 to its prohibition in 1950)
CSD	Centre for Scientific Development, merged with the FRD to become the NRF
CSIR	Council for Scientific and Industrial Research
CTMWA	Cape Town Municipal Workers' Association
CWC	Church and Work Commission
CWIU	Chemical Workers' Industrial Union
CWU	Communication Workers' Union
DEA	Diplôme d'Etudes Approfondies
DENOSA	Democratic Nurses Organisation of South Africa
DfID	UK Department for International Development
DITSELA	Development Institute for Training, Support and Education for Labour

EHESS	Ecole des Hautes Etudes en Sciences Sociales
ETG	Economic Trends Group, also: Economic Trends Research Group (ETRG)
ETRG	See ETG
FAWU	Food and Allied Workers' Union
FBI	Federal Bureau of Investigation
FES	Friedrich Ebert Foundation
FIET	International Federation of Commercial, Clerical, Professional and Technical Employees
FNETU	Federation of Non-European Trade Unions
FOSATU	Federation of South African Trade Unions
FRD	Foundation of Research Development, merged with the CSD to form the NRF
GAWU	General Agricultural Workers' Union
GEAR	Growth, Employment and Redistribution
GSP	Global Studies Program
GWU	Garment Workers' Union
HSRC	Human Sciences Research Council
ICCO	Interchurch Organisation for Development Cooperation
ICFTU	International Confederation of Free Trade Unions
ICU	Industrial and Commercial Workers' Union of Africa
IHRG	Industrial Health Research Group
IHSEP	Industrial Health and Safety Education Project
IHU	Industrial Health Unit
IIE	Institute for Industrial Education
ILO	International Labour Organisation
ILRIG	International Labour Research and Information Group, since 2001 International Labour Resource and Information Group
IMF	International Metalworkers' Federation
IMF-SACC	International Metalworkers' Federation – South African Coordinating Council
IMS	Iron Moulders Society
IMSSA	Independent Mediation Service of South Africa
IOLS	Industrial, Organizational and Labour Studies
IRP	Industrial Relations Project, UCT
ISA	International Sociological Association
ISI	Institute for Scientific Information
ISP	Industrial Strategy Project
ITGLWF	International Textile, Garment and Leather Workers' Federation
KZN	KwaZulu Natal
LATINDEX	Sistema Regional de Información en Línea para Revistas Científicas de América Latina, el Caribe, España y Portugal
LEP	Labour and Enterprise Project
LERG	Labour and Economic Research Group

LMG	Labour Monitoring Group
LRA	Labour Relations Act
LSE	London School of Economics
LSEP	Labour and Small Enterprise Project
LSO	Labour Service Organisation
MAWU	Metal and Allied Workers' Union
MERSETA	Manufacturing, Engineering and Related Industries Sector Education and Training Authority
MIT	Massachusetts Institute of Technology
NACTU	National Council of Trade Unions
NALEDI	National Labour and Economic Development Institute
NCSR	National Council of Social Research, formerly NBESR
NEDLAC	National Economic Development and Labour Council
NEHAWU	National Education and Health Workers' Union
NEUM	Non-European Unity Movement
NIPR	National Institute for Personnel Research
NRF	National Research Foundation, created by the merging of CSD and FRD
NUM	National Union of Mineworkers
NUMSA	National Union of Metalworkers of South Africa
NUSAS	National Union of South African Students
ORSTOM	Organisme de Recherche sur les Territoires d'Outre-Mer
PAC	Pan Africanist Congress
POPCRU	Police and Prisons' Civil Rights Union
PPWAWU	Paper, Printing, Wood and Allied Workers' Union
RAU	Rand Afrikaans University
RC18	Research Committee 18 "Political Sociology" of the ISA
RC30	Research Committee 30 "Sociology of work" of the ISA
RC44	Research Committee 44 "Labour movements" of the ISA
RC48	Research Committee 48 "Social movements, collective action and social change" of the ISA
RC5	Research Committee 5 "Race and ethnicity" of the ISA
REF	Regional Economic Forum
RHRU	Reproductive Health Research Unit
SA	South Africa
SAAWU	South African Allied Workers' Union
SACBC	South African Catholic Bishops Conference
SACCAWU	South African Commercial, Catering and Allied Workers' Union
SACHED	South African Committee for Higher Education
SACP	South African Communist Party (since 1953, formerly CPISA)
SACTU	South African Congress of Trade Unions
SACTWU	South African Clothing and Textile Workers' Union
SACWU	South African Chemical Workers' Union
SADC	Southern African Development Community

SAIRR	South African Institute for Race Relations
SALB	South African Labour Bulletin
SALDRU	South African Labour Development Research Unit
SAMWU	South African Municipal Workers' Union
SANPAD	South African Netherlands Programme for Development
SAQA	South African Qualifications Authority
SARHWU	South African Railways and Harbour Workers' Union
SASA	South African Sociological Association
SASBO	The Finance Union
SASOV	Suid-Afrikaanse Sociologiese Vereniging
SATUCC	Southern African Trade Union Coordinating Council
SEIFSA	Steel and Engineering Industries Federation of South Africa
SEP	Small Enterprise Project
SEWU	Self Employed Women's Union
SIGTUR	Southern Initiative on Globalisation and Trade Union Rights
SSCI	Social Science Citation Index
SWOP	Sociology of Work Program
TAG	Technical Advice Group
TGWU	Transport and General Workers' Union
THRIP	Technology and Human Resources for Industry Programme
TUCSA	Trade Union Council of South Africa
TURP	Trade Union Research Project
UC	University of California
UCT	University of Cape Town
UDF	United Democratic Front
UDUSA	Union of Democratic Staff Associations
UDW	University of Durban-Westville, today: University of KwaZulu-Natal
UKZN	University of KwaZulu-Natal
UND	University of Natal, Durban, today: University of KwaZulu-Natal
UNDP	United Nations Development Program
UNISA	University of South Africa
US	United States (of America)
UWC	University of the Western Cape
WIG	Workplace Information Group
WISER	Wits Institute for Social and Economic Research
Wits	University of the Witwatersrand

# Introduction

Research usually starts with someone wondering about something. This was the case with this book. As a student of sociology and social anthropology in Freiburg, Germany, and Paris, France, over five years I read German, French, British and US-American sociological writings about European and North American societies as well as German, French, British and US-American works about African, Latin American and Asian societies. Among my readings, there was not a single text produced in Africa, Asia or Latin America. This state of affairs was surprising and formed the starting point for this study: which sociologies are practiced in the continents of the South, and why do we ignore them in Freiburg and Paris?

This study makes a critical claim. Its aim is to denounce global inequalities, not in economic capital or military power, but in scientific production and exchange. If these inequalities are to be redressed, I believe that they first need to be adequately, empirically analysed and their causes and consequences understood.

This book is the shortened and revised English translation of the original German edition “Vermessene Disziplin. Zum konterhegemonialen Potential afrikanischer und lateinamerikanischer Soziologien” (transcript: Bielefeld, 2008). The first chapter of this book summarises the longer and more detailed part one of the German version. It proposes an empirical analysis of the existing hierarchies and inequalities within international sociology on the basis of a proposed centre-periphery framework. In chapter two, I then introduce the concept of counterhegemonic currents in order to redirect our attention towards real, practical possibilities of overcoming – or subverting – those inequalities despite their structural causes. The main part of this book (chapters III to XI) corresponds to the second part of the German version. It outlines a systematic and historical in-depth study on the development of South African Labour Studies from the 1970s into the early 2000s as an example that, I argue, illustrates the idea of counterhegemony very well. The empirical research for this part was conducted 10 years ago, in 2004. It is with great pleasure that I now finally have the opportunity to provide a detailed version of my results to my South African colleagues and present my work for their critical readings.

The third part of the German version of the book, in which I critically analyse the consequences of the observed distortions within our discipline for its nomothetic, universalist aspirations, was published in English in the *Canadian Journal of Sociology* (Keim, 2008) and is accessible online (free access). This argument will not be repro-

duced here. I also refer readers to a more recent text in which I offer a more detailed conceptualisation of the circulation of knowledge in the social sciences (Keim, 2014), in particular with regard to circulation across places that occupy unequal positions within the international scholarly community, as well as to knowledge circulation across the institutional boundaries of academic spaces, that is, in exchange with extra-academic actors.

A few additional introductory comments are necessary. Since the terms “developing” or “Third World” countries appears outdated and would not be adequate within the framework of this study, and because after the end of the East-West-conflict and in particular with regard to African social sciences the term “Western” social science is misleading, I have decided to use the term “North Atlantic” sociology to refer to the sociologies of Western Europe and North America as well as the term “global South” when referring to Africa, Asia and Latin America. The term “global South”, although equally debatable, has gained currency and is still convenient as a shortcut, as Shinn, Jack Spaapen and Venni Krishna argue:

“For analytical purposes we write about South and North as broad categories. We realize that by doing that we do not justice to the large socioeconomic and cultural differences that exist between countries within these spheres. Moreover, it is arguably the case that some countries in the geographical South belong to the conceptual category of the North (Australia, New Zealand) and *vice versa* (some of the East European countries). Nevertheless, the above distinction between North and South is now broadly used.” (Shinn/Spaapen/Krishna, 1997: 28, footnote 1)

This study is mainly concerned with sociology. The theoretical framework and conclusions refer to this discipline. However, numerous empirical materials have only been available for the social sciences in a wider sense; part of the literature consulted also included the neighboring disciplines.

Because this study is based on a PhD thesis that, when defended in 2006, addressed a new area within the domain of sociology of science; because in the so-called age of globalisation, a centre-periphery framework requires a solid foundation perhaps more than ever; and because the concept of a counterhegemonic current contradicts some of the established views regarding scientific development in the global South; for all these reasons I found it important to develop my line of argument on a solid empirical basis. For reasons of transparency, I have decided to provide detailed documentation regarding many of my empirical results. In order not to stretch the volume of this book beyond a reasonable format, this documentation is available online through univOAK (Open Access to Knowledge - Archives Ouvertes de la Connaissance), the institutional repository for Université de Strasbourg (Unistra) and other higher academic and research institutions in the Alsace region. The PDF-file is directly accessible under the following link: <https://univoak.eu/islandora/object/islandora>

An important empirical source for the main part of the book was a series of narrative interviews conducted with South African colleagues in 2004. Each interviewee was asked for consent to be quoted from the interview. Only where interviewees did not agree to be quoted were the quotes anonymised. The interviews were recorded and

transcribed. For quotes from the interviews, the following rules apply: (...) stands for an omission from the original transcript that does not change the sense of what is being said. [...] stands for a silence in the conversation. The interviews have been kept in their original form, except for the marked omissions (mainly to avoid unnecessary repetitions), and with additions aimed at enhancing the understanding of what is being said where necessary (in brackets and marked with my initials, W. K.). The quotes are thus reproduced in spoken language. I have kept audio files and transcripts in my personal archives, available upon request.



# Chapter 1

## For a centre-periphery framework in the international social sciences<sup>1</sup>

This first chapter deals with the question of global inequalities in the production and circulation of sociological knowledge and proposes a centre-periphery framework for understanding these inequalities.

Wherever I have presented this framework, it has been criticized from various viewpoints. To some, the terminology of centre and periphery sounds old-fashioned or politically incorrect. Besides the term “global South” (which I also use as a convenient shortcut throughout the book, although I do not find it in any way analytical), the terms “metropole” and “majority world” (Connell, 2007) are often favoured, while in Latin America, where “centre” and “periphery” were coined as social scientific concepts, the terminology endures (Rodríguez Medina, 2013). It is interesting to observe that colleagues often insist on analysing the importance of material inequalities and power relations, but usually hesitate to name them. My intention here is to provide an analytical tool that is useful to address unequal relations between places and positions of knowledge production in general. This includes not only the very broad categories that I tentatively call the North Atlantic social sciences and those of Africa and Latin America or the South – in accordance with my initial question about the lack of visibility and acknowledgement of the activities in African and Latin American scholarly communities. Moreover, the proposed framework also applies to differentials between single countries, between important and less important cities or between single institutions within countries, and between hierarchical positions within institutions.

Another important critique raised was that I underestimated or even denied agency to southern scholars. While I do not believe that I am denying them agency, especially in the in-depth study on the historical development of South African labour studies that I present in this book, admittedly, a centre-periphery-framework as a tool is more focussed on structural factors than on agency. If we want to understand the distortions

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<sup>1</sup>This first chapter summarises the first part of Keim, 2008. An earlier version of this text in French, entitled “Pour un modèle centre-périphérie dans les sciences sociales. Aspects problématiques des relations internationales en sciences sociales” is accessible online: Keim, 2010.

within the international social sciences and their implications for the practice of our craft in different places of the globe, I believe that a thorough understanding of such structural factors is indispensable. Furthermore, I believe that the strength of the framework presented here is that it manages to integrate into a coherent overall picture a series of disparate studies, empirical observations and practical experiences concerning the realities and conditions of scholarly practice in disadvantaged positions within the international social science community.

According to the centre-periphery framework that I would like to propose here, we can analytically distinguish three dimensions: first, the dimension of infrastructure and internal organisation, which is strongly determined by factors outside academia; second, the conditions of existence and reproduction; third, the dimension of position and international recognition. The second and third dimensions relate above all to problems within academia. The chapter is essentially based on the relevant literature, which remains scattered across various research fields – sociology of science, science and technology studies, history of sociology, regional debates in the scholarly communities of the South, debates on the internationalisation/globalisation of sociology, and post-colonial studies. The proposed framework will systematise and contextualise the arguments put forward in the literature and demonstrate the emerging relevant interrelations. Furthermore, where feasible, empirical analyses will be presented in order to illustrate the main argument.

The distribution of academic activities and output across different regions around the world is extremely unequal, so much so that we can argue that inequalities are greater in the field of knowledge than in terms of material goods (Barré and Papon, 1993; Adebowale, 2001; Hountondji, 2001/02; Weingart, 2006).

This unequal geographical distribution relates to the national dimension of science, which despite the trends towards internationalisation or globalisation continues to leave its mark on academic activity very decisively (see Crawford, Shinn and Sörlin, 1993; Gingras, 2002; Heilbron, 2008; Heilbron, Guillot and Jeanpierre, 2008). This “national” or “local” dimension – terms used here synonymously, in opposition to “international” and “global” in a topographical sense, or to “general” and “universal” in an epistemological sense – is very important and sometimes underestimated in the social sciences. Compared to the so-called “hard” sciences, social sciences, because of their social reflexivity, achieve a lesser degree of decontextualisation and abstraction in terms of theoretical output (see below).

This uneven distribution can first be explained historically: most of the modern scientific disciplines, as they are practiced within specialized academic institutions, emerged first in Europe and then expanded around the world through colonisation, and, in some cases, through post- or neo-colonial relationships.<sup>2</sup> Except for the foundational program developed by Ibn Khaldun ([1377] 1967-68) in the 14th century,

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<sup>2</sup>This era of “colonial” or “imperial” science led to a series of studies on the history of science which are part of a centre-periphery approach (MacLeod, 1982; Petitjean, Jami and Moulin, 1992; Todd, 1993; Baber, 2003; Mignolo, 2004). Ping confirms the exogenous origins of Chinese social sciences (Ping, 2010). See also the work by Polanco as well as Hountondji. It is worth remarking, as S. F. Alatas recently did, the historical influence of extra-European elements and traditions prior to the establishment of modern science (S. F. Alatas, 2010).

which had the potential to become the origin of modern sociology, we do not find any similar initiative. This very general observation on the exogenous origins of science is also valid for the social sciences outside Europe and for sociology in particular; their autonomous development is still an issue today.

Although the proposed framework suggests common characteristics among most of the Southern countries, this does not mean that the same situation exists across the four continents or in the North Atlantic region.<sup>3</sup> On the contrary, there is a diverse range of very specific cases. For instance, in Latin America, “people consumed ideas in the same way as fabrics, railways and locomotives” (Marini, 1994: 310).<sup>4</sup> But later, the emergence of Cepalism, that is, the theoretical and empirical works produced by the Economic Commission for Latin America and the Caribbean (CEPAL) (a UN organisation from which emerged studies that were used as a basis of reflection for developing original theories on the roots of underdevelopment), led to a phase of emancipation (for a critical discussion of these developments as a counterhegemonic current, see Keim, 2008a: 181-194). Today, the big countries of the Latin American subcontinent have a substantial and well-integrated institutional base, thanks to the existence of the Council and Faculty of Latin American Social Sciences (CLASCO and FLASCO) or of institutions such as the Latin American Association of Sociology.

In Africa, on the other hand, because of the relatively recent independence movements, in 1980 French and British ethnologists were still presented as the founders of African sociology (Akiwowo, 1980). A fully-fledged social science emancipation does not seem to have taken place as of yet, but there are signs of this in recent years.<sup>5</sup> S.F. Alatas (2006) illustrates similar tendencies in different Asian countries. Owing to its particular history as a settlement colony and to its early industrialisation in comparison to other continents of the South, Australia has long been excluded from the binary South-North opposition. However, Connell believes that this country should be viewed alongside the continents of the South, so she discusses the dependent development of Australian sociology in great detail (Connell, 2007).

Many of the authors cited above maintain that the exogenous origins of the sociologies of the South and the historical relationships between the centre of the disciplinary tradition and the peripheries are still in existence today: they claim that the Southern countries are marginalised at present and sociology, for example, is very Eurocentric. Despite the existence of a lively and often polemical debate on this question, until recently there have been barely any empirical and systematic studies on this subject<sup>6</sup>. The critical presentation by Polanco (1990) on sciences in general and by Gareau

<sup>3</sup>See the critique by Arjomand of Connell and the idea of the “theory of the South” (Arjomand, 2008). On the second point, see also the discussion on hierarchies within Europe (Boatcă, Costa and Gutiérrez Rodríguez, 2010; Gutiérrez Rodríguez, Boatcă and Costa, 2010).

<sup>4</sup>Aware that the passivity suggested by Marini is in reality a point of debate, several authors emphasise the importance of debates since the independence movements, notably in social philosophy and politics, around the issue of regional cultural autonomy (González Casanova, 1970; Brachet-Marquez, 1997; Vessuri, 1999; Beigel, 2010; 2013).

<sup>5</sup>For example, at the World Congress of the International Sociological Association (ISA) in Durban in July 2006, and especially during the first congress of the African Association of Sociology in Grahamstown-Rhini in 2007.

<sup>6</sup>The World Social Science Report 2010 (International Social Science Council, 2010) was published after completion of this study. It is a valuable resource to complete and differentiate the analyses provided in this chapter. I refer the reader to single contributions to the report where adequate.

(1985) on sociology in particular are two relevant approaches. These studies were used as a starting point for my framework, even if they tend to favour a unilinear explanation and do not take into consideration the three dimensions that I will outline below.

Polanco distinguishes between two phases in the establishment of a “world-science” (analogous to Braudel’s “world-economy”): first, the exporting of a science that was established in Europe, which led to its eventual delocalisation and universalisation; second, the establishment of academic communities outside Europe as an integral part of “world-science”. Polanco’s approach remains very abstract and thus difficult to put into practice, since he does not relate it to the present situation.

Gareau’s analysis of the relationships between the three large “blocs” in sociology – the sociologies of the Western, Soviet and Third Worlds – underestimates the intra-academic factors. His hypothesis of an entirely external determining factor in the relationships between the centre and the periphery, namely that North American sociology is not dominant because of its intrinsic values but entirely because of its hegemony in the economic, political and military spheres, is problematic. Even if economic, political and cultural factors play a very important role, questions that are inherent to international academic relationships merit special attention. Below I will focus in particular on the latter.

## 1.1 Conceptualisation of the centre-periphery framework

Following the two authors mentioned above, I will highlight the innovative aspect of the centre-periphery framework when it first emerged: understanding the relationships and interdependencies between the centre and the periphery. What applies to the global expansion of capitalism will be transferred here by analogy to the expansion of science and in particular to modern sociology. In their classic work *Dependency and Development in Latin America*, Cardoso and Faletto ([1969] 1978) distinguished between three dimensions in the peripheral integration of the Latin American economies in the world market: the problems of underdevelopment, dependency and marginality. The transition by analogy from a conceptualisation targeted at a world of material goods to one targeting a world of ideas and knowledge can only be approximate; however, the analytical distinction of these three dimensions is no less pertinent.

As indicated in Table 1, I distinguish between three dimensions in the centre-periphery concept which allow the identification of: developed or underdeveloped sociologies, depending on their material, infrastructural and institutional aspects; dependent and autonomous sociologies, depending on their conditions of existence; and finally, marginal and central sociologies, depending on their position within the international academic community.<sup>7</sup>

A certain material basis, a certain degree of academic freedom, the existence of an integrated academic community, in the sense that Gaillard (1987, 1994) attributed to

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<sup>7</sup>It is evident that the centre, as well as the periphery, are also internally ordered hierarchically and we can find the same distinctions within a region, country or even an institution (Shinn, 1988). For sociology in particular, see Boatcă, Costa and Gutiérrez Rodríguez, 2010.

Table 1: The three dimensions of the centre-periphery framework

<u>Centre</u>	<u>Periphery</u>
I. Infrastructure and internal organisation	
Development	Underdevelopment
II. Conditions of existence and reproduction	
Autonomy	Dependency
III. Position and international recognition	
Centrality	Marginality

Source: model developed by the author

this term<sup>8</sup>, research and teaching institutions, an academic job market and a publication sector are all necessary components in the development of a discipline.<sup>9</sup> These are the most commonly noted aspects in science studies, where the relationships between economic and academic factors are well known and rarely questioned.<sup>10</sup> Rather than insisting on this dimension, I would like to focus on the two intra-academic dimensions and their more specific meanings for the social sciences by proposing a conceptualisation of dependency and marginality. To this end, I have to systematise the various arguments and empirical data that can be found in existing studies but are scattered across several research fields. Certain empirical indicators concerning the dimension of marginality will also be proposed here. However, the analysis of the dependency-autonomy question calls for qualitative analysis, which is more difficult, and almost impossible to conduct on a global scale.

I must make an additional note in order to clarify the status of the concepts put forward in my proposed framework: “centre” and “periphery” are to be taken as ideal-typical poles. Empirically observed academic realities are certainly always to be located somewhere on an axis between the extreme poles of total development and total

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<sup>8</sup>Namely, the integration of researchers into local and regional institutions and associations, and into professional careers. Gaillard notes that in many Southern countries, researchers suffer from isolation and a lack of communication with colleagues at the local level, which strengthens the orientation towards the centre. This tendency is confirmed, among others, by Beaton (2010) in the case of several Asian countries and by Shami and Elgeziri (2010) for Arab countries. On the other hand, Cimadamore (2010) confirms that CLACSO has managed to reverse this tendency in Latin America. In Africa, the existence of regional associations allows a certain regional integration despite the crises in numerous national research systems (Olukoshi, 2010).

<sup>9</sup>It goes without saying that academic development is not linear and is never achieved once and for all, i.e. that I reject the idea of unilinear “stages of development” in a narrow sense (as presented in the field of economics by Rostow, 1960).

<sup>10</sup>See the discussion on the literature (Ben-David, Price, Frame) in Polanco (1990: 27 ff.). See Barré and Papon (1993), and especially the series on “Les sciences hors d’Occident” edited by Waast (1996). For a state of the art report on social sciences in the Southern countries, see the contributions in UNESCO and ISSC (2010a), particularly UNESCO and ISSC (2010b).

underdevelopment. Furthermore, this model allows the possibility of differentiating between various combinations of the three dimensions of the framework, which is an advantage compared those that identify three “positions” (centre, semi-periphery and periphery). In other words, a local academic community and its sociological output can be simultaneously affected by the three aspects of underdevelopment, dependency and marginality; their effects are often but by no means necessarily interrelated. For example, Japan in the 1970s and again in the 1990s was described as a country where sociology is very developed in terms of institutions, funding, the number of researchers and their integration in a national association. However, it seemed that the output of knowledge remained very much guided by and dependent on North American and European influences. A large part of sociological work in Japan was dedicated, among others, to the translation of texts, which is not an autonomous or particularly original contribution to the discipline as such (Koyano, 1976; Lie, 1996). Similarly, Australia illustrates a case where sociology has historically suffered from intellectual dependency, whereas the country shows a considerable level of development and cannot be viewed as marginal. If the literature that I have reviewed starts from the hypothesis that the countries of Africa and Latin America are on the periphery of social sciences around the world, the framework proposed here should allow a more detailed and differentiated view of the diverse aspects of the characterisation of social science peripheries. Furthermore, I hope to be able to evaluate these positions through empirical indicators concerning the international constitution of the social sciences.

## 1.2 Dependency and autonomy

A series of studies criticise the “extreme dependency” of researchers from the South on the “countries of the centre” (Arunachalam, 1992; Hountondji, 1990; Gaillard, 1994: 225). According to S.F. Alatas, this is a key problem for peripheral sociologies (Alatas, 2003, 2006).

Alatas lists six reasons that contribute to academic dependency: dependency on ideas, on media of communication, on research and educational materials and technology, on overseas aid for research and teaching, and finally, “dependency of Third World social scientists on demand in the West for their skills and qualifications” (S. F. Alatas, 2006), namely a brain drain. But the latter form of dependency can also be viewed as part of a way of thinking about development and the disintegration of academic systems, especially in Africa (Waast, 2003). This phenomenon of “extraversion” will be analysed below. Furthermore, it seems more efficient to first examine the institutional and structural factors of dependency before analysing what is strictly speaking an intellectual dependency.

Even though the question of dependency is frequently highlighted in debates<sup>11</sup>, there is very little empirical work that can actually illustrate this dependency, which is a highly political subject that is usually presented in rather polemical ways. The reasons

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<sup>11</sup>See the continued debate around cultural and intellectual autonomy since the independence movements in Latin America (for ex. the paradigmatic book by Fals Borda, [1970] 1971; Beigel, 2010; 2013); see also the “declarations of independence” during the recent African social science conferences, such as the inaugural congress of the AfSA (1st Congress of the African Sociological Association, Grahamstown-Rhini, South Africa, 15-18 July 2007).

obviously are that the hypothesis of imported theories and methods and the idea of a “captive mind” described so well by S.H. Alatas (1974) pose a real methodological challenge to the sociology of science and that the latter has not yet been able to address this challenge. It would be necessary, for example, to have access on a global scale to both quantitative and qualitative data on the textbooks used in teaching sociology, the bibliographies distributed to students, the books that are held in libraries or even the institutions where professors and researchers obtained their degrees.

Furthermore, dependency on overseas funding is a complex and ambiguous question. I hesitated to mention this type of dependency as an indicator of underdevelopment (Keim, 2008), but I can certainly consider it an indicator of dependency. Existing studies provide ambiguous results regarding the effects of this material dependency on the output of knowledge.<sup>12</sup> However, there are a number of consequences of the dependency on overseas funding that clearly contribute to the consolidation of other aspects of dependency. First, overseas funding often has an ideological influence which has already been highlighted, especially as far as the Cold War period is concerned (Singh, 1988; Chekki [1987] 1990/91). Second, increased competition between local institutions to obtain overseas funding plays a negative role in the integration of the local academic community.<sup>13</sup> The insecurity of planning and the impossibility of developing long-term research perspectives and priority areas, specialisations in specific topics, or even long-term personal careers, are also obstacles to development. Furthermore, the procedures for obtaining and managing funding generate additional work. Finally, the external determination of research topics and priorities can often lead to research activities that have no local social relevance (Waast, 2001a, 2001b, 2003).

It is easier to consider the control of publications, and of academic publishing and communications as an aspect of the autonomy/dependency dimension. In 1991, Altbach noted that “the developing world is heavily dependent on imported books” (Altbach, 1991: 11) and that “international communications” look like a unidirectional movement going from “the metropolitan centres” towards the “Third World” countries. Arvanitis and Chatelin (1990) established an “index of editorial dependency” (based on the percentage of publications published abroad). With the aid of this indicator, Chatelin and Waast (1996: 82) in a study on sciences in Africa demonstrate a strong dependency of Africa on overseas publishers. In Latin America, where there are large local and regional publishers that have been able to establish themselves and

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<sup>12</sup>The lack of “financial instruments that can have an effect on the output trends in the world” is one of the two fundamental characteristics of non-hegemonic countries, according to Losego and Arvanitis (2008: 351). Several other authors describe dependency on overseas funding as a problem that is specific to Southern countries and see it as the origin of a series of other problems, such as intellectual dependency. On the other hand the role of overseas funding during oppressive and dictatorial regimes in particular make this material source appear as an advantage rather than a threat to the development of independent traditions (for the discussions, see Shinn, Spaapen and Krishna, 1997; Barreiro Díaz, 2000). The case study on Labour Studies in South Africa presented in this book confirms this. Romani reaches a similar conclusion on the particularly coercive context of Palestinian social sciences that draw their “dynamism”, “scientific legitimacy” and “resources from abroad in order to build up their disciplines” (Romani, 2008b: 502). See also Romani (2008a).

<sup>13</sup>This emerges as an important aspect of in-depth research on the development of migration studies in Mexico, in particular from interviews with researchers in three major centres (the Colégio de la Frontera Norte/Tijuana, Universidad de Zacatecas as well as the Universidad de Guadalajara and CIESAS-Occidente).

thus enjoy a good reputation, the most plausible reason for the fairly high number of books imported from the North Atlantic region is the prestige of those publications (Brachet- Marquez, 1997: 8; UNESCO, 1999b: 108).

The realities of the reproduction of academic communities represent another important criterion of academic dependency, albeit one that S.F. Alatas (2003) does not mention. Certain academic communities in the Southern countries depend on overseas institutions to obtain degrees and to receive accreditation for their staff, because either such institutions do not exist locally, or those abroad are more prestigious than the local ones. Abreu (2003) mentions a whole series of doctoral programmes in Latin America that have been developed fairly recently, thus gradually reducing the exodus of doctoral students towards Europe and North America. However, the prestige of qualifications obtained overseas remains. On the other hand, in a large number of African countries, dependency in terms of accreditation remains real because of the lack of an equivalent curriculum in the local institutions (Cruz María e Silva and Sitas, 1996b: 13; UNESCO, 1999c: 125). Most professors who teach at African universities have obtained their doctorates overseas (Szanton and Manyika, 2002). Ping confirms that in China obtaining a foreign degree, preferably from a “world-class” university in the United States, remains a requirement for students aspiring to a career in research (Ping, 2010).

Thus obtaining higher education degrees overseas goes hand in hand with the problems of local academic development and reinforces dependency on concepts, theories, methods and textbooks developed elsewhere, which is in turn perpetuated in the design of research projects or in the citation practices that we observe in sociological texts.

Gingras and Mosbah-Natanson (2010) conducted an impressive study systematically analysing dependency in terms of citations in social science publications across seven geographical regions. Their figures clearly indicate that North America and Europe are the regions cited by far the most. Among the continents of the South, we can distinguish between the regions that are dependent on Europe, such as Africa, and the regions that are dependent on North American references, such as Latin America and Asia-Pacific. In comparison, scholars from North America cite references from the same region in approximately 80% of cases, while in Europe the practice is divided equally between regional and North American references.

This intellectual dependency, which is an important dimension in the ongoing academic debates in the South and is difficult to evaluate globally, calls for a “decolonisation” of social sciences (Mkandawire, 1989; Gutiérrez Rodríguez, Boatcă and Costa, 2010). S.H. Alatas (1974) conceptualises the mechanisms and effects of this dependency in a very detailed way using the term “captive mind”. Through their dependency on and the domination of North Atlantic approaches, he claims, Asian researchers are “captive” in the way they think and the way they analyse their specific social realities, which creates a “non-relevant” sociology (S. H. Alatas, 1974: 691).<sup>14</sup> This argument was reiterated more than 30 years later by his son (S. F. Alatas, 2006). It is important

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<sup>14</sup>Solórzano Anguiano and González Gómez speak of “alienation” in the case of Latin-American sociology prior to 1960 (Solórzano Anguiano and González Gómez [1979] 1994: 15).

to emphasise that, according to S. H. Alatas, the “captive mind” is a problem specific to the continents of the South. It does not simply refer to the “acritical” adoption or imitation of received concepts, but to concepts received from abroad. Although he does not reject the acceptance of existing approaches, he calls for their selective, constructive and creative appropriation.

The idea of intellectual dependency has recently been strongly criticized for underrating the agency of peripheral scholars, i.e. it has been equalled with passivity. This is not exactly what I mean by the term (cf. for a more detailed argument Keim, 2014). The selection, reading, rejection, adoption or adaptation of any type of literature, of theories and concepts provided by colleagues are processes of intellectual activity and thus agency. Intellectual dependency as I use the term refers to the fact that the majority of key texts, theories, concepts and also methods that a scholar chooses to use in his or her social science practice is of foreign origin.

To conclude, the issue of dependency appears to be specific to the analysis of South-North relationships in the social sciences. It does not cover the relationships between Southern countries, and varies in the case of the relationships between countries within the North Atlantic region. Even if there are a number of more important local or regional centres in certain Southern countries – Mexico, South Africa, India, and some Australian universities – it is difficult to speak of a South-South dependency that emanates from these centres. The relationships between countries in the North Atlantic region that could also be described as dependent – Europe in relation to the United States, Eastern or Southern European countries in relation to Great Britain, France and Germany – are not the focus of this study.

### **1.3 Bibliographical databases: indicators and instruments of marginalisation**

Marginality and centrality are terms that describe the given relationships between academic communities. A central sociology is visible, and it is highly recognised at the international level – scholars everywhere thus actively contribute to reproducing centrality. A central sociology is also one that has the potential to impose thematic and theoretical priorities because of its prestige. It is often described as “the core”, “the emporium”, as the “canon” or the “mainstream” of the discipline (Jubber, 2005). That being said, since this is a phenomenon that is recognised by both sides, the definitions of knowledge as “central” or as “marginal” are always partly tautological: defining the “mainstream” as the publications contained in the databases of the ISI (Gaillard, 1987: 9; Arunachalam, 1992) when these databases are the “mainstream” which they define, or yet again defining the “centre” as “radiating or spreading influence” (S. F. Alatas, 2003: 603), are definitions marked by this tautology, from which it is very difficult – almost impossible – to escape. For the moment, we use the hypothesis that centrality characterises a large part of North Atlantic sociology but rarely, or never, characterises the sociology of Southern countries. This initial hypothesis will be questioned through the introduction of the concept of “counterhegemonic currents” below.

Bibliometry is a common instrument of science studies for measuring the contribution of a researcher or of a scholarly community to their discipline. However, the widespread usage of bibliometric databases is highly problematic when it is meant to be measuring academic *output*.<sup>15</sup> These databases contain only publications that already have a strong “international impact”, namely those that are frequently cited, which creates a vicious circle whereby recognised publications become even more visible (Barré and Papon, 1993: 328). Output in Southern countries, for instance, is not sufficiently taken into account, since the origins of publications that are registered in the databases have a strong geographical concentration.<sup>16</sup> In contrast, while bibliometric indicators may not accurately reflect the extent of academic output in the social sciences, they seem to be relevant indicators of centrality or marginality.

According to a comparative analysis of three international databases, namely the *Journal Citation Reports/Social Science Citation Index*, FRANCIS and *Sociological Abstracts*, the latter can be considered to be the most balanced database in terms of geographical representativeness (Keim, 2008a, 2009). *Sociological Abstracts* is the only database that is entirely dedicated to sociological research, and allows for the possibility of making longitudinal comparisons.

For the period 1995-98, research by country, using the field of “author’s affiliation”, in *Sociological Abstracts* reveals severe inequalities between countries. North American publications<sup>17</sup> account for 46.5% of the output (26,136 references with the US as the author’s country of affiliation), Great Britain 13% (7,325 references), followed by Germany (4.6%), Australia (3.9%), France (3.6%) and the Netherlands (2.9%). Italy, Israel, Brazil, Mexico, Spain and Sweden each represent slightly over 1%, while Japan, Finland and India barely achieve 1%. All other countries account for less than 1% of the database and two thirds (95 of the total 166 countries) are not taken into account (27 references or less). The African continent represents only 1.3% – less than Spain –, Asia 3% and Latin America 4.1%.

Ten years later (2005-08), the United States (43.5%, that is, 23,475 references) and Great Britain (14%, that is, 7,573 references) remain in first place, while the order of the following countries is slightly reversed: Australia (4.2%), Canada (3.8%), the Netherlands (2.6%) and Germany (2.4%). France (1.9%), China (1.7%), Sweden and Mexico (1.5%), South Africa and Israel (1.4%), and Italy and Spain account for over 1%, Norway, Japan and New Zealand only 1%, while all the other countries account for less than 1% and 100 countries do not even achieve the 0.1% mark. Over the course of the last decade, the most important changes among the most prominent countries concern Canada (from 28<sup>th</sup> place in 1995-98 to 4<sup>th</sup> in 2005-08), China (from 39<sup>th</sup> to 8<sup>th</sup>) and Taiwan (from 34<sup>th</sup> to 20<sup>th</sup>) as well as Brazil (from 9<sup>th</sup> to 27<sup>th</sup>). As in the previous period, certain Southern countries are among the first

<sup>15</sup>For a very important discussion that cannot be presented in detail here, see the contributions in Arvanitis and Gaillard (1992).

<sup>16</sup>For this reason, certain authors propose the exploration of data sources other than bibliographic databases, such as, for example, a large library catalogue (Waast/Arvanitis/Richard-Waast/Rossi, 2010) for the countries of the Maghreb.

<sup>17</sup>In the case of many US authors in *Sociological Abstracts*, the country name is not listed in the address, which is revealing in itself. The figure presented here was obtained after searching by US state and by adding the resulting figures, which represents approximately the total for the United States as a whole. However, multiple affiliations, as well as co-authors in the United States, are counted twice.

20 countries – first of all Australia, then China, Mexico, South Africa, Japan, New Zealand and India. However, at continent level, Africa represents barely 2.5% and Latin America 3.6%. Therefore the relationships remain very unequal, even if the continents of the South as a whole have achieved a slightly higher place. Moreover, it seems that *Sociological Abstracts* is strongly polarised according to language. In a longitudinal comparison, English has been the dominant language since 1965 (when the database was first created): between 81.7% (1965-1970) and 85.5% (1995-1998) of the publications contained in the database are written in English.

Instead of interpreting these figures as an accurate image of academic output, we must see them as indicators of the degree of centrality or marginality of national scholarly communities. This becomes evident in the case of China. According to UNESCO data (1998), in 1998 (the last year when UNESCO itemised these figures by disciplinary fields), China was the number one country producing social science books (55,380 titles).<sup>18</sup> However, this level of productivity is not reflected in the figures obtained from *Sociological Abstracts* in the same period. The creators of these databases and their selection criteria determine which social sciences are central (thus constituting the dominant mainstream) and which are of no interest to the international community. Therefore, it is in this sense that we have to understand them not only as an indicator of marginality but also as an instrument of marginalisation that reinforces domination by the North Atlantic region.

Nevertheless, the analysis outlined above does not exclude the possibility that the low visibility of the output of Southern countries (excluding Australia) corresponds to a real problem of academic underdevelopment, in particular in the publishing sector, which has an impact on the number of publications produced; in this case, the results would indeed appear to correlate with the level of academic output. Unfortunately, I can offer only a partial response to this suggestion since there are no alternative data sources on a global scale. Nevertheless, UNESCO manages DARE, a small database (DARE, 2004) which contains, among other types of information, data on social science journals around the world. The DARE database is neither complete nor representative. Since the person in charge of the Paris office could not explain the criteria according to which journals were included (Personal communication, September 2003), we can consider it as a random sample of social science journals. Due to time and space constraints, I will focus only on the African output.

DARE contains 243 African journals, most of which have been in existence since the 1960s or 1970s. Their longevity indicates stability and strength.<sup>19</sup> The *Journal Citation Reports – Social Science Edition* (1998) (JCR) includes only two out of these 243 journals: the *South African Journal of Economics* and the *South African Journal of Psychology*. In 2008, this same database (2008) included two African countries, South Africa, with eight journals, and Nigeria, with two journals. The marginalisation of African output is evident. The FRANCIS database (1984-2005) is slightly more representative: it includes 32 journals from ten African countries. For the period 1960-2005, *Sociological Abstracts* included 23 of the journals that were

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<sup>18</sup>We note the rarity of data on output according to disciplinary fields. For a recent attempt based exclusively on SSCI, see Russell and Ainsworth, 2010.

<sup>19</sup>On the longevity of African journals, see Adebowale, 2001.

included in DARE: a journal from the Ivory Coast, Ghana and Tunisia, two journals from Kenya, Nigeria, Senegal and Zimbabwe, and 12 journals from South Africa. Even if this database is more balanced than the JCR, *Sociological Abstracts* barely includes 10% of the sample of the 243 journals contained in DARE.

This brief analysis also indicates a lack of agreement on which African journals are among the “most important in the world”: none of the covered journals is included in all three databases. The fact that both JCR and FRANCIS overlook two of the oldest and most recognised journals in the African continent, the CODESRIA publications *Africa Development* and the former *South African Sociological Review* – now the *African Sociological Review* –, should discredit these databases within the African academic community. On the other hand, a popular non-peer-reviewed journal, the *South African Labour Bulletin*, is included in these databases, which highlights the common ignorance of the African social science publication sector in Philadelphia, Cambridge and Paris. Therefore, the databases confirm the hypothesis that African social sciences are highly marginalised compared to the international mainstream.

The LATINDEX (2008) is an initiative of the Hispanic and Portuguese-speaking communities adopted in order to create their own alternative database. It contains 10,137 Latin American journals, of which 505 are on sociology alone. In comparison, the JCR (2008) includes six Mexican journals, three Brazilian and Chilean, two Argentinean and one Colombian. The search engines of *Sociological Abstracts* and FRANCIS do not have a feature for obtaining the number of journals per country. *Sociological Abstracts*, upon request<sup>20</sup>, made available the following figures: the database contains 54 Brazilian journals, 30 Mexican, 10 Venezuelan, nine Colombian, six Argentinean, four Chilean, two from Costa Rica and Ecuador, and one from El Salvador, Peru and Uruguay, that is, 120 in total for the entire South American continent. This database seems more balanced than the JCR, but it still contains only a little over one fifth of the periodical publications indexed in LATINDEX.<sup>21</sup>

These analyses can be expanded further by including the language factor or the composition of the editorial committees of international journals (Braun/Schubert, 1996). However, it seems more interesting to look at other less evident elements of the marginality-centrality dimension.

#### 1.4 The unequal division of cognitive labour in the social sciences

Marginality also relates to the role of an academic community in the global production of knowledge. Hountondji observes an unequal division of academic work at the global level since the colonial period (Hountondji, 2001/02). S.F. Alatas distinguishes between three levels: 1) The separation between theoretical and empirical work; 2) The separation between work on other countries and work conducted on one’s own country; 3) The division between comparative studies and isolated case studies (S. F. Alatas, 2006: 71).

<sup>20</sup>Personal communication, 27 May 2010. The statistical data is available from the author.

<sup>21</sup>Mouton (2010) presents comparable results on sub-Saharan social science output with the help of “African Journals Online” (AJOL).

Social sciences that are peripheral in relation to a globally accepted hierarchy of knowledge (Gaillard and Schlemmer, 1996) produce “low-level” knowledge, namely knowledge that demonstrates a low level of abstraction and generalisation. By contrast, the centre has nearly the monopoly over prestigious comparative research and the development of generalisable theories.<sup>22</sup>

This unequal division of labour is evident at the institutional and personal level, in the programmes of academic cooperation, for example. González Casanova in his programme for a Mexican policy in social sciences emphasised as early as 1968 the crucial question of international cooperation and summarised certain rules to be respected in such collaborations in order to ensure their proper development. First, Mexican researchers must be part of all stages of the research, from conceptualisation to the publication of the results. Their participation must not be limited to the collection of data. Second, the theoretical framework and initial hypothesis must be published and the results must be analysed and published first in Mexico and only later abroad. Furthermore, Mexican researchers, as partners in comparative projects, must participate in the entire process of analysis and interpretation. This also means that they must have access to all of the materials from the regions that are part of the comparison. Casanova asks particularly that no world region should be excluded as a research subject. Finally, the research organisation and process, as well as the resulting practical experience, must be reflected upon and published with the results (González Casanova, 1968: 26).

In an introduction to a collection of articles on international cooperation, Gaillard indicates that the key problems in South-North relationships are “linked to the imbalance in collaboration and to the domination that the partners from the North exert” (Gaillard, 1996: 12; see also Gaillard, 1999). The hierarchies refer to the fact that the partners from the North are more involved in the key tasks of conceptualisation, interpretation, theoretical development and publication, while their colleagues from the South are often limited to collecting data or conducting an initial analysis of the data. Empirical research on the South-North inequalities in academic collaborations – regardless of the discipline – indicate that in 90% of cases, the headquarters of the projects are based in an institution from the North, and that in 65% of the cases, the research initiative originates in the North (Gaillard and Schlemmer, 1996: 124). In their analysis of the collaborations across different regions in the area of joint publications, Frenken, Hoekman and Hardeman (2010) observe a strong centre-periphery structure: the United States and Western Europe dominate in joint publications, whereas there are very few co-authorships between the regions of the South. In this context, and more specifically for the social sciences, Mkandawire (1989) notes that it is mostly regional specialists who are interested in research in Africa, a question that will be developed further below.

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<sup>22</sup>See also Sitas, 2002. These hierarchies correspond roughly to the “hierarchies among researchers and forms of research” that Shinn (1988) identifies within the scientific institutions themselves.

## 1.5 Localism, extraversion and exoticism as characteristics of marginal social sciences

The issue of marginality and centrality does not stop there. “Place matters only to those for whom Great Truths are not an option”, writes McDaniel (2003: 596). This quote summarises another phenomenon that needs to be analysed here, namely that North Atlantic sociologies claim that they produce works with a high level of abstraction and generalisation, or even universality (the “Great Truths” according to McDaniel) with far greater ease than those in the continents of the South. On the other hand, the sociologies of the South prefer, for various reasons, to produce results with a narrower, local relevance. The unequal division of labour, often combined with problems of academic development (lack of an integrated academic community, isolation, and lack of a communication infrastructure) and the prestige of the institutions in the centre, affect the cognitive level of the output of sociological knowledge. These factors lead to Hountondji’s concept of “extraversion”: the fact that African academic output is not oriented towards local colleagues or local society but rather towards an overseas, North Atlantic audience. This extraversion is evident in the choice of local subject areas and in the low degree of generalisation (Hountondji, 1990a: 11).

This already foreshadows the problem of local perspective and the limited scope of the sociological output from the periphery. According to the “divisions” observed by S.F. Alatas, “extraverted” peripheral social sciences have limited perspectives. North Atlantic audiences are more interested in case studies on local societies that feed into the work of theorisation in the North (Hountondji, 2001/02: 5). Furthermore, the social sciences of the South view themselves as subject to pressure for an “exotic” representation that they also internalise or use strategically in order to attain a certain visibility in the international community. This expectation of exoticism is viewed as a specific aspect of their geographical location that is particularly limiting. This is what Sitas (2004: 20) says, for example: “(...) there is a serious pressure to define ourselves as ‘different’ in the world context of ideas. Trying to be more than peripheral exotica in the ‘global cultural bazaar’ of social science we are bumping up against the niche trading tents we have been offered. (...) Of course we can be cynical and say that even here very few of us are considered good enough to be included, like Ali Farka Toure and Yousso N’Dour in the category called ‘world music’, as decorative additions.”

The difference between localism and generalising abstraction can be empirically evaluated, at least approximately, through publication titles. The titles of publications from the periphery typically contain the geographical location, indicating the “provincial” or regional status of the knowledge presented, which is not the case for North Atlantic publications. According to Baber, this shows that there is a topographical dimension to the production, circulation and validation of knowledge in the social sciences (Baber, 2003: 618). As McDaniel maintains in the above excerpt, this indicates a need for localism in order to make the work from the countries of the South more legitimate.

The hypothesis of extraversion and localism, as components of marginality in the social sciences from the South, can be equally tested empirically by examining the

geographical specialisations of research institutions. The DARE database (2004) contains information on a somewhat arbitrary selection of approximately 4,800 social science institutions around the world. The descriptions of these centres include among other facts an indication of the geographical focus of research. As I explained earlier for journals, this database can be used as a random sample.

Due to time and space constraints, I will focus once again only on Africa and Latin America. Of the 89 African institutions contained in DARE, eight (9%) did not indicate a regional specialisation, only six (7%) were oriented beyond the continent, while 33 (37%) indicated a specific country and 45 (50%) mentioned the African continent or region as the geographical areas of their research. Among the 149 Latin American institutions, two thirds (105) had a local or regional orientation, 23 (15%) focused their research on other continents, and 21 (14%) did not indicate their geographical specialisation. In order to simplify the approach, France and Germany can be taken as examples of European institutions: 208 centres (89 German and 119 French) were included in DARE. Among those, 56 (27%) did not indicate a geographical specialisation, 20 (10%) were focused on their own country, and 41 (20%) on Europe; 50 (24%) focused their research on other continents and 38 (18%) indicated a global perspective. The hypothesis of the centrality of Western Europe, which in terms of knowledge “dominates the rest of the world” – various regional specialisations beyond Europe and global perspectives or perspectives with no geographical reference –, and the marginality of Africa and Latin America, which are mainly limited to local and regional issues, is confirmed as far as the aspect of the cognitive division of labour is concerned.

However, these indicators do not clearly show to what degree the limitation to local issues in the South corresponds to the interests of the North Atlantic audience, a hypothesis that is part of Hountondji’s concept of extraversion. An analysis of the invitations of foreign scholars to an institution of the centre, the case of the *École des Hautes Études en Sciences Sociales* (EHESS), made it possible to go deeper into this question (Keim, 2010b). To summarise the key results: The statistical distribution shows that the majority of invited scholars from Africa, Asia and Latin America present to their colleagues at the EHESS subject areas that are related to their country or region of origin and are viewed as “informants”, according to Hountondji’s terminology, thus providing information on their place of origin to a Parisian audience. On the other hand, the majority of invited scholars from Europe and North America give presentations of a general, theoretical or methodological nature, disregarding their place of origin. Another tendency is to discuss other eras or continents, something which is common among invited scholars from the North but less so among their colleagues from the South.

Furthermore, considering the invitation practices at the EHESS from a different angle, an additional marginalisation factor emerges: the disciplinary structure of social sciences channels discourses, researchers and funding, and prevents voices from the South from becoming part of the hard core of the nomothetic social science disciplines (economics, sociology, political science). Traditionally, ethnology/social anthropology and orientalism were disciplines that analysed societies outside Europe; since the Cold

War, “*area studies*” have been added to the regional specializations (Wallerstein et al., 1996).<sup>23</sup> A large number of the EHESS invitations of colleagues from the South originate from a regionally specialised centre within this institution. Centres with more general orientations, for example, the Centre d’Études Historiques [Centre for Historical Studies], are more accessible to researchers from the North.

Finally, the same division of labour described for an institution from the centre can be observed in the South. Andrade Carreño presents an analysis similar to the one I have just summarised. He takes an in-depth look at the topographical dimension of the subject area and origin of articles in seven Mexican sociological journals. The unequal division of cognitive labour is very prominent in the data he presents. The majority of articles from Mexico and Latin America<sup>24</sup> analyse a local or regional issue – 57% and 76% respectively – whereas most of the North American and European contributions do not have a geographical focus. The author justifiably considers this an indicator of the degree of abstraction and generalisation in relation to their geographical location and thus an index of more theoretical contributions (Andrade Carreño, 1998: 136). Moreover, a significant part of published work was focused on Mexico and Latin America and once again highlighted the frequent communication between social sciences from the South and regional experts from the North. The phenomenon of extraversion can therefore be clearly detected in the local academic communities, as the case of Mexico has just illustrated.

## 1.6 The inherent evolutionist assumptions in the social sciences

Finally, the problem of marginality is also linked to persistent evolutionist hypotheses (or maybe more adequately: premises) that are inherent in the social sciences, which despite the disillusion and post-modern deconstruction of the past few decades create hierarchies both in research topics and in the locations of sociological output. Therefore, the hypothesis that all societies experience the same stages of development, or the idea that the rich nations of the North are currently at the peak of human development and that the rest of the world will “catch up”, continues to strongly affect the perception of the production in the social sciences. A consequence of these evolutionist assumptions concerns the core disciplines in social sciences – sociology, political science and economics – that do not view Africa or Latin America as places with their own social realities, or as capable of developing relevant theories; they understand these continents as “fields” or as “laboratories” where the “general theory” developed in the North Atlantic region can be put to the test. This attitude is evident in the publication of the volume *Africa and the Disciplines: The Contributions of Research in Africa to the Social Sciences and Humanities* (Bates, Mudimbe and O’Barr, 1993). Contrary to what the title implies, this volume does not highlight research *in* Africa but research *on* Africa, for example in the field of economics: “Africa is a gold mine to economists because its economic history has been so extreme. Booms, crises, famines, migrations. Because there are so many African countries, often following

<sup>23</sup>For a slightly different argument on disciplinary divisions as an instrument of “internal colonisation” in the southern countries, see Lander (2004).

<sup>24</sup>Articles signed by authors with an address in Mexico or by authors with an address in Latin America.

radically different economic policies, Africa offers an ideal diversity ideally suited to the comparative approach which is the economist's best substitute for the controlled experiment" (Collier, 1993: 58). This excerpt clearly reveals the extent to which researchers from the North consider the African continent as an experimentation field, as a region exporting raw materials to help complete the theory-building that takes place in the North – an attitude that is often also internalised by their African colleagues. This perception is linked to an evolutionist assumption contending that Africa has lagged behind in terms of its social and economic development and cannot inform cutting-edge research in social science. Sociologists from the South often have the feeling of not being able to contribute in a substantive manner to international debates since the development of their societies remains far behind the knowledge achievements of the metropolitan centres (a view expressed in some of the interviews with South African researchers).

The goal of this chapter was to conceptualise a centre-periphery framework, put it to the test with the aid of certain empirical indicators and present certain aspects that are less known or controversial. The model proposed here makes it possible to understand and differentiate given situations by distinguishing between various types of problem that are connected to three dimensions: infrastructure and internal organisation, conditions of existence and reproduction, and positioning and international recognition. The position of a given academic community can also be described with the aid of empirical indicators according to its placement on each one of these three dimensions, between the two ideal-typical poles of each dimension. Empirical analyses indicate that the Southern countries are frequently affected by the problems of the periphery, but to very different degrees and not necessarily on all three dimensions at the same time. The empirical data analysed in this study were gathered at the beginning of the 2000s. Recent developments in international debate indicate that much has changed since then: the consolidation of emerging powers within the international scholarly community, increasing fragmentation of what I have here very broadly called the "South", deterioration of conditions for academic activity in many formerly rather central countries, thus leading to increasing multi-centricity on a world scale.

The centre-periphery framework still seems relevant in understanding the international constitution of sociology, as material inequalities and important differentials in recognition and prestige persist even though they may have shifted since this study was completed. I leave it to the critical discussion with and by critical readers to determine today's accuracy of my findings and to differentiate the picture where necessary. The observed centre-periphery structures, especially the dimension that sets marginality against centrality, leads to geographical hierarchies in the output and circulation of sociological knowledge – this is what in the following is referred to as North Atlantic domination.



## Chapter 2

# Counterhegemonic currents – a conceptualisation

A variety of critiques of North Atlantic domination as conceptualized in the previous chapter have been articulated in recent years that can be strengthened by empirical evidence of structural inequalities and distorted mechanisms of communication and exchange at an international level. While these critiques are important and necessary, what has been largely missing so far is the demonstration of viable alternatives to North Atlantic domination, as well as analyses of conditions of their emergence<sup>1</sup>. Here, I would like to open up a different perspective by highlighting counterhegemonic currents emerging from the South despite its peripheral position, that is, by drawing attention to challenging scholarly communities that have not received much, if any, attention in the debate so far. This may eventually allow us to respond to the question: what has to happen in order for North Atlantic domination to be weakened and for scholarly exchange on a more equal footing to become possible?

### **2.1 Critical and deconstructive endeavours to counter North Atlantic domination – a short and critical appraisal**

In recent years, several attacks have been launched against the aforementioned North Atlantic domination in the social sciences. S.F. Alatas has very aptly systematised and conceptualised to which extent imported approaches may be irrelevant for the analysis and understanding of local societies, and proposes a set of criteria necessary to render Southern sociologies more relevant to their own contexts (S.F. Alatas, 2001). A variety of authors have criticised Eurocentrism in general (Lander, 2003a; 2003b; Fals-Borda/Mora-Osejo, 2003) or theoretical approaches in particular, such as Amin (1988) for modernisation theory or Connell (2006) for contemporary general theory such as Bourdieu, Coleman and Giddens. Calls for Afrocentrism (Asante 2003) have been pushing for the opposite of Eurocentrism.

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<sup>1</sup>A notable exception is Alatas, who provides several examples of autonomous sociological production from the Arab world and Asia (see, in particular: S. H. Alatas, 2006a: 112-122).

Said (1978) offers a brilliant account of the power-discourse relationship within Orientalism, and Bouhdiba (1970), Mafeje (N.d.) and Mamdani (1997) join him in the deconstruction of Anthropology and African Studies (see also Sow, 2007: 3 ff.). Chakrabarty (2000) calls for “provincialising Europe” and Gutiérrez Rodríguez, Boatcă and Costa (2010) for the decolonisation of European sociology. At the same time, the constructive approach of the indigenisation project attempts to develop sociological concepts from the social knowledge contained in oral poetry (, 1986; Akiwowo, 1991; Akiwowo, 1999; Makinde, 1988; Lawuyi/Taiwo, 1990; for a critique see Adésinà, 2002; Keim, 2007).

These very diverse approaches have been paramount in drawing attention to North Atlantic domination and in opening up spaces for alternative voices. However, they have not had a decisive impact on the hierarchical structures of the international social scientific community so far. As Sitas (2002) points out, this has led to frustrations within the Southern communities, who felt that their reclamations remained trapped. This explains the ongoing need for declarations of independence, for instance during the founding congress of the African Sociological Association (Grahamstown-iRhini, 15-18 July 2007. See, for instance, Sow, 2007). Furthermore, the deconstructive projects mentioned above have appeared first and foremost as political critiques, while their attack on the very epistemological foundations of sociology has seldom been fully recognised.

Their shortcomings as real alternatives to North Atlantic domination thus have to be pointed out clearly. First of all, the theoretical and deconstructive efforts as well as the indigenisation project remain restricted to the level of discourses, theories and texts and do not take into account material inequalities and institutional and power factors. Second, they exist as reactions, as necessary, critical deconstructions of already existing North Atlantic paradigms and thus have little constructive and creative potential. Thirdly, and maybe most importantly, they rely on the dominant arena of competition (for the concept of “arena of competition”, see Shinn, 2000<sup>2</sup>). The main idea underlying the concept of “arena of competition” is that the problem of marginality/centrality is a problem of reciprocal recognition. This recognition takes place in two steps. In the first step, everybody has to agree on a common “arena of competition”, that is, the mainstream international community with its platforms, its international journals, its prestigious institutions and so on. Only in a second step can the battle for recognition and prestige within this common arena of competition begin. The aforementioned theoretical attacks thus rely on the dominant arena of competition, which they are actually trying to deconstruct, in order to receive recognition and to develop their critical potential.

Finally, the critical and deconstructive attacks emerged at a time when postmodern *laissez-faire* characterised large parts of sociological activity in the centre and worldwide. This is especially true when it comes to defining scholarly discourse as a

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<sup>2</sup>Shinn, in his analysis of French science, talks about “arenas of diffusion” or “arenas of competition” referring to “traditional arena” on the one hand – specialised journals, scientific conferences etc. – and alternative arena like the “industrial arena of diffusion”, i.e. the diffusion of scientific knowledge into industry (Cf. Shinn, 2002). I adopt his concept of “arena”, which allows an appropriate distinction between orientations and priorities in social scientific production and communication.

discourse of power. From then on, within large parts of the North Atlantic public, any effort for deconstruction was welcomed; yet apparently the need to defend positions was no longer felt, resulting in the emergent critiques attacking a void. Regarding the limited success of existing attacks at North Atlantic domination, the question remains: what possibilities for overcoming or subverting North Atlantic domination exist?

## 2.2 Counterhegemonic currents through engaged practice and defying scholarly production

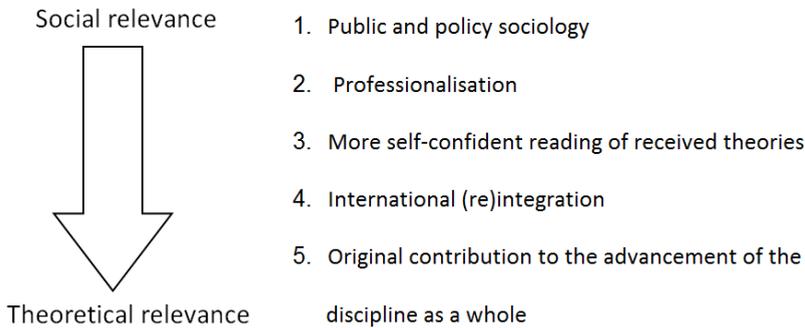
The centre-periphery framework outlined above implies an alternative “way out”. The concept of “counterhegemonic currents” that I propose here suggests a change of perspective in order to focus more on the specific, original developments in the social sciences of the South, whose importance has not yet been entirely recognised. Precisely with regard to the difficulties of explicitly deconstructive sociological projects, I will propose a different view on the emergence of what I would call counterhegemonic currents in a real and practical sense. This is meant as a change of perspective, not as lowering the importance of the aforementioned critical approaches. But what has hardly been taken into account so far is the existence, in Southern countries, of vibrant, engaged scholarly communities around specific, most often locally relevant topics that function *despite* the strictures and structures of North Atlantic domination. Maybe generalised ignorance of these communities is due to the fact that they are often rather small – in comparison with the huge national communities of the North – and thus cannot be accounted for by the means of quantitative analysis, which often remains the favoured method in measuring productivity and impact. Yet as non-explicit challenges to the global mainstream, these communities, their production and the conditions of their emergence do deserve attention as counterhegemonic currents.

The central feature of what I here call counterhegemonic currents is their refusal to participate in the dominant arena – less through theoretical discussion and explicit critique, but rather through specific forms of collective social scientific practice. As soon as a sufficiently large scholarly community turns its back on the so-called “international community” and orients itself towards alternative arenas – local scientific communities, non-academic actors and audiences – North Atlantic sociology loses importance and the very foundation of the dimension of marginality/centrality starts to crumble.

The concept of the counterhegemonic current thus refers to the emergence of original, autonomous sociologies at the periphery. We can generally distinguish several phases that lead to growing independence from North Atlantic domination.

In the first phase, constituted as public and policy sociology (Burawoy, 2004a; 2004b; Burawoy n.d.), counterhegemonic currents shift their arena of debate and interest from the international, Northern-dominated scholarly community to the local community of sociologists as well as to extra-academic actors in their own society. The North-Atlantic hegemony loses importance as locally relevant social problems are dealt with. Commissioned and consulting-type research constitutes a solid basis of empirical data

Figure 2.1: Emergence of counterhegemonic currents



Source: author's own model

on which subsequent theorisation and generalisation can be elaborated. In the subsequent phase, this socially relevant sociology has the potential to be professionalised and the emergence of “critical sociology” (Burawoy, 2004) takes place, building on the achievements of public and policy sociology but also on a gradually more self-confident reading of received theories. Thirdly, commitment to social or political questions in the practice of public sociologies favours a socially relevant orientation and proximity to the lived experience of the actors involved. Existing concepts and theories may appear inappropriate and need to be adapted, elaborated further or supplemented by alternative ones. Thereby the basis for genuine theory-building is gradually provided, as opposed to the application of pre-existing, imported theories and concepts. From social relevance, these currents start to develop theoretical relevance.

Fourthly, the scholarly community, integrated on a local level, becomes active on more equal terms within the international scholarly community and finally makes original contributions to the advancement of the discipline. Obviously, these broad, abstract phases of development can look different according to their concrete local realisations. In any case, counterhegemonic currents as conceptualised here challenge the present North Atlantic domination in a different way than the aforementioned deconstructive projects, namely through social scientific practice: the emergence of integrated and productive scientific communities; the production of data, knowledge, texts and of new generations of scholars; and close interaction with local actors outside academia.

This means that the emergence of original sociologies in the South is apprehended in a perspective of academic development. The proposed development steps are not to be taken for “stages of development” in the strong sense, for instance in a unidirectional and uniform sense such as that proposed by Rostow (1960) for economic development. On the contrary, examples of “inverse development” or stagnation can be illustrated for the domain of academia and research (Waast, 2001a). Nevertheless, we are dealing here with a domain of human activity in which development certainly takes place: scholarly communities and institutions are gradually built, knowledge production becomes deeper, more detailed and specialized, more comparative and generalising. The first developmental step would thus consist in a sort of “import

substitution”, if one wants to remain within the terminology of political economy. The analogy is only partly suitable, in the sense that classical theory and methodology as well as contemporary developments from the North Atlantic centre are usually not ignored completely. However, they no longer appear central for the self-understanding of sociologists in the South. Once disconnected from North Atlantic hegemony, the gradual development of an autonomous tradition of professional and critical sociology begins and completes the emerging counterhegemonic current.

Examples of counterhegemonic currents could certainly be found in many, and maybe in the most unexpected places. In Keim (2008), I provide a historical account of Cepalism and Dependency Theory as a counterhegemonic current emerging from the Latin American scholarly communities. In the following, I will focus on one empirical example, namely the historical development of Labour Studies in South Africa from the 1970s into the early 2000s.

Counterhegemonic currents cannot be studied in a satisfying manner through macro-sociological or quantitative indicators that tend to dominate science studies. Quite on the contrary, statistical indicators would even seem to be suitable for hiding the existence of such developments, at least in their early phases when they do not achieve large numbers. In particular, bibliometric analyses that take “international publications” as a criterion for originality and productivity, if not for scientificity altogether, are necessarily misleading here. In order to find out whether counterhegemonic currents do develop, and whether they develop according to the suggested patterns, in-depth case studies are needed that rely mainly on qualitative analyses. In accordance with the outlined conceptualisation, I will provide a few indications of what such in-depth research will need to search for empirically in order to confirm the idea of counterhegemonic currents.

A first indicator of counterhegemony would be the rootedness of such social science activities in society. In order to counter North Atlantic domination, I said, sociology needs to be in exchange with actors outside the universities, such as governments, political parties, social movements, trade unions, firms, religious communities, courts, NGOs or journalism. To do research for, with, or in discussion with such local audiences, to confront sociological insights with their judgments, and to take responsibility for research results that may serve as an orientation for the agency and decision making of social actors favours the development of sociological alternatives.

This can also translate into extra-academic teaching activities and in the carrying out of commissioned and action-type research. Counterhegemonic sociology thus also contributes to popularising scientific content. Furthermore, exchange with extra-academic groups also favours institutional and informal networks that go beyond the boundaries of the academic institution, as well as intersectoral mobility between academic and extra-academic domains. Corresponding opportunities for funding, such as institutional cooperation or commissioning of research, can also be indicative of the emergence of counterhegemonic currents.

Counterhegemonic currents lead to the consolidation of local scholarly communities that become increasingly professionalised. They undertake scholarly communication

amongst specialists in the form of conferences, the creation of specialised journals, personal professional contacts and cooperative research arrangements. They may found scholarly associations, working groups or other forms of cooperation. The institutionalisation of university courses and degrees, curriculum development and the development of teaching materials as well as the participation of students in research projects ensure the reproduction of a scholarly community that is competent in locally relevant domains. Counterhegemonic scholarly communities collect, process, systematise and make available local sources of data and information in the form of libraries, archives or databases, in order to be able to cumulate knowledge on these bases.

In terms of content, counterhegemonic currents are characterised by the choice of specific, locally relevant research topics. They provide a critical discussion of existing concepts and methods and come up with methodological and theoretical innovations, initially at a low level of abstraction. Sociological knowledge is then increasingly accumulated within the scholarly community in question, research builds on former achievements and deepens, broadening and specifying analyses and interpretations. Over time, more general claims can be made on this basis, existing theories can be questioned, rejected or elaborated and modified, or alternative approaches suggested. In the long-term perspective, autonomous traditions emerge that are able to impose themselves within the international scholarly community and contribute their insights to general sociological theory building.

## Chapter 3

# Historical development and current trends in South African sociology – an overview

The historical development of South African Labour Studies from the 1970s into the early 2000s serves to illustrate the theoretical argument for the development of counterhegemonic trends. It was argued above that in the development of peripheral sociology, two steps are necessary to avoid exoticisation on the international stage and to steer clear of a fixation on the centre. First of all, a certain social relevance needs to be pursued. A “public sociology” according to Burawoy (2004b) will ideally start from a position within one’s own social reality, that is, neither from overseas literature nor from seeking recognition by the international scholarly community. Alternatively, social relevance can also be created through “policy sociology”, that is, through applied or commissioned research. This encourages an engagement with real problems, secures an empirical basis for the research and forces researchers to adapt their concepts, categories, perhaps even their methods and entire manner of posing questions, regardless of where their research tools originally came from. In the following, I will show that precisely this characteristic of “public” and “applied sociology” is very much in evidence in South African Labour Studies. It is no coincidence that Burawoy invited sociologists from Africa, India and Latin America to the 2004 conference of the American Sociological Association, which he as the Association’s President gave the theme of “For Public Sociology” (in the USA, of course). The South African sociologists invited were representatives of the field under discussion here.<sup>1</sup>

The second step follows in searching for ways to recognise, adequately capture and explain local social problems: alternative concepts are developed and sociological

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<sup>1</sup>Cf. also Burawoy’s call to “South Africanize” American sociology: Burawoy, n.d. Burawoy’s initiation of a debate on “public sociology”, particularly his text “South Africanizing”, led to lively discussion among South African colleagues, who felt they had been “labelled” and needed to respond to this. These discussions revealed particularly clearly that some felt the distinction between “public” and “policy sociology” was an artificial one that failed to describe their own activities accurately. However exciting this question may be, here the criteria for distinguishing between the two categories and the need or possibility of differentiating them are of secondary importance, as the main emphasis lies on the very trait they share – their orientation towards a non-academic audience. This debate was mostly oral in nature (personal communication Shireen Ally and Ari Sitas, August 2007). For written documentation, see for example Adésinà’s speech as SASA President: Adésinà, 2006; as well as: Uys, 2005; 2006; Jubber, 2007; Sitas, 1997b. See also the most recent contribution to the debate by Adésinà, 2012.

statements gain theoretical abstraction. Finally, based on this foundation it becomes possible to question, change or extend existing theories and develop new ones.<sup>2</sup> This is the process through which the South African labour and industrial sociology developing from the 1970s onwards went according to my suggestion. In a historical context in which the black trade unions were the only remaining broad social anti-apartheid force following the banning of the political opposition parties, government-critical social scientists in the liberal white English-language universities sought contact with the trade union movement. Starting from practically and politically motivated commissioned research in the service of workers' organisations and workers' education, university research programmes and institutions soon developed. These produced empirical data on trade union development and strike events, on rates of profit and inflation, workers' biographies, a journal, study programmes and generations of students who gained their degrees in South Africa itself and were in demand there as specialists. Sociologists' personal networks created a productive, integrated academic community that engaged critically with important social, political and economic actors. This scholarly community's recent publications show that this socially relevant foundation has also given rise to a theoretical relevance to labour sociology in general.

Our purpose here is to provide empirical insights into the evolution and development of South African Labour Studies and its counterhegemonic aspects. Even though in recent years more and more self-reflective contributions on South Africa's past have been produced, there is still a lack of material as far as the activities of the 1970s and 1980s are concerned. The political situation, repression and censorship meant that central theoretical debate as well as discussions on the problems of working with trade unions were seldom put in written form.<sup>3</sup> Carrying out interviews proved vital for this period in particular in order to record the "oral history" of this academic community. For this reason the following pages will quote extensively from these conversations. A list of all the interviews, which the author has archived privately, is provided in Appendix 1. Annual Reports on the activity at the most important labour studies centres, course handbooks, course outlines and examination questions, information on composition and mobility of staff in the research institutes, publication practice and strategies, as well as information on international activities (conference papers, the newsletters of ISA Research Committee 44 on labour movements [RC44]) were used to capture these realities. Biographical information and individual participants' career paths were also taken into consideration.<sup>4</sup> A selection of texts judged to be significant

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<sup>2</sup>These thoughts refer to the development of independent sociologies in peripheral contexts. It is not possible to discuss the extent to which they may be applicable to the centre of the international academic system here.

<sup>3</sup>Von Holdt confirms this especially for the particularly sensitive issue of relationships between academics and trade unions: "This history doesn't exist. None of those people are alive anymore, not in the unions (...). This stuff was never written about because it was too sensitive." Interview Karl von Holdt 8 April 2004.

<sup>4</sup>Information on individual people was gathered through interviews and material such as research reports of the institutions visited, available academic CVs, biographical information in the journals consulted and similar sources. The picture thus obtained – particularly in regard to the labour specialists whom it was not possible to interview in person – was supplemented with extensive internet research, which produced plentiful points of reference. This applies particularly to analyses of citation methods (see Chapter VIII.2), where for example the institutional affiliation – often abroad – of a large number of authors cited needed to be ascertained. To a certain extent this research also made it possible to cross-check the information provided in the interviews and produced another picture of existing networks. However, it should be noted in this regard that by recouring to the internet and written documents, those actors who had no

were used for the theoretical dimension. This part of the study is concerned with analysing this material while considering the context of Labour Studies' developmental phases on the one hand and the study's theoretical framework on the other. A glance at the history of sociology prior to 1970 will provide insight into the discipline's historical context.

At the outset, a few words on the choice of language seem in order. Even now, there seems to be no alternative to adopting the classification of the population according to skin colour defined by apartheid and still common in South Africa today. "Coloured" refers to individuals with parents of mixed colour, while "Africans" refers to the black African population. "Whites" are European immigrants and their descendants. In addition to these, in industrial relationships – particularly in the province of KwaZulu-Natal – "Indians" or "Asians" play an important role; these are immigrants mainly from India and their descendants. In the anti-apartheid movement, "black" was used as the "political colour" of all non-whites.

Both the history of South African sociology and current developments have been examined in a number of self-reflective works by the South African academic community on the history of the discipline.<sup>5</sup> Here the aim is only to briefly sketch the aspects most important for this study using some milestone dates in the discipline's development, in order to facilitate the contextualisation of Labour Studies into its contexts from the 1970s into the new millennium.

Seen in international comparison, the discipline's history in South Africa began quite early. A decision of the "South African Association for the Advancement of Science" (founded in 1903) demanded a systematic analysis of the country's "native" population as early as 1918. This reflected the colonial conditions in South Africa, which were to shape the discipline decisively in various ways up until the beginning of the 1990s. From the 1920s onwards, study programmes for basic studies in philosophy and anthropology offered occasional sessions on sociology (Cf. Cilliers, 1984). Despite these early beginnings in connection with social anthropology, the discipline only established itself institutionally in the 1930s, when it became linked to social work. The American "Carnegie Commission on the Poor White Problem", which linked sociological studies with social work programmes, is often cited as the starting point for this development (See Groenewald, 1987; 1991). University departments for social work and sociology sprang up across the country.

Sociology was only able to emancipate itself and become an independent discipline in the 1950s, largely due to the efforts of S. P. Cilliers, who is regarded as a key figure in the development of sociology during the post-1950 phase (Webster et al., 2000: 9). After studying with Talcott Parsons in Harvard, he was offered a position at Stellenbosch in 1958 and introduced Parson's theory to South Africa. On a theoretical

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formal role, were less concerned with the written word or who reached a more limited audience due to the inequality in South Africa could not be considered to the same extent as, for example, established academics or politicians.

<sup>5</sup>I refer summarily to the works of Cornie Groenewald, Bernard Makhosezwe Magubane, Ari Sitas and Eddie Webster. Furthermore: Ally/Mooney/Stewart 2003; Bozzoli/Delius, 1990; Cilliers, 1984; Crothers, 1996; Cruz María e Silva/Sitas, 1996b; Grundlingh, 1994; Hindson, 1989; Lever, 1981; Masilela, 2000; Meer, 1998; Sekgobela, 1994; Taylor, 1990. See also the debate on Olzak's report on South African sociology: Olzak, 1990; Bozzoli, 1990; Joubert, 1991; Oosthuizen, 1991.

level, Parsons' approach as imported by Cilliers was constitutive for the discipline's self-conception, for only with the foundation of an independent, coherent theory could the line separating sociology from social work be drawn. Over the course of the 1960s, the institutes originally set up for both subjects broke apart.

At the same time, since the beginning of apartheid in 1948 an ever-increasing divide set in between an English-language, more liberal orientation and an Afrikaans-language school more supportive of apartheid. After the separation from social work had progressed significantly, it was decided at the 16th meeting of the "Joint University Committee for Sociology and Social Work" in 1964 to found an independent sociological association (Cilliers, 1984: 129). After controversial discussions, which by now have been worked through several times in the academic community's collective memory,<sup>6</sup> the "Suid-Afrikaanse Sociologiese Vereniging" (SASOV) was called into being in 1967. The decision to include a clause in the constitution excluding black members had caused fierce debate (Grundlingh, 1994). Some original participants immediately distanced themselves in protest and in the years that followed, the organisation had a majority of Afrikaans-speaking colleagues.

Simultaneously the "Association for Sociology in Southern Africa", ASSA, was founded in Mozambique in 1971, which was distinguished by its non-racist orientation at least as much as its initially regional focus. The ASSA increasingly attracted an English-speaking audience critical of apartheid. Thus the division into two camps against the background of racial segregation was also carried out on an institutional level, leading Ken Jubber to describe South African sociology as "schizophrenic" (Jubber, 1983: 53). This bipartite division was also reflected in terms of the content produced (see below).

By contrast, at the black universities<sup>7</sup> sociology was only introduced in the 1960s, beginning with Fort Hare, and was usually taught by Afrikaans-speaking staff. Up until the 1970s it appeared not to have produced any achievements worthy of mention. And even though some critical black sociologists were able to join current theoretical debate within the framework of ASSA, these universities' poor material and financial situation, their intentionally peripheral geographical location (they were disparagingly referred to as "bush universities"), and the harsh state repression they were subjected to prevented any progress to speak of. What working at a white university meant for a black sociologist is shown impressively by Fatima Meer (1998) in her text "Sociology in Apartheid society".

Before the orientations of the two sociological associations are briefly sketched, we must mention two further factors influencing the situation in South Africa: the intellectual community in exile and the academic boycott. The new generation of social scientists who were to create a turnaround in South Africa's universities in the 1970s were strongly influenced by overseas activity. Not only foreign African Studies scholars analysed and discussed the situation in the Cape: a whole generation of exiles participated in this debate on the region's past and future (Cf. Bozzoli/Delius, 1990).

<sup>6</sup>Cf. Ally/Mooney/Stewart, 2003; Cilliers, 1984; Crothers, 1996; Groenewald, 1991; Grundlingh, 1994; Hindson, 1989; Taylor, 1990; Webster et al., 2000; Webster, 1998b, 2004.

<sup>7</sup>On the history of South African universities: Adam, 1971.

Thus one cannot speak of pure dependency on the centre in regard to the returning scholars: a significant proportion of the South African critical intelligentsia, including many political activists, gathered in places such as London, Oxford or Sussex after the banning of political opposition in 1960.<sup>8</sup> The African Studies Centre founded in Maputo after independence was also a hub for these delocalised intellectuals. After 1965, Ray and Jack Simons, members of the Communist Party and referred to below in connection with their influential work “Class and color in South Africa 1850-1950”, were based first in Lukasa, then in Manchester. Harold Wolpe at the University of Essex is also called the “Dean of South African Marxism” (Webster et al., 2000: 10). Leo Kuper had left the Department of Sociology at the University of Natal in Durban.<sup>9</sup> The seminars of Stanley Trapido at the Oxford Institute of Commonwealth Studies, those of Martin Legassick in Brighton, then Oxford and finally Warwick, and those of Shula Marks at the London Institute of Commonwealth Studies had a significant impact upon the exile community (Bozzoli/Delius, 1990: 20).

It was in this constellation that the movement known as “revisionism” emerged in Great Britain, which was to create a paradigmatic shift in South Africa in relation to the question of the future of capitalism. In the 1960s, the opinion that apartheid’s conservative, backward-looking ideology was incompatible with capitalism had spread throughout liberal circles. Sooner or later, economic progress and development would inevitably lead to the fall of this regime. By contrast, the central argument of the South African and overseas revisionists was that these two systems were definitely compatible and mutually supportive. This insight had been created by a radical reconsideration of the central categories used to analyse South African economic and social conditions – shifting away from racial aspects towards economic ones: to the question of class. The impetus had been provided by the Canadian Marxist Africa specialist Frederick A. Johnstone. Later, black sociologists in particular were to strongly criticise the revisionists’ neglect of the category of race. It was indeed the case that the theory of class relegated the race question to a secondary position, something that some earlier adherents of this moment now also view critically (Bozzoli/Delius, 1990: 20).

The teaching in England shaped by revisionism produced a whole generation of radicalised graduates, some of whom returned to South Africa and became active in newly created positions at English-language universities: Charles van Onselen, Belinda Bozzoli, Dan O’Meara, Eddie Webster, David Webster, Phil Bonner, Colin Bundy, Duncan Innes, Jeff Guy, D. W. Hedges, Henry Slater. However, one of the returnees who was important for the developments to come had not studied in England: Richard (Rick) Turner, who had written his PhD thesis on Sartre in Paris, returned to Durban at the end of the 1960s.

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<sup>8</sup>Sitas (1997b: 3) even credits them with a leading role there: “(...) in England, at the universities there, a critical scholarship pioneered by South Africans who had left the country (...) inspired by new left debates”.

<sup>9</sup>In 2004 the University of Natal was joined with the University of Durban-Westville and renamed the University of KwaZulu-Natal.

Due to the political situation, the international community placed an academic boycott on South Africa at the end of the 1960s.<sup>10</sup> Opinions are divided as to its effects. In the interviews there was neither agreement on this measure's usefulness and political legitimacy, nor on its actual impact. Some interviewees were of the opinion that the boycott, together with censorship and the prohibition of certain texts, led to the isolation of the South African academic communities from important international developments.<sup>11</sup> At the same time, the exile community established lively contacts on both a political and social scientific level. There were programmes for overseas study, banned literature circulated widely despite its prohibition, and the African National Congress (ANC), which advanced the sanctions on the one hand, on the other hand took care that its academic supporters were placed in foreign universities. The only systematic survey of retaliatory measures unfortunately provides purely statistical results and as good as no qualitative analysis or interpretation (Haricombe, 1992).

Theoretical developments from overseas reached South African universities in their written form, via personal contacts and of course via the returning graduates, leading to a veritable "photocopying culture" in the early days:

„The new perspectives generated in England in these years were consumed with great eagerness in South Africa. Dog-eared copies of papers given at Oxford, Sussex or London soon circulated (surreptitiously in most cases) in Johannesburg and Durban. This 'photocopying culture' emerged, we suggest, in tandem with a series of major political and intellectual developments in South Africa towards the end of the repressive decade of the 1960s" (Bozzoli/Delius, 1990: 22).

As far as sociological production in South Africa itself is concerned, Elijah Sekgobela claims that, despite the boycott, the discipline was essentially dependent on European and American developments from the very beginning. This explains the criticism of the sociology produced so far arising in the 1970s in the ASSA: most of it was regarded as irrelevant to local social issues, shying away from dealing with controversial and socially contentious themes, unable to adequately capture the accelerated social change of the 1970s, let alone explain it.<sup>12</sup> Soon after its creation and more strongly during the 1980s, the ASSA thus developed into a discussion platform for social and politically engaged social science – the main emphasis lay on sociology, but related disciplines, particularly those that did not have a comparable critical forum for exchange, were also to be found. Debate was influenced by "Marxism" on the one hand and by political discussions of the rising black trade union and community movements, the Black Consciousness Movement and similar developments on the other.

Albert Grundlingh (1994: 69) characterises the activities of SASOV as the opposite of relevance and originality of the sociology practiced by ASSA: "The SASA's failure to be attuned to the dynamics of South African politics in the 1980s partly explains the

<sup>10</sup> Haricombe (1992: 26) distinguishes between the measures used by the academic boycott: "a) refusal by international scholars to travel to South Africa or to invite South Africans abroad; b) refusal to publish South African manuscripts internationally; c) refusal of international scholars to collaborate with South African scholars; d) refusal by some publishers to provide access to information (e. g. books, computer software); e) denial of South African participation at international conferences; f) denial of access to South African academics by certain institutions abroad".

<sup>11</sup>For example Crothers, 1996: 48; Webster/Fakier, 2001: 21.

<sup>12</sup>Sekgobela (1994: 45) mainly attributes these traits to the predominance of functionalism.

lack of intellectual force in the organization. This was compounded by a corresponding lack of theoretical renewal that stifled the emergence of new ways of conceptualizing South African reality.”<sup>13</sup> Presumably this was linked to its persistently functionalist orientation, which was unable to deal with social change.<sup>14</sup> As SASOV played hardly any role in Labour Studies, its developments will not be dealt with any further here.

The context of South African sociology changed radically with the end of racial segregation. The scope of its content became more diverse, postmodern thought found its way in, and strands of thought that had been defined through their opposition to apartheid were thrown into crisis. The two separate associations merged to become the “South African Sociological Association” (SASA). However, for this brief historical overview the new institutional context is of the greatest importance, for it had a decisive influence on developments during the 1990s. Webster et al. characterise this context as caught up in the tension between four institutional requirements in post-apartheid universities: equality, career orientation, commercialisation and new priorities in research funding (Webster et al., 2000: 12 ff). The aim of equality policies, legally regulated first and foremost via the Employment Equity Act, was to make higher education institutions more demographically representative in regard to skin colour and gender. This process of transformation was proving tough; it led to fierce conflict<sup>15</sup> and, despite some changes by the early 2000s, it had not produced the desired results. Much has been written in recent years about changes to the university system in line with aspects of equality,<sup>16</sup> and this text will not go deeper into this issue.

In order to increase the career orientation of university education, the South African Qualifications Authority, SAQA, was given the mandate to align education and research with other sectors – above all the productive sector. Accordingly, SAQA set up structures to evaluate university education in which academic and non-academic players from government, economy and society give recommendations on how to shape curricula, assess universities’ achievements and participate in the formal recognition of qualifications or degrees. The demand for an education focused on career-based and applied outcomes (“outcome-based education”) was seen by many as a reduction of studying and teaching to a market-based offer (Sitas, N.d.b).

Commercialisation refers to the fact that the discourse of competition, financial autonomy and profit penetrated into university administration. The restructuring increased the pressure within institutions for sociology to be applicable and marketable, which

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<sup>13</sup>SASA was the English abbreviation of SASOV, but should not be confused with the new “South African Sociological Association” (SASA), which is why this text uses the Afrikaans abbreviation here.

<sup>14</sup>“The membership of the two associations would not differ only politically but also according to theory and method in sociology. ASSA members used to be more inclined to liberal interpretation. In later years they drew more heavily on historical materialism and class analysis in explaining the South African complexities and changes (...). SASOV members would be more inclined to apply functionalistic and pluralistic modes of analysis and would be more in defense of positivistic research methods. These observations obviously can be criticised as gross generalizations but they nevertheless serve to indicate a significant drive in the community of sociologists in South Africa.” Groenewald, 1991: 47.

<sup>15</sup>Cf. Chachage, 1999; Webster, 1998a.

<sup>16</sup>With no claim to completeness or representativity of the large body of scholarship on the transformation process, see for example the following contributions: Cloete et al., 1997; and Cooper, 2000. Furthermore: Balintulo, 2002; Chachage, 1999; Motala/Singh, 2002; Muller, 2004. Focusing on the academic system: Mouton, 1995; 2002.

is why sociology departments increasingly offered customer-oriented service courses and consulting (Webster et al., 2000: 13). Demand for such sociological services existed both in the lucrative private sector and the public sector, into which many academics migrated. This was also to have an impact on Labour Studies, as will be shown below.

Finally, the effects of this increased career orientation and marketing on the discipline were connected with state funding policies. By 2000, the National Research Foundation (NRF)<sup>17</sup> had shifted towards individual evaluation and performance systems (Crothers, 1996: 55). This was questioned critically by many social science institutions that had been strongly communally oriented until then, and led Webster and Fakier for example to explore and sketch alternatives for their discipline.<sup>18</sup> Their main objection to the NRF system was that by setting “international standards”, it increased North Atlantic domination.

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<sup>17</sup>Before 2000, the Foundation for Research and Development funded the natural sciences and the Centre for Scientific Development funded the social sciences. These separate institutions were merged into the National Research Foundation with the aim of encouraging more interdisciplinary work. Among social scientists there was a widespread view that their disciplines fared badly under the new funding model, as the government focused on the natural sciences and technological development.

<sup>18</sup>“However by adopting a developmental approach we hope that the benchmarking system that we are proposing will not simply reproduce the legacy of the North but begin to foreground social knowledge produced in the South (...) The precise details on how a less Western-dominated system of benchmarking would actually work will need to be spelt out by the stakeholder. In the meantime we suggest that this system of benchmarking be based on the following broad principles: That the aim of the evaluation be to develop the research capacity of the members of the entity (...); that the question of equity is central to the goal of excellence and that the ability of the entity to produce a new generation of researchers be a key component of the evaluation; that teaching and research entities, rather than individuals, be assessed; (...) that the assessment be undertaken by peers nominated by the South African Sociological Association with the final decision being made by the NRF; (...) that only those entities that wish to be part of the rating system be evaluated. In other words, it is a voluntary system (...).” Webster/Fakier, 2001: 23/24.

## Chapter 4

# South African Labour Studies – from its foundation to the end of Apartheid

The preceding historical overview provides a background against which the development of South African Labour Studies can now be divided into two distinct phases. From its foundation up until the end of apartheid, that is, in the 1970s and 1980s, the discipline was shaped by a radically different framework than in the period from the 1990s up until the beginning of the 21st century.

### 4.1 The right time, the right place: “All these issues, resistance, trade unions and so on were in the air”

South African Labour Studies emerged at the beginning of the 1970s. Both students and lecturers at the white, English-language universities recognised the high political and social relevance of the labour and trade union movement<sup>1</sup> and made them both the focus of their anti-apartheid efforts and the object of their scholarly work.<sup>2</sup> Many of those involved recall the heated atmosphere of the time, the call for action and mobilisation that was “in the air”: “I studied at Wits in the 1970s. All these issues, resistance, trade unions and so on were in the air. The student body was highly politicised. The students themselves were involved in support programs for the emerging trade unions” (Interview Ari Sitas 13 February 2004) These very same words are also used by Karl von Holdt, who experimented with adult literacy training in Cape Town during the 1970s using the approach of Paolo Freire. Von Holdt was a member of the student movement and reading groups on capitalism and took part in debates on the Cape Town Trotskyist “Unity Movement”: “(...) all those (...) things, it all kind of came together, but it was sort of, in the air (...)” (Interview Karl von Holdt 8 April 2004)

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<sup>1</sup>This was a mixed-race labour movement. However, as white workers’ movements had existed from the beginning and the post-1973 movement emerged predominantly at the initiative of blacks and was driven by them, reference is often made to “black trade unions”. The use of this term should not be equated with any racial restriction.

<sup>2</sup>Taylor contrasts this new trend with earlier South African sociology, which had always shied away from examining pressing social problems: Taylor, 1990: 68. On the history of the discipline, see also: Webster, 1985b.

Like von Holdt, many later Labour Studies specialists were active in various circles at this time: “It was very vibrant at that time. I was also involved in creative work, with the Junction Avenue Theatre Company, so we had a lot of contact with communities, trade unions and so on (...). So it was a lot of activities in other words, it wasn’t just one thing. Everybody was doing lots of things” (Interview Ari Sitas 13 February 2004). For committed students, their academic tasks took second place:

“I was involved in the community action support group, which in the late ’70s started getting all the resistance movements together in Johannesburg. So it was community organisations, trade unions, everybody and from that all range of other actions followed, boycotts, and anti-republic day (...) and also (theatre) plays that moved from community to community. So it was before the UDF, the United Democratic Front, it was before (...) the main social mass movement started. And I was also involved with Eddie Webster on a project in the metal industry, which gradually became my PhD. But most of the time I would be involved in non-university matters” (Interview Ari Sitas 13 February 2004).

Furthermore, there were the graduates returning from the United Kingdom, equipped with Marxist theory and the New Left thought of the 1968 student movement, who took up posts in the social science departments at the English-language universities:

“They were the main influences. Then they became the junior staff in the departments and drawing a lot of enthusiasm and, but you know, that was (...) the right time, the right place: the workers, the trade unions, (...), ANC, PAC (Pan Africanist Congress, W. K.) underground all those things. It was a conjectural thing, all this came together, so. The academics were teaching, they were active, they were accepted, they were seen as being relevant, so everything just blossomed” (Interview Ken Jubber 5 March 2004).

These different influences and movements will here be examined separately, even though this is not easy given the many ties between them and the way these ties changed over the years.

## 4.2 The predecessors of Labour Studies: The Communist Party, Industrial Psychology and the “Durban Moment”

Nearly all interviewees agreed that Eddie Webster had founded Labour Studies in Johannesburg, and that Johann Maree in Cape Town and Ari Sitas in Durban also belonged to this first generation of institute founders.<sup>3</sup> However, Devan Pillay, a student of Harold Wolpe, a prominent Communist Party intellectual who was active for many years in exile,<sup>4</sup> differentiates this picture somewhat. He points out that

<sup>3</sup>Some already counted Ari Sitas among the second generation, as he had written his PhD in South Africa (Wits University, supervised by Eddie and David Webster), while Eddie Webster and Johann Maree had gained their doctorates in Britain.

<sup>4</sup>An obituary in “Transformation” paid tribute to Wolpe as a “revolutionary” and influential South African theorist: “His significance as a writer on South Africa lay less in the empirical richness of his analysis than in the importance of introducing a new set of conceptual prisms through which to view the concrete problems of the society. Most of the left intellectuals who succeeded him and built their reputation partly in critique and empirical reworking of the relationship between race, class and the articulation of modes of production, stood on his shoulders whilst doing so. In this most important sense, Harold was a revolutionary thinker of our time.” Transformation, 1995: 97-98.

many writings on the labour movement in South Africa were already produced much earlier, and that Rick Turner had laid the foundation for both political activism and the discipline with his Institute of Industrial Education in Durban.<sup>5</sup>

Devan Pillay is also able to explain why the intellectual link to the earlier activities of the Communist Party was hardly mentioned at all during the foundational phase of Labour Studies, neither by the student movement nor by the academics:

“The National Union of South African Students with the encouragement of people like Rick Turner who was introducing radical perspectives in this country, and some of these intellectuals had studied overseas as well, the new Marxist perspective which they added to what Rick Turner had produced, they turned their attention towards the trade union movement (...). So (...) there was a break with the Communist Party tradition. (...) this new generation, there wasn’t an overt link to the Communist Party tradition although some people in various spheres may have had, it was very dangerous to be linked with the Communist Party, first of all. The Communist Party had deep underground and if anyone had an association with Communist Party or the ANC, you were going to go to jail. So, for that reason, I think it was a self preservation reason as well as for intellectual reasons they went another way altogether. They distanced themselves completely as well as intellectually from the Communist party for those two reasons (...). However, they did draw on that history, but very critically and the big thing that they wanted to avoid was the mistakes of SACTU. It was very prominent (...) amongst labour historians. Phil Bonner and Ari Sitas wrote with much passion that we didn’t want to subordinate trade unions to the nationalist movement, because when the Apartheid regime did clamp down the trade union was smashed. So, in that sense they introduced a new fresh perspective to worker organisation on the shop floor and they imported a lot of that from the British experience (...)” (Interview Devan Pillay 25 March 2004).<sup>6</sup>

The works of the 1950s and 1960s – Eddie Roux, “Time longer than a rope” (1948) and Jack and Ray Simons, “Class and colour in South Africa” (1969) were mentioned

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<sup>5</sup>“Well, certainly Eddie, Ari and Johann Maree (...) were the three that were very intimately involved in introducing industrial sociology to South Africa. The fact that they are still practicing sociologists now is [...] quite interesting, I suppose. But the father of perhaps all of them is Rick Turner, (...) perhaps one should start with Rick Turner. Oh no, actually we must (...) go further back than that (...). Rick Turner certainly for this latest expression of industrial sociology in this country, I think he would have been the inspiration for it, because he introduced a radical perspective within the university environment and he was very much a product of the new left Marxist thinking, in the late 1960s. And he came into South Africa, the University of Natal, and introduced that [...] strand of thinking into the university and people like Eddie Webster and others spread that to other parts of the university. They weren’t the only Marxists, (...) first of all, they were building on the preceding generation of Communist Party activity in the country and the role of people like Jack Simons at the University of Cape Town. (...) He was a leading theoretician in the Communist Party. And him and his wife Ray Simons, Ray Alexander, wrote one of the seminal works on labour history called ‘Class and colour in South Africa’, recording the history of the working class movement in South Africa after the 1950s (...). So people like them, Communist Party intellectuals, really paved the way. (...) he (...) and his wife were based in the trade union movement, which was in the ‘40s, ‘40s and ‘50s. (...) So, he was one of the first, and then you had people like Eddie Roux, he was also a Communist Party activist and he wrote another seminal book called ‘Time Longer than Rope’ which recorded the history of resistance in South Africa up until the 1950s.” Interview Devan Pillay 25 March 2004. On the history of the SACP, cf. the account on the Party’s official website: History of the SACP 1912-1990, n.d.

<sup>6</sup>It is not possible to go deeper into the complex political debate surrounding, for example, reformist versus revolutionary strategies, the reception of “Marxism” and similar issues within the frame of this study. The same applies to the history of the South African trade unions.

most frequently – did deal with the labour movement. In this sense their content also entered into Labour Studies at the beginning of the 1970s, as the analysis of “Essays in Southern African labour history” shows (Webster, 1978a; 1985b; see Chapter VIII.2). However, Eddie Webster justified his position as founder, seeing these writings more as a defence of the working class than as a social-scientific attempt to capture and understand it as a movement. An academic programme of research and teaching, that is, Labour Studies in today’s sense of the word, was only set up by himself and his colleagues at the Universities of the Witwatersrand, Durban and Cape Town:

“(...) there were books written on labour, by people within the communist division, but fundamentally, what distinguishes them from what we call Labour Studies, was that those projects were not located in the university. They were writing as outside of that. The time they were writing, they weren’t basically developing Labour Studies, in the university, in the way that we understand it now. They were directly linked to the Communist Party (...). Let me put it in terms of labour as an actor on its own, not the Communist Party, labour on its own, in the university, looked at socio-scientifically. That was essentially in the ’70s” (Interview Eddie Webster 5 April 2004).

This approach, which regards trade unions as autonomous social agents independent of any particular party and as a social movement, reflects the legacy of the New Left, the ideas of which Webster and others had brought back from his stay in Britain. The idea of “new labour studies” probably originated with Robin Cohen in Britain and Peter Waterman in the Netherlands. It began to establish itself as a new trend via the journal “Newsletter of International Labour Studies” at the Institute of Social Studies in Den Haag in 1979. Ronaldo Munck provided additional impetus for its development with the publication of “The New International Labour Studies” in London in 1989. Webster (1985b) brought this idea to South Africa. “The rise of a new labour studies in South Africa – a brief report on current labour research activities” (1985) can be seen as the new discipline’s manifesto.<sup>7</sup>

This is not to say that no-one else at the universities was investigating the subject areas of labour and industry. The National Bureau for Personnel Research (later the National Institute of Personnel Research, NIPR), already founded in 1946 as a subdivision of the state-funded Council for Scientific and Industrial Research (CSIR), dealt with industrial-sociological issues such as evaluation, selection and training to make the most efficient use of a given workforce, especially black workers.<sup>8</sup> Industrial sociology then established itself at universities in the late 1960s within the context of the economy’s increasing industrialisation and modernisation. From that point in

<sup>7</sup>The term “Labour Studies” is here used specifically to refer to the field of study and its academic community, even though sometimes alternative designations are chosen, as “Industrial Sociology” at the UCT shows.

<sup>8</sup>“Several of the early investigations were ‘concerned with the important question of scientifically testing the aptitude of the native for industrial work both as an operative and in more responsible position.’ This was to be ascertained through physical performance tests, for example. Council for Scientific and Industrial Research, Second Annual Report, 1947: 26, quoted in: Webster, 1981: 90/91. Webster (1981: 91) presents the NIPR’s central research topics between 1946 and 1978 in a table in percentages: “selection and training” 30%, “productivity/efficiency” 12%, “job evaluation/classification” 11%, “attitude towards housing/work” 10%. All other topics made up less than 10% of research effort; least represented were “industrial relations” 1%, “organizational sociology” 1%, “trade unions” 0%, “industrial conflict” 0%.

time onwards, it developed in two directions. On the one hand, it concentrated on questions of productivity, achievement motivation and similar issues, based on Elton Mayo's Human Relations approach. The Institute of Industrial Relations, founded in 1977, worked on ways of creating harmonious relationships between managers and workers within organisations.<sup>9</sup> This kind of industrial sociology, which had already existed for some time, was not very original, and representatives of the new school thought it too much in the service of capital.<sup>10</sup>

This more management-oriented industrial sociology managed to retain its foothold in the Afrikaans-language universities. This is reported by Andries Bezuidenhout, who came to the University of the Witwatersrand after taking his Masters degree at the Afrikaans-speaking University of Pretoria:

“Already then I'd decided that the action was here at Wits. I mean, if you're serious about Labour Studies in South Africa, the Afrikaans universities had industrial sociology programmes, but they were very managerialist. Especially towards my Masters here I got frustrated. (...) They were very managerialist. And typically a person who studied there would go and work for the industrial relations department of a company or human resources. The track was towards management and the methodology was generally quantitative positivist. So the research approach in Afrikaans universities was linked in positivist, structural-functionalist American sociology specifically. The textbook I did in my first year was an American textbook, it was made for the American market and we studied that. The approach was, there are three approaches in sociology: conflict theory, interactionism and functionalism and everything, the family, the state, the labour you basically did, part of those three, which is a very simplistic way of approaching sociology. It also didn't take cognizance of anything remotely post-modern, or post-structuralist, and it horded conflict theories from Barbarian to Marxism into one very simplified way (...). But already from my honours year, I started attending the breakfast seminars at Wits. (...) If you read anything about the 'South African Labour Bulletin', you knew this was the place where the action was; this was where the research was taking place” (Interview Andries Bezuidenhout 30 March 2004).

Furthermore, the English-language universities also often had programmes for industrial psychology – here the differentiation proposed by Gerhard Maré is instructive, in which industrial sociology stands for “supporting the workers”, while industrial psychology by contrast represents “control of workers” – and for industrial relations, as well as related disciplines at the Faculties of Economics. However, these fields – which had their own respective publications – were not counted as part of Labour Studies.<sup>11</sup>

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<sup>9</sup>“The main objective of the Institute is, therefore, to bring representatives of labour and management together to promote their joint interests by expanding the opportunities for communication and cooperation between them and by increasing their industrial relations skills, so that they may develop a sense of common purpose and ability to resolve constructively and effectively any conflicts which may arise.” Institute of Industrial Relations, cit. in Webster, 1985b: 5.

<sup>10</sup>“Henry Lever, for example, in his Inaugural Lecture in 1971 as Chair of Sociology at the University of the Witwatersrand was clearly excited by the idea of sociology serving industry in the way it had served social work. The concerns of management dictated much of the syllabus, focusing on factors affecting productivity such as labour turnover, morale and monotony in industry.” Webster, 1991: 53.

<sup>11</sup>“And on the more management-oriented side, (...) you have the South African Journal of Labour Relations, but it is in a different tradition, (...) more in the human resources tradition. Nevertheless,

Labour Studies defined itself by its claim to “take labour seriously”, dealing with workers not as an abstract category, but as human beings at work and with a social life beyond the workplace. First of all, this meant that subjective experiences in the workplace needed to be examined. Furthermore, the relationship between trade unions and social movements, or rather the understanding of workers’ organisations as a political and social movement, together with the desire to support these, was of central importance: “Firstly, the new labour studies is concerned with labour not as a commodity but with labour as a social and political force. Whereas the traditional industrial relations approach is concerned with the important task of bringing labour and management together, the new labour studies is concerned with developing the labour movement as a social force” (Webster, 1985b: 8). The emergence of New Labour Studies thus led to a split into traditional industrial sociology on the one hand, which persisted mainly in the Afrikaans universities, and the New Labour Studies on the other. In this respect, the field of research and teaching under examination here is demarcated from related areas in the universities as well as from its theoretical and political predecessors such as the Communist Party.

Both students and lecturers in the social sciences were involved in the development of Labour Studies in this sense of the term.<sup>12</sup> The students in Durban and Johannesburg, often organised in the student union NUSAS,<sup>13</sup> were actively involved in programmes supporting the emerging black trade unions at the beginning of the 1970s: “But the university-based academics’ efforts started in the late ’60s, when most of the radical white students in what we used to call liberal white universities began to organize support work for black workers through what they called wage commissions (...). As kind of informal, non-organisational, non-political offices, if you like, advice centres around workplace issues” (Interview Bethuel Maserumule 1 April 2004).

One of these projects was the Institute for Industrial Education, set up by progressive students and academics at the University of Natal, including the political science lecturer Rick Turner, who had just returned from his studies in Paris and was to be murdered by security forces in 1978. The institute was founded as part of the strike wave of 1973, known as the Durban Strikes, which shook the country to its very foundations. Both the place and the time are referred to in the collective memory as the “Durban Moment”. The institute set itself the task of workers’ education and providing materials;<sup>14</sup> as early as 1974, it published a book titled “The Durban Strikes”,

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some of us would also publish in this one. And also the Industrial Relations Journal of South Africa, it started in the early ’80s, but collapsed in the mid-90s. It was founded by a German scholar, with a strong management orientation. They are generally located in industrial psychology rather than industrial sociology, where we have more of a worker orientation. This divide is quite important in the organisation of research and teaching.” Interview Johann Maree 3 March 2004. Industrial psychology is still found at many universities today alongside Labour Studies.

<sup>12</sup>“(...) some were students at the higher stage of their learning processes (...) but were to then finish their studies and then find employment in particular departments, especially the sociology department. I think the sociology department became the power basis for the trade union support work by those academics. When the workers began to organize, subsequent to the 1973 strikes in Durban, these academics and students (...) offered some of the [...] strategic support for nurturing those organizations. (...)” Interview Bethuel Maserumule 1 April 2004.

<sup>13</sup>While interviewing Johann Maree, the author noticed a photograph in his office, showing a group of NUSAS members, including Maree himself and Webster.

<sup>14</sup>Webster writes on the founding of the IIE: “On 30<sup>th</sup> May 1973, three months after the wave of spontaneous mass action by 100 000 black workers, a group of sympathetic trade unionists, students and academics (...) met (...) in Durban to inaugurate the Institute for Industrial Education (IIE). Harriet

which is sometimes referred to as the first work of South African Labour Studies. However, it is a purely empirical representation of the strike events. The project's political intention was "watered down"<sup>15</sup> so as to avoid apartheid censorship.<sup>16</sup> It seems unclear who actually authored "The Durban Strikes". That a team of authors was used can be explained by the caution made necessary by the repressive atmosphere of the early 1970s: Rick Turner had already been exiled, so could not act as the author. Others probably involved include Halton Cheadle (who later established the legal practice "Cheadle Thompson and Haysom" specialising in labour law) and David Hemson – both had later legal restrictions placed upon their work; Gerhard Maré, who still researched and taught in the Durban sociology department in the early 2000s; as well as Foszia Fisher and Karel Tip, co-founders of the "South African Labour Bulletin" (Jubber, 1976: 72; see Chapter VII).

The importance of the Institute for Industrial Education as the foundation for the relationship between Labour Studies and the trade union movement and for the development of this branch of research is also stressed by colleagues whose specialisation in other fields makes them more "neutral observers" (Grundlingh, 1994: 63). The institute can also be seen as a model for the labour service organisations that established themselves in the time that followed.

The lecturers actively involved in the early days mainly included those who had studied overseas and were influenced by the New Left Marxist thought current there, such as Eddie Webster. Alongside the graduates from British universities, gradually more and more of those actively involved in the student movement, such as Ari Sitas, stayed on at university as sociologists. Due to their inspiring activism and the growth of the workers' organisations, they attracted more students to their classes than any other sociological subdiscipline or indeed the discipline as a whole:

"The National Union of South African Students (...) decided to set up wage commissions, working about the workers' living conditions, wages and so on. They then started the organisation of workers that grew into trade unions. (...) Now all those intellectuals who were involved in the organisation of the workers' movement were in sociology departments, mostly in Durban, Wits and here. And they then started teaching what they were involved in, what they were experiencing. This attracted a lot of students, a lot of radical, committed students came into industrial sociology. During the '80s, the unions grew and this attracted even more students" (Interview Johann Maree 3 March 2004)

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Bolton, Secretary of the Garment, Textile and Furniture Unions opened the meeting and explained how the project had come about. She said that workers lacked formal knowledge of trade unionism as they had neither the time nor the money to study. She said a school should be formed which would educate workers about their rights. Foszia Fisher, who was later to become the secretary of the IIE, then proposed: a) that a correspondence course be established to help workers understand the social and economic situations in which they operate; b) that a resource centre be established to provide the unions with background material and information." Minutes of the IIE sub committee, 30 July 1973, cited in: Webster, 1984.

<sup>15</sup>Ari Sitas, personal conversation 10 February 2004.

<sup>16</sup>One of the book's aims was to reject the speculation expressed in government circles and by some of the general public that the strike wave was triggered by intellectual rabble-rousers. Another was to present an alternative view of the events as workers' actions. The book is also concerned with the strike's effects on politics and the economy, and with defending black workers' trade union rights. Jubber, 1976: 72-73.

In South Africa, Labour Studies developed in three centres: at the University of the Witwatersrand in Johannesburg, at the University of KwaZulu-Natal in Durban and at the University of Cape Town. This geographical distribution is no coincidence. These were the white, English-language universities in the country's three largest industrial centres, in which strong trade union movements developed accordingly. Sitas explains this localisation as follows:

“(...) firstly, because (...) of the growth of the trade unions. Secondly, because of these universities paying lip service to freedom of expression, whereas the other universities were much more authoritarian in their approach and much more ready to please the state. Partly because they were in the industrial heartlands of the country. Durban is like the cradle of the trade union movements that were started in the new period in 1973. And, (...) for instance at Rhodes, which has a similar kind of pseudo-liberal approach, it's very rural there, it wasn't in the middle of anything. And if you go to Port Elizabeth which is industrial, the university was very apartheid-linked. So, it introduced industrial sociology, which would be an extension of managerial type of studies. Whereas we started from the social movements and spread upwards. So that's the difference. (...) So that explains the three places” (Interview Ari Sitas 13 February 2004).

The historical development of Labour Studies in these three centres thus already suggests their involvement in and orientation towards the nation's social reality. A few years ago, the Rand Afrikaans University in Johannesburg joined the three traditional centres. Here, Tina Uys became Head of the Department of Sociology and changed its traditionally Afrikaans orientation, for example by appointing Peter Alexander, a British sociologist. Alexander introduced Labour Studies there at the end of the 1990s, and his efforts have already earned the approval of several specialists.

### **4.3 The Trojan Horse strategy as the political motivation for the emergence of Labour Studies**

Knowledge of the political strategy pursued by Labour Studies, which was probably more important than any academic ambition in its early stages, is necessary in order to understand the discipline's early approaches and orientation since its inception. Not only did politics take precedence over scholarship in these early years, but the early writings and the communication via journals cannot be assessed appropriately without taking this background into account. This political strategy significantly determined the discipline's relationship to the trade unions and thus the positioning of the academic community within South African society, as well as the commissioned research on which the majority of time, money and energy was spent. The development and changes in the black trade unions went hand in hand with development and changes in Labour Studies. This was understandably due to the fact that the discipline attempted to reflect upon the central processes of the labour movement and to capture them conceptually in its theory. But the aspiration to become active in an advisory capacity also demanded an orientation towards the realities in question. Not least, academics were to a certain extent dependent on the trade unions' demand for knowledge and research and on the funds that could be obtained for supportive

activity to trade unions. Thus it is necessary to take a look at the political intention behind the Labour Studies project and trace its relationship with the labour movement.

Eddie Webster sketches the chosen strategy – on which opinions differed both then and now, although these cannot be examined in detail here – most clearly:

“We conceptualised it very clearly (...). The way to challenge Apartheid was not to take the state head on, but was to build intermediate institutions. (...) Spaces where inside the economy, inside the factories, inside the workplace, where – and that’s the Trojan horse idea – where your cadre of worker leaders would be accountable directly to the workforce. That’s why we focused around struggles at the factory. (...) And the concept I developed later to describe this was radical reform. It was a reformist strategy. So you operated in the law, you struggle for recognition in society by the law, you register those institutions, (...), you build up your blocks inside the institutions, you build up your power. Incrementally, that’s a reformist strategy. It’s a classic, that’s why it would be seen as social democracy at one level, because (...) initially you’re building up the power of the workers peacefully and non-violently. Non-violence, that’s another important point. Their power being their capacity to withdraw labour, which is a non-violent strategy. It’s a collective process. It’s a democratic process, because you’re winning support voluntarily, showing that your leaders can win incremental games, so it’s not the big issues you take. (...) And as you build up your power, you stretch it to the community. As you extend it to the community, you start to take on more political questions and as you draw in more political questions, you start to take on the state. And your vision is radical. Your vision is one of a more egalitarian society, a non-racial society. You separate out your vision, which is radical, but your strategy, which is tactically flexible” (Interview Eddie Webster 5 March 2005).

In contrast to the strongly (party-)politically oriented SACTU – the 1960s umbrella organisation, the demise of which was now once again interpreted as a failure to build up strong support in the organisations<sup>17</sup> –, this approach to strengthening the trade unions by campaigning for legal concerns in the workplace will here be termed “workerist”. The social sciences’ interest in organisation in the workplace and in questions of work processes and control over workers becomes understandable against the background of this political strategy.

From the Durban Strikes of 1973, which here for the sake of simplicity are taken as the starting point of the re-emerging black trade union movement, until well into the 1980s, concentrating on workers’ concerns was also the main strategy pursued by the umbrella organisation FOSATU. Thus a line was drawn between the trade unions and the Black Consciousness movement, which emerged after the uprisings in Soweto in

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<sup>17</sup>The umbrella organisation SACTU, under which mainly black trade unions had joined forces, decided to form an alliance with the ANC around 1955, thus espousing a general political orientation very early on. Webster, 1988: 177. By 1964 this trade union movement, which was unable to rely on a solid foundation on the level of individual organisations, had been smashed by the state. The decade that followed was known as an era of “industrial peace”, in which the number of black workers continued to increase. Cf. Webster, 1988: 177 ff.

1976 and advocated the idea of national liberation through the strength of and the independent, exclusive solidarity between blacks.

In the early 1980s, when daily life was marked by constant strike activity<sup>18</sup> and the emergence of the popular resistance movement the United Democratic Front (UDF) in 1983, the question once more arose of how the workers' organisations should position themselves in regard to popular and general political resistance, now in the shape of the UDF. In practical terms the resistance of the labour movement became increasingly political, going beyond the workplace. In November 1984 the trade unions formed new alliances with community and student organisations, thus drawing closer to the UDF, and for the first time since the 1976 Soweto uprising there were joint political campaigns. With the foundation of the Congress of South African Trade Unions (COSATU) in 1985, the political line also changed on the highest level of the workers' organisations, uniting different traditions.<sup>19</sup> Given the growing strength of this union and the UDF's successful strategy to make the townships "ungovernable", the government declared a national state of emergency in 1986.<sup>20</sup>

The COSATU thus aimed to draw closer to the congress movement, and the more populist movement around the ANC increasingly criticised the workerist approach for its emphasis on class, which ignored the workforce's reality in a racially structured colonial society. Just how complex the relationships and links in the political scene sometimes could become, and what their effect on the work of the academic community could be, becomes evident in David Cooper's memory of the issue of financing a university-based research institute that he founded in the 1980s. The "International Labour Research and Information Group" (ILRIG) had the aim to produce research, publications and educational activities on the international labour movement:

"(...) we applied in '82 to a European, mainly church-linked funding agency. And I didn't know yet that the agency asked the ANC if they had accepted our application. (...) at that moment the ANC was very supportive with the building of the trade union movement, there hadn't been that clash where the unions conflicted (...) so they were still very supportive. And (...) we said we were academics producing work for the unions. Later on some of them: 'There was too much stress on class and not enough on identity and race.' And in actual fact, some people set about to cut our funding off. (...) when I was traveling, I met some of them in London and I said: '(...) our focus is on worker education. Clearly there is a political agenda but we're not anti-ANC and we're actually not trying to build up an opposition.' And they said: 'Why do you do the Brazilian book? Aren't you supporting the Workers' Party ideal in opposition to the union?' You know, it was quite difficult to work. And some

<sup>18</sup>"(...) rent strikes, bus boycotts, school boycotts, anti-Constitution campaigns and stayaways became permanent features of the political terrain from 1983 onwards." Webster, 1996: 5.

<sup>19</sup>At the end of 1984 three groups of trade unions actually existed side by side: the industrial unions, united under FOSATU; and two general federations, one espousing the UDF line (SAAWU) and one the Black Consciousness line ("Azanian Confederation of Trade Unions", AZACTU). The most important industrial and general trade unions joined to form COSATU in 1985 and thus united both the "workerist" and the "populist" traditions. Only the Black Consciousness line did not join the umbrella organisation, instead forming the National Council of Trade Unions (NACTU). Cf. Webster, 1988.

<sup>20</sup>The organisation of the conservative black lower middle classes in "Inkatha" was an important factor in the situation in the provinces KwaZulu and Natal. From the mid-1980s, Inkatha provoked conditions similar to civil war in its confrontations with ANC followers.

of the people said: ‘You’re just being naïve, everybody thinks like that, you can’t say you’re just doing worker education, nobody does. They all have an agenda’” (Interview David Cooper 5 March 2004).

This debate confronted not only trade unionists and academics; it also affected the relationship between white, university-educated, “Marxist” intellectuals on the one hand and black workers and trade union intellectuals whose thought and activity went beyond the workplace on the other hand. It is not easy to do this complex situation justice, but Karl von Holdt summarises it in a fairly differentiated manner:

“The group that controlled FOSATU and, I mean, it’s very crude to say that, FOSATU had strong democratic structures and stuff like that, but it is true that when there’s a group of intellectuals who are gatekeepers, who control access to the organization, that you can talk about that as a form of control. They were a very strong form of influence. (...) And the intellectuals, basically the line was: ‘We don’t get involved in politics, because we’ve got a long-term strategy. We’ve got to build up the union on union issues and build for the long term.’ Because the problem with the populists and SACTU in the 1950s is that they got too political before they got strong enough on the factory floor. So FOSATU emphasized this factory floor issue, which was very important, I mean, it’s a fundamental (...) contribution to our labour movement and to change in South Africa that they did that. But they wanted to exclude these political issues and of course they had a different political agenda. There was talk of a workers’ party being formed, but then the UDF came up and the same people would have said: ‘It’s populist, it’s dangerous for unions, we’ll get crushed by the state, it’s adventurous, it’s opportunistic (...)’ And then (...) the popular movement became so powerful in the townships, that the shop stewards and black officials got more and more involved in this popular movement and the civic organizations and the youth. (...) So there was a shift taking place and the very democratic structures that had been established by FOSATU became the means through which this new group actually took over the unions, because they said that workers must be involved in the political struggle. So there was this stay-away (the first joint FOSATU/ UDF stay-away in 1985, W. K.) which was a real turning point (...). And then the process continued, and then with the launch of COSATU in ’85 later, (...) just after that stay-away. And the new leadership that was elected and the first thing they did after they were elected, (...) they went to see the ANC in Lusaka. Now, FOSATU would never have done that” (Interview Karl von Holdt 8 April 2004).

This criticism did not apply to all academics equally, and it may be characteristic of the reality of Labour Studies that those who survived in the academically defined field were those who did not fundamentally contradict the COSATU line. The movement of students of the discipline into the trade unions now also became more difficult:

“I did my Honours in industrial sociology (...) with Eddie, because that had historically been the way that a lot of people had gotten into unions, through industrial sociology and through that programme. But at that time the union movement was changing dramatically because COSATU was launched. (...) the academics, that was Eddie Webster, (...) Phil Bonner and Duncan Innes had had quite a lot of work, contact with the COSATU unions. (...) The COSATU leadership was much more

aligned towards the ANC, towards the congress tradition, and they didn't like the line of the academics. Not so much Eddie, but Eddie wasn't [...]. They (...) regarded the academics as workerists (...) there was a real skepticism about (...) people coming out of the university, because they were regarded as having a particular political line which was hostile to the national democratic tradition, the political tradition in South Africa. (...) Eddie was much more (...) sympathetic to a congress tradition. But people like Duncan Innes and Phil Bonner (...) had run seminars (...) critiquing the freedom charter, criticizing SACTU, arguing for an independent workers' movement, all that sort of stuff for a class based movement as opposed to a populist movement, etc., etc., etc. So just when I had the good fortune of doing industrial sociology, it no longer was a way to get close to, but that wasn't a problem, because I was developing relationships with COSATU people anyway, through political links" (Interview Karl von Holdt 8 April 2004).

Before we can examine in detail to what extent contact with the trade unions in itself led to Labour Studies' counterhegemoniality, as well as which of the discipline's special traits emerged against this background, a few words need to be said about the intense and often conflicted relationship between white university intellectuals and the black labour movement – if only to avoid an overly romantic and coherent picture of the early years in particular.

#### 4.4 “Rebels without a cause of their own”<sup>21</sup> – the “critical engagement” of the white intellectuals in the black labour movement

The much-lauded critical engagement in connection with the workers' organisations was not always easy. Karl von Holdt experienced a certain distrust towards outsiders as early as the late 1970s in Cape Town, when he was trying to bring adult education together more closely with trade union forms of organization (Interview Karl von Holdt 8 April 2004). Sakhela Buhlungu became a trade union functionary for the CEPPWAWU in 1987 after completing his degree and working for the university-based research organisation ILRIG, only taking up a university position at the beginning of the 1990s. He reflected in depth upon the difficult relationship between academics and trade unions:

“I got in there (CEPPWAWU) and things were happening there and I just, I *was* there. The links were happening. (...) this was a moment of confidence, when the labour movement were, people were doing things and there was a kind of subtle view, sometimes very strongly expressed, that the university-based intellectuals: ‘Fine, they want to theorize about our suffering, we’re doing the thing, we’re fighting. So let them stand back a little bit, they want to control, they want to write about it’ and so on (...) and so forth, ‘We’re doing it! Let’s do our own thing!’ And so, it was at that time, and I can talk about cycles within the labour movement, like when it needs intellectuals, when it thinks it needs intellectuals and when it doesn’t. (...) the

<sup>21</sup>Sakhela Buhlungu, who has examined the issue of white functionaries in the black trade unions in great depth, published an essay with this title – “Rebels without a cause of their own: The contradictory location of white officials in black trade unions, 1973-2000” – in the papers of the Department of Sociology at the University of Johannesburg, No. 2002/5. Unfortunately this paper was unavailable.

times when the labour movement is very confident (...) and (...) on the top, they don't really need intellectuals. You get that kind of rejection of inputs, of intellectual inputs. But when it's on the decline, then it wants intellectuals, it wants their inputs (...). I think South Africa has gone through some of those cycles as well" (Interview Sakhela Buhlungu 30 March 2004)

Both von Holdt and Buhlungu confirm that the language barrier played a decisive role both in the conflict and in the research methodology, albeit one that has been underestimated or purposely understated until now:

"There were all those things happening in the '70s and '80s and not one of these whites could speak more than two words of Zulu or Xhosa or Sotho or whatever" (Interview Karl von Holdt 8 April 2004). Buhlungu: "I wrote an article about white officials in the union movement, and very few people thought it was an issue. I said: 'Good God! What sociology' – I didn't say this to anybody, but I thought to myself – I said: 'What sociology did you do?' The sociology that I did tells me that this is an important issue for debate (...). Basically I was posing the question about their contradictory location within the black labour movement. The labour movement was essentially black (...) and here people are (...) coming from a white society, in a polarized society, they are going into a black movement, and they get accepted. How does it come? So I'm posing that question. And I'm posing the question of the contradictoriness of their location within this movement. That they don't simply dissolve and become absorbed and integrated into this movement in an unproblematic way. Some of the contradictions remain and (...) some of the issues become thorny and then they do erupt from time to time. (...) part of me raising some of those questions now, I attribute to that five years I spent in the movement, because I knew some of the debates, (...) that people kind of kept pushing under the carpet. And I keep tapping into those things. Now, which brings me to a bigger question about the Labour Studies community. (...) to a large extent, people who've been dominant in the field of Labour Studies are people who are kind of removed, far removed from the experience of labour. From the experience of black workers, from the experience of the black labour movement. Now, this is a general statement I'm making here. This is a big general statement [...]. They are removed from the experience, it is an alien experience, we come from a divided society. And many of them get into it, purely through studying it at university. Now, I mean it's conceivable, no, (...) I wouldn't say that about my colleagues, many of my colleagues. It's conceivable that a person could go far in Labour Studies without ever having met and have a meaningful interaction with a real worker. (...) because the worker is someone who comes and cleans your house in the morning. The worker is someone who comes and does your garden. And then you go to university and you pontificate about the black working class and that kind of thing. You've never met one. As an equal, as a person" (Interview Sakhela Buhlungu 30 March 2004).

Buhlungu also reflected upon the fact that this probably would also have serious methodological consequences:

"None of these people (in Labour Studies, W. K.) speak any of the workers' languages. (...) I'm not talking about some kind of pidgin Zulu or pidgin Sotho, or pidgin this

or that, I'm talking fluent command of any of the workers' languages. So what it means then is that all this process of Labour Studies that we're talking about here is always filtered, it's mediated by translations and translators at various stages of the process. And that is a problem! I mean if we're talking sociology then that is a problem. (...) Nobody would write about it! This is, so, Labour Studies itself, it's got its own, look, this is strong now, I'm using a strong term here. Every discipline has its skeletons in the cupboard. I wouldn't call it skeletons in the cupboard, this is a bit too strong here, but it's got its own issues under the carpet. This is one of our issues as a Labour Studies community under the carpet. We're not talking about it. Because (...) it is uncomfortable, entire careers could come tumbling down if you pose this thing in a strong way" (Interview Sakhela Buhlungu 30 March 2004).

Buhlungu's criticism of the way in which some colleagues represent their past and their outstanding role in setting up workers' organisations and in the fight against apartheid, thus obscuring the influence of much other organisational experience and many other networks, is also linked to this issue.

In his PhD thesis, Buhlungu also discusses the issue of the "intellectuals" both in and outside the trade unions, demanding a broadening of the term in combination with a relativisation of the outstanding role that the whites in the trade unions and universities ascribe themselves in building up the black trade union movement.<sup>22</sup> Subsequently Buhlungu differentiates between four categories in addition to "professionally qualified intellectuals", namely "freelance intellectuals", positioned outside the trade unions and offering their support; "party intellectuals" from the ranks of the ANC and the South African Communist Party (SACP); "trade union intellectuals", who came from the workers' unions themselves; and finally "grassroots intellectuals" on the unions' grassroots level, who took on cultural roles such as tradition, shaping the collective memory and awareness-raising through songs and poetry. By "professionally qualified intellectuals" he refers mostly to white university graduates, who worked in the trade unions as functionaries, spoke English as their native language and thus had access to journals, financial resources and networks outside the organisation. Most of them were not working class and did not speak any African languages. Their frequently quite powerful positions were controversial. Due to their individualist competitive behaviour they were more often visible to the public eye and gained a lot of attention, which was one reason for the complex tensions between white and black functionaries. According to Buhlungu, literature to date has ignored that in the racially segregated society under apartheid, the black workforce regarded these white intellectual trade union employees as more influential, better informed and more qualified, often by virtue of their skin colour – a subtle problem in the relationships between trade union members of different race.

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<sup>22</sup>"The contribution of intellectuals to the emergence of the democratic tradition of unionism in South Africa is not in dispute. What is at issue is the form that this contribution took as well as the composition of the intellectual group involved in union organising and mobilisation. With reference to the South African trade union movement, the term 'intellectual' has been associated with only a particular group of activists who were white and university-educated. (...) The fact that most of the university-educated or traditional intellectuals were white is a function of inequalities in the provision of education and processes of social closure under apartheid which made it difficult for a black intellectual class to emerge." Buhlungu, 2001: 52 ff.

The “monopoly” on organisational skills from which this group of individuals benefited at the beginning gradually opened up in the 1980s when a large number of black “organic intellectuals” from the trade unions began to rise. Their confident manner undermined the white functionaries’ power. This development within the unions took place more or less parallel to the emergence of the UDF, the reappearance of the ANC and the time in which the radical generation of the 1976 school and youth protests entered working life. From then onwards into the 1990s, the white functionaries moved increasingly towards specifically politically oriented tasks.<sup>23</sup> Sakhela Buhlungu thus initiated a debate that has now led to critical reflection in the wider academic community.

Not only the academics occasionally had trouble in defining and asserting their role to the workers’ organisations. Conversely, the workers’ organisations sometimes made demands of the sociologists’ activities that the latter understood as appropriation, political control or attacks on their autonomy as researchers. At the universities, the idea of “critical engagement” gradually became established in order to combine independent scholarly work with support for the movement:

“Pressure exists on intellectuals to make a clear declaration that their research and teaching should be constructed as support for and behalf of, particular organisations. To prevent this subordination of intellectual work to the immediate interests of these organisations, I prefer the stance of critical engagement. Squaring this circle is never easy as it involves a difficult combination of commitment to the goals of these movements while being faithful to evidence, data, and your own judgement and conscience” (Webster, 1996: 3-4).

One stage for this kind of debate in the literature was the “South African Labour Bulletin” (see Chapter VII).

#### **4.5 The border between theory and practice – academic freedom, censorship and repression**

Despite the manifold difficulties in the relationship between Labour Studies and the trade union movement, it remains undisputed that in the first two decades, the method and content of this line of research – despite the dominance of British theoretical influence, as will be seen below – was shaped most strongly by the political motivation for social and political change and resistance to apartheid. That this did not always go down well with the apartheid state will be shown in the following brief section.

Anyone who has studied the practice of critical social science under authoritarian regimes even slightly will wonder how this kind of blatantly oppositional academic activity was possible at all during the period of racial segregation. And indeed, during its first 20 years the Labour Studies community struggled with repression

<sup>23</sup>“The second half of the 1980s and 1990s saw a retreat by white officials from the union movement into specific policy-oriented areas. By this time the post-apartheid South Africa was in sight and these intellectuals carved a niche for themselves in the policy area because that was where their skills were ‘significantly more valuable because this is the terrain of university-based intellectuals’. It was this new-found niche which drew most of the old generation white union officials out of the unions and into state institutions, non-governmental organisations (NGOs), union investment companies and consultancy work.” Buhlungu, 2001: 50. Here he quotes from an interview with Eddie Webster from 1 March 2000.

and censorship, as evidenced by the following recollections: “But don’t forget, what happened was: The state didn’t like that. (...) There was a strong alliance between the workers and the students. And the state [...] tried to smash that. Up to a point they succeeded, people were banned, like me, people were assassinated like Richard Turner” (Interview Eddie Webster 5 April 2004). Nonetheless, the English-language universities maintained a certain liberalism – as shown in this exchange with Sitas, which he introduced as follows:

“Under apartheid (...) you couldn’t teach where you wanted, you couldn’t study where you wanted (...) the books were banned, all the critical books were banned [...]” – “It didn’t mean that you didn’t read them.” – “Yes, but we couldn’t teach them. Lecturers were harassed, hassled, some were banned, some were jailed, like Rick Turner was assassinated. Very oppressive conditions. But the universities played their role in reproducing the dominant order, the only difference is basically the liberalism, the liberal stature of (...) some of the white English-speaking universities” (Interview Ari Sitas 21 February 2004).

The question of how far these activities went seemed to be crucial. Academic freedom was prized highly and was successfully defended by the white universities. In this regard, the academics here had fairly favourable conditions for the criticism of the regime as compared to all other social sectors. However, as soon as activities beyond the university came into play, they had to reckon with repression and censorship:

“They (sociologists, W. K.) should confine themselves to university and I think that’s the core point. (...) You can practice your craft and you can do whatever you want to do, you can even consult Marx, Engels, Lenin and any other revolutionary, provided it’s in the library, it’s for academic purposes, that is disinterested scholarship. In that sense the university was highly tolerant and there was deep interest in textual exegesis of all the critical social thought that underpins the European radical tradition. But (...) the moment you cross the border between the classroom [...] well not even the classroom, the classroom was a problem, because that was the students and the students, as you know, are a problem (...) a major force in developing anti-Apartheid opposition, (...). When they banned the political movements, they (the students, W. K.) were the only ones and they were white students. And they had the privileges of whites and therefore they had the legitimacy and protection of being white. So, when they started to connect up with workers or more importantly, when their teachers started to link up with workers, then they crossed that boundary of theory and practice. (...) The moment you get into (...), influencing the public, especially the counter public. (...) giving a lecture to a group of students who are mobilising around a campaign for trade unions or the release of political prisoners, which is what I did, I was put on trial. I was arrested. So, the moment you connect theory and practice, that’s when you (...) transgress the boundaries of what’s legitimate and what’s not legitimate. So, a lot of our energies were spent on trying to avoid the use of revolutionary language. It would have been considered to be reckless, irresponsible, foolish. That’s why we survived” (Interview Eddie Webster 15 March 2005).

The Labour Studies specialists made downright brilliant use of this protection offered by the university sphere with reference to academic freedom, as will be shown below.

## Chapter 5

# From Resistance to Reconstruction: Developments in South African Labour Studies Since the End of Apartheid

Towards the end of the 1980s it became increasingly obvious that the apartheid era was coming to an end. The trade unions were to play a central role both in the process of transition and in the democratic constitutional structure hoped for. Thus a number of larger studies on economic and industrial issues were launched that went far beyond any research on operational and legal questions that had been commissioned this far. These studies were intended to prepare the unions for their future political responsibility for the nation. Labour Studies specialists as well as economists from all parts of the country worked together on this broad research for COSATU, as Bethuel Maserumule recalls:

“(...) by (the) late ‘80s, unions begin to realize that the country was pretty much set on an irreversible path to democratic reforms and that they had to review their role to shift from protest to engagement or reconstruction. We are no more protesting, we are also raising ideas for reconstruction. And they realized that having played a big socio-political role and socio-economic role, they would inevitably be required to play a role in shaping most of the socio-political and socio-economic legislation under the new government and they knew that the [...] reconstruction and transformation ideas had to be very well researched and formulated. (...) Unlike protest ideas, you don’t like this, you don’t like that, you don’t have to have an alternative. But if you are reconstructing then you definitely have to have a sense of the new thing, you need to replace the old thing (...). And so at that time they firstly set up something we call the Economic Trends Group. They put together all the academic researchers that had stayed in the universities in this group. (...) Through obviously the influence of the union officials, some of whom were former academics, they retained particular links with those who remained in the universities. (...) They formulated initially broad issues regarding problems of the South African economy, its location in the global system [...] just to generate initial and preliminary union views on how to

approach issues of economic transformation (...)” (Interview Bethuel Maserumule 1 April 2004).<sup>1</sup>

COSATU made strategic use of the results of the Economic Trends Group in the national debate with the business community and the government, as Maserumule remembers:

“COSATU very strategically and cleverly used the research to launch a strong attack on government and business. (...) So, it was very useful and it earned COSATU a lot of respect in the business community as a labour agency or a labour grouping with policy capacity, with strong ideas that were mostly true about the South African economy and the role of management and government within it. Because it was finding its way, those comments were finding their way into important international economic institutions, like the World Bank and the IMF and the EU. So, while COSATU would not have anything to do with those institutions, government and local business were not happy that a critique which in most cases would be credible would begin to (...) look acceptable in the eyes of such institutions. So they were forced to say: ‘Okay guys, do you want to talk?’ That was very, very, very, very, very, very, very, fundamental. So, the second was, now emerging from that the union recognized that they couldn’t just rely on general economy-wide research. (...) They begin to lay basis for sector growth strategies, industrial policy in other words. So, they then felt that it was important to establish what they called ISP, Industrial Strategy Project. It was almost an off-shoot of the Economic Trends Group which began to now see value in doing sector related research work, (...), the same gang of people, (...) but now joined by fresh troops who were just graduating from university (...). In departments, where some of them were not yet heads of departments, for instance, they began to be recognized seriously by their departmental seniors. (...) So, the person will come here (to the Friedrich Ebert Foundation, W. K.) and say to me: ‘I’m aware you’re supporting TURP and it is in our view projecting or rather helping

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<sup>1</sup>On the history of the economic Trends Group (ETG): Alec Erwin, economist by training and a former lecturer at Natal, joined the trade union movement in 1976/77. He took the lead in economics at a national level within NUMSA and COSATU. In early 1986, then education officer of NUMSA and based in Durban, he asked Stephen Gelb to set up a group of economists to work on the impact of economic sanctions. The research question was whether current economic problems were linked to sanctions or whether they reflected deeper structural problems within the country’s economy. Stephen Gelb was at the time at Wits and worked informally with various COSATU-affiliated trade unions, including NUMSA. Around that time, he had set up the Labour and Economic Research Centre (LERC) together with Taffy Adler (former NAAWU) and Judy Maller (Industrial Sociology student at Wits). It was within LERC that he started the ETG upon Alec Erwin’s request, co-funded by COSATU, the FES and Oxfam UK. The ETG, starting in 1987, gathered around 12 progressive scholars from LERC and from various universities: Brian Kahn (Economics, UCT), Vishnu Padayachee (Institute for Sociological and Economic Research, University of Durban-Westville), Anthony Black (Economics, UCT), Dave Kaplan (Economic History, UCT), Mike de Klerk (Economics, UCT), Bill Freund (Economic History, University of Natal), Jean Leger (SWOP, Wits), Fuad Cassim (Economics, Wits), Doug Hindson (Sociology, Wits), Dave Lewis (TGWU) and Mike Morris (Development Studies, University of Natal). In 1989 Stephen Gelb left LERC and the ETG moved with him to the University of Durban-Westville. In February 1990, as ETG-coordinator, he took part in a meeting with the now unbanned ANC and COSATU in Harare. In May 1990, the so-called “Harare document” defined the economic policy supported by COSATU and ANC as the first policy statement of the ANC since the freedom charter. Within the ETG, there had been a division of labour between macro-economists and industrial policy experts. The industrial policy group took over the ETG for the second phase under the name of Industrial Strategy Project. Dave Lewis became its new coordinator and moved it to UCT. Stephen Gelb, Personal communication, 1.10.2014.

to situate our university strategically in society” (Interview Bethuel Maserumule 1 April 2004).<sup>2</sup>

Here, Maserumule describes how COSATU recognised and embraced the trade unions’ key role in and responsibility for developing new economic policies after 1990. It distanced itself from the oppositional attitude it had taken so far, moving towards a stance generally referred to as “strategic unionism”.<sup>3</sup> The trade unions now wanted to become more active in supporting politics and helping to shape the agenda in the new South Africa. COSATU and its union officials also took on a range of tasks that supported the ANC’s election campaign in the run-up to the first democratic elections in 1994. Subsequently its “Tripartite Alliance” with the ANC and the SACP meant it moved into the uppermost echelons of the main political players. A number of Labour Studies specialists were also elected into the government or were given offices and tasks within the upper levels of administration in democratic South Africa. Thus the needs of the trade unions shifted and the practices of Labour Studies along with them.

When looking back at the developments of the 1990s, in particular when referring to the current situation, many interviewees lamented the dwindling contact between university-based Labour Studies and the trade unions. However, they believed that the field had lost significance not only within society as a whole, but also within the universities themselves, losing its prominent position within the social sciences. Interviewees – such as Buhlungu – listed several related reasons for this new situation: changes in the demand for sociological research outside academia, the growing social recognition of the trade unions (linked with difficulties in the relationships between academics and unions), the development of research institutions with the trade unions and the migration of staff into other sectors:

“It’s not as clear cut as it used to be before. You can’t look at South Africa and say Labour Studies is leading sociology as a whole. Not any more. (...) Partly because we’ve lost people in numbers. People have left. They’ve gone and become consultants and things like that. And it’s serious, it’s serious. (...) University pays little, you go and become setting yourself up as a consultant, start while you’re in the university, and you get the money and you realize that, in fact, the demand is much more than you can meet because of time, and then you just leave the university and get a consultant full-time. Because there’s people out there who don’t (...) have a clue what labour is about. So they (...) want a hand to be carried, they want someone to baby-sit them (...). The consultant is someone to baby-sit someone, someone else who knows nothing about the subject. That’s how I define a consultant. But anyway. So, (...) there is a decline there. (...) The connection of Labour Studies to the movement here, is weak. Is weak! (...) Because the notion of intellectuals, there was a time when it got discredited within (...) the labour movement. Because the problem is that some of those intellectuals wanted to lead. (...) not only they want

<sup>2</sup>He dated this last meeting with a representative of the University of Natal to around 1996/97.

<sup>3</sup>“Strategic unionism calls for conscious intervention at the macroeconomic level and the setting of goals such as low unemployment, low inflation, and social development. It requires commitment to growth and wealth creation, as well as to equitable distribution. It requires democratization of the workplace, participation in tripartite bodies, and a strong research and educational capacity inside the union movement” Webster, 1996: 14.

to kind of advise, they want to lead! (...) late '80s, early '90s. [...] Remember, this was also the time when the labour movement was developing its own internal capacity (...) to do these things on their own (...). And remember, this was the moment also when the labour movement was getting cosy with the new government. So kind of arrange, you don't really need those intellectuals, (...) get it sorted out with the government and so on and so forth. So, that was the moment. So the links are poor, and as a result, both sides are left impoverished by this. They're impoverished by this, (...) because the labour movement gets all sorts of things. We get a lot of insights, of access (...) by being in touch with them. But once we're not in touch, we end up poorer, both sides, so that's a big problem" (Interview Sakhela Buhlungu 7 April 2004).

The manifold reasons given for the subdiscipline's situation since the 1990s, which was felt to be disadvantaged, go in different directions, are sometimes contradictory and were not evaluated in the same way by all respondents. The aim here is to analyse the arguments presented individually and to link them as far as possible. The interviewees agreed on some central points – those touched upon by Buhlungu and several others besides –, while other issues proved more controversial.

## 5.1 Ideological crisis and the loss of political motivation

The social and political change threw Labour Studies – whose self-definition was strongly linked to resistance to apartheid – into an ideological crisis.<sup>4</sup> The official responsible for social sciences in the NRF even went so far as to call the field old-fashioned. According to her, its representatives clung to obsolete themes and failed to adapt to social change:

"It's (Labour Studies, W. K.) been one of the core platforms for sociology in South Africa because of the nature of the labour movement historically. But it's no longer a core platform. Although livelihoods and labour is an issue, the way it's construed is no longer the platform. So, it's actually a bit old fashioned. (...) And why it loses importance has largely nothing to do with sociology. It's why people persist in the interest when the field, the terrain has moved on. (...) Because the actual issues that confront South Africa (...) they're not trade union, labour-related issues for many, for the majority of the population" (Interview Tessa Marcus 26 March 2004).

That the NRF took such a ruthless stance could potentially have catastrophic financial implications for the discipline. However, despite all this the funding made available for the programmes in Durban and Johannesburg around 2000 showed that they were still regarded as of scientific importance.

It is certainly true that the anti-apartheid dimension that had shaped the discipline's first two decades no longer applied, and that Labour Studies thus had to rethink itself as a field. But the argument that labour, the trade union movement and industry had become insignificant for society and politics did not really make sense: Due to

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<sup>4</sup>"With democracy in 1994 and with Apartheid removed, it takes away the main kind of enemy, with people coming together because of the moral outrage or the need for some kind of conception (...). So, I think that's the obvious explanation. Normalisation of South African society up to a point takes away that." Interview Eddie Webster 5 April 2004.

its alliance with the ANC and the SACP, COSATU was involved in national politics at the highest level. And as far as the economy and industry were concerned, liberalisation, restructuring and opening up to international competition represented tough challenges. Research in the late 1990s and early 2000s certainly showed that Labour Studies was adapting to social change both in terms of its content and its methodology, dealing increasingly with issues of national and government politics. By contrast, other scholars had retained a grassroots focus, concentrating on the working class's potential for political resistance and dealing with topics such as redundancy, poverty, survival strategies and precarious or informal work. New lines of conflict within the sub-discipline were already being drawn.

Several interviewees mentioned the emergence of new objects of study in South African sociology as yet another reason for the sub-discipline's loss of significance. For example, it was stated that sociology of health in connection with HIV/AIDS was a highly relevant field of research and contributed to Labour Studies' ousting from its leading position within the discipline (Interview Shane Godfrey 3 March 2004. Interview Tessa Marcus 26 March 2004). However, the fact that new topics were gaining ground should be welcomed in principle and speaks for South African sociology's general potential for development. Even though Labour Studies no longer dominated the discipline as a whole to the same extent as during the 1980s, this does not mean that it was any less significant as such.

In the opinion of some sociologists, social change was linked to another development that limited this branch of research's political relevance. After "affirmative action" programmes that supported (or were supposed to support) formerly disadvantaged groups of society were put in place across all sectors, white academics increasingly withdrew to the universities which were one of their last strongholds, trying to maintain their former position by using existing networks. Both blacks working in the universities and individuals participating in the transformation of the university system, for example in administrative roles, gained this impression.<sup>5</sup> However, the "Africanisation" of society as a whole and of politics and the economy in particular and the white intellectuals' retreat to the ivory tower meant that they were in a more difficult position when voicing social criticism. The legitimacy of their criticism of the new, predominantly black government, for which many academics had struggled and fought for years and with which they were strongly linked via personal and political networks – and upon whose goodwill they were dependent in financial terms – was a controversial matter, as Jubber confirmed: "South African people don't want to be too critical, too outspoken, too debunking, because (...) we feel a kind of loyalty now, and keep a delicate flower growing and blooming. You're going to be too nice, that's all. It was okay when it was the apartheid state and government to say very nasty things, go across and broadcast things, but, [...] you know, you might call it a moratorium against being overtly critical" (Interview Ken Jubber 5 March 2004).

For many, the loss of political motivation connected with the end of apartheid represented a radical change. This was linked to the frequently voiced concern that Labour

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<sup>5</sup>Cf. interviews and conversations with Sakhela Buhlungu, Jay Govender, Lungisile Ntsebeza and Ari Sitas.

Studies and South African sociology as a whole were increasingly losing their roots in South African society, roots which had consisted of many different connections to political, social and trade union movements. This was having a negative effect on the discipline's social and theoretical relevance, as it was neither willing nor able to involve itself in pressing social issues in a responsible manner on an analytical level. Sitas based this reproach on the fact that the annual SASA conference, which took place in Durban in 2003, made no contact with any new social movements in the area, in contrast to the ASSA conferences of the 1980s (Interview Ari Sitas 17 February 2004). His pleas for stronger links with social reality, particularly the political grassroots scene, and against increasing professionalisation had raised the academic community's awareness of this issue and encouraged debate in the following years.

Buhlungu took a more conciliatory view. Based on his own experience within and outside the trade unions, he knew that the unions go through regular cycles of highs and lows. At times in which the trade unions are more self-confident they distance themselves from academic Labour Studies, but in the low phases that follow they seek contact and rely on support from sociology. Thus one could count on the relationship becoming stronger again in the foreseeable future (Interview Sakhela Buhlungu 7 April 2004).

However, several critics thought the topics under study irrelevant and the approaches used unsuitable. Opinions were strongly divided in this regard. Jonathan Grossman and Belinda Bozzoli could be seen as representing the extreme positions. Bozzoli considered the simple dichotomies of the apartheid era to be obsolete in the new South Africa: "(...) you've moved from a world of binary opposites and master narratives, the master narratives of Labour Studies with the goodies and the baddies and the triumphant victory in the end, where we are in a much more cynical world, where those master narratives no longer hold. So it seems to me, it won't be able to hold the kind of position that it did, I don't see it" (Interview Belinda Bozzoli 30 March 2004).

By contrast, Jonathan Grossmann missed radical social criticism with a "Marxist" orientation: "What you're broadly calling Labour Studies has shifted, changed and adapted to meet what I would see as market needs. Some people are very proud of that and I think it is pretty disgusting" (Interview Jonathan Grossman 4 March 2004). He himself no longer feels part of this branch of research. In his opinion, the new focus in content and the collaboration with the higher echelons of unions and government represent an uncritical adaptation to social trends. He does not want follow this: "Labour studies isn't a label I would use. (...) my particular interest is in the working class. Labour studies were once focused on the working class. I think Labour Studies are now focused on policy around it. Industrial relations and particularly a notion of what constitutes economic growth. So the labour part of Labour Studies [...] has certainly changed in its focus [...]. It hasn't changed, it's been changed. People have changed it" (Interview Jonathan Grossman 4 March 2004).

Blade Nzimande, secretary general of the Communist Party and former Labour Studies researcher in Durban, saw the situation in 2004 in a similar manner and was thus planning a project to revive class analysis. This venture is supported by the Rosa

Luxemburg Foundation among others and saw itself as a think tank, the aim of which was to revive the connections between movements within and outside academia.<sup>6</sup>

## 5.2 Institutional differentiation and its impact – setting up research institutions within the trade unions

The reservations uttered concerning developments around 2000 indicated both debate about and reflection upon the discipline's original constitution and a search to reposition it within democratic South Africa. Various demands were voiced, which were to be realised using various strategies. The 1990s brought not only a change in the context of society as a whole, but also ushered in more specific changes within the scientific and university sectors on the one hand and within the trade unions on the other hand. These changes should not be underestimated as factors in the academics' growing distance to the universities and their new stance towards actors from outside academia. Here we refer to the gradual building up of research capacities within the trade unions on the one hand, and to increased professionalisation in the academic system on the other – a process we can refer to as 'institutional differentiation'. Karl von Holdt referred to the waning contact between trade unions and universities as follows:

"It is a very long and complicated story. I mean, I think that is true, and I think it's got to do with changes in the unions and changes in academia [...]. And it's partly to do with the fact that then the main job of the unions, it was just to build these organizations, so they had to draw on outside, they didn't have enough internal capacity. Now unions have got (...) more institutional capacity, although it's still very, very limited. But they, then there's a NALEDI (National Labour and Economic Development Institute, W. K.), which is part of COSATU, [...] unions are always wary about academics not understanding where their real needs and imposing their stuff. So there's always a tension. I think there were gatekeepers in the '70s and '80s who were white, who had an academic history themselves, Alec Erwin, Bernie Fanaroff and (...) in smaller unions, you know, Jane Barrett, whoever, because those white intellectuals, mostly white intellectuals, who had a university background, were very, very important in those early unions. They provided a very critical set of skills and a real commitment and that was very, very important. But then, they felt the trust in certain, and it was with particular individuals, it wasn't with university academics per se. They built relationships with particular individuals that they trusted, and they were able to do this kind of work. (...) Now, the number of white officials in unions almost can be counted on one hand, I'd say. And they are not in dominant positions at all, they are not in organizing positions, they are in policy offices, education offices, sort of specialists. So that easy link between individuals who knew each other in the unions and on the campuses (...) isn't there any more. The political conditions have changed to the extent that, I mean, the academics were also important in the sense

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<sup>6</sup>"What is missing, is an overarching paradigm and broad think tank, analytically. In other words, the way we would see the Chris Hani Institute (a recent project by the SACP, W. K.), is that it would not replicate what NALEDI (National Labour and Economic Development Institute, W. K.) is doing, what DITSELA (Development Institute for Training Support and Education for Labour, W. K.) is doing, but what it would seek to do is to take that work and bring it together [...] and try and chart a way forward, broadly for the working class." Interview Blade Nzimande 6 April 2004.

that, putting out an argument for the legitimacy of trade unions at that time. Now, the trade unions have got their legitimacy, they don't need the academics, they've got more legitimacy than the academics, you know what I'm saying? (...) And then, another thing is, changes have taken place in academia, where the people who used to do that were lecturers, they were relatively junior often, and they didn't have these [...]. Firstly, universities have become very goal orientated, secondly, the individuals who were involved have become more senior, so they're running, they're looking after their careers. They have to. The (...) career pressures are much greater and [...] (...) so they're unable to devote the time [...]" (Interview Karl von Holdt 8 April 2004).

First of all, a few words on the setting up of internal capacities within the trade unions. Gerhard Maré stated that the starting point for the change in the relationship between Labour Studies and the trade union movement was linked primarily with the development of the workers' organisations, which were able to strengthen their financial infrastructure over time through access to money from overseas and the rise in contributions following from growth in membership. Thus they were in a position to employ their own specialists (Interview Gerhard Maré 9 February 2004).

The foundation of the internal COSATU research institute NALEDI in 1993 was probably an important milestone in the process of institutional differentiation. This institute's mission corresponds more or less to the tasks carried out by university research units and Labour Service Organisations (LSOs, see Chapter VI) during the 1970s and 1980s on behalf of the trade unions.<sup>7</sup> However, by 2000 even a few individual trade unions had their own staff for research and unionist education.

Despite the tendency observed for the institutions to drift apart, there appeared to be significant differences depending on the sector and the individual trade unions. The historic close links between the SWOP and the mining trade union, which persisted into the new millennium, serve as an example of this. Bethuel Maserumule stated that since the "deep level mining" study that laid the foundation for SWOP in the early 1980s and until the beginning of the 2000s, the NUM had had more trust in SWOP than in NALEDI, preferring to commission it to carry out research (Interview Bethuel Maserumule 1 April 2004). This is confirmed by von Holdt from NALEDI's point of view (Interview Karl von Holdt 8 April 2004).

Other Labour Studies experts saw the trade unions' institutional development more as a differentiation and specialisation of their remit than a distancing or break from the universities. David Jarvis noted for NALEDI that the institute's capacities were far from sufficient and that enough research projects would continue to be given to universities and the LSOs (Interview David Jarvis 29 March 2004). Webster also did not perceive that the dialogue was weakening in any way; he saw the setting up of union research institutes as an intensification and specialisation of the relationships between the institutions, which "feed on each other" (Interview Eddie Webster 5 April 2004).

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<sup>7</sup>"NALEDI's mission is to conduct policy-relevant research aimed at building the capacity of the labour movement to effectively engage with the challenges of our new society. Formed in 1993, NALEDI is an initiative of the Congress of South African Trade Unions (COSATU)." <http://www.naledi.org.za/> (Nov. 2005).

The difference to the earlier situation was that COSATU's inclusion in the tripartite alliance had caused research topics to become ever more complex and further removed from classical themes. The distribution of tasks around 2000 thus strengthened the role of university-based institutions in three ways: training specialised research staff, carrying out independent long-term research outside the trade unions and conceptualising relevant questions. The development of unionist research capacity, according to Eddie Webster, "strengthens our role":

"(...) The unions need people to be properly trained (...). You need a class of intellectuals, you need people who can research, you need people who can write (...). So, the growth of that movement required more professionally trained people. So, I saw that as our job, we train people. We train people to take labour seriously. (...) The second condition is, when you get more long-term research, you know, not instrumental, 'quick and dirty' is what we call it. (...) 'Taking labour seriously' (a long-term SWOP research project, presented at the last Breakfast Seminar, W. K.), if you read tomorrow's 'Sowetan', (...) the (COSATU, W. K.) general secretary has basically taken the survey and used it to legitimise the demands. So they use it to show that independent researchers are thinking the way they are, so (...) they need that kind of research. It also tells us things about their members they don't know, they can't pick up because we're outsiders. (...). You have to conceptualise. So, we were beginning to theorise and conceptualise. It's very valuable to them. (...) In fact, what Neva (Neva Makgetla/COSATU, W. K.) said to me (at the Breakfast Seminar presentation of 'Taking labour seriously', W. K.) about our studies, there're all these different sectors, (...) fish processing, mining, clothing, whatever, all these areas, cover all their organising sectors, that they would like us to spend time with them and see what it means for collective bargaining, what it means for restructuring" (Interview Eddie Webster 5 April 2004).<sup>8</sup>

This meant that the building up of capacities within the trade unions had shifted some traditional tasks from the universities into the unions, although it was not possible to ascertain the proportions taken by this shift very accurately. At the same time, due to the trade unions' new challenges and responsibilities, Labour Studies had moved into new areas. This is why some representatives criticised the neglect of classical topics such as the working class, political and social movements, the lower levels of society ("shop floor", "grassroots"). This allegation, which reflected a certain ethos of sociology as a force unveiling social inequality and particularly relations of power and exploitation, is certainly understandable. However, this does not mean that Labour Studies had become socially irrelevant and had no significance for actors outside the universities. Rather, the questions, aims, and target audience of sociological research had changed.

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<sup>8</sup>This position to some extent contradicts Buhlungu. While his inquiry referred specifically to *white* officials' and intellectuals' retreat from the trade unions, it was linked to the general allegation that the universities were no longer training dedicated individuals in the way they used to: "The other reason why there are fewer white organisers in the unions is, according to one white ex-unionist, because social institutions such as universities which used to produce 'committed whites' have stopped producing them. 'Maybe Sociology is not producing those people anymore'. Over the last 15 years all the intellectual and leadership roles which white officials used to perform within individual unions and inside the union movement have been assumed by black leaders and intellectuals." Buhlungu, 2001: 60. He is citing a 1 March 2000 interview with Kally Forrest, former media officer of the Transport and General Workers' Union, who then was the owner of Umanyano Media Services.

### 5.3 “A little bit distant from the cutting throat of struggle” – competition, commercialisation and professionalisation

Conversely, changes in the academic environment appeared to have contributed to a weakening of relations outside academia. Sociology’s retreat from politics and society, from the struggle’s “cutting throat”, was cited by Blade Nzimande as a reason for leaving academia: “I was elected into the central committee of the party (SACP, W. K.) in ’91, the first congress after unbanning. (...) I was also getting fed up with academia itself and I was, that’s another story, I was feeling that it was a little bit distant from the cutting throat of struggle, even left scholarship. I felt it was beginning to falter a little bit” (Interview Blade Nzimande 6 April 2004).

There are ample reasons supporting the subjective impression that academics were losing their commitment to social and political involvement. The transition process necessarily also involved the research and university systems, where a number of reforms, restructurings and support programmes for formerly disadvantaged groups aimed to balance out the inequalities of apartheid. Conflicts over power and influence arose in the universities.<sup>9</sup> Research staff had to deal with administrative issues and negotiate and implement reform after reform. This had an extremely negative effect on the discipline, particularly at the UCT; it cost significant time and effort, led to bitterness and forced neglect of intellectual and political engagement:

“(...) In this university itself we’ve had changes introduced which, [...] you just got to counteract that. We had a change in getting out of the past. (...) change just for the sake of change is a totally irrational thing, because we’ve been through that, it’s been going on for the last ten years, it’s still going on. I mean, you must have picked up this whole amalgamation of universities, as I say the whole thing has been shaken up and retarded in a way, and maybe it will start working in the long run. But people have lost momentum and they’ve stopped publishing and they stopped reading and they wondered if they had a future in the intellectual domain. (...). So, the universities who’ve done the best are the ones who have been slowest to adapt, like Rhodes University. (...) what I’m referring to are quite technical things. They wanted to do away with Majors a couple of years back and have programs that were linked to marketable jobs and training and stuff like that. So, we went furthest down that road at UCT, and it was a disaster, and we’ve been backing off the last five, six years to where we were. Because the damage is still there. So it was disruptive, even though we never had a bloody revolution, it was like you had a revolution” (Interview Ken Jubber 5 March 2004).<sup>10</sup>

The introduction of new funding models by the universities following orders “from above”, that is, the ministries of science and education, advised by US or World Bank experts, were seen as being likely to have long-lasting effects. There was a trend

<sup>9</sup>Sitas, who held the office of dean during the “hot” years between 1994 and 1998, described striking experiences, which it is not possible to reproduce in detail here. Interview Ari Sitas 13 February 2004. Black colleagues also spoke of conflicts and difficulties in connection with the university reforms for greater equality. Interviews Sthembiso Bhengu 16 February 2004; Sakhela Buhlungu 30 March 2004 and 7 April 2004; Jay Govender 12 February 2004. The sociologists at the UCT complained particularly vociferously about the destructive effects of failed reform attempts: Interviews David Cooper 5 March 2004 and 9 March 2004; Ken Jubber 5 March 2004; Johann Maree 3 March 2004.

<sup>10</sup>Sitas (n.d.b) refers to the experience of “continuous discontinuity” of successive reforms.

towards greater “financial autonomy”, meaning that the universities were required to make their own money:

“When I started, state subsidies (for universities) were about 70%. They’ve dropped down to 60%, and now they are down to beginning to approach 50%. (...) 50% of your budget will come from the state, 20% comes from student fees. (...) and then the 30% of the university has to be raised (...) out of its own entrepreneurialism. So it’s research funds, it’s this, it’s that, you know, it’s patents, it’s pressure for it to become a money earning [...]. (...) so with that at the top, (...) you can understand the pressure for people to publish, for people to bring in research funds (...)” (Interview Ari Sitas 21 February 2004).

This last point can be linked to the decline in involvement outside academia. Individualised evaluation procedures increasingly measured scientific performance according to so-called “international standards”. Among other things, this meant that pressure had increased to publish in academic journals. So-called “international” journals were particularly highly regarded:

“Now if I publish something in ‘International Sociology’ (...), the university gets R30,000 from the state subsidy for those, of which 15,000 comes to me in my research fund. (...) that is seen as international. If it is a local peer-reviewed journal, it is 5,000. So, the pressure! Other countries’ national journals, like the ‘British Journal of Sociology’ is more prestigious by implication, than our national ones. Because their national one is international whereas our national is not international. And it doesn’t matter they’re both peer-reviewed” (Interview Ari Sitas 21 February 2004).<sup>11</sup>

Under these circumstances, academics’ capacity for activities not recognised by the universities was reduced. Buhlungu was certainly critical of the fact that only little effort was demanded of academics in the 1980s. Besides the stress of new publication practices, he also mentioned the increased teaching load, which prevented sociologists from becoming active in other areas. This was an important point if we consider that South African lecturers were unable, for example, to delegate the correction of written assignments to student or research assistants. Buhlungu also drew a connection between the winds of change blowing through the corridors of the alma mater and the fact that many colleagues abandoned their contacts outside academia:

“(...) suddenly, when the international game changed and South Africa was readmitted and so on and so forth, people discovered that, in fact (...), it was a very competitive environment. You are judged, in the main, not by your connections with the labour movement. But in terms of your own publications. So people wake up to the thing. And of course, what has happened as well is (...) these universities

<sup>11</sup>However, on this issue cf. in footnote 283 the refutation by Tessa Marcus, who holds responsibility for this within the NRF. Ethical issues and solidarity between colleagues in the individual institutions were also referred to: “So, what I am trying to explain, the fiscal, the little transformations that are involved in all this, that are pushing in a direction that is for me negative, personally it is nice to know I don’t have to beg for personal research money, but it’s not systemically nice. It’s unequal, it’s elitist, it’s inappropriate for what we are doing. Now, there’s two tensions there: Okay, you get that, those research funds, some of the people pocket them. At least we’ve got an ethos that says: that goes into the general account of IOLS and we use it for special things, you know (...). In Astrid’s unit (Astrid von Kotze, Community Development, W. K.), they all do consultancies, but the consultancies come into the kit. In other units they do that but it goes into private pockets.” Interview Ari Sitas 21 February 2004.

were small then, they were small. And so, there were classes of about twenty. (...) First year would have been a hundred, or something, first year. And then, second year, it goes down to fifty. And in third year it goes down to twenty. Honours, you have two students. Now (...) the games were changed. In first year you have 700. I mean, in fact, we're still considered lucky, other places have more, first year only. So (...) what they had to juggle really was publishing a little bit, teaching a little bit and then getting involved, and becoming heroes outside the academy. What has happened now is that the imperatives of teaching and research have become obvious, and you're either in, or you're out. (...) I mean, in the '80s you (...) could work in this university and not publish and (...) still survive. I know some people now, some of whom are due to retire, who never really bothered. And the system protects them in some strange ways. And the system wasn't really yet, in terms of pushing people on and tightening the schools and so. The system now does that. And the entire thing about promotion (...) is depending not on your links, but on this" (Interview Sakhela Buhlungu 7 April 2004).<sup>12</sup>

However, increased pressure to perform needed not necessarily prevent academics from engaging in other activities, as Devan Pillay showed. He did not resist the pressure to produce research, but combined the new academic rules with journalistic activity and continued to see himself as a "public intellectual". He used to dislike "the game that academics had to play":

"Few academics were publishing because they wanted to take part in public discourse, to make a real contribution to knowledge, that disappointed me. And I thought to myself, mistakenly, that I won't take it seriously. I'll publish in popular journals and engage with the broader society. I said mistakenly, not because I don't believe that was not important, but now that I'm back in academia, if I want to take this life seriously, I've got to play according to their rules, so the pressure is on at this university to publish in accredited journals. So, I try to combine the two as much as I can" (Interview Devan Pillay 25 March 2004).

To summarise the arguments mentioned here, the scientific policies of the 1990s thus created pressure to professionalise Labour Studies. In the experience of many of those involved, this was linked with a retreat from extra-university activities. The optimists – led by Eddie Webster – saw the changes somewhat differently. Beyond individual perceptions, it is hard to capture in empirical terms to which extent the changes had any real effect on the discipline as a whole. We will return to this point in connection with the empirical analyses on publication practices (see below).

The priorities of the higher education policy of the 1990s also required changes in the curricula and classes offered. Raising student enrollment was expected to make the universities more commercially viable. The university or the respective department

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<sup>12</sup>That engagement outside academia sometimes was recognised, despite the criticism voiced here, can be seen in the following description by Maserumule: "Lately Eddie Webster through SWOP has been bringing the rector, the principle (...) to some of the events we were doing as FES and SWOP, around labour issues, to kind of [...] expose him to things that SWOP was doing, which were of benefit to unions and were finding their way into policy and legislation. (...) he would invite him to come and deliver opening remarks and then the rector would start saying: 'Listen, universities are not ivory towers, the research work is fundamental not only in analyzing the world but in helping those who want to change it' (...)." Interview Bethuel Maserumule 1 April 2004.

received financial rewards for students who graduate successfully. As a result, the departments saw themselves forced to make their curricula as marketable as possible, even where the administrative reforms had not had as disastrous an impact as at the UCT. For the field of Labour Studies, this meant accommodating the needs of the labour market, in order to increase students' chances of finding a job after graduating and thus attract more students. Study programs' priorities were defined by key words such as "vocationalising" and "outcome-based education" (Interview Ari Sitas 21 February 2004). Based on his experiences of sociology in Cape Town, Chachage for example thought this would undermine the discipline-based foundation of the university courses and would make it hard to keep up academic standards in the longer run.<sup>13</sup> Critics were particularly concerned by the orientation towards management studies.

This widespread pessimism concerning the future of Labour Studies programs could be countered with the fact that still significantly more students chose to study industrial sociology than general sociology. Devan Pillay regarded three factors as decisive: the intellectually appealing atmosphere of universities with strong Labour Studies programmes, the political significance of the trade unions, and the practical and work-focused orientation.

However, particularly where the orientation towards work was concerned, Labour Studies also had to compete with related study programs such as Management Studies or Human Resources.

Maintaining or increasing the number of students was only possible through increasing the curriculum's orientation towards work, given the difficult job market situation and high school graduates' motivation. Given the pressure to commercialise, around 2000 the three centres had shifted the content of at least part of their respective programs towards areas hitherto frowned upon, such as Management Studies or Human Resources. This was frustrating for many colleagues, who complained about the "career-obsessed, narrow-minded, individualist" and "fashionable" generation of students: "We're not providing thinkers any more, just vocational people (...) This is because of the new strategy in Labour Studies: straggle into management disciplines. A lot of management students have compulsory courses in IOLS" (Interview Jay Govender 12 February 2004). This enabled graduates to start professional life on a management level:

"They can sort of enter on the side of management, human resource managers (...). In the '80s it was to fill positions in the union movement itself, union politics, be on the side of workers. (Now) it has to be on the side of management, but managing workers, but understanding workers. And labour legislation and reconciliation and arbitration and all those things come into it. So, I think the motivation has shifted amongst the mass of the students" (Interview Ken Jubber 5 March 2004).

Given the difficult situation on the job market, the institute directors and some members showed greater understanding for the students' worries about the future and

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<sup>13</sup>"The names of the programmes are quite attractive and they are seemingly 'practically oriented'. In reality, they are a death knell to the basics of the scientific enterprise." Chachage, 1999: 18-19.

their career plans: “Yes, students are getting here without a clear sense of what it is. They’re not getting here into the program with the sense of becoming labour intellectuals or union organizers or union researchers or [...]. In the first instance, they want something that they can hold onto. That can give them a job. Okay? Or something of that sort. So, yes, people say: ‘(...) they get into it with very instrumental purposes’. Fine! There’s nothing wrong with that. The thing is what do we do with them once they’re inside!” (Interview Sakhela Buhlungu 7 April 2004).

#### 5.4 A “hunting ground for progressives” – challenges in reproducing the academic community

Study programs and student motivation were also linked to challenges in reproducing the academic community. Its small size entailed specific developmental challenges, such as isolation and insufficient research capacity, as frequently mentioned in the interviews. However, the majority of interviewees did not share this perception and it is doubtful whether this really constituted a new problem. The “founding fathers” in particular spoke of a “vibrant” or “very active” research community even at the beginning of the new millennium. By contrast, on several occasions the younger generation gave the impression that there was no proper academic community, or that they were not part of it, which certainly did not bode well for the future.

One factor accounting for the reproductive challenges of recent years that was mentioned particularly often by the older members of the department was that promising youngsters were moving into other sectors. The challenge of keeping early-career researchers at universities was not a new one.<sup>14</sup> However, the transition process set in motion a real brain drain that robbed the university departments of their best younger staff.<sup>15</sup> The new government recruited massively from the universities:

“(...) what happened after 1990, when the ANC got unbanned and the SACP, and even more so after 1994, the hunting ground for progressives to be drawn was universities. And so there was quite an exodus of left academics, particularly the few black academics who were left in orientation. They were just needed in government. They went to parliament and so on, so there’s been a serious rolling back of left wing scholarship, which is quite ironic, as we get our freedom, instead of consolidating that, it has weakened. That’s my analysis and assessment. It worries us there” (Interview Blade Nzimande 6 April 2004).

But since the 1990s the economic sector had also been particularly keen to recruit skilled black graduates in order to meet the requirements of affirmative action. Furthermore, salaries were often far more attractive in this sector than at the universities. Finally, as Buhlungu stated initially, the transition process created a heightened demand for consulting in labour and industry. Several former members of the three centres seized the moment and set themselves up as independent service providers in

<sup>14</sup>David Cooper for example already faced this problem in the 1980s. Interview David Cooper 9 March 2004. The SWOP also already complained in its initial phase that younger graduates had to leave the programme due to insufficient funding: *Sociology of Work Program*, 1990: 18.

<sup>15</sup>“There’s a thing called brain drain, and anyone who (...) is half good disappears. So it impoverishes the pool.” Interview Ken Jubber 5 March 2004. Sitas and Govender lamented similar problems in the IOLS.

this field. An additional factor was the desire to emigrate, particularly among white graduates, who could not see any chances for themselves in the new South Africa shaped by black empowerment.

Problems also seemed to arise in integrating students and early career researchers into the Labour Studies centres. No young people at all were seen at the UCT, while some young interview partners in Johannesburg and Durban said they felt they were not well integrated into the institute's activities.<sup>16</sup> Internship programmes in the IOLS and SWOP were attempting to address this. By purposefully including higher-year students in the SWOP and IOLS-Research (formerly TURP) research projects, the institutes were attempting to interest the younger generation in research activity early on and offered them the chance to improve their methodological knowledge. These internship programmes were supported by the Friedrich Ebert Foundation and, in recent years, by the NRF.

The situation in the "wider academic community", that is, the university-based Labour Service Organisations, also contributed to the problem of reproduction (for more detail on this, see Chapter VII). Whereas dedicated anti-apartheid activists were formerly prepared to work regardless of precarious conditions, around 2000 there was still a lack of stable and secure structures offering long-term perspectives to qualified staff. Finally, the academic community was also diminished by the movement of frustrated staff into other areas of the discipline.

The impression that the academic community had become smaller or engaged in insufficient communication may also have had to do with the tendency towards professionalisation described above. In earlier years, contacts and exchange took place via personal and political networks. Since the 1990s, a decrease in extra-university activity, and perhaps also the increased competition for government or trade union commissions, had hindered acquaintances and connections that went beyond research and academia. This explained, for example, why younger representatives such as Andries Bezuidenhout had the impression that Johannesburg dominated the scene and there was not enough communication with the other two centres (Interview Andries Bezuidenhout 30 March 2004).

Another reason for these reproduction problems was that both within and beyond the universities it was always the same people, who had been active in the field for many years, who were listed as Labour Studies specialists: first and foremost the three "founding fathers" from Johannesburg, Cape Town and Durban. In the long run, at the latest when these three would retire from academic work, the discipline's reputation and its contact with the outside world would face new challenges, which would presumably pose problems, taking into account the current composition of the non-professorial staff. The fact that black early-career researchers in particular frequently left academia would again further strain the relationship with other key players in society. It had been a topic of discussion since the days of apartheid that the country's great universities had produced no black intelligentsia to speak of. In

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<sup>16</sup>"I like synergy and there's no synergy in university. When you're busy teaching you're on your own. You're on your own. There's no flow of things, like when you're in an organisation, there's a flow of things from one department to another." Interview 2004. This individual, as well as other institute members and students who voiced similar impressions, asked to remain anonymous.

future, the predominantly white staff could lead to further problems of legitimating university research units towards the trade unions and government, who were already complaining in the early 2000s that Labour Studies had not been able to produce black researchers, despite their many years of work for the black labour movement (Interview Bethuel Maserumule 1 April 2004).

### 5.5 South African Labour Studies as an example of the emergence and development of a counterhegemonic current

Despite all the criticism of white intellectuals and the repressive political situation under apartheid, the close connections to the trade unions during the 1970s and 80s should be emphasised once more at this point. Labour Studies emerged from this constellation as a politically and socially relevant field of academic research and teaching. However, its social relevance also encouraged the development of theoretical relevance, that is, the critical examination, adaptation or rejection of traditional theories and concepts and the formation of independent approaches.

At first, the academics' position and reputation played an important role in methodological terms. The trust of the trade unions provided insights into life-worlds and social realities that would have remained closed to those working solely in academia. Jay Govender summarised the status of some of the Labour Studies academics using the friendly term of the "comrade academic":

"The word is a comrade academic. So, take for example Ari Sitas, (...) is a comrade professor [...] I don't know how to define that, but it depends on the personality, the work that they do and who they engage with. For example, if I've done a lot of work with workers and I train at the Workers' College. The perception of me is a worker-friendly sort of person as opposed to an academic. In the language, our language would be a worker language. (...) We can talk to them much more easily than academics. Look, I can go into a factory and talk to workers and be understood" (Interview Jay Govender 12 February 2004).

At the same time, constant exchange and mutual trust also meant that the academics saw the workers' and unionists' view as relevant to themselves. Wherever these views contradicted traditional categorisations or theoretical assumptions, sociologists were prepared to take these contradictions with received concepts and theory seriously. This is the point at which social relevance can become theoretical relevance. The aspect of involvement also appears to play a role here: Whoever is willing to do justice to the individuals researched, to be in dialogue with them, he or she will also be flexible enough in their sociological work to let themselves be guided by the evidence and to reconsider traditional approaches. In the following pages, this hypothesis will be confirmed using the material gathered on the research activities and content focus of the discipline.

Developments since the 1990s were more ambiguous. On the one hand, relationships with extra-university actors persisted, but were moving from the lower levels, that is, the grassroots of the labour movement, to the upper levels of the unions and

government. Cooperation with businesses was also becoming more common. At the same time, the sub-discipline was becoming increasingly professional, caught between ideological crisis and the loss of political motivation on the one hand and new, competitive approaches in research and higher education policy and the commercialisation of the universities on the other hand. The way these trends were impacting upon the academic community's practice and production will be examined in the following section.

To summarize, the 1990s saw a shift from locally specific activities, strongly rooted in society, in the service of non-academic interests, towards specialised activities – academic research and teaching – that followed their own institutional logic. This reflects the gradual emergence of counterhegemonic movements at the periphery as outlined in chapter 2. The following pages will examine whether the initial counterhegemonic outlook could be retained even over the course of the sub-discipline's subsequent professionalisation; and furthermore, whether the counterhegemonic movement could be integrated into the international arena and challenge the international dominance of North Atlantic approaches.



## Chapter 6

# The Characteristics of South African Labour Studies as a Counterhegemonic current

Labour Studies' political motivation and its position within society, especially during the early years, have resulted in some unique characteristics: the initial interdisciplinarity of its academic community, linked with modest research ambitions (lack of an association or specialised journal); its personal, institutional and financial links to players outside the universities; its outstanding position within the South African social sciences; its great attractiveness to students. According to the hypothesis developed in the present study, these characteristics encouraged the discipline's counterhegemoniality. This assumption will now be put to the test in a detailed analysis of the activities of the country's three important Labour Studies centres and in an empirical analysis of several indicators of counterhegemoniality. More specifically, we will here be concerned with the so-called Labour Service Organisations, the historical and contemporary developments in the three centres Johannesburg, Durban and Cape Town, as well as forums for communication and publication practices in the Labour Studies community.

### **6.1 In service to the movement: Labour Service Organizations and the universities as money-laundering**

In its initial phase, the Labour Studies community was interdisciplinary, although even then it was predominantly rooted within sociology. Halton Cheadle, for example, came from the field of law. As a student he was very active in connection with the Durban Strikes, and later for many years was a member of the editorial team of the "South African Labour Bulletin" before taking up a chair in law and playing a key role in the development of the Labour Relations Act of 1995. Particularly during these early years, historians such as Philip Bonner were able to provide a retrospective view looking back at history. The History Workshop at the University of the Witwatersrand also dealt with issues relevant to the trade unions at this time (Interview Belinda Bozzoli 30 March 2004). Economists were involved in the establishment of the discipline, too, such as Alec Erwin (economist, then trade unionist, secretary general of FOSATU, Education Secretary of FOSATU and later COSATU, Minister

of Trade and Industry, then Minister of Public Enterprises between 2004 and 2008) or Stephen Gelb (director of the Economic Trends Project at the end of the 1980s, economic adviser to the trade unions, churches and other organizations in the democratic opposition, to the ANC after its unbanning in 1990 and then to the democratic government; 1997-2001 economist at the Development Bank of Southern Africa). In Durban, attempts were made to integrate industrial sociology and industrial psychology. Geographers, educational theorists and political scientists also formed part of this circle, which chose the ASSA as its forum and from which Labour Studies gradually emerged. It is indisputably the case that the field became strongly rooted within sociology over time, both in disciplinary and in institutional terms. To this day, Labour Studies is dominated by sociology. However, this great diversity in its early days shows that its object, the social problem, was at the forefront of all of its efforts and the disciplinary or academic identity of the researchers was of secondary importance.

Before the developments in the three centres at the universities in Johannesburg, Durban and Cape Town is examined in detail, a few words on the so-called Labour Service Organisations are in order. They are important for the establishing of the discipline in all of the three aforementioned locations and characterise South African Labour Studies as a branch of research rooted in and committed to society. The LSOs usually are non-governmental organisations whose actions support the trade union movement, that is, they have placed themselves in the direct service of the unions.<sup>1</sup>

The LSOs were the precursors of today's Labour Studies: the wage commissions of the student movement organised via the NUSAS; the Institute for Industrial Education in Durban, which published a number of textbooks for the trade union movement besides "The Durban Strikes"<sup>2</sup> and carried out commissioned research on industrial ownership and minimal wages to prepare the ground for wage negotiations; the Technical Advice Group in Johannesburg, which will be discussed further below in connection with the foundation of the Johannesburg Labour Studies centre; these and yet further LSOs marked the beginning of Labour Studies research.<sup>3</sup> They were based variously in the social science, economic or law departments of the liberal universities and in

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<sup>1</sup>For an overview of humanities and social science research in NGOs, which would appear to account for a significant proportion of research overall in South Africa, see Jennings et al., 1995: 97-111.

<sup>2</sup>The titles were, as can be seen in the annuals: "Worker organisation", "History of worker organisation", "Worker in the factory", "Worker in society", "Negotiation Handbook", "Legal Handbook". Cf. Webster, 1981. They were published in English and Zulu as part of the IIE correspondence course. Cf. Webster, 1996.

<sup>3</sup>According to Webster, in 1985 the "new labour studies" were in an experimental phase and not strongly established in institutional terms. He cited as the most important institutions precisely such service organisations as the South African Labour and Development Research Service (SALDRU), the Industrial Health Group and the Industrial and Labour Research and Information Group (ILRIG) in Cape Town, several sociological projects at the University of Natal, the Centre for Applied Legal Studies (CALs), the Labour Monitoring Group (LMG), the Technical Advice Group (TAG), as well as the History Workshop at the University of the Witwatersrand and the "South African Labour Bulletin". He thus confirms that the discipline developed out of the LSOs. Cf. Webster, 1985b. The SALDRU as one of the older LSOs, founded in 1975 with Francis Wilson as director and Norman Bromberger, Dudley Horner and Delia Hendrie as researchers, already contained all of the tasks regarded as typical of LSOs in its programme: commissioned research and consulting, educational activities, the popularisation of academic content, support for early career researchers within its projects and the provision of a library of materials and an archive. Cf. Southern African Labour and Development Research Unit 1976: 66.

many cases – as will be seen below – in the academic Labour Studies centres, if they were created after these centres. Thus the LSOs represent an institutionalised link between the universities and the trade union movement or civil society in a wider sense. They were usually led by academics of the university in question, but also employed staff that had not embarked on research careers; in some cases, staff were not even university-educated.

The reason that many of these projects were located within the universities is quite obvious: while criticized for their bureaucratic procedures by some, the universities offered protection from the repressive climate under the apartheid regime.<sup>4</sup> The fate of the Institute for Industrial Education in Durban, which was founded at the beginning of the 1970s by the circle around Rick Turner, served as a warning to later generations. This institute was located outside the university in the middle of the city. It was not able to survive for long. First a number of its members were banned and in the end Turner himself was killed by security forces.<sup>5</sup> The universities, protected by the rule of academic freedom, offered scope for oppositional activity:

“The logic being that the university was a very safe space from the security system. So the chances of the security branch harassing an academic was lesser than a community activist. And also if this activist was white, they were treated very differently to, say, an African or black activist. So the white academic was protected. You could speak out under the guise of academic freedom. It doesn’t mean they weren’t harassed. They were, but to a lesser degree” (Interview Jay Govender 12 February 2004).

Particularly towards the mid- and late 1980s, when the repression of the trade unions, UDF and the restive townships had increased enormously, the comparatively well-protected LSOs credited themselves with an important function in supporting the mass movement.<sup>6</sup> Even the local branch of the Friedrich Ebert Foundation, which had fallen out of favour due to its support for the resistance, used the chance to set itself up within the protective walls of the UCT.<sup>7</sup>

David Cooper was always able to justify the use of university rooms and facilities for ILRIG, which he had founded in 1983, to the UCT’s university management:

<sup>4</sup>“And there were a lot of projects then that started concentrating around university, because it was difficult to exist outside, in this uncivil society.” Interview Ari Sitas 13 February 2004.

<sup>5</sup>Webster points out that Turner himself was unable to carry out his activities at the university as he was banned: “Turner was banned in February 1973, confined to his home and unable to continue his lecturing post at the University of Natal. (...) As a result of his banning and because of the deep hostility of the state to the project, both projects (IIE, ‘Labour Bulletin’, W. K.) were established off-campus in the offices of the emerging labour movement. In this sense, Turner did not have the option to establish institutional links between the professional and the public.” Webster, 2004: 7, footnote 3.

<sup>6</sup>“As a result of these relentless attacks, many organisations have suffered severe disruption of their normal activities. A heavy strain has been placed on their human and material resources. (...). Under these circumstances, service groups such as ILRIG have an important role to play. Service groups have not yet been as severely affected by state repression as have the mass-based organisations. Given the strain on resources of major trade union and community organisations at the present time, service groups can offer valuable support to these mass-based organisations in fields of work which they are not easily able to undertake themselves.” International Labour Research and Information Group 1990: 10.

<sup>7</sup>“So, FES’s support for the ANC made it to fall out of favour with the regime and prevented it from opening up office openly and had to, in the early years, operate in a university department in Cape Town. And only when the political landscape was going through serious changes, were they allowed to set themselves up as a separate entity.” Interview Bethuel Maserumule 1 April 2004. He was no longer quite sure whether this had occurred during the 1970s or already in the 1980s.

“(...) the university kept saying that: quite left. And we printed this (ILRIG material, W. K.) in the university printing press, saying the people in the commerce factory are writing reports for companies, we’re doing the same thing for unions. (...) And interestingly the university agreed to this. The vice chancellor accepted and he was sympathetic and he realized that he couldn’t be seen in 1983 supporting business and not unions, he had to have been useful. He also saw that government was going to change and he had positioned himself in a more progressive way, so it was an unusual moment” (Interview David Cooper 5 March 2004).

That this protection was in fact necessary can be seen, for example, in the events that followed ILRIG’s attempt to establish a branch within the city, which proved impossible to protect from security police attacks even using barbed wire and electric fences.<sup>8</sup>

The LSOs have in common a strong bent towards applicability: they provided the trade unions with information and advice on technical problems such as security and health in the workplace, labour law, preparation for wage negotiations, as well as educational events and material on additional economic and political issues. Thus the closeness of the LSOs to the movement meant they not only influenced sociological content, but also played an important role in the popularising of academic insights. That these activities were not always conducive to an academic career is confirmed somewhat painfully in retrospect by David Cooper. During the 1980s, most of his effort was focused on ILRIG and he neglected academic publications, for example.<sup>9</sup> Initially, the service organisations were funded mainly by money from abroad (see below) and then gradually increased their income from paid commissioned research. Several such organisations united to form the national Economic Service Organisation Forum. In 1988/89, this forum had twelve members.<sup>10</sup>

The degree to which the LSOs were integrated into the academic community varied. For example, ILRIG took part in the History Workshop at the University of the Witwatersrand as early as 1984, and in 1987 LERC carried out the Economic Trends Project in collaboration with a whole range of economic and social scientists from Cape Town, Durban and Johannesburg (see above). And even though commissioned research for the trade unions often included small, academically unappealing projects, sometimes topics emerged that had been neglected thus far in the academic commu-

<sup>8</sup>“(...) a number of us researchers took room in (...) which became known as a community research house. And they put a big fence around with barbed wire, electrified and everything, before we moved in. They actually blow out the building. Police went in, but they put the bomb in the wrong place and it only damaged part of, so the building nearly came down. It would have come down, it was a very big bomb. (...) The security police. So that was kind of atmosphere. (...) Because they wanted to destroy the building, so we couldn’t have a place [...]. I mean, they would fire.” Interview David Cooper 9 March 2004.

<sup>9</sup>“We weren’t so academic in that sense. I mean, we didn’t spend time, I didn’t get promoted for 15 years, because I didn’t publish (...), and now I think it was a mistake, I should have written some of the stuff up as journal articles.” Interview David Cooper 9 March 2004.

<sup>10</sup>In 1988/89, the members of the Economic Service Organisations Forum were: Community Resource and Information Centre, ILRIG, LRS, SALDRU, Planact, TURP, LERC, “SACHED Trust – Labour and community project” as well as several projects in the field of health: IHRG, WIG, IHU, IHSEP. Cf. International Labour Research and Information Group, 1989: 22. On the activities of the individual LSOs, cf. Labour Research Service, 1987; Labour and Economic Research Centre, 1987. The aforementioned ILRIG had somewhat different aims, namely to provide information on the international labour movement and the developments taking place in individual countries. International Labour Research and Information Group, 1985.

nity. For example, this goes for the research on the Namibian labour movement in the 1980s, carried out by ILRIG and commissioned by COSATU and the National Union of Namibian Workers, which apparently was the source of subsequent historiography on this subject.

Following the drop in overseas funding around 1994 and the “ideological crisis” of Labour Studies, the LSOs found it increasingly difficult to produce the next generation of staff or even to survive. Their dependency on commissioned projects, which entailed job insecurity, made it difficult to retain staff who had other, more promising prospects elsewhere. The SWOP appeared to be at an advantage over other projects in that in 1990 the programme obtained the status of a university research unit and was thus firmly rooted in the university. Durban and the UCT were still trying, in 2004, to have existing programmes officially recognised.

David Cooper, concerned with questions of higher education policy and development, argued that networks had existed for long enough in South Africa; what was necessary were “firm structures” and “stability”. He considered the existing programmes to be strongly dependent on their respective directors (Interview David Cooper 9 March 2004). Dave Kaplan, a specialist for science, university and research policy, agreed with this in principle. He also called for stable structures in university and basic research (Interview Dave Kaplan 12 March 2004). Several LSO researchers also expressed their concerns unequivocally.<sup>11</sup>

In their orientation towards applied research, the LSOs that had survived the transition to a certain extent counteracted the subdiscipline’s tendency towards professionalisation. They maintained contacts with the trade unions, and since 1994 also with the government, as well as – even though this was talked about much less – to businesses in some cases. The way in which LSO practices were linked to academic Labour Studies research, and to which extent their existence and activities supported the thesis of counterhegemoniality, will be demonstrated below using the example of the Trade Union Research Project at the University of Natal.

Only little printed material was available on the issue of funding. However, the heads of institutes and LSO staff provided basic information on their institutions’ financial situation in interviews and conversations. The question of funding as the material basis for the development of Labour Studies can be pre-empted here briefly for the entire field. Research and educational activities geared towards the trade unions, not least via the LSOs, secured the material foundation for building up Labour Studies in South Africa.

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<sup>11</sup>“The work is absolutely great, the people I work with are great, I’m very keen to continue working in this area and take my work forward – very dissatisfied with the approach of the university to research units like ourselves and the lack of support we’re getting from the university, which is actually making it very difficult to survive (...)” Interview Shane Godfrey 3 March 2004. Rajden Naidoo was also aware that at present he was unable to offer favourable working conditions at his “Industrial Health Unit”: “Our centre is recognised within the faculty. Our trade union work, it’s like any other institution, oh it’s nice to know that you’re doing work for the broader community. But they don’t give any resources or any sort of benefits, because we do it, they just like to put into their annual reports that they have units training workers. It’s not that they give official support. But that would be marvellous, because we could go out and do training and not worry about funding.” Interview Rajen Naidoo 19 February 2004.

In the 1980s in particular, during the peak of resistance against apartheid, there was broad solidarity with the movement overseas, translating into generous financial support from governments, trade union federations, parties, churches, foundations, development organisations and non-governmental organisations as well as the International Labour Organisation in Geneva. The universities offered the right structures for bringing this kind of funding into the country, as they possessed the necessary legitimacy and circumvented the tax system to boot:

“The university system became a conduit for external funding. So it became legitimate, legitimised. In fact, you may want to say it was laundered, probably not the right term to use there, but the university financial system could receive these funds (...) which could be utilized for these anti-apartheid things, and setting up these institutions (LSOs, W. K.) would be one of the ways that this funding was utilized. It was very convenient, the university system made it very convenient. (...) because it was legitimate and it was also not taxed, you see? So it was a fairly ingenious use of the university space” (Interview Jay Govender 12 February 2004).

Johann Maree recalled the amounts of money he received from European embassies and associations as an industrial sociologist, which he was supposed to channel into the trade union movement:

“(...) we did filter a lot of money here also. Especially at times of strikes. (...) I remember at some times there was so much cash coming in, we just had (...) all that cash here in my office. And when it came to: we need money, just had to send everybody out of the room and get that box and get all the cash we needed out of that box. It ended up in that I had to open up a secret bank account, at another bank than my usual one (...), to leave that money somewhere, it was just too much. (...) It came from abroad, mostly through sympathetic embassies. They knew it was for the trade unions. ICFTU, International Free Trade Unions, gave a lot of money, especially at strike times. I still remember walking out of a sympathetic embassy with those two big bags full of money. (...) That was the Norwegian one” (Interview Johann Maree 3 March 2004).<sup>12</sup>

The end of racial segregation meant a break in the kind of funding available so far. The generous support for the trade union movement and Labour Studies, which had been motivated by solidarity with the anti-apartheid movement, now ceased. The priorities on the international level shifted. For example, the Friedrich Ebert Foundation, even though it was still active in South Africa, announced at the beginning of the 1990s that it was cutting its current subsidies and shifting its focus to Eastern Europe (Personal communication Eddie Webster, March 2004). This threw the existing structures into deep crisis. Projects and LSOs had to close down, and alternative publications such as “Work in Progress” were discontinued. But even though many representatives of the field had been lamenting the poor financial situation since then and the transition had certainly been difficult, in actual fact the state of affairs at the beginning of the

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<sup>12</sup>This once again confirms that funding from abroad can strengthen critical, oppositional social sciences under authoritarian regimes, and that financial dependence on the North need not automatically go hand in hand with intellectual dependency. Indeed, the example of South African Labour Studies appears to confirm that funding can encourage the emergence of counterhegemonic tendencies regardless of its country of origin.

21st century did not look that bad. The analysis that follows moves from the negative to the positive developments.

First, the new government began to take control of foreign funding. Recipients had to be registered as non-profit organisations (Interview Jay Govender 12 February 2004). Nevertheless, foreign support continued to be available to Labour Studies, albeit to a lesser extent.<sup>13</sup>

The situation was also not easy as far as national funding for science and research was concerned. Since the mid-1990s, the NRF had shifted its priorities towards the natural sciences, engineering, communication and computer science, considering the social sciences to be overrepresented within the world of science and higher education. Nevertheless, it still appeared to offer possible funding for research centres, study programmes, publications or conferences, as its support for the SWOP and IOLS showed.

Furthermore, since 1994 the funding options tended to be commissions of applied, politically relevant research (Interview Dave Kaplan 12 March 2004). In the social sciences, this usually lent itself to cooperations with the government: “(...) a lot of academic research, a lot of university, academic-based research is now funded (...), not by the NRF, not by government funding agencies, but by various forms of contract.” In these kinds of commissions, the social and economic scientists acted as political consultants: “For example, government wants to get a new strategy (...) on industry or some trade issue (...) or something like that. Now, their own capacities are fairly limited. So they commission work from academics, from researchers. So that’s been the kind of big growth area. So more and more people have got into some kind of engagement with that level of government” (Interview Dave Kaplan 12 March 2004).

The trade unions’ need for a suitable strategy was an opportunity for commissioned research. These were projects with a broader scope, such as the aforementioned Economic Trends Group or the Industrial Strategy Project. Furthermore, restructuring plans on the business level also required larger-scale commissioned research projects. The new government’s need for studies on work and industry to develop their policies had also offered commission opportunities for Labour Studies (Webster, 1999: 35).<sup>14</sup>

Commissioned research for the government was usually assigned via existing personal networks. Following the end of apartheid, many former trade unionists and individual academics made use of the opportunity to work for the new government on various levels. The ties that members of the academic community had forged in trade union and oppositional political circles thus moved into the public sector with the transition.<sup>15</sup>

<sup>13</sup>“(...) but there is still funding from abroad. SANPAD for example, they still run South Africa-Netherlands programmes, as long as you involve one Dutch academic in the programme. So international funds didn’t dry up completely” Interview Johann Maree 3 March 2004.

<sup>14</sup>The rise of the consulting sector in the 1990s, into which several labour specialists moved, was linked to businesses’ interest in changes in operations and the workplace.

<sup>15</sup>“Also the Department of Trade and Industry and the Department of Labour funds our research. And ironically, many people who were with us in the struggle are now in government, so the networks change, but still the same people, and now they commission us.” Interview Johann Maree 3 March 2004.

The shift in the funding of Labour Studies from overseas funding as part of the anti-apartheid movement towards commissioned policy research, naturally had an impact on both the field's thematic orientation and its research methods. We will return to this issue below. Following this general overview, the emergence and development of the three centres will be investigated in regard to the reasons for their foundation, the building up of study programs and research capacity, their thematic orientation and their extra-university connections. The interviews as well as various publications on the history of the subdiscipline served as the basis for this analysis. A detailed look at individual indicators of counterhegemoniality will follow. It should be pointed out that South African university structures sometimes differed from the European systems, and that many developments were in a state of constant flux throughout the period of the investigation. This applies to the interdisciplinary activities that created an exchange between Labour Studies, which was coming from sociology, and a number of related disciplines. Moreover, individuals interested in labour were able to attain higher positions at a comparatively early stage in their career, particularly during the initial phase when there was a dearth of qualified staff.

## 6.2 The Sociology of Work Programme at the University of the Witwatersrand – the beginnings of academic institutionalisation

The Sociology of Work Programme (SWOP<sup>16</sup>) was created in 1983 in Johannesburg. A group of scientists and engineers who wanted to put their professional skills to good use in society had founded the Technical Advice Group (TAG), an LSO offering advice on health and safety issues in the workplace. They approached Eddie Webster, who at the time was already a lecturer at the Department of Sociology at the University of the Witwatersrand and working on his dissertation on foundries, suggesting a joint research project.<sup>17</sup> Eddie Webster, longstanding director of the SWOP, recalled the particulars of this joint work:

“It started as a theoretical argument about the changing nature of work and workers’ lives, particularly their health, and we decided to concentrate on (...) where their health and safety was most at danger, which is deep level gold mining. Where, because of seismic activity, there are great big rock falls which cause fatalities. And we discovered that workers have their own occupational culture (...), a tacit knowledge that was not recognised or credentialised by management. And they were demanding the right to (...) not have to work in dangerous conditions. So it meant getting involved in the struggles of the mineworkers and their demands and their organisation, which was struggling for recognition in (...) ’83 (...) which is when we set up the programme and that evolved really. (...) So, we argued that the workers had tacit knowledge that wasn’t recognised by management for racial reasons. (...) The thing

<sup>16</sup>Originally titled “Sociology of Work Programme”, the abbreviation SWOP remained even after the project was recognised as a university research unit and renamed “Sociology of Work Unit” in 1990.

<sup>17</sup>This suggestion met with Webster’s interest: “The proposal was attractive to the department as it had played a leading role in establishing Industrial Sociology as a central focus within South African sociology, and many of its members were committed to a problem-solving approach to the discipline.” Webster, 1996: 2. Conventional industrial sociology had already been introduced at Wits as a submajor as early as 1968. Cf. Webster, 1981: 92.

is, it wasn't just about how knowledge was constructed, it was about how workers could win rights underground. (...) So it became a question of management's power, management's prerogative. It became a very political question. So, when we presented the research they tried their best to discredit it. (...) So from that, we developed into a research programme that tried to give support for the emerging black labour power. How to strengthen their bargaining not just around health and safety issues although that was still the one where we were most active" (Interview Eddie Webster 15 March 2004).<sup>18</sup>

Following this study, Webster founded the Sociology of Work programme, which to this day combines applied and commissioned research with fundamental research. It is thus along these lines that Webster reflected upon the activities and motivations of the SWOP in 2004:

"I chose a different path from that of Turner by trying to resolve the contradiction between the professional and public role by institutionalising the link between these two types of sociology inside the university. The key institutional innovation was the creation of a research programme, the Sociology of Work Programme (SWOP), in 1983, linking high quality academic research on the world of work with a broad range of actors within the world of work. In 1988 I became head of the department of sociology in the University of the Witwatersrand where I was able to cement the links between the University based research entity and teaching programme with movements outside the university. These links presuppose a commitment to the university as the central arena of one's work and a belief in the intrinsic value of sociology both as an intellectual activity and a way of creating a better society. This requires that you make academic publications in peer review publications a central goal but that you do not neglect three other goals: the public dissemination of your research findings, a contribution to policy formulation, and the production of a new generation of social researchers" (Webster, 2004: 7).

In its first activity report, SWOP described its activities as "critical engagement" on behalf of the trade union movement, a central term for understanding the functioning and relations of academic Labour Studies. Webster defined these as follows: "In our research and relationships with the labour movement, we see ourselves involved in a process of critical engagement. By this we mean that we cooperate with the labour movement in developing our research agendas which are broadly informed by the goals of the labour movement. These goals provide us with the starting point of our investigations, not the conclusions. We retain independence from specific tendencies within the labour movement and we are committed to publishing the results of our research so that they advance knowledge and are open to public scrutiny" (Sociology of Work Program, 1990: 1). "Critical engagement" again suggested that a kind of solution to the problem of theory vs. practice debated in Europe was emerging here: research priorities were primarily dictated by the needs of the workers' unions, but

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<sup>18</sup>Webster described the circumstances surrounding this early SWOP research in a later essay. According to this essay, SWOP organised a joint seminar with the NUM and the Chamber of Mines (the representative body of the mining industry) in order to use the study on miners' safety to promote the recognition of their trade union. The study horrified the opposing side, triggering a heated debate in the media about the safety conditions in the mines. The SWOP also made the results of its research available to the mining workers by translating it into Xhosa, Sotho and English. Cf. Webster, 1996: 6.

were carried out independently and according to scientific criteria. The results were to serve both the movement and scientific progress, something the SWOP already proved during the first phase by publishing academic articles. At the same time, a number of former students became officials in various trade unions.

After the mining project and Eddie Webster's doctoral project on foundries (Webster, 1985a; see chapter IX), the SWOP shifted the main focus of its research onto large-scale industry and labour process theory. This was also linked to the centre's immediate geographical proximity to the main seats of power. Ari Sitas saw this as the main difference from the orientation of Labour Studies in Durban.<sup>19</sup>

During the first years, the SWOP saw its main role as supporting the black trade unions as part of anti-apartheid resistance. With this aim, SWOP members founded the Labour Monitoring Group (LMG) in 1984. This LSO devoted itself to documenting the re-emergence of stayaway tactics and disseminating information on and analyses of the backgrounds of the respective events.<sup>20</sup> In these early days, SWOP activities still strongly resembled those of other LSOs. Following the "radical reform" strategy, the centre worked for an actor-driven path of social change that saw social and political movements not as a threat to the existing order but as offering the potential for social change: "We call this approach radical reform; radical in its vision of an alternative to present society but 'reformist' in its strategic use of power. In its emphasis on gradualism, flexibility and compromise with employers and the state, the labour movement is the clearest example of the strategy of radical reform" (Webster, 1996: 14).

After the centre had established itself in the field over the course of the 1980s, it gained the status of a university research unit in 1990; in 1996 it was recognised as a research unit of the NRF and supported accordingly. This support included funds to introduce an internship programme, in which a grant enabled students to take part in SWOP research projects and thus gain experience in both empirical and conceptual work. The SWOP hoped to encourage up and coming scholars from disadvantaged backgrounds in particular, ensuring the reproduction of the academic community (Sociology of Work Unit, 1998: 20)

This academic professionalisation occurred in parallel to adapting to changing social conditions – COSATU's change in strategy following the end of apartheid and the building up of its internal research unit in 1993. Thus the SWOP developed close contacts with the COSATU research institute NALEDI. The changed social

<sup>19</sup>"Wits in terms of industrial, kind of big industry stuff is stronger than us, because that's where the headquarters are, that's where all the decisions are made. They're very much closer to the seats of power there than we are." Interview Ari Sitas 13 February 2004.

<sup>20</sup>The group's activities were described as follows: "(...) The aim of the LMG was to provide impartial information and an analysis of the causes, scope and events surrounding these protests (the re-emergence of stay-aways as a tactic of mass resistance to apartheid in 1984, W. K.) (...). Parallel groups have been established at the Universities of Natal, Cape Town and Port Elizabeth to monitor events in their regions. The Transvaal group has acted as the national coordinator, compiling national reports based on data submitted by the other regions. The shortage of adequate information on the labour movement hampers informed, accurate and timely analysis of labour action and issues in South Africa. (...). It has also become important to provide empirical information on a range of labour related issues, such as the ratios of shop stewards to workers, grievance and disciplinary procedures and their outcome. Information on these shop-floor issues are essential background information when analysing major industrial relations events or conflicts." Sociology of Work Program, 1990: 8.

context required the use of different methods, such as macrosociological statistical surveys. Moreover, the SWOP revised its attitude towards businesses in light of political democratisation and economic globalisation.<sup>21</sup>

A year after the first democratic elections, the first two projects were commissioned by the Department of Labour – where Ian Macun, a former SWOP researcher, was now working; as a SWOP associate, he remained in contact with the research unit. They were followed by a number of joint research projects, which clearly reveal the SWOP's cooperative stance towards the new government. Since the beginning of the 1990s, the SWOP had thus carried out policy research on economic restructuring and corporatism (Webster, 1999: 29). This orientation towards the centres of power was harshly criticised by some voices from the academic left, which rejected policy research as subservience to the upper levels of the trade unions and government and not a task of critical engagement.<sup>22</sup>

After 1994, themes such as poverty, unemployment or the informal sector took more of a back seat. This was probably what Jonathan Grossman's criticism referred to; Grossman thought that Labour Studies in the new millennium were ignoring the realities of the working class and that leading Labour Studies colleagues in fact only knew very little about their own country. He was also critical of the relationships with institutions outside the universities: "Academic people (are) now very involved in policy studies, where policy now is, this is with experts and ministers and all those high positioned people. They don't think anymore of politics being at the grassroots level. And they are so jealous about their relations, to trade union leaders, to big business, to government" (Interview Jonathan Grossman 4 March 2004).

After 1994, the SWOP indeed reconsidered its original mission. Now its main aim was to produce research "relevant for the academic community, the government, the working class and businesses". The turn towards pragmatic political issues, which was not just criticised by Grossman, was mentioned explicitly, as was the aim to establish the SWOP as an "internationally leading research centre" in the longer term (Sociology of Work Unit, 1997: 1). Here we can recognise both the aim of the SWOP's formerly oppositional stance as well as its commitment to social and theoretical relevance, for which it hoped to gain the interest of an international audience. Only a year later, the SWOP even more optimistically announced its aim to "strengthen its position as an international research centre" (Sociology of Work Unit, 1999).

Whether this discourse had any effects in practice will be discussed in Chapter IX. At any rate, after the opening up of South Africa, the SWOP quickly established itself on the international stage. The "location of the South African experience within an internationally comparative and theoretical context" had been strategically pursued through intensifying international contacts, more frequent visits to international

<sup>21</sup>"This shift exploring alternatives involved a change in research methodology. Participatory research became less common and more conventional research strategies began to be used. SWOP also became less oppositional in its stance towards management as a shift occurred in managerial strategy. In fact SWOP embarked on a number of joint union-management research projects during this period (. . .). Indeed some trade unionists became critical of what they saw as a 'reformist agenda' in the research work done by SWOP at this time." Webster, 1996: 13-14. See also Sociology of Work Unit, 1998: 1.

<sup>22</sup> Webster (1999) mentioned A. Desai (1997): "Race, class and difference in South Africa's democratic transition", Conference on Race, Class and Difference, St. Anthony's College/Oxford.

conferences, international publications and inviting foreign colleagues.<sup>23</sup> Webster's and Buhlungu's activities in the research committee on labour movements of the International Sociological Association (discussed in greater detail below) marked an important step in this direction. Furthermore, the growing number of foreign visitors and associates listed in the online appendix SWOP VISITORS spoke for the unit's international recognition. Here, an orientation towards the United Kingdom and the USA could be noted, which will also be discussed below. In 2002, the SWOP was able to appoint four outstanding representatives of the field as Honorary Overseas Research Associates, which it reported with unmistakeable satisfaction:

"They are leading scholars in the field and we are delighted to be working closely with them. Professor Burawoy has assisted us with workplace ethnography in our studies on mining, Professor Benner with the information economy and call centres in particular, Professor Wood in the Taking Democracy Seriously project and various industrial relations surveys, and Professor Lambert on the new labour internationalism."<sup>24</sup>

In the following, various aspects of the SWOP as the oldest centre will be examined more closely as exemplary of South African Labour Studies. First, the SWOP can be located in the university's sociology department. A key part of this work is an analysis of the research projects carried out in regard to their themes and cooperation partners. The contents of student dissertations, courses and exams in the "Industrial Sociology" study program will then be examined. Finally, the SWOP's position in the world of work and industry will be identified.

### 6.3 Funding issues, the position of the sociology department and publication practices

According to the annual reports, initially the SWOP received hardly any internal funding from the university and was dependent on foreign money, which is why it was unable to create any permanent positions for research staff. At the time, SWOP staff were usually employed within the sociology department. It was only in 1991 that the university provided a first research position. While internal funding and consolidation had gradually improved over the 1990s, the SWOP was also strongly affected by the drop in overseas funding. The decision was taken to carry out a certain amount of consulting in order to survive the transitional period. The 1995 activity report addressed issues with paid commissioned research and the use of income derived from the consulting activities of individual researchers:

"The generous overseas funding has largely disappeared and SWOP is faced with competition from off campus consultants who can afford to be more client-driven. We have responded to this challenge by undertaking a limited number of research

<sup>23</sup>This was the first of four aims for the coming year formulated in the annual report 1996/97. Sociology of Work Unit, 1997).

<sup>24</sup>Sociology of Work Unit, 2003: 4. The name Rob Lambert will appear frequently throughout this study. Lambert took part in setting up Labour Studies at the University of Natal at the beginning of the 1980s after having gained some experience working for the trade unions. After being Webster's first doctoral student, at the end of the 1980s he emigrated to the University of Western Australia, where he is now a professor. He continues to maintain his contacts with South Africa in academic and trade union circles via SIGTUR, a global trade union network. Lambert has carried out several comparative studies (Brazil, Philippines) on trade union movements in the global South.

contracts and using the levy extracted for cross-funding of SWOP's activities. To date these contracts have been of considerable benefit to all parties. However, it is important that research contracts are properly regulated and are not abused by either party. There could be no greater danger to the university as a community of scholars than the unregulated involvement of academics in the market" (Sociology of Work Unit, 1995: 2).

Recognition as a university unit meant it became possible to employ a secretary and free Webster from his teaching commitments in sociology. Continued FES support meant that a second research position could be funded.<sup>25</sup> The recognition as an NRF research centre – the SWOP fell into the NRF programme "Sociopolitical Effects of Globalisation" – then led to an increased budget and thus somewhat greater planning security.<sup>26</sup> From the end of the 1990s onwards, the SWOP employed larger numbers of student interns and assistants as well as staff to carry out broad surveys. The administration structures were expanded around 1998/99 in order to be able to manage the running of the unit more effectively. Efforts to establish international contacts also led to a rise in overseas funding; at the end of the 1990s, funds came from institutions such as the South African Netherlands Programme for Development (SAN-PAD), the International Labour Organisation (ILO), the MacArthur Foundation, the British Department for International Development and the FES, which despite its announcements in the mid-1990s had never discontinued its support. The Department of Sociology's early research reports<sup>27</sup> show the strong presence of Labour Studies within the discipline. For the year 1985, for example, we read:

"The Department of Sociology has, in 1985, engaged in a wide range of research which reflects the varied interests of the departmental staff. Research is both historical and contemporary and includes studies on health; the safety of miners working underground in the gold mining industry; labour relations; the extent of corporate power in South Africa; the role of Black women in our society; the special problems of child care for the Black working mother; and the growing problem of unemployment in our society. The Department would like to draw special attention to the publication this year of Professor Eddie Webster's book entitled 'Cast in a racial mould – labour process and trade unionism in the foundries'. It is the first work of its kind to look in depth at the labour process within a particular sector. (...) It is a unique and important contribution to a growing body of industrial relations literature and has great

<sup>25</sup>The report for 1991-1995 included the budget. Just to give an idea of the scale involved: External sources (FES, E. Oppenheimer, S&P Lowenstein, SAB) provided 548,924 Rand overall. Altogether, commissioned research (Nampak, PG Bison, Transnet, Carlton, ILO, Harmony) contributed 175,310 Rand and sponsored projects (Everits Health and Safety, Industrial Democracy Project, COSATU & Elections, Dept. of Labour Workshop, Aids Research Project) 51,670 Rand. The university provided 446,687 Rand in total. Including a few smaller items, the SWOP thus had a total income of 1,383,186 Rand. The three main expenses were salaries and special allowances (550,315 R), travel expenses (104,421 R), research projects (510,682 R); overall, the SWOP spent 1,318,650 Rand over this time period. Sociology of Work Unit, 1995.

<sup>26</sup>By way of comparison: the 2002/03 budget had more or less doubled: Commissioned research (FutureMine, CoalTech 2020, Teaching, FES, MacArthur, Dept. of Labour) contributed 1,127,005 Rand, the university provided 709,578 Rand, the NRF 324,000 Rand. Total income was 2,612,268 Rand. The three greatest cost factors were salaries at 1,337,827 R, research commission by the SWOP at 543,060 R, and travel expenses with 150,400 R. In total, outgoings were 2,405,747 Rand.

<sup>27</sup>The following information is taken from the "University of the Witwatersrand Research Reports", which I refer to summarily.

relevance for our understanding of some of the complexities of Black-White relations in work situations” (University of the Witwatersrand, 1985: 31).

The year 1986 marked a “consolidation and expansion of SWOP activities” (Ibid., 1986: 38) and from 1987/88 onwards the annual reports noted that the SWOP had built up a “successful relationship with the trade union movement, particularly the National Union of Miners” (Ibid., 1987/88: 31). Since then, the annual reports listed the SWOP research report separately.

Sociologists who did not specialise in labour and industry in the long term also worked in the field at that time: Belinda Bozzoli worked on the migration of women, Jacklyn Cook on motherhood in the working population, Duncan Innes on power structures in enterprises and on worker control, G. Jaffee and K. Jochelson on trade union initiatives regarding redundancies and unemployment. In 1986, four sociologists took part in an interdisciplinary project on their university’s relationship to civil society (University of the Witwatersrand, 1986: 38), the results of which were published in two articles, “A university serving the community” (published by J. Hyslop in: *Work in progress* 44, 1986) and “Tomorrow begins today at Wits – the role of the university in a changing South Africa” (published by J. Hyslop at Wits, 1986). These constituted very early reflections on South African sociology as “public” or “policy sociology”. Besides the SWOP activities, this area also included a project of the History Research Group, which made “history from below” accessible to a wider audience, and a cooperation with the Department of Community Dentistry on the development of health programmes for the wider population. Thus this kind of commitment and interaction with extra-university bodies were not typical only of Labour Studies.

That these areas were to remain the strongest fields of specialisation at the University of the Witwatersrand in the years that followed is evident from the numbers of publications (if we ascribe significance to quantitative indicators): in 1986, of 31 publications in sociology, eleven were linked to labour and industry, in 1987/88 31 of 64, and in 1989 it was 12 of 38. This was the year that Jacklyn Cook’s book “Maids and Madams – domestic workers under apartheid” was published – a pioneering and highly critical study of exploitation and gender relations between white ladies of the house and black domestic workers, for which the author even received death threats (Cook, 2004). The information provided on the 1980s strengthens the claim that during this time, Labour Studies played a leading role in the discipline, “radicalising” it so to speak (Interview Debby Bonnin 18 February 2004). This description referred to the theoretical and conceptual innovations following the paradigmatic shift towards “Marxism” as much as to the growing publicness and increasing social relevance of Labour Studies activities.

In the 1990s, the significance of Labour Studies decreased comparatively. This certainly had to do with the emergence of further fields of specialisation: militarisation and violence, the land question, gender research, demographics and abortion issues, educational sociology, environmental and urban sociology. By the mid-1990s, not only SWOP researchers but also colleagues in general sociology were dealing with the transition process, national politics and development, economic neoliberalism and the Southern African Development Community (SADC). Labour and industry, which had

been topics for the majority of sociologists during the 1980s, lost their importance for general sociology and became specialist areas. Nevertheless, they continued to be among the most important fields of research.

The only separately listed research unit thus far, the SWOP, was joined by the WISER (Wits Institute for Social and Economic Research) and the History Research Group as subgroups within the sociology department over the course of the 1990s. The entire discipline's loss of significance could be seen in the numbers, too. The 1990 annual report listed 40 publications in total, twelve of them in Labour Studies; the 1992 report listed ten out of 27 in total, 1994 only one of 24, and in 1997 seven of 42. In the year 2000, 14 of 26 sociological publications were in this field and 16 of 113 the following year (University of the Witwatersrand. Faculty of Arts, 1990). These findings match the impression given by many of the interviewees, both Labour Studies specialists and general sociologists, at the beginning of the 2000s: the area remained important for the discipline as a whole. However, due to changes in society and the emergence of other branches of sociology, it had sustained a comparative loss of significance since the end of apartheid.

Looking at the output of the Sociology of Work Unit in isolation immediately reveals a rise in the number of publications, as shown in Table 6.1. The overall number of publications rose during the 1990s in practically every form of publication, albeit to varying degrees. Books only became a medium during the 1990s, apart from Webster's 1985 work. This corresponds to our hypothesis of the professionalisation of the subdiscipline and growing academic ambition, and contradicts Bozzoli's claim that hardly any South African sociologists have been able to establish themselves as scientific authorities by writing pertinent books (see quote p. 230). The SWOP at least had published twelve books in ten years. SWOP researchers published articles in academic journals (88 in total) over the total period. In the 1990s, they diversified the range of their academic publications with reviews. All of this suggests that the SWOP became increasingly professionalised.

However, over the total time period in question about twice as many articles (156) appeared in non-academic journals, half of them in the "South African Labour Bulletin". This popular journal was always listed by interviewees as their publication outlet of choice. This form of publication increased hugely in the 1990s in particular, doubling or tripling depending on the respective year in comparison to the 1980s. This means that precisely at the time Labour Studies were thrown into ideological and financial crisis and many of its representatives lamented a turn away from social issues and the extra-academic audience, the opposite was actually the case and the subdiscipline's "public" dimension increased.

On the one hand, this result can be explained by the broad public debate over the course of the transition process, to which the labour specialists contributed both theoretical content (criticism of transition theory, globalisation theories, economic reconstruction, the role of the trade unions in the "tripartite alliance", restructuring the workplace and much more besides) and empirical data (results of the Economic Trends Project, the Industrial Strategy Project or the "Taking labour seriously" survey). However, this result could also be interpreted as showing that the interviewees

Table 6.1: Output of the Sociology of Work Unit in numbers according to year and type of publication

Time period	Type of Publication								Total
	Books	Articles in Scholarly journals	Reviews	Book chapters	Articles in Non-scholarly journals (aside from SALB)	SALB articles	Research/conference reports	Other	
1985	1	-	-	-	-	-	1	-	2
1986	-	3	-	-	-	-	1	-	4
1987	-	6	-	-	5	4	-	3	18
1988	-	7	-	1	-	1	-	-	9
1989	-	8	-	-	3	2	2	-	15
1990-91	-	8	1	3	4	3	-	-	19
1992	1	3	2	6	1	-	-	-	13
1993	1	13	6	7	-	2	-	-	29
1994	2	2	-	-	2	4	-	-	10
1995	2	3	1	5	2	6	9	-	28
1996/97	1	4	-	5	10	18	7	-	45
1997/98	-	8	6	3	21	10	12	-	60
1998/99	1	8	2	6	9	10	-	-	36
2000/01	1	3	3	9	13	6	4	-	39
2001/02	-	8	4	14	8	6	-	-	40
2002/03	2	4	3	4	1	5	7	-	26
Total	12	88	28	63	79	77	43	3	393

This summary is based on the information provided in the SWOP annual reports. The early reports also list the publications of the associates who were not employed by the SWOP or the Department of Sociology; from 2000 onwards only those of those associates employed by the university (who are now referred to as "university research associates") are included, not the overseas and "honorary research associates", except in cases where articles were co-authored with SWOP members. Therefore this information does not correspond exactly to that in the University of the Witwatersrand Research Reports. Sources: Sociology of Work Program, 1990; 1991; Sociology of Work Unit, 1995; 1997; 1998; 1999; 2002; 2003.

underestimated or understated their own role in the transition process as they were disappointed with the social changes that occurred. Particularly those representatives of the subject who had hoped for a socialist solution and were not convinced of the new government's politics, but were unable to criticise it openly due to their specific position as white academics, presumably felt increasingly isolated from current political events.

A further indicator used to evaluate the SWOP's scholarly work and activities outside the university is the information on conference participation. The numbers given in Table 6.2 are taken from the annual reports from 1986 to 2002/03. According to this information, SWOP members regularly presented their work at conferences. It is difficult to interpret the development here, as the numbers – apart from trips abroad – are distributed comparatively randomly across the years and no clear trends can be detected. As far as the national stage is concerned, the table confirms that the ASSA or SASA were favourite forums. 58 of the 193 papers given in South Africa were presented here. This also means that Labour Studies specialists presented their results to a general sociological audience in the majority of cases.

This corresponds to the observation that only little effort was made to create specialist bodies for the area of labour and industry, and also points to the field's strong roots in the discipline as a whole. Even though the majority of presentations took place at academic events (133 of 193), nevertheless the participation in non-academic fora seems comparatively high for a university institution at 60 papers. Furthermore, in this section we can note a clear concentration on the three years leading up to the first democratic elections. Apparently the need for information and discussion among the wider public was particularly high and SWOP members knew how to make use of this opportunity to intervene in public debate – “public sociology” in the truest sense of the word.

International activity will be examined further below. In total, SWOP members gave more than a quarter of the talks listed in front of an international audience: a considerable number. While the academic boycott was not able to completely prevent appearances abroad, it nonetheless restricted them significantly. The low numbers in the 1980s need to be relativised as the SWOP only established itself as a research unit in the mid-80s and expensive trips abroad would not have been possible during the early years. However, the marked rise after 1994 is striking. This confirms the academic community's self-assessment that their subject opened up to and advanced onto the international stage very quickly.

Table 6.2: Conference papers of the Sociology of Work Unit in numbers according to year and type of conference

Time period	Conference Type				Total
	National academic conferences	National ASSA/SASA	National non-academic conferences	International conferences	
1986	-	-	-	1	1
1987	4	2	2	-	8
1988	-	2	-	1	3
1989	5	3	1	1	10
1990-91	1	9	17	1	28
1992	3	-	11	3	17
1993	13	4	11	1	29
1994	2	2	1	2	7
1995	4	2	-	8	14
1996/97	1	7	1	5	14
1997/98	10	6	2	5	23
1998/99	3	7	2	10	22
2000/01	17	7	11	15	50
2001/02	9	6	1	4	20
2002/03	3	1	-	10	14
Total	75	58	60	67	260

This summary is based on the information provided in the annual reports. "National academic conferences" included: Conferences of South African scientific associations apart from ASSA/SASA, conferences of individual departments, South African universities or research groups. "National non-academic conferences" included events with trade unions, businesses, government and politics and groups from civil society. "International conferences" included events of international associations and organisations as well as conferences of foreign institutions and organisations. Sources: Sociology of Work Program, 1990; 1991; Sociology of Work Unit, 1995; 1997; 1998; 1999; 2002; 2003.

## 6.4 Research practice

A detailed list of all research activities undertaken by the SWOP between 1987 and 2003, based on the SWOP reports, can be found in the online appendix SWOP RESEARCH PROJECTS. In this section, an overview of the unit's research practice and its central topics will be provided. The Sociology of Work Programme's foundation stone was a study on accidents in the mines. Health and safety in the workplace thus determined the unit's thematic orientation in its initial phase. A further dominant topic was the restructuring of the economy on both a micro- and a macrosocial

level. The SWOP's participation in the Economic Trends Research Group and in its follow-up project at the beginning of the 1990s, the Industrial Strategy Project with various sector analyses, can be classed as part of this perspective. (On the significance of these two initiatives, see the quote by Maserumule p. 50). South African Labour Studies' research on the role of the trade union movement shaped the concept of social movement unionism as early as the late 1980s (see Chapter VIII); contrary to the descriptions given in the interviews, this concept was also examined from a comparative perspective, as the project "Comparative study on the role of unions in the politics of social transformation in South Africa, Zimbabwe, Brazil and South Korea" coordinated by Rob Lambert in Australia shows. The three core themes of the 1980s – health and safety and, perhaps even more strongly, economic restructuring and the role of the trade union movement in transition processes – were highly topical in terms of their content.

During its initial phase, the SWOP embraced participatory research approaches. This means that the problems to be examined were defined together with interested players – mainly the trade unions – during planning and conceptualisation. After the research was completed, the results were passed on to the interested parties. However, the practice of this kind of public and policy sociology also depended on the guarantee that the research was independent provided by university institutionalisation and professionalization (Webster, 1992: 90). These conditions existed in the SWOP.

Following the restructuring and international opening up of the South African economy, issues of restructuring in entire sectors as well as in the workplace remained relevant throughout the 1990s: new production forms and technologies, flexible specialisation or skills development, shift work and co-determination as sociological concepts and economic or in-house measures were extremely topical. The role of the trade unions in general politics also remained a topic. However, during the first half of the 1990s interest also shifted conversely to the effects of social change on the trade unions. New methods were needed to carry out broad quantitative studies such as the COSATU "National Shop Steward Survey" 1990/91 and "Taking democracy seriously: organised labour and the advent of parliamentary democracy. A survey of COSATU members", first carried out in 1994 and extended into a long-term study by follow-up surveys in 1999 and 2002/03. With the end of apartheid, the SWOP now also established contact with the rest of the continent, as evident for example in its cooperation with the comparative CODESRIA project on labour, state and democracy in Africa. This cooperation fell into another important field of interest at the beginning of the 1990s: the question of ways of democratising after the end of apartheid that went beyond the world of work and industry. Accordingly, the activity report for the time period 1991 to 1995 sums up:

"Especially gratifying has been the way in which a broad research vision emerged within SWOP during this period around the theme of work and industrial relations in a changing South Africa. This focus has come together at a time when global economic change is transforming the nature of work and industrial relations and revitalising the sociology of work as a field of specialisation within sociology. The transition to democracy in South Africa during this period has also opened our work

to the debates around the consolidation of new democracies. These two intellectual and political currents – globalisation and democratisation – have given our studies of the world of work an audience beyond the field of industrial relations” (Sociology of Work Unit, 1995: 1).

The SWOP created a research plan for the second half of the 1990s that was to link the main research topics to date with objects of scientific and social relevance. That the SWOP itself phrased its aim this way can only serve to confirm our hypothesis of South African Labour Studies as a counterhegemonic movement:

“Towards the end of 1994, the Unit formulated a five-year research programme to guide its activities in the medium term. The projects identified all sought to base themselves in areas of research that had been the subject of investigation by members of the Unit. But the projects were also identified for their relevance to areas of debate in the sociology of work and for their current relevance to changes taking place in work and industrial relations in South Africa” (Sociology of Work Unit, 1995: 15).

Between 1995 and 2000 the new legislation, the Labour Relations Act (LRA) of 1996, was on the agenda. The SWOP had already involved itself in the debate on its passage as early as 1995 and now examined a whole range of questions linked to the new legal situation, such as studies on the impact of the LRA on productivity. This is where the closeness to business both in terms of content and policies becomes evident that Grossman and some other colleagues criticised so strongly. Given “practical constraints”, such as the opening up to global competition after 1994, the issues debated were now the power to compete, productivity or flexibility and job preservation.

The SWOP also retained its emphasis on trade unions in the transition process during the second half of the 1990s. Webster moved on to more theoretical, comparative work on political alliances between trade unions and political parties in cooperation with colleagues from Berkeley. Glenn Adler was delegated to the NALEDI, where he was in charge of coordinating three studies on working hours, co-determination and the tripartite alliance. Finally, during this time period efforts were made to expand the traditional definition of labour in order to include casualisation and unemployment in the field of Labour Studies. Bridget Kenny for example worked on job market flexibility and its effect on working-class households. In her PhD project, Sarah Mosoetsa examined the effects of redundancies in the footwear industry on households’ survival strategies. She considers there to be a great need for a reconsideration of traditional categories.<sup>28</sup>

Casualisation is also linked to the effects of new technologies on the way work is organised in various sectors. Despite these recent efforts, the field of informal, casual and outsourced labour has remained strongly underrepresented so far. Presumably

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<sup>28</sup>“For instance, issues around gender and household issues are not conventional industrial sociology issues. Industrial sociology (...) in the narrowest sense of it (...), I would say is just factory work. (...) Employment. And that’s it. When the worker leaves the factory and goes home, then industrial sociology is not interested in that. That is the crudest way I can put it. While I am saying: ‘No, there are synergies here’. (...) I can look at a worker in the factory and say: ‘How does your work impact on your household? (...). How does your gender, which is constructed by your family, by your society, which is not really an interest in industrial sociology, affect your output at work? (...) the fact that you didn’t sleep last night because of your drunk husband or your abusive husband, how does that affect you at work?’” Interview Sarah Mosoetsa 7 April 2004.

this is what the criticism voiced by some colleagues, namely that Labour Studies and the SWOP in particular are ignoring the current problems of the working class and especially of the lowest social classes, refers to. Interestingly, Mosoetsa's PhD project was also linked to the Durban Livelihoods Project (see below), which was concerned more closely with the wider field of work and the realities of poor, casualised workers.

Between 2000 and 2004, the Southern African Development Community had also emerged as a main topic. General problems such as liberalisation, globalisation, structural crisis and environmental issues were examined by the SWOP from a comparative perspective in cooperation with foreign institutions. Sector analyses (electrical and household goods, automobile industry) were also produced from an international, comparative perspective. Finally, Buhlungu, in collaboration with Cock, looked at the more fundamental issues of social emancipation and social citizenship in developing countries, with particular reference to labour movements and social movements at the beginning of the 21st century. This orientation reflected Webster's idea of a double transition in South Africa – economic liberalisation on the one hand, which is at the root of problems such as casual labour, redundancies and so on can be located; and political democratisation on the other hand – and this latter issue was why the SWOP introduced the project on social citizenship (Sociology of Work Unit, 2002: 2).<sup>29</sup>

This brief overview shows that the SWOP's research topics always mirrored the social developments taking place in South Africa. The majority of projects had an empirical focus on specific problems, while according to the titles purely theoretical studies were hardly carried out at all during the initial phase and only started to be produced in the 1990s, albeit in very low numbers. The fact that Webster in particular devoted himself to theoretical questions reflects the hierarchical division of labour specific to scientific institutions and shows that the SWOP had developed into such an institution.<sup>30</sup>

As far as theory was concerned, the section on important publications will provide more information. Here we can note that the SWOP gravitated towards current social issues. These were first examined empirically, initially mainly through participatory research, later through quantitative studies and – as von Holdt's work demonstrated – workplace ethnography. This confirms our assumption that South African Labour Studies concentrated primarily on local realities. This could contribute to the recognition of the limitations of imported approaches for local use and to their adaptation. Furthermore, this provided a solid empirical basis for inductive theorising. These results confirm the counterhegemoniality hypothesis.

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<sup>29</sup>As will be seen below, von Holdt criticised this "double transition" and added a third dimension. See Chapter IX.

<sup>30</sup>Besides the cooperation with Berkeley, this category also includes "The role of the trade union movement in creating a new democratic social order: orthodox collective bargaining versus political or social study of labour in South Africa" (1990/91), "Transforming the discipline of sociology" (1997-01), "Worlds of work: building an international sociology of work" (1997-99); furthermore in cooperation with the CODESRIA the comparison of relationships between the state and labour movements in various countries in the southern hemisphere (1994-98) as well as "Reinventing social emancipation" in cooperation with Buhlungu and Cock (2002 onwards). Other larger-scale works with higher levels of theory were produced as part of the PhD projects of Rob Lambert (1988), Jean Leger (1992), Owen Crankshaw (1995), S. Surtee (1997/98), Sakhela Buhlungu (2001), and Karl von Holdt (2001); the PhDs of Sarah Mosoetsa, Andries Bezuidenhout and Bridget Kenny had not yet been completed at the time of the present study.

## 6.5 Commissioned research

The SWOP reports also provide us an overview of the commissioned research carried out by the unit. Sociological work “on order” can provide insights into how SWOP capacities were being used by actors outside the university sector. However, this type of work could not always be distinguished clearly from the cooperations due its presentation in the reports.

In the 1980s, research that definitely fell under consulting was listed: work for a number of individual trade unions and the COSATU, as well as to a lesser extent for the ILO, churches, engineering associations and health service institutions. In addition to these the SWOP also offered legal and business advisory services (to the law firm “Cheadle Thompson and Haysom”, headed by Halton Cheadle; “West Rand Gold Mining Company”; “South African Breweries”). Since the 1990s, there were also the research and educational institutes and projects within the trade unions (NALEDI, COSATU September Commission, DITSELA), the Department of Labour as an important commissioner and cooperation partner, as well as the Commission for Conciliation, Mediation and Arbitration, a mining business (“Anglo Platinum Mine”) and institutions whose names were less revealing, such as the Centre for Developing Enterprise or the Centre for Working Capital. The SWOP continued to undertake research for the ILO. The SWOP was able to access funds and projects of the UK Department for International Development via a cooperation with the London School of Economics, which made several larger projects and the creation of positions for undergraduates and doctoral students possible. Overseas foundations and institutions (SANPAD, Third World Network, MacArthur) had also commissioned research or provided funding in recent years.

This information clearly shows that a broad range of extra-university institutes and players made use of the SWOP’s research capacity and field of expertise. Even though the trade unions remained important partners, in the 1990s many new clients were gained in just about every social sector: businesses and the economy, government, civil society, international organisations. During this time, in which social transformation, economic liberalisation and globalisation and legal reform subjected the world of work and industry to significant change and associations were weakened by the migration of members into government and the private sector, consulting by industrial sociologists was in great demand (Sociology of Work Unit, 1995: 13).

The SWOP thus ensured the transfer of sociological content into society as a whole and in turn gained insights into highly diverse realities. Commissioned research usually took the form of policy sociology and as such was not really of interest in terms of theory. However, the devil sometimes is in the details, and as will be seen in connection with the work of TURP (see below), empirical surveys on highly specific questions secured not only an empirical data basis, but could also uncover problems that might have remained hidden to sociologists working exclusively within academia.

The scope becomes even broader if we consider partners whose financial contribution did not carry much weight but who were nonetheless useful in terms of content and research techniques – that is, cooperations rather than commissioned research.

Several early projects were set up in cooperation with the National Centre of Occupational Health, the Centre for Applied Legal Studies, professional consultants, individual trade unions – above all the NUM – with Rob Lambert in Australia, with the Economic Trends Groups and the Industrial Strategy Project.

During the 1990s, the basis for cooperations became broader; they now included the Department of Labour and the trade union institutions as well as the National Productivity Institute, the Medical Research Council, the Human Sciences Research Council (HSRC), the Reproductive Health Research Unit, the Chris Hani Baragwanath Hospital and the ILRIG. From this time onwards, international contacts increased – the Albert Einstein Foundation, the CODESRIA, the ILO and the United Nations Institute for Social Development. These findings match those of the interviews, according to which Labour Studies gradually moved away from their initial cooperations with the grassroots working class and individual trade unions over the 1990s and now tended to work more with the upper union levels, the government and businesses. However, commissioned research for businesses had already taken place now and again during the 1980s and the long-established relationship with some individual unions (NUM) had weathered every change in the socioeconomic context until the first half of the 2000s. Further indicators of the SWOP's roots in its social surroundings will become evident in the analysis of the breakfast seminars below.

Furthermore, individual colleagues and entire institutes at national and foreign universities cooperated with the SWOP: in South Africa the centres at the University of Natal and at the UCT, which suggest the integration of the Labour Studies community, as well as the English-language universities Rhodes and Port Elizabeth. Abroad, contacts were established primarily with the USA – Berkeley, Vanderbilt University, Ohio State University, William Smith College, Pennsylvania State University – and with the UK – Manchester University, the London School of Economics, Sheffield University, and the University of East Anglia. Cooperations were also established with the Vrije Universiteit Amsterdam and the University of Coimbra in Portugal. This listing of international partners reveals a clear fixation on the USA and Great Britain. This will be examined more closely in Chapter X on the international relations of Labour Studies.

## 6.6 Academic teaching and student research interests

We are only able to provide a qualitative analysis of the aspect of teaching. No reliable numbers of students and graduates for the whole time period were available at any of the three centres. This is because on the one hand an administrative distinction was not always made between graduates of general and of industrial sociology, while on the other hand students from other disciplines, such as Commerce Studies or Industrial Psychology, also gained degrees in Labour Studies.

A range of materials can be used to gain an overview over the discipline's teaching content. Looking through the course handbooks was not always helpful, as individual modules were often printed in a standardised form that did not change over the years, even if the lecturers changed. Only some of the course outlines handed out to students were available. Instead, the exam questions from various years lend themselves to

analysis; they can be rounded off with a glance at students' final dissertations. Jubber chose this method to evaluate the development of the content taught in sociology at the UCT (Cf. Jubber, 1983). He justified this way of proceeding by claiming that the traditional method of analysing article content was inappropriate for South Africa, as content was transported first and foremost via lectures and courses.<sup>31</sup> This was linked to the fact that the high teaching load meant a majority of the lecturers' capacity went into teaching rather than research and publishing results. Several interviewees also confirmed that particularly in Labour Studies' early phase – probably also because of censorship – many content-related debates were carried out via teaching, both within departments and between the centres through personal exchange, and via the use of external examiners from other universities.

In the archives of the University of the Witwatersrand, exam questions for industrial sociology were available from 1971 up to the end of the 90s. This means the questions should reveal the transition both from conventional industrial sociology to Labour Studies, which emerged in the 1970s and was institutionalised by Webster at the beginning of the 1980s, as well as developments in content since then. An overview will now be provided using the exam questions from 1971 onwards in roughly five-year intervals.<sup>32</sup> The exam questions that were analysed in the following are available in their full wording in the online appendix WITS EXAM QUESTIONS.

In 1971, the final exams were still held by professors of the “old guard”, O. Wagner and Henry Lever. They obviously set great store by the study of classical industrial sociology and psychology (F. Taylor, W. A. Faunce, the social-psychological experiments of Lewin, Coch, French, Maier und Solem, mass communication theory, personality and selection tests). The following task provides clear evidence for the claim voiced in the interviews that industrial sociology in South Africa prior to the emergence of Labour Studies had been more concerned with the problems of management than of the workforce:

“You are the chief personnel officer of an establishment employing more than twenty African workers. You have come to the conclusion that channels of communication between your African staff and yourself are necessary and so you examine two alternative ways of creating this communication. You look at the procedures provided for in law and you also consider creating your own informal channels.”<sup>33</sup>

<sup>31</sup>He refers to literature prior to 1983, the year his article was published. Cf. Jubber, 1983.

<sup>32</sup>The analysis is based on the following exam questions: Oct.-Nov. 1971 Industrial Sociology – Paper 1 and Paper 2; Nov. 1971 Industrial Sociology 2 – Paper 1 and Paper 2; Nov. 1975 Industrial Sociology 1 – Paper 1 and Paper 2; Nov. 1975 Industrial Sociology 2 – Paper 1 and Paper 2; Jan. 1980 Industrial Sociology 1 – Paper 1; Nov. 1979 Industrial Sociology 1 – Paper 2; June 1979 Industrial Sociology 2 – Paper 1 and Paper 2; Nov. 1986 Industrial Sociology 2 – Paper 2; Nov. 1986 Industrial Sociology 3 – Paper 3; Nov. 1986 Industrial Sociology 3 – Paper 4; June 1991 Industrial Sociology 2 – Paper 1; June 1991 Industrial Sociology 3 – Paper 1; June 1992 Industrial Sociology 3 – Paper 2; June 1994 Industrial Sociology 2 – Paper 1; June 1994 Industrial Sociology 2 – Paper 2; November 1996 General Sociology and Industrial Sociology 3 – Paper 3; November 1998 Southern Africa in the Era of Globalization 1<sup>st</sup> Year; Nov. 1998 Organisations, Movements and Change 2<sup>nd</sup> Year; Nov. 1998 South African Industrial Relations in the Context of Globalisation 3<sup>rd</sup> Year; June 1998 The Sociology of Work, 3<sup>rd</sup> Year. These are the exam questions in the three years of the Bachelor's degree. From 1979 onwards Wits also offered an Honours programme, which however is not taken into consideration here. See also the online appendix WITS EXAM QUESTIONS.

<sup>33</sup>Oct.-Nov. 1971, Industrial Sociology 1 – Paper 2, Section A 3.

But the curriculum also included classic sociology – Weber, Marx, Smelser, Durkheim. The theoretical side was dominated by modernisation theory, modern societies and their institutions, supported by analyses of the United Kingdom, the USA and Russia and comparisons between them. Only three questions consider “underdeveloped” countries in the process of industrialisation from a theoretical angle. Unlike the European and American authors, who were usually referenced in several questions, only two South African publications were mentioned (Wilson, Monica; Mafeje, Archie [1963]: Langa. A study of social groups in an African township; and Van Zyl Slabbert [1970]: Modernization and Apartheid). Furthermore, the candidates were to discuss a government paper on industrial decentralisation. A whole series of questions on English- and Afrikaans-speaking South Africans, “Coloureds”, Cape Malaysians and South African Chinese reflect the liberal pluralism that dominated English-language sociology.

In 1975, two critical “Marxist” lecturers were working in the Johannesburg Department of Sociology, Dunbar Moodie and Dan O’Meara, and the Durban Strikes of 1973 had obviously also stirred up industrial sociology at the department. Four years before the publication of “Essays in Southern African Labour History” (for a discussion, see Chapter IX), several articles published in the essay collection had probably already appeared in the South Africa Labour Bulletin, or the authors – including O’Meara – were in the process of working on them. Accordingly, the exam questions of the first section deal with the history of the labour movement and the question of race versus class as the central explanatory category.<sup>34</sup>

Historical events such as the miners’ strike of 1846 and the Rand Rebellion of 1922, the discussion of “Afrikaner Nationalism” and the articulation between the mining industry and Bantustan economies through migrant labour refer to the central issues confronting South Africa and attest the adoption of a materialist theoretical framework.<sup>35</sup> This also shows the field’s interdisciplinary orientation, particularly its proximity to history. The section on professional sociology includes a question on the South African context (worker participation and the Bantu Labour Relations Act). But here again the classics are dominant, with questions on Durkheim, Marx and Simmel; the same can be seen in the section on organisational sociology (Weber, Etzioni). A last section is devoted to the future problems facing industrial societies, such as population growth and technological development, which are to be discussed abstractly without reference to any specific context.

Thus the break with liberal, management-oriented industrial sociology and the transition to “Marxist” Labour Studies had already taken place by the middle of the 1970s, at least in some parts of Johannesburg sociology. The representatives of this new direction began dealing with the history of labour movements in South Africa up un-

<sup>34</sup>As the first two questions show: “1. ‘Social classes in the Marxian sense of relationship to the means of production exist by definition, as they must in any capitalist country, but they are not meaningful social realities. Clearly pigmentation, rather than the ownership of land or capital is the most important criterion of status in South Africa’. P. van den Berghe, South Africa. Discuss. 2. ‘African opposition in South Africa has taken many forms – from primary resistance through to mass nationalist movements. Yet a constant and debilitating feature of this opposition has been a divergence of interests between the various class forces in the African population’. Discuss in general terms or with reference to one or more specific organisations.” Nov. 1975, *Industrial Sociology* 1 – Paper 2, Section A.

<sup>35</sup>Nov. 1975, *Industrial Sociology* 2 – Paper 2, Section A.

til then. It is striking that, in contrast to the earlier reception of overseas theorists, “Marxist” theory was immediately linked to the local context, as the questions referenced in footnote 227 show. Even though the 1971 exam questions already provide examples of application, the proportion of questions on South African society itself has risen strongly by 1975, although the classics are not neglected entirely.

In 1979 and 1980<sup>36</sup> the lecturers holding the exams were the ones who were to expand and institutionalise the discipline in the years to follow (Eddie Webster, Ari Sitas; Belinda Bozzoli had also returned from the UK). The first section on theories of industrialisation once more asked for classic theory (Saint Simon, Comte, Spencer, Marx, Durkheim), while the second for the very first time drew links to the global South via Arrighi’s world system theory, listing Kenya as an example. “Industrial Sociology 1 – Paper 2” starts with South African labour history. The influence of “Essays in Southern African labour history”, which was published the same year, is unmistakable. About half of the following two sections on organisational sociology and “Trade Unions under Capitalism” are made up of Western classics (Weber, Taylor, Michels, Marx) and the other half of theories on South African society, for example the migrant labour system with reference to van Onselen, a criticism of the liberal pluralist paradigm and thoughts on the role of trade union representatives in a South African business. The questions on “industrial relationships” and the “South African state” referred nearly exclusively to the local context, while “division of labour” included the working process in the Soviet Union and the Chinese Cultural Revolution.

In sum, it can be stated that the new Labour Studies had established themselves in the taught curriculum by around 1979/80. While sociological classics remained on the curriculum, the proportion of the exam questions devoted to the local context shows that discussion of South African problems was preferred. The first publications of the scholarly Labour Studies community, the articles on the history of labour, had appeared and obviously had a strong influence on the classes taught. Furthermore, the lecturers of these years broadened their focus to include individual countries in Africa, Eastern Europe and Asia and shifted away from modernisation and development theory towards world system theory and the problems facing the global South.

The complete exam questions for 1986 unfortunately are not available, but among those that are, the questions on research methods and theory of cognition are particularly striking. These two fields had been neglected thus far and certainly represented an important addition to the education of future Labour Studies specialists. As can be expected, the research methods are tailored to the subdiscipline’s profile at the time. The first question – about how can South African sociologists make their research more relevant to society as a whole<sup>37</sup> – shows the will to engage with society. The highly suggestive question whether “anything [is] wrong with the Positivist model of social investigation”<sup>38</sup> supports alternative methods such as oral history and a warning against the flaws of official sources and the press as foundations for social scientific

<sup>36</sup>The exam questions for the 1979 “Industrial Sociology 1 – Paper 1” were not in the archive. For the sake of completeness the corresponding questions for 1980 are used here.

<sup>37</sup>“1. If contemporary South African social researchers want to make their work more relevant to the needs of the community, how can they go about it?” Nov. 1986 Industrial Sociology 2 – Paper 2 Section C.

<sup>38</sup>“6. Is there anything wrong with the Positivist model of social investigation, and, if so, what is the alternative?” Nov. 1986 Industrial Sociology 2 – Paper 2 Section C.

research. These two new sections doubtlessly play an important role in the discipline's professionalisation.

In "Class, community and conflict", Belinda Bozzoli taught several British and American approaches (Thompson, Williams, Marx) as well as examples of class, racial and ethnic conflict. She did not appear to draw any links to South Africa. In the section on "Theories of capitalist development", Hindson examined key concepts such as value, wealth, capitalism and mercantilism, and referred to the physiocrats, Smith, Ricardo and Marx. This targeted testing and defining of central terms is something new in the exam questions set thus far and suggests that the curricula were being set more and more rigorously. "Reform, reproduction and rural areas" and "Labour law" looked exclusively at South African issues: the former section looked at the role of the Bantustans in the economy, popular resistance in the Bantustans and the role of traditional authorities on the one hand, the government and its reforms on the other in this context. By contrast, Duncan Innes asked for a discussion of the causes of the 1973 Durban Strikes and their effects on the system of industrial relations, such as the Wiehahn Commission Reforms. He thus taught a dynamic version of law and placed the legislation in the context of historic events. The last question sheet contained the topics medical sociology, the motor industry as well as secularisation and religion in South Africa.

This means that the range of themes became more diverse (economic sociology, law), and for the first time the basics of sociological theory and research (methods, epistemology) were asked about specifically. The material available does not contain a section on labour history. However, parts of the exam are missing, so that this omission cannot be interpreted as neglecting this topic.

Complete exam material is not available for the beginning of the 1990s, either. The sections on the sociology of the labour movement and "State, legislation and industrial relations" refer to several South African theorists (Hindson and Crankshaw, Webster, von Holdt). They deal with specific local issues – geographical segregation and class, trade union strategies in connection with the introduction of the Industrial Council System, projections of various power constellations after the end of apartheid – as well as general questions in reference to the South African context – such as alliances between the trade unions and political parties using the examples of South Africa and China, or the strategic use of legislation by labour movements. In "Sociology of Work", Judy Maller asked about different types of management, flexible production and dequalification – that is, key terms – to be discussed using South Africa as an example. The task is illustrated using a tour the students had done of a Nissan factory, which Maller refers to.

Our interpretation of this year's exam is only as complete as the material available. Obviously specialisation had advanced to the point that a number of questions could be dealt with using South African literature. The classics had dropped out of the exam questions examined here, which is not necessarily positive. The degree seems strongly focused on South African developments; apart from a look at Japanese organisational structures, the candidates did not have to deal with any other countries. This strengthens our hypothesis that a local grounding reduces dependency on the

centre. However, it also suggests a certain introversion of South African sociology, which can definitely be seen in connection with the exceptionalism hypothesis (see below). An exclusively local focus offers no opportunities for comparison.

Complete materials were not available for the mid-1990s either.<sup>39</sup> Extant exam sheets include sections on “Capitalism and modernity”, sociology of industrial relations and organisational sociology, sociology of work and “sociology of work and the industrial democracy” as well as several sections on other sociological subfields (demography, urban sociology, war, peace and security), which are not taken into consideration here. The first section referred to Marx’s and Weber’s theories of modern society. For the first time, a lecturer explicitly criticised classical theory, placing it in the historical, European context in which it developed.<sup>40</sup> This criticism of the classics’ Eurocentricity obviously also gained a foothold in Johannesburg.

By contrast, in the section on the sociology of work Eddie Webster and W. Leroke appear to adhere to a Marxist theory of the labour process, using concepts such as de-qualification, flexible specialisation and Post-Fordism. However, the hypothesis that “workers have multiple identities which are not necessarily determined by class” points to a continued engagement with the issue of class and race into which postmodern concepts of culture and identity have now entered. The section on industrial democracy is linked to labour process theory in terms of content. Apparently the students were taught the example of Yugoslavia in the classes on this subject.

For the last year examined (1998), the material is complete, providing a final picture of teaching in the department in its entirety. Candidates in the first year of their Bachelor degree were asked to answer questions on “Industrialisation, democratisation and globalisation in Southern Africa” and “Globalisation and underdevelopment”. The title shows that at the end of the 20th century, Labour Studies broadened its focus beyond national borders onto the continent and entered the debate on globalisation. This does not prevent a retrospective look at history, as the questions on the system of migrant labour and the history of the ICU show. Thus the history of the labour movement had not been completely abandoned, even though it only constituted a small part of the exam content. Moreover, students needed to be familiar with theories of transition, dependency and modernisation to master the tasks. More specific questions referred to multinational corporations, structural adjustment programmes and the effects of globalisation on gender relations in Africa.

In the second year of the Bachelor’s degree, questions on “Organisations, movements and social change” were set that assumed knowledge of concepts such as oligarchy, Taylorist versus Japanese organisational structures in production, Weber’s concept of

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<sup>39</sup>The 1994/1995/1996 exam questions were analysed here in order to gain a reasonably broad impression of the topics dealt with.

<sup>40</sup>1. (compulsory): What are the main similarities and differences between Marx and Weber’s conceptions of the transition from ‘traditionalist’ agricultural society to ‘modern’ capitalist society? Which version do you find more convincing and why? (...) 2. ‘Edward Said’s concept of ‘Orientalism’ provides a basis for understanding why Marx and Weber’s conceptions of the relation between ‘the West and the Rest’ are inadequate’. Discuss. (or) 3. ‘Marx and Weber’s work is rooted in Enlightenment thought and therefore suffers from all the typical problems of that outlook’. Discuss. 4. ‘Their treatment of magic and religion is the weakest aspect of Marx and Weber’s thought’. Discuss.” June 1994 Industrial Sociology 2 – Paper 1 Section A.

bureaucracy and Foucault's concept of power. Other topics included the emergence of casual labour and the contradictory position of trade union representatives. In the third year "South African industrial relations in the context of globalisation" were on the agenda, with questions on the effect of neoliberal economic policy on trade unions, Adler's and Webster's critique of transition theory, the new Labour Relations Act of 1996 and the dangers of corporatism for worker representation. Sociology of work included concepts such as Post-Fordism, the informal sector, affirmative action and co-determination; this section also took up one of the questions that had already played a role at the time the SWOP was founded: academic knowledge and experiential knowledge, here in the context of globalisation. Candidates were to deal with theorists such as Teeple, Adler and Webster, Kraak, Castells, Portes and Streeck, that is, roughly half South African and half international literature.

The last year thus reveals that the SWOP remained true to some issues in its teaching curriculum (history of the labour movement, race, class and workers' identities, theory of the labour process, power relations and participation in the workplace, organisational bureaucratisation versus democratisation etc.). At the same time, teaching followed current developments in the country (the struggle against apartheid, legislation and reforms, trade union strategies, new organisational structures in the workplace, technologisation, globalisation, casualisation, the informal sector, SADC). Lecturers used both international and local literature, although the proportion of classical sociology shrank over the years and South African works were increasingly included in teaching. For the purposes of the present study it is perhaps most interesting that the students dealt with the issues of their own society and only had to answer comparatively few general theory questions. This impression is strengthened further by a look at student final dissertations.

Analysing the topics of final dissertations can add to the impression of teaching and student supervision in Labour Studies gained thus far. The next potential generation of young academics reveal themselves in the topic chosen for their first scholarly piece of work. A list of all final MA and PhD dissertations produced at the SWOP can be found in the online appendix SWOP THESES. As the research institute became more established, the number of graduates supervised by the SWOP grew in parallel. While one or at most two students per year attained an MA during the 1980s and the beginning of the 1990s, from the mid-90s onwards this increased to up to six per year. According to lecturers, this was more than in the field of general sociology.

The content of the 1980s dissertations was strongly influenced by the struggle of the trade unions and the fight against apartheid. Two examined forms of resistance (strike, stayaway), some titles employed Marxist terminology ("Capital/labour relations in the mining industry", "Alienation and the black auto-assembly line worker"). During this time period, two graduates already developed central theoretical concepts: Karl von Holdt began his research on the relations between trade unions and communities, which was to apply and develop the concept of social movement unionism and occupy him up until the completion of his PhD 15 years later (see the discussion of this work in Chapter IX). In the first dissertation written at the SWOP on the historical development and failure of the umbrella organisation SACTU in the 1950s,

Rob Lambert coined the term “political unionism”. His work falls into the context of the unit’s early stages, when staff were reflecting upon the history of the country’s labour and trade unions to draw lessons for a revival of the movement and avoid the mistakes identified by Lambert in the SACTU strategy.

During the 1990s, dissertations followed the transition process in sociological terms. The majority dealt with aspects of change in the workplace. This confirms the SWOP’s continued specialisation in themes of the workplace in large-scale industry and the dominance of labour process theory. Several dissertations are case studies on this issue.<sup>41</sup> The transition process on the macroeconomic level was a second thematic thread – liberalisation, globalisation and the government’s economic policy – dealt with by K. Gostner and Geoffrey Nkadimeng. Finally, some theses dealt with the effects of the transition process on the trade unions’ strategies and organisational structures (Tanya Rosenthal, M. Ginsburg, M. Tshoedi).

Research on health and safety in the workplace only followed in the 1990s, with Jean Leger’s BA dissertation and S. Arkles’s MA thesis. Owen Crankshaw’s PhD thesis makes a theoretical contribution to South Africa’s class structure. S. Nakanyane’s project “The changing nature of work and collective action” on the private security industry already pre-empts a perspective that was to become important in the 21st century.

After 2000, the main focus of student dissertations was casualisation, new forms of labour and retrenchments. Thus they followed current developments in the world of work and industry – in contrast to the large SWOP projects’ engagement with the topic, which only developed slowly.<sup>42</sup> Dissertations on job creation, welfare state policies and trade union relations in the SADC also deal with current topics. T. Sephiri produced a historical review of the role of black intellectuals in the labour movement and Sakhela Buhlungu linked his own experiences as a trade union functionary with the conceptualisation of the “dilemma of leadership” in his dissertation (on this, see the analysis of his work in Chapter IX).

The choice of topics for student works confirms the local relevance of South African Labour Studies. Nearly all dissertations, apart from S. Arkles’s project on handicapped miners in Lesotho and Portia Lebala’s on franchising on Zambia, make concrete reference to South Africa. The only title which is less empirical is K. Gostner’s “Social clauses and international trade globalisation, economic regulation and organised labour”. This can be interpreted conversely as a lack of theoretical and/or comparative focus. However, such a hypothesis would require an examination of the respective dissertations’ content, which is not possible here.

This local orientation lends strength to Bozzoli’s argument that Labour Studies are suited to confronting students with local social problems – many carried out field

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<sup>41</sup>The restructuring and flexibilisation of the labour process, with new corporate strategies, co-determination and representation within organisations, were dealt with by Judy Maller, S. Mapadimeng, Lael Bethlehem, D. Gampel, Sakhela Buhlungu, L. Mashike and Franco Barchiesi.

<sup>42</sup>This category includes the final dissertations of Sarah Mosoetsa on restructuring in the footwear industry, Nathaniel Ndala on casualisation in the retail sector, Rahmat Omar on working conditions in call centres, S. Zdrzil on training measures given the threat of retrenchment and A. Ngonini on the effects of retrenchment in rural areas.

studies in businesses or working class households as part of their final dissertations – and thus to counteracting the “alienating” tendencies of postmodern theory that separate the younger generation from their own reality. In this regard, her thoughts round off the present analysis of teaching in Labour Studies suitably:

“One of the good things that are happening in the Labour Studies perspective is: It keeps you real. It keeps you real. I think in many ways we have a lot of American influences, a lot of post-modernists around the place. And I myself find post-modernists very interesting, but it can get into the realm of the unreal, because it’s [...] relative. It can mean that you don’t engage with the fact that we’re living in a society where people are poor, starving and don’t have jobs, you know? But you can talk about the discourse and the meaning of the nature of crime without thinking of the fact of [...]. The matter is, there are a whole lot of people being mugged as we speak, so the relativism can slide into a sort of moral relativism cop-out. The thing about Labour Studies that’s good, is it keeps you real, it keeps the focus on experience, which is something I value tremendously. I really want to emphasise that, although I’ve drifted out of it, it’s essential to have that realist, that sociological realism present in every department and it’s been a break on post-modernism, excessive post modernist working (...). I mean, in many American departments, you have this whole removal of a department from reality. There we’re sitting in this really poor country and at least we have some institutionalized things that are saying: ‘No, we don’t live in Hollywood! Look at the real world!’ And it’s very good for students, because besides being seduced by the romance of the good (...) workers and the bad capitalists, they can be seduced by the romance of post modernism which is a very romantic way of thinking. (...)” (Interview Belinda Bozzoli 30 March 2004).<sup>43</sup>

## 6.7 Breakfast seminars and other contacts

The SWOP had relationships with a number of national and international universities and academics. Visits by foreign academics can serve as an indicator of international contacts. The list of all of the visitors mentioned in the annual reports (online appendix SWOP VISITORS) includes 58 names for the 1987-2003 period. In purely quantitative terms, the information available reveals that the number of foreign visitors increased at the beginning of the 1990s and grew significantly at the beginning of the 21st century.<sup>44</sup> Only two guests visited the SWOP between 1987 and 1990: Rob Lambert, who came from the institution himself, and Siyabonga Ndabezitha, whose name also suggests South African origins. Between 1990 and 1995 the SWOP had 21 visitors, including Burawoy, with whom there had already been many years of contact, Ronaldo Munck, James Mittelman, Mahmood Mamdani, Wolfgang Streeck and Dunbar Moodie, some of the big names in Labour Studies and South African sociology. In the second half of the 1990s there were 19 guests, including Richard

<sup>43</sup>One of the interviewed students wholeheartedly agreed with this view: her motivation to study Labour Studies was the discipline’s closeness to reality: “Let’s see what was my reason for studying Labour Studies. I think they are a very interesting aspect to study, because they are very dynamic. I like real scenarios. I was never meant to be a scientist and sit in a lab.” Interview Andziwe Zenande Tingo 20 February 2004.

<sup>44</sup>However, the significance of these contacts rose with the trend towards professionalisation and the ambition to establish the SWOP as an “international research centre”, while in the early years presumably not as much value was placed on visitors from abroad. It is therefore possible that not all visits in the first years were included in the reports.

Hyman, Immanuel Wallerstein and Jamie Peck to name the best known. In the first three years of the 21st century the programme had 17 visitors from abroad.

As far as the visitors' countries of origin are concerned, a clear dominance of the USA (18 guests) can be detected; but the UK (9) and Australia (7), to where Rob Lambert emigrated and established links, were also well represented. From the 1990s onwards, the diversification of countries of origin suggested an expansion of networks to various European countries (five Swedish, two Dutch and one visitor respectively from Germany and France) and Canada (five visitors). Perhaps the relationships to other countries in the global South – one guest came from Brazil, one from Malaysia, one from South Korea and three from the African continent (Nigeria, Uganda) – can be emphasised. Further contacts were established with Israel (1), Japan (1) and the ILO (1). Most guests were academics, but trade unionists and individuals employed in other institutions, such as a delegation from the US Department of Labour, also visited the unit in Johannesburg. The SWOP seemed to be well on the way to establishing an international profile. That foreign social scientists were prepared to travel to meet the South African Labour Studies specialists in their country suggests a degree of balance in the international networks: it was not just the South Africans who were travelling abroad.

There were links to institutions outside the universities on both a personal and institutional level. Several SWOP researchers gained experience in other sectors before their scholarly work, or alternatively left the university in order to make use of their knowledge elsewhere. A number of extra-university contacts accordingly resulted from staff development alone. Of these, the contacts to the Department of Labour via the former SWOP researcher Ian Macun, to the NALEDI via Karl von Holdt, and – perhaps less obviously – to the COSATU via the siblings Gay Seidman and Neva Makgetla deserve special mention. The online appendix SWOP STAFF contains a chronological list of all SWOP staff including information on their institutional origins and whereabouts, which will not be examined in detail here.<sup>45</sup> However, several researchers were also included in the national and international academic community in one way or another through their work for the SWOP. To mention only those individuals referred to more frequently in this study:

Eddie Webster was connected with the national academic community as part of the editorial team of the "South African Labour Bulletin" and the South African Sociological Review. As a member of the Project Advisory Group for the Research and Analysis Skills Strengthening Programme of the Centre for Civil Society at the University of Natal, he remained in official contact with colleagues there. In addition, for many years he was an advisor on the board of Ravan Press, a progressive Johannesburg publishing house, which published several works in Labour Studies. In terms of funding, it is of interest that he was appointed a member of the NRF's Advisory Committee for the Social Sciences and Humanities in 2002. Thus Webster held gate-

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<sup>45</sup>In the IOLS and at the UCT, information from the material available such as annual reports and course handbooks was supplemented with interviews, which was essential to establish staff's former institutional affiliations and current whereabouts. This completion was dispensed with in the case of the SWOP, as there was already sufficient information available from the other two institutions. Given the very high number of former and current researchers at the SWOP, investigations would have required excessive interview time.

keeper positions in some of the most important South African publication and funding organs. His position on the international advisory board of the “British Journal of Industrial Relations” and the international advisory board of “Work, Employment and Society” since 2000 suggested growing international recognition. He had been active on the research committee RC44 since the opening up of the country (see Chapter X). Outside academia, he had contacts with the Ministry of Labour (“Member of a committee to advise the Minister of Labour on the implementation of the Report of the Comprehensive Labour Market Commission”, 1996). Since 2003 Webster had been a consultant for the British Department for International Development.

For many years, Karl von Holdt held a position at the “South African Labour Bulletin” (see Chapter VII and the online appendices SALB CONTENTS and SALB EDITORIAL BOARD). In 1996 he moved from the SWOP to the NALEDI, retaining his links to the university as an associate. Between 1998 and 2003 he was also a member of the advisory board of the Pearson Chair of Economic Journalism at Rhodes University and on the board of directors of the South African Post Office during the same time period; moreover, between 1998 and 2001 he was also a member of the Employment Equity Commission. In 2007, after this study was completed, von Holdt moved back to the SWOP, of which he then became the director.

Von Holdt’s colleague Sakhela Buhlungu was also on the editorial team of the “South African Labour Bulletin”. He was involved in the national academic community in 1998/99 through the Council of the South African Sociological Association (SASA), and had been active in the international community since 2002 as the editor of the RC44 newsletter (see Chapter X). Outside academia he acted as a member of the Presidential Commission to investigate the Development of Comprehensive Labour Markets in 1996 – in the implementation of which Webster was involved as an advisor to the Ministry of Labour, as mentioned above –, from 2000 he had been on the board of directors of the NALEDI and the Workers’ Library, and since 2001 he had been on the editorial board of the journal of the South African Reserve Bank, titled “Labour Markets and Social Frontiers”. After this study was completed, he moved to the University of Johannesburg, which suggests that in the meantime the concentration in the three national centres had become less strong.

These positions held by SWOP researchers resulted in personal contacts with a number of political and social institutions and actors, which it was possible to use for academic studies, commissioned research and funding, and the popularisation and political application of scientific results. Institutionalised contacts had also emerged through contributions to trade union education, which the SWOP was occasionally involved in,<sup>46</sup> and the organisation of joint events.<sup>47</sup> The presentation of the results of the South African Labour Flexibility Survey in an event titled “Labour markets

<sup>46</sup>The classes taught at the annual COSATU Summer/Winter Schools are worthy of mention, for example.

<sup>47</sup>In 1994 the SWOP, NALEDI and “South African Labour Bulletin” held a seminar on “Co-determination and worker participation”, to which they invited Wolfgang Streeck, a labour sociologist from the Max Plank Society, and Andy Banks, who was in charge of education at Public Services International. The same institutions put on an event on “A future for socialism? Markets, ownership, redistribution” in 1996 and on “Rethinking Welfare in South Africa” in 1998, to which they invited Jamie Peck of the University of Manchester and Leila Patel, Ex-Director General of Welfare. These events, which offered qualified debate on current political issues, attracted up to 60 participants.

and enterprise performance in South Africa”, organised jointly with the Department of Labour, the UNDP and the ILO in 1997, showed links to international organisations.<sup>48</sup>

Conversely, the SWOP board of directors – only seldom mentioned in the first reports – included highly regarded and influential people from both academic and social circles, as the annual report of 2002/03 shows: the president was Tselane Morolo (responsible for the NRF programme “Socio-political impact of globalisation”). The members of the board brought together the *crème de la crème* of the University of the Witwatersrand – Prof. Belinda Bozzoli, Director of the School of Social Sciences, Prof. Jacklyn Cock, Head of the Department of Sociology, Prof. Loyiso Nongxa, Deputy Vice Chancellor: Research, Prof. Gerrit Olivier, Dean of the Faculty of Humanities. Reputable scholars from three South African universities were included – Prof. Peter Alexander, Director of the Centre for Sociological Research at the Rand Afrikaans University, Prof. Johann Maree, Department of Sociology, UCT, Prof. Peter Vale, Centre for Southern African Studies, UWC. The traditional links to the miners’ union were maintained through Secretary-General Gwede Mantashe; Philip Dexter, the Executive Director of the NEDLAC, was doubtlessly also a useful contact; and through their membership of the board, Lael Bethlehem, Director of the Department of Water Affairs and Forestry, and Dr. Jean-Patrick Leger, Executive Director of Vesco Plastics – two former SWOP researchers who had in the meantime established themselves in government and private enterprise – remained linked to the programme.

These relations had been institutionalised through a special feature of the Johannesburg Labour Studies: the breakfast seminars. Thanks to the financial support of the Friedrich Ebert Foundation, about once a month the SWOP invited individuals who deal with issues of labour, trade unions and industry in various contexts to a talk and shared breakfast. Between 1990 and 2004 this circle met on 130 mornings. The author was lucky enough to be able to take part in two such events in April 2004 and observe and make use of this opportunity for interaction, discussion and networking.

On 19 April 2004, Beverly Silver of Johns Hopkins University presented her most recent research on the rise of trade union movements in emerging economies (China). Two weeks later, Webster and Buhlungu presented the latest edition of a broad survey of the opinions and situation of COSATU shop stewards that the SWOP carries out in regular intervals. Both representatives of some of the strategically most important national institutions as well as foreign academics took part in the breakfast meetings.<sup>49</sup> The seminar offered “accelerated networking opportunity”, as Eddie Webster

<sup>48</sup>Cf. the information in the SWOP reports of the years in question.

<sup>49</sup>The list of participants and mailing list during the month of March 2004 included 77 people, of whom around 40 took part in the two breakfast seminars attended by the author. Seven of the 77 names came from the SWOP, seven from other departments of the university (sociology, psychology, education), four from other South African universities and five from foreign universities (Johns Hopkins and Madison in the USA, the London School of Economics and the University of Lagos, Nigeria). No institutional affiliation was provided for the five students on the list. There were 13 representatives from trade union circles (NUM, POPCRU, SAMWU, CWU, SASBO, COSATU and NALEDI), six from government institutions (Department of Labour, Political Labour Section, National Productivity Institute), and two from the world of business (Galmedia Group, LIMELITE Technologies). Finally, a representative of the Friedrich Ebert Foundation, a representative of a non-governmental organisation and the editor-in-chief of the “South

announced during a break for participants to go back up to the buffet, and served to establish communication between labour specialists from both university and extra-academic circles. Thus the shared morning meals fulfilled a number of different functions: they made it easier to establish contacts for cooperation and funding as well as for commissioning research. They encouraged media coverage. Students had the opportunity to get to know their future professional fields by participating in the discussions, presenting their work and making contact with professionals. Finally, the content and results of academic and commissioned research were passed on to a wider audience made up mostly of people in strategic positions, creating the opportunity for feedback, criticism and direct evaluation by extra-academic actors. For example, if Makgetla approached Webster to plan further cooperations following a presentation of the shop steward survey, or if trade union secretaries requested written versions of the results as they wanted to use them in their work, this suggested the research was highly relevant.<sup>50</sup>

Earlier research had now also become a constructive influence on government policy. Leger's study from the 1980s on worker knowledge in connection with landslides and dangers in the mines was taken into consideration in the new Health and Safety Act. The drafting of this legislation was coordinated by Marcel Golding, a former NUM functionary, later ANC member of parliament.

Thus the breakfast seminars contributed to the establishment of Labour Studies as public and policy sociology. Conversely, the discussion with and presentations given by non-academics bring scientific content face to face with reality, with actors from other sectors criticising or strengthening that content and suggesting topics for further investigation. Through their involvement with and integration into their social context, South African Labour Studies could strengthen their counterhegemonic potential. At the same time, foreign researchers from prestigious universities who were not working specifically on Africa but on issues concerning globalisation and international economic and geopolitical relations (Silver, Arrighi, Teddy Brett) were also interested in this diverse circle. This suggested that the local academic community raised questions relevant to the subdiscipline as a whole and provided answers to them, thus gaining the attention of certain international circles. The SWOP itself argued along this line in one of its activity reports.

From its foundation, the Sociology of Work Unit was set up as a project of counterhegemonic sociology. The institution's development, its research and publication practice and its academic teaching clearly reveal the emergence of this potential. Its many diverse links to non-university sectors have been identified as particularly striking. On the one hand these links made it easier to turn away from the international stage, while on the other they facilitated the definition of priorities and criteria of rel-

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African Labour Bulletin" took part. The institutional affiliation of the other participants was not specified further.

<sup>50</sup>Not everyone was convinced of this. David Jarvis attended breakfast seminars on behalf of NALEDI, but had little use for them: "The kind of conferences we go to are union conferences or workshops [...] we very rarely (...) go to things like the SWOP breakfasts (...), unless they tie into what we're doing. It's a totally different environment, like the last SWOP breakfast that I attended, it's a very alien environment that discusses and theorises on labour as opposed to us (...) we're assisting labour on a day to day basis." Interview David Jarvis 29 March 2004.

evance specific to the unit. At the same time, since the end of apartheid the SWOP research group had opened up increasingly to international circles. The conditions in which this was taking place will be examined more closely in the section on Labour Studies' international relations (see Chapter X).

## 6.8 A decade after the Durban Moment of 1973 – developments in the IOLS

“Industrial, Organisational and Labour Studies”<sup>51</sup> (IOLS) at the University of Natal was founded by two men at the beginning of the 1980s: Ari Sitas, who was just finishing his PhD in Johannesburg under Eddie Webster’s supervision and whose academic career began with the founding of the Labour Studies programme, and Rob Lambert, whose PhD had also been supervised by Webster and who also had a trade union background. Both were supported by David Ginsberg of the Department of Sociology. The Labour Studies programme in Durban was inspired by the success of Labour Studies at the University of the Witwatersrand (Interview Ari Sitas 13 February 2004). Sitas and Lambert were unable to base their institution on the former Institute of Industrial Education with which Rick Turner, his colleagues and students had laid the foundation for activist Labour Studies, for as mentioned above, it had already met a violent end in 1975/76. Sitas and Lambert started with a first Honours class – the first two years have always consisted of general sociology – which immediately captured the interest of an impressive number of students. The first PhD in Labour Studies in Durban was completed by Blade Nzimande, who today is the Secretary-General of the Communist Party.

Looking back, Sitas divides his institute’s development into several phases. He recalls the early days as follows:

“We went through all kinds of phases. From ’82 to, let’s say, ’85 was euphoria. Things were growing everywhere in the province. We had good connections with the trade union movement, good connections with community organizations, and we started a whole range of projects as the need arose. (...) We started with what became the Culture and Working Life Project. That was around late ’83. It started from myself and others working with Dunlop-workers in producing a play at a time when they were fighting for union recognition. And, you know, the budget for that was, I think, 253 Rand, and it was raised by Fatima Meer. You know, the costs were cut by Fatima Meer walking down and up Grey Street and getting Indian merchants to give cloth, give this, give that for that. Now, what happened is that (...) things attracted a lot of very senior and very influential people in the grassroots of the trade union movement. A lot of creative people exploded around, you know, and there was a revival of oral poetry and so on. So we tried to consolidate that activity and that’s why we created the Culture and Working Life Project, to give support for the cultural movement that was starting in the trade unions. And at the same time I was involved in the formation of a Durban Workers’ Cultural Local. (...) And that became the nucleus for things that were happening in the trade unions, so there was dialogue,

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<sup>51</sup>The programme changed its name several times. In order to avoid confusion, the present study will use the current name throughout.

between the two. Now, by imitation that activity grew in other areas and was going everywhere. Lots of strikes, lots of activities, the UDF was formed in 1983 as well, so there were a lot of initiatives there” (Interview Ari Sitas 13 February 2004).

Several research projects were developed during this early phase around 1984/85. The Culture and Working Life project emphasised culture and “the intangible” – a focus that distinguishes Durban within the South African academic community. Sitas’s own creative work – poetry and theatre – may have been a formative influence here.<sup>52</sup> For the most part, “Culture and Working Life” was financed by church funds. The “Natal Workers’ History Project”, which emerged at about the same time and was directed by Fatima Meer’s daughter Shamim Meer and Zim Nondumo, examined the historic realities of the divided working class in KwaZulu-Natal: of Indian descent on the one hand and African on the other. This project was funded by the Ford Foundation. Into the new millennium, the “Trade Union Research Project” (TURP) mainly carried out commissioned research for the trade unions. It will be examined in greater detail below as an example of an LSO. The “Youth Unemployment Project” was created by Moss Ngoasheng during the short time he spent at the IOLS. This means that in the mid-1980s, a constant of 14 to 16 people were employed in the IOLS projects mentioned. While the outbreak of violence and civil conflict in the province in 1985 dampened the mood, in material terms this was possibly the best time of all: the South African Council of Churches was able to attract vast sums from Europe via the church network, which made the project activities possible.

In reaction to a number of severe accidents at companies in and around Durban, in 1986 Mark Colvin, a doctor, and Vanessa Kruger, a nurse, started the “Industrial Health Project” and – perhaps surprisingly – also integrated it into sociology. The project offered clinical services and professional development on health and safety in the workplace for workers and trade unions. Rajen Naidoo, who became director of the Industrial Health Unit (IHU) in 1992, gave reasons for this choice of location:

“Our clinic was across the road from a major tertiary hospital, but essentially our offices were located up on the main campus and the reason for that also was political. Because the Department of Sociology with people like Ari Sitas, Mike Morris, were people that had very close links with the trade union movement. So, fairly progressive people, so even though it was a health unit and had a (...) home in the health sciences faculty, the faculty at that time was fairly hostile to those sorts of initiatives. Well, I wouldn’t say hostile, but it was felt that it would not be as well protected in this sort of environment. So, it stayed up there. But then, in changing circumstances, I think in 1995, the industrial health initiative moved to the health sciences faculty.”<sup>53</sup>

<sup>52</sup>Cultural issues were of prime importance for the development of the trade union movement, as research on alternative leader personalities for example revealed: “Whereas a clear picture of shopstewards, their beliefs and priorities has emerged, less has been written on the self-motivation and cultural energy of another kind of leadership (...): a cultural core which was particularly strong in KwaZulu until 1992. Indeed much of the cultural energy in creating a labour movement subsisted on forms of rhetoric, performance and communication, deeply embedded in Zulu traditions and symbolism.” Sitas, 1997a: 99-112, here: manuscript: 1-2. He refers to Debby Bonnin’s works and his own works of the mid-1980s. Webster also recognises Durban’s strength where cultural issues are concerned. Cf. Webster, 1999.

<sup>53</sup>Today’s “Centre for Occupational and Environmental Health”, which has offered MA and doctoral degrees in Occupational Health since 1999, is now based in the Department of Community Health. Commissioned research and workers’ education is carried out by the Industrial Health Unit, which was moved into this centre in 1995. It is financed via a mixed model that includes commissioned research for businesses,

The next phase ushered in the merging of industrial sociology and psychology, a quite remarkable enterprise considering the fundamental theoretical and political differences between these two related disciplines: “In ’88/’89 (...) we decided to merge industrial sociology and industrial psychology and form Industrial and Labour Studies. At that stage in industrial psychology the top person was Blade Nzimande, (...) a young upcoming activist and he was my PhD candidate as well” (Interview Ari Sitas 13 February 2004). After completing an MA in industrial psychology at the University of Natal Pietermaritzburg campus, Nzimande had gone on to lecture at the University of Zululand. He left the university in 1987:

“(I had been lecturer at the University of Zululand, W. K.) from ’85, but I left in ’87 because it was intolerable. Because it was still the same old Afrikaner Broederbond controlling the university. They used to send spies to listen to what I was teaching and I was teaching Marxism, you know? (...) I left (the University of Zululand, W. K.) in July (1987) to take a junior job (...) at the University of Natal in Durban. That’s when we started working closely with Ari and we both set up the programme on Industrial and Labour Studies. I’m a founder member of that programme. (...) it was an attempt to fuse industrial psychology and industrial sociology and I was getting more attracted to industrial sociology now, because there was a national association of sociology and that was where the left debates were, the Marxist left debates. I started writing, presenting papers. (...) Industrial psychology has been very conservative, I would say I practically abandoned industrial psychology, though (...) Ari was saying industrial psychology is very important and we were attempting to combine the two, seeking to create a new paradigm (...). Well, the dominant paradigm was informed by industrial sociology, because there wasn’t even a grouping of progressive industrial psychologists. For instance, I was the first black industrial psychologist in South Africa ever [...] there was an association which was very conservative. And then I registered my PhD with Ari as my supervisor, in Industrial and Labour Studies (...)” (Interview Blade Nzimande 6 April 2004).

Other progressive industrial psychologists who played a role in linking the two disciplines in Durban were Cathy Campbell and Sheida Bobat. However, the links broke apart in 1995 after Blade Nzimande and Cathy Campbell had left (Interview Ari Sitas 13 February 2004). Looking back, Debby Bonin said that the merger had been unsuccessful right from the beginning and that “theoretical, professional and political” disagreement had always existed.<sup>54</sup> Since 1995 the programme had been called “Industrial, Organisational and Labour Studies”.

The previous year the university had created two chairs, one for general sociology and one for industrial sociology. Gerhard Maré was appointed to the former, Ari Sitas to the latter. 1994 marked a turning point in the history of the IOLS, first and foremost because of the changed funding situation.<sup>55</sup> A long phase of university

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so the money thus earned can be used for trade union work. Interview Rajen Naidoo 19 February 2004. Today, the Industrial Health Unit enjoys the status of a collaborative centre of the ILO’s Occupational Safety and Health Information Centre. Cf. Industrial Health Unit, 2000.

<sup>54</sup>“I think it was not a very happy marriage. They were very different theoretically, professionally and politically.” Interview Debby Bonnin 18 February 2004.

<sup>55</sup>“Crucial turning point is ’94, when out of a sudden all that funding dried up. And funding had to come from the state. (...) And the new democratic state was opening up. But there were no procedures

restructuring began, the original aim of which was to balance out the inequality caused by apartheid in the higher education sector. Even in 2004, the success of these efforts was somewhat doubtful, as reform after reform actually caused significant damage. Above all, this process deprived progressive academics of the opportunity for political and social involvement during the most crucial years, instead keeping them busy with administrative tasks: first with implementing the reforms and then with reversing them.

Towards the end of the 1990s, the somewhat truncated IOLS started new projects that increasingly moved away from the former core concerns of Labour Studies and attempted to follow new trends in the social sciences: the African Renaissance Project, the Livelihoods Project and the Global Studies Project with the Universities of Freiburg and Delhi. The IOLS was successful in integrating new objects into its existing field of study – unlike the UCT, as will be shown in the following chapter.

This way the IOLS gained Pitika Ntuli as Associate Professor for the African Renaissance Initiative and Gillian Hart as regular Visiting Professor for the Livelihoods Project. The African Renaissance Project retained the centre's focus on culture. In 2004, the project included two employees who worked on culture in the workplace. Simon Mapadimeng was examining the effects of culture on work performance in his doctorate. He included democratic representation structures, ways of organisation and “Ubuntu”, that is, “African humanism”, in “culture in the workplace” (Interview Simon Mapadimeng 16 February 2004). Sthembiso Bhengu also dealt with questions of work, culture and performance in a class he taught together with Pitika Ntuli. As has already been noted for the SWOP, these topics addressed problems that arose in South African businesses following liberalisation and the country's opening up to the international market.<sup>56</sup> By contrast, the Livelihoods Project took traditional Labour Studies and expanded it to subject areas such as the informal sector, developmental problems and poverty. Mvusi Mgeyane for example wrote a doctorate in this field under the supervision of Ari Sitas, but was linked to the Institute for Development. Debby Bonnin shifted her focus more strongly towards gender studies. These very different orientations continued to be held together under the umbrella term “Labour Studies” thanks to the IOLS's structure and Sitas's directorship. The situation after completion of this study, following Sitas's departure for the UCT in 2009, would merit fresh analysis.

Within the university, the IOLS distinguished itself through its high number of graduates: between 1989 and 2000, the programme awarded more than 1000 undergraduate degrees, around 100 Master's degrees and four doctorates. However, in contrast to the

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and so on, so all the projects got into a crisis of continuity. And a lot of the funders were coming in now with the self-funding idea, the first neoliberal ideas started coming in. And we were not ready to become little businesses. Little businesses, yes. So the long-term only project that survived until recently was the TURP. The other projects we had to scale down and close, eventually. But because we were in debt (...).” Interview Ari Sitas 13 February 2004.

<sup>56</sup>“The main thrust of that course was to look at a relationship between culture, society and work, and how work is organised. And what we were trying to argue, Professor Pitika and I, was that for a new South Africa and for the new form of work that will be more competitive and more productive, Africa and South Africa need to develop new organisational cultures that are informed by African values and African traditions.” Interview Sthembiso Bhengu 16 February 2004.

impression given by some interviewees, the majority of graduates did not go to work in the trade unions:

“For the past decade the IOLS programme has produced Master and PhD graduates who have been leading problem-solvers in the areas of public and private, industrial, organisational and labour relations. Of the 98 post-graduates we have managed to account for, 28% are employed in the private sector in senior positions ranging from human relations to training and development fields; 27% are in academic and educational fields, mostly in the tertiary sector; 15% are working in consultancy firms; 12% have emigrated; 10% are in senior government and public sector positions; 5% in trade union and trade union-related positions and 4% in Non-Governmental Organisations (...)” (Industrial, Organisational and Labour Studies, 2000: 1-2).<sup>57</sup>

In order to maintain high numbers of interested students and provide graduates with professional perspectives, in the early 2000s the IOLS had been focusing on what kind of profile and what skills are in demand on the job market. The curriculum then included questions on new technologies and organisations in a globalised world; the problem of equality and normative change in the new South Africa; and the organisational capacities of large organisations and governments. These job-oriented topics have led critics to fear that Labour Studies’ main core was being neglected and that a more “marketable” orientation towards management studies was increasingly being adopted. One measure that could also strengthen the IOLS’s local relevance in the longer term was the planned alternative access to studies at the IOLS via the Worker’s College, a trade union educational establishment.

## 6.9 The IOLS – a sociography

An approximate sociography of the institution has been created based on the information provided in course handbooks and reports, supplemented with the interview data and the academic CVs available. The idea for this comes from Gerhard Maré, who suggested that this kind of analysis would provide a nice picture of the fluctuation between university and extra-university sectors:

“There was a dialectical relationship between the two (universities and the labour movement, W. K.), but of course, increasingly that broke away. And also the unions became to some extent suspicious of people (from university). (...) I think it’s a natural and very important progression. (...) You’ll see, at the other centres as well, you’ll find out the number of names of people who have been attached to the universities, had contact with the union movement, left the universities to move into labour and then subsequently moved into government. Or into consultancies. Or into, etc., etc. (...). That would be an interesting part of your research, to trace that route. But very many of them had origins in the 1970s and early 1980s in the labour movement. Some move back again. Mike Morris (...) went into the union movement and went back into university (...). So tracing those individuals’ routes would give you a pretty interesting picture of that relationship between sociology

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<sup>57</sup>No systematic information is available on where the undergraduates are now working.

teaching, university teaching, and the labour movement. In and out in different directions” (Interview Gerhard Maré 9 February 2004).

This state of affairs will be examined more closely here, as it represents an important aspect in the evaluation of Labour Studies’ links outside academia and supports the argument for counterhegemoniality. Table 6.3 shows the employment periods of the teaching staff appointed by the university, resulting in the following picture:

Table 6.3: IOLS Teaching Staff 1993-2003, chronologically according to the first year of employment at the IOLS

<i>Name, title (where appropriate)</i>	<i>Time period</i>	<i>Former institutional affiliation</i>	<i>Current workplace</i>
<i>Ari Sitas Prof., Director</i>	93-04	BA Hons., PhD Wits	IOLS
<i>Hillary Bennett Senior lecturer</i>	93	MSc Indust. Psych., PhD UN, Registered Indust. Psychologist	Univ. New Zealand
<i>Shaida Bobat Lecturer</i>	93-98	MA Clinical Psych. UN, Registered Psychologist	Psych. Dpt., UN
<i>Debby Bonnín Sen. lecturer, 01-02 Progr. Dir.</i>	93-04	MSocSc UN	IOLS
<i>Catherine Campbell</i>		PhD Bristol, social and community psychologist	Social Psych., LSE
<i>Gerhard Maré Prof.</i>	93-03	BA Hons. UN, BA Hons., MA Wits	Sociol. Dept., UN
<i>Moss Ngoasheng Lecturer</i>	93	BA UNISA, BA Hons. UN, MPhil Sussex, Robben Island	Economic policy, ANC
<i>Mandisa Poswa Lecturer</i>	93-94	Undergrad. from Lesotho, MA IOLS	Dept. of Educ.; Consultant
<i>L. Price Lecturer</i>	93-94	MsocSc UN	?
<i>June Webber Lecturer</i>	95	Health Care in Canada, Coord. in HIV/AIDS progr., Zimbabwe	Canadian Nurses Union
<i>Sonia Hill Lecturer</i>	96-98	MCom, Indust. Psych. Univ. of Pretoria	Forensic consultancy
<i>Silvia Magojo Dr., lecturer</i>	96-98	BA Hons. Psych., BA Hons. Social Work Univ. of Fort Hare, MSocSc, PhD UN	Psych. Dept., UN
<i>Vanessa Neophytou Lecturer</i>	96-99	BSocSc Hons. IOLS	Sociol. Dept., UN
<i>Nirvana Pillay Lecturer</i>	96-02	BSc Wits, MSocSc IOLS	Sociol. Dept., UN
<i>Simon Mokong Mapadimeng Lecturer</i>	97-04	BA Hons., MA Wits	IOLS PhD stud.
<i>Sthembiso Bhengu Lecturer</i>	03-04	BA Hons. IOLS	IOLS PhD stud.
<i>Shaun Ruggunan Lecturer</i>	03-04	BA Hons., MA UN	IOLS PhD stud.
<i>Andziwe Zenande Tingo Lecturer</i>	03-04	MA UN	IOLS PhD stud., Lecturer in the Secret Service

<i>Gillian Hart</i> Adjunct prof.	04	Prof. of Geogr., UC Berkeley, USA	
<i>Catherine Campbell</i> Adjunct prof.	04	Social Psych., LSE (formerly lecturer, IOLS; PhD Bristol)	
After 2000 industrial psychology split from the IOLS, thus reducing the number of staff overall. Sources: The information in columns 1-3 is taken from the 1993-2004 Course Handbooks and is supplemented with information from the interviews carried out in Durban. The information in column 4 is taken from the interviews.			

More than 100 people had been employed via contracts in various research projects since the IOLS's foundation until 2004. Table 6.4 is ordered according to projects and alphabetically within these projects. It includes information based on the memories of Sitas and Bonnin on 22 staff members. As scarcely any written material was available on project staff, information on the length of employment at the IOLS was left out here as it would have been very incomplete. The text lists the key dates of individual projects.

At first glance, this information more or less confirms what Debby Bonnin stated about staff movement: "Blade (Nzimande, W. K.) is in full-time politics, Moss (Ngoasheng, W. K.) is in full-time business, and all the other teaching staff stayed in academia anyway. You know, the projects were not that academic in the end, they were quite independent of the department. There was no accountability towards the department. So the shift between sectors applies more to the project staff and not so much to the academic and teaching staff" (Interview Debby Bonnin 18 February 2004). In fact only two of the total of 21 teaching staff had a non-academic background – Moss Ngoasheng, who had been imprisoned on Robben Island for his political activity, and June Webber, who had worked in health programmes. Of the eight individuals who no longer taught at the IOLS, Ngoasheng – as Bonnin stated – had become a full-time ANC politician, Mandisa Poswa worked in the Department of Education and as a consultant, June Webber worked for a Canadian trade union, Sonia Hill also worked as a consultant and after 2004, Andiziwe Tingo taught for the secret service.

Even though some connections to other sectors were established via former teaching staff, it seems that the number of teaching staff remained comparatively constant and primarily pursued academic careers. However, no information from the 1980s was available, when tendencies towards professionalisation were less marked. By contrast, the project staff were significantly more mobile and less continuous. Of the 21 individuals on whom more detailed information was provided in the interviews, eight had a trade union background – one in a church workers' association –, two had been involved in the feminist movement, one (as mentioned above) had been imprisoned on Robben Island, one came from the church and one was a former journalist. After leaving the IOLS projects, they were distributed across the sectors of education/research/university, politics/government, trade unions, non-governmental organisations, consulting, journalism and the church.<sup>58</sup>

<sup>58</sup>This more or less matches the information gathered by the IOLS in a small survey of the current workplaces of former project employees: "(...) of the 108 people who have been employed in various contractual capacities in the outreach research projects – 28% are in senior positions in government or government created institutions; 16% in consultancies; 16% in managerial positions in the corporate sector;

Table 6.4: IOLS Project Staff 1993-2003, according to project and alphabetically

<i>Name, title (where appropriate)</i>	<b>Project</b>	<b>Former institutional affiliation</b>	<b>Current workplace</b>
<i>Blade Nzi-mande, Dr.</i>	CWLP	PhD Indust. Psych. UN	General Secretary, SACP
<i>Fareed Abdullah, Dr.</i>	IHU	Medical doctor from Johannesburg	Chief Director, Health Services/Western Cape Ministry of Health
<i>Mark Colvin, Dr.</i>	IHU	PhD Med. UCT	Head of HIV/AIDS Division, Med. Res. Council
<i>Vanessa Kruger</i>	IHU	MA Nursing, UN	Ind. Soc., Univ. Fort Hare; consultant to Cape Govmt.
<i>Thembeke Gwagwa</i>	IHU	MA Nursing, presid. of DENOSA	Concerned Nurses of SA Network; Government
<i>Sbu Ndebele</i>	IHU	UDW, MA International Relations on Robben Island	Dir. of Students' Affairs; Secr. Gen. ANC; Natal Minister of Transport; ANC pres. of Natal
<i>Zim Nondumo</i>	IHU/ NWHP	Hons. Soc. UCT; studied overseas; Young Christian Workers	Engineering stud. Bordeaux; Durban Engineers' Dept.; Dept. of Trade and Industries; "Diamond Cutting"
<i>Jean Farburn</i>	NWHP	MA History, UCT	NGO Cape Town
<i>Shamim Meer</i>	NWHP	MA (MIT), Women's Centre	NGO Johannesburg
<i>Jabu Ndlovo</i>	NWHP	Trade unionist	Projects at Bat Cultural Centre, Durban
<i>Deanne Collins</i>	TURP	MA History, trade unionist	Ed. SALB, UN Develop. Foundation; ed. "Indicator", community newspapers
<i>Jayanathan Govender</i>	TURP	GAWU, SACTWU organiser, SACHED educator	IOLS-Research
<i>Shafika Isaacs</i>	TURP	?	Private consulting
<i>David Jarvis</i>	TURP	MA IOLS	Naledi
<i>Alfred Mafuleka</i>	TURP	Trade unionist, field worker	Coord. Health Systems Trust
<i>Jillian Nicholson</i>	TURP	General Secretary of Black Sash	Private consulting; NGO work; now retired
<i>Gary Phillips</i>	TURP	MA IOLS, church	Minister in Church
<i>Imraan Valodia</i>	TURP	MA Econ. Manchester, UDW	PhD Econ. UN, School of Develop. Studies UN
<i>Hazel Bothma</i>	?	Lecturer UCT, PhD in IOLS	?
<i>Laurence Mshengu</i>	?	Trade unionist	Trade union, Eastern Cape
<i>June Rose Nala</i>	?	Trade unionist, Ruskin College, UK	Lecturer UCT; Dept. of Labour, Durban
<i>Una Seerie</i>	?	Journalist	Teacher, Johannesburg

CWLP = Culture and Working Life Project, IHU = Industrial Health Unit, NWHP = Natal Workers' History Project, TURP = Trade Union Research Project  
As project staff who were not also teaching were not mentioned in the course handbooks consulted, no reliable information on their length of employment was available.  
Sources: Interviews with Ari Sitas and Debby Bonnin; Industrial Health Unit, Annual Report 2000

The wide range of projects also brought a range of life experiences into the IOLS. The origins and current workplaces of its employees showed that wide-ranging networks outside academia that were available to the Durban Labour Studies. At the same time, the programme provided a core of academic teaching staff who ensured that continuity and academic standards were maintained. This analysis confirms the subject area's grounding in society and supports the claim for counterhegemoniality. In the following, this will be examined in greater depth using the example of the TURP as an LSO.

## 6.10 The “Trade Union Research Project” (TURP) – an example of a Labour Service Organisation

The Trade Union Research Project (TURP) at the University of Natal founded in 1986 will be examined more closely here as an example of a Labour Service Organisation. A wide range of detailed documentation was available on TURP and it could thus be taken as representative of the South African LSOs in this context. The description and contextualisation of research and educational activities, publication of education and informational material, staff development, funding and relations between the TURP and the trade unions, other service organisations and the university environment provide pointers for the significance that these institutions held for the development of South African Labour Studies.

The project's annual reports from 1989 to 2001 and the first and second edition of its news sheet from 1986, the year of TURP's foundation, form the basis for this analysis. No material was available for the missing years, which is also due to the fact that the archiving process has not been completed yet.<sup>59</sup> A review in the annual report of 1996/97 marking the project's ten-year anniversary gives an additional impression of its early activities. The document information was supplemented by the interviews with Ari Sitas, Jay Govender and David Jarvis. In 2002 the TURP renamed itself “IOLS-Research”, aiming to establish a clearer link to the university unit Industrial, Organisational and Labour Studies (IOLS). This step was taken in conjunction with the request to be recognised as a university research centre. However, all of the material analysed here referred to the time prior to renaming, and thus “TURP” is used throughout for simplicity's sake.

In a first newsletter, the TURP introduced itself as a project offering research for trade unions of the umbrella organisation COSATU, which had been founded a short time previously (Trade Union Research Project, 1986a). In 1991, its target group was broadened to include trade unions and community organisations – organisations for youth, women and the unemployed were listed. The TURP also supported both NACTU-affiliated and independent trade unions that were regarded as progressive

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13% in NGOs; 7% in academic or research positions; 7% in trade unions; 7% in private/creative endeavours and 4% emigrated.” Industrial, Organisational and Labour Studies, 2000: 2.

<sup>59</sup>Earlier sources were available in the archive of the Killie Campbell Collections, where part of the material was moved to after 2002. More recent documents could be found in the project's office and material storage room at the university. The information in the annual activity reports are not consistent from year to year; furthermore, the appendices containing lists of staff, publications and the budget were often missing from the reports, which were available as photocopies.

and critical of apartheid (Trade Union Research Project, 1991: 3).<sup>60</sup> The 1992 annual report also added “progressive churches and religious organisations”, which probably had to do with the fact that part of the TURP’s funding came from church circles (Trade Union Research Project, 1992a: 2). After the trade unions became more strongly involved in national politics, the institutions making use of the TURP’s offer also came to include COSATU representatives in organisations such as the National Economic Forum and its regional equivalents. Moreover, from the very beginning its offer was not restricted to research alone, but also included educational events, publishing books and brochures and building up a collection of material in the form of a “resource room”.

Something not explained in the early documents but acknowledged in the planning of the early 1990s is that the TURP was originally conceived as a fixed-term project and was supposed to end as soon as the trade unions had built up their own research capacity. However, over the years a longer-term future came to be envisaged for the project – despite serious problems following the transition (Trade Union Research Project, n.d.b: 5). It was by no means a matter of course that the TURP survived the first half of the 1990s.<sup>61</sup> The difficulties occurring over the course of the political transition were discussed by TURP staff in 1991, with the aim of strategically reconsidering and redefining the project’s scope and future activities.<sup>62</sup> The following changes are worthy of mention and confirm how closely the project aligned its activities with the needs of the trade unions:

“The period under review has been marked by watershed developments in the political and industrial relations arena (...). Importantly, the general political trend in South Africa is one in which the unions and other progressive organisations are moving from the arena of opposition to the arena of empowerment and development. This has impacted on the activities of TURP. As the TURP work report shows, the changes in South Africa have had the following effects on TURP’s activities: 1. The project is now being called upon to provide quick, concise and accurate information of a sometimes very complicated nature. This is the result of the unions and other ‘clients’ entering negotiations at a much more complex and dynamic level. (...). 2. The project has played an important role in making policy questions and debates accessible to rank and file in the organisations that it serves. The political changes in South Africa have pushed opposition forces into policy research. TURP’s role in making this material accessible to rank and file is seen as crucial for the democratic process. 3. (...) the project is being asked to provide reports that are in-depth and

<sup>60</sup>Around this time, activities for non-trade union players included seminars for the Phoenix Women’s Groups and ANC branches, for example.

<sup>61</sup>In the 1996/97 annual report, Ari Sitas, one of the project’s co-founders and a permanent member of its Managerial Committee, was full of praise: “TURP has been one of the few community-sensitive and service driven projects to survive the democratic transition.” Trade Union Research Project, 1996/97: 2.

<sup>62</sup>The project justified the need for this kind of reflection as follows: “TURP continued its services to the progressive trade unions during a very challenging and difficult year. The transformation process in South Africa has not only affected the research and education agenda of the trade unions, but it has also impacted on the organisations that service trade unions. It is within this context that TURP embarked on a strategic planning exercise in an attempt to systematise our response to the changing and more specialised research and education requests from the trade unions. Local, national and international trade unionists as well as representatives from other non-governmental organisations were consulted about their views on the future direction of the labour movement and service organisations and gave their support to the decisions arising from the strategic planning exercise.” Trade Union Research Project, 1993: 3.

which cover a much wider field. 4. TURP has also been commissioned to conduct research of a specialised nature. This development stems from unions entering negotiations in specialised areas like investments and productivity. 5. The education component of TURP's activities has increased substantially. This development is related to progressive organisations placing emphasis on skills training and education" (Trade Union Research Project, 1991: 1-2).

What these changes meant for the individual range of tasks will be examined more closely in the following. After the first democratic elections of 1994, the trade unions' need for education and research increased yet again, which was linked both to their integration into day-to-day economic and political events and to the movement of former staff into the new government.<sup>63</sup> Soon after the government took up office, many people lost their illusions about what its future economic policies would be. From 1995/96 onwards, new problems such as transnational corporations, job market flexibility, cuts to public services, privatisation, unemployment, liberalisation and globalisation appeared on the agenda. The neoliberal path became the government's new strategy for achieving macroeconomic growth in 1996/97 via GEAR ("Growth, Employment and Redistribution"); the "Reconstruction and Redevelopment Programme" with which it had campaigned and in which the COSATU had been involved as a partner in the tripartite alliance was forgotten. Around 1999/2000, the international opening up and regional integration of South Africa via the SADC increased the demand for research on Southern Africa (Trade Union Research Project, 2000: 3-4).

## 6.11 Research in the TURP

The TURP offered different types of research activity. Here examples of concrete projects will be listed that can be seen as indicative of the direction taken during the respective time periods. For a complete list of all research projects, see the online appendix TURP RESEARCH PROJECTS. Besides more elaborate surveys, which will be discussed shortly, significant time was also spent on short-term telephone surveys enquiring after specific information. The News Sheet issues 1 and 2 (Trade Union Research Project (1986b) reveal that during its first year TURP was busy primarily with issues relating to wage negotiations: compiling inflation rates, consumer price index, minimum wage and the poverty line. It also gave advice on income tax equalisation. The sheets contain information on the government reforms on local and provincial levels as well as some general information on the current law affecting the black working population ("influx control"; the legal situation in the "homelands"). This shows that there was a great need for basic information on a local level on the part of the workers and unionist work.<sup>64</sup>

<sup>63</sup>"Trade unions in a post-apartheid South Africa are having to adapt to new challenges which emerge at the shop floor as well as within the industrial and the tripartite structures on which their members now serve. They face these challenges at a time when their human resource base has been drained as officials leave unions to take up new positions elsewhere. Nevertheless, the demands on leadership to be well informed on issues related to the economy and industrial relations has, in a sense, never been greater. Union members are now participating in the drafting of new labour laws, in regional and national economic structures which require proposals from labour on a range of economic issues particularly around restructuring and in a host of new areas at the shop floor on issues related to work organisation and to co-determination." Trade Union Research Project, 1994/95: 1.

<sup>64</sup>Other LSOs had similar experiences, such as the Labour and Economic Research Centre, which at first was unable to get down to the planned "complex questions of the trade unions", instead receiving and

Around 1989, the need for information became more specific following the increased movement of wage negotiations from the level of individual companies to centralised negotiation structures. The demand grew for comprehensive reports on entire sectors as a basis upon which labour organisations could develop wage policies for entire industries (Trade Union Research Project, 1990). One of the larger research projects in 1989 included a six-month study on flexibility and casual work in the retail trade. The 1989 annual report notes that industrial sociology students in advanced semesters were required to undertake research tasks as part of their credits (Ibid., 1989b) – a practice retained to this day. Students at the IOLS were thus able to gain skills in empirical social research and practical experience of commissioned research for trade unions.

After the end of apartheid, new tasks appeared on the agenda, which the trade unions first had to learn to deal with: “COSATU, NACTU and their affiliates face huge challenges in the formulation of economic policy and in their deliberations with government and big business in forums like the National Economic Forum. TURP has begun to assist unions with developing policy on key economic issues” (Trade Union Research Project, 1993: 1). In 1991, this was shown in the COSATU’s requests for information material on job creation, unemployment insurance and investment strategies.

At the beginning of the 1990s, information on wage negotiations still constituted an important proportion of the TURP’s activity, but was by no means as significant as it had been in the early stages. Individual trade unions now also saw themselves confronted with more complex tasks (Trade Union Research Project, n.d.a: 2), as a broad-based project on the restructuring, technologisation and job cutbacks in the metal industry for the National Union of Metalworkers of South Africa (NUMSA) shows. The demand for policy research rose both in the trade unions and in the regional economic policy committees. It was here in particular that the TURP ascribed itself an important role, given the lack of specialists with the necessary analytical and research capacity able to advocate worker-friendly content.<sup>65</sup> In the following years, among other activities the project produced a larger social study on small businesses in a Durban quarter; this was integrated into COSATU’s plans for an industrial area; as well as research on unemployment in the region, on small businesses in KwaZulu-Natal, on the potential to develop tourism, on the effects of the GATT on the local economy and, at the request of the NALEDI, on corporate governance. The largest research effort in 1995/96 was the South African Enterprise Labour Flexibility Survey. This study was part of a national survey by the International Labour Organisation and aimed to support the Department of Labour in developing its strategy. The Regional Economic Forum’s “KwaZulu-Natal Industrial Restructuring Programme” collaborated with the Centre for Social and Development Studies at the University

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working on “a growing number of requests from trade unions to fulfil their more immediate information needs”. Labour and Economic Research Centre, 1987: 1.

<sup>65</sup>“Labour is not strongly represented at the metropolitan and regional forums and has no technical back up. Research is needed to provide that back up and also a need to develop labour capacity to participate at all the levels of these forums. There needs to be a co-ordinated programme of research by whoever has the capacity as there are very few people in the region doing this.” Trade Union Research Project, n.d.b: 14.

of Natal and hired a TURP researcher, who was also invited to take part in a study trip to the UK in this context.

In 1996/97 the TURP undertook larger research projects than in previous years, including national surveys with a large data basis both for individual trade unions and for other organisations: a survey for the SACTWU on the working and living conditions of 2500 female SACTWU members; and a study on technological change for the FAWU. In collaboration with the Faculty of Social Science, the Department of Sociology, the Department of History and the IOLS, the TURP produced a national study for the nurses' union DENOSA on its membership. Unionist approaches to industrial restructuring were analysed for the "Industrial Restructuring Project" of the Regional Economic Forum, and the consulting sector was analysed in a second project. The DITSELA commissioned research on the educational offer, accreditation of qualifications and fundraising under Labour Service Organisations.

In the last two years of the 20th century, the TURP continued to undertake large research projects and the research effort rose overall. Some studies were carried out for non-union players: the Church and Work Commission (CWC) of the South African Catholic Bishops' Conference commissioned the project to carry out a study on microbusinesses in three regions as a basis for selecting future job creation projects worthy of support (Trade Union Research Project, 1998: 6). The SWOP in Johannesburg, funded by the ILO, commissioned field studies in the KwaZulu-Natal region for a broader study on the effects of collective wage negotiations on competitiveness. Following trade union pressure, the Royal Hotel had its promotion system evaluated and requested suggestions for improvement. Salary structures and issues of unionisation in the police were examined for the POPCRU, as was the privatisation of prisons. The Manufacturing, Engineering and Related Industries Sector Education and Training Authority commissioned the TURP, the SWOP and another institution with the development of a "sector skills" plan, and the CEPPWAWU requested a recommendation on how to react to the planned company closure. In 2001 the TURP carried out studies on the privatisation of public transport in Durban as a sub-project of NALEDI research on privatisation in South Africa, as well as a study of the promotion structure for COSATU functionaries.

From the end of the 1990s onwards, some studies also moved beyond the regional borders: for the Campaign for Clean Clothes, the TURP and a research centre based in the Netherlands with a focus on multinational corporations provided research findings to the Africa office of the International Textile, Garment and Leather Workers' Federation. The SACTWU requested a study on the textile sector in the SADC and also had a members' survey on their service carried out. Following the study on the DENOSA's membership base, this trade union commissioned research on the emigration of nurses. The TURP analysed the informal sector in sub-Saharan Africa for "Streetnet" and the ILO and the effects of globalisation on businesses in KwaZulu-Natal in the context of an NRF project based at the IOLS.

Research practice in the early years was thus concentrated on surveys, compiling and interpreting empirical basic data, while from the 1990s onwards more complicated relationships were increasingly investigated, including on the basis of secondary liter-

ature and sources (available political and academic literature, the press). In the latter field in particular, the project took on an important popularising role in processing complex theoretical texts for use in everyday politics and in the education of the trade unions' membership base.<sup>66</sup>

## 6.12 Trade union and worker education, publications and the TURP library

As far as educational activities are concerned, the topics covered are of prime interest here and not the number of workshops or seminars provided or the time spent on them as listed in the annual reports. In 1989<sup>67</sup> the offer included the following topics: bookkeeping and taxes; tax issues for women; parental rights; promotion systems and wages; preparation for wage negotiations; dealing with companies' reactions to pay-related demands; medical care; and unemployment insurance. The demand for education rose from the early 1990s and soon went beyond the immediate locality. The TURP also held events in the two large industrial centres Cape Town and Johannesburg. Besides the seminars held on request as part of the COSATU summer and winter schools, in 1990 the TURP first offered its own seminars for organisers that aimed to provide skills for wage negotiations – from using a calculator to questions concerning the increase and distribution of profits.

The educational work was all the more important as many leaders left the trade unions during the first half of the 1990s and in 1994 to take up positions in the government.<sup>68</sup> Thus the workers' organisations suffered from a downright brain drain, just at a time when they needed the capacity to analyse and formulate political strategies more than ever. Many trade unions and the umbrella organisation COSATU in particular employed education officers and developed internal programmes for their staff, in which they were supported by the TURP. The importance of these topics increased after the elections with the new government's political agenda, which focused on democratising the country's educational establishments and created the South African Qualifications Authority (SAQA) in order to do so. This opened up new ways of gaining qualifications for the working population, through distance learning for example. After the COSATU had commissioned the compilation of teaching materials for its Educational Programme on the South African Economy in 1991, the TURP gradually became specialised in editing and publishing teaching materials. This work gained

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<sup>66</sup>“( . . . ) TURP has played a vital role in ‘interpreting academic research’ so as to make debates around policy issues accessible to rank and file union members.” Trade Union Research Project, n.d.a: 3. Also: “In particular, TURP has assisted the union movement in the field of policy. TURP’s primary role in this regard has been the digesting and then the popularising of complex debates and issues related to policy making.” Trade Union Research Project, 1992a: 4.

<sup>67</sup>The content of the 18 seminars and workshops held in 1988 was not defined more closely. Trade Union Research Project, 1989a

<sup>68</sup>“One of the problems which has arisen during the aftermath of the elections, is the dearth of skills within the unions. The departure of many skilled trade union leaders to parliament, has caused a serious leadership vacuum within the trade unions. This crisis has caused many unions to focus on building a new generation of leadership. TURP remains committed to building the capacity of the unions to survive this crisis by facilitating with seminars and workshops at union staff development programmes.” Trade Union Research Project, 1993/94: 4.

recognition even beyond trade union circles.<sup>69</sup> The provision of teaching materials was also important in that no other service organisation had such an offer.

In 1993 the TURP began its cooperation with the Durban Workers' College, an educational institution for the working population. The following year the TURP already took over the teaching modules on an economics diploma. The seven modules dealt with the global economy; South African economy; the region of Natal; the South African job market; wage negotiation issues; and basic economic theory. The modules were designed so as to be relevant to trade unionists.<sup>70</sup> The Workers' College courses were successfully accredited in the following years, offering an opportunity to qualify for a social science degree at the UKZN. Between 1993 and the middle of 1994, the TURP produced three textbooks for the courses at the Workers' College: "Economic Theory", "The South African Job Market" and "Privatisation". In the mid-1990s, new areas were added to the TURP's standard themes: globalisation, the job market, gender issues as well as legal questions on new legislation. In 1995, the TURP supplied 22 fully developed sets of course materials, including 12 textbooks and handbooks. Over the first ten years of the project, around 5,000 trade unionists made use of the TURP's educational offer.<sup>71</sup> Besides the total of 41 events in 1995/96, the TURP also took over a seminar on the IOLS Honours degree and three seminars on "South African Trade and Industry Policy" at the university's School of Development Studies. These seminars were also held in subsequent years. This way, course content was introduced directly and purposefully into the academic environment for the first time.

The creation of DITSELA<sup>72</sup> in 1997 provided another boost to worker and trade union education, as the TURP coordinated DITSELA's education offer over the next years. Following the successful completion of a pilot project for Nedlac's "Workplace Challenge Labour Capacity Building", the TURP took on further events in this context in 1999. Moreover, via its seminars it ensured trade union participation in the Nedlac initiative to develop the tourism sector. The activities carried out in 2001 as part of the "Tourism KZN Labour Capacity Building" presumably were a continuation of this initiative. In 1999 the TURP also became involved in multimedia, developing two educational packages: the "Best operating practice toolkit for workers" on workplace restructuring and a computer simulation of challenges at the workplace, aimed primarily at advanced students at the IOLS.

From its beginning up until 2001, the TURP provided further training for over 12,000 unionists. With its classes at the IOLS and the development of some materials for

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<sup>69</sup>The TURP developed an economics course for the Cambridge Open Learning Project – part of the Higher International General Certificate of Secondary Education – in 1996/97. Aseca ("Secondary Educational Curriculum for Adults") requested support for creating teaching materials in economics for its distance learning adult education programme.

<sup>70</sup>"The course content is selected to provide unionists with information that is directly relevant to the issues confronting them in their daily dealings with management and with the bodies such as the Regional Economic Forum and the National Economic, Development and Labour Council (Nedlac) on which some of them now sit." Trade Union Research Project, 1994/95: 7.

<sup>71</sup>Trade Union Research Project, 1995/96: 5.

<sup>72</sup>"The launch of DITSELA in July 1997 marks a watershed in trade union education in South Africa. DITSELA holds the promise of systematic capacity-building in the unions and co-ordinated service in the arena of trade union education. TURP sees this development as complementary to its own educational activities in that it assists in providing direction to TURP's training services to the unions." Trade Union Research Project, 1996/97: 5.

labour, industrial and organisational sociology students, it also introduced its content into university teaching. The Department of Sociology even made some of the publications presented in the following section compulsory course reading.

Over the years, the TURP built up a whole stock of publications, some for individual clients, many catering to the general demand for knowledge supporting the interests of the trade union movement (for a complete list of all publications, see the online appendix TURP PUBLICATIONS). These were widely read in trade union offices, by union confidants and in research institutes.<sup>73</sup> By 2001 the TURP had published over 30 titles designed to directly convey practically relevant information and skills, including handbooks, brochures, pamphlets and newsletters. The story of a strike at Natal Die Casting, which appeared as “Amandla ethu Akakhokhelwe: our strength must be paid” was somewhat different. The NUMSA had commissioned it with the aim of strengthening awareness of the labour movement.

Over the course of the 1990s, the LSO published a series of consistent publications.<sup>74</sup> The 1990 annual report also points out that 1,500 copies of the bimonthly newsletter “TURP News” were distributed to organisers across the entire country to inform readers of the latest inflation rates, poverty line, economic conditions and other trends in the world of work and economics. Unfortunately, this popular information service became a victim of the 1998 financial crisis. The decision to cut this cost from the annual budget was presumably linked to growing capacities within the unions and the increased use of new information technology. Moreover, the Labour Research Service regularly published “Economic notes for trade unions” in the “South African Labour Bulletin”, which contained exactly the same information.<sup>75</sup>

The annual report of 1994/95 first referred to publications of journal articles and contributions to essay collections that were more academic than unionist in nature. From the end of the 1990s onwards, TURP members published articles in the “Labour Bulletin” and “Agenda”, a journal specialising in women’s issues. The reports of recent years also mentioned conference papers. This may be because those among them planning a university career now regarded it as necessary to establish a profile in the academic community. But this may not have been anything new, only the new evaluation and funding systems meant that TURP research was becoming increasingly valuable for the university.

<sup>73</sup>“The publications have been widely distributed and many are used as vital references in union offices and among shop stewards and union officials as well as other research organisations.” Trade Union Research Project, n.d.a: 5.

<sup>74</sup>In 1990 “Wage negotiations... some practical information” was published, a handout on how to prepare for wage negotiations. Other reading with practical relevance to current events included “Workers and unemployment insurance” (1991), “Calculations for wage negotiations” (1992), a new summary of statistical economic data in “A user’s guide to the South African economy” (1994/95), “Understanding the financial pages of a newspaper: a unionists’ guide” (1995/96) and two publications on restructuring in the workplace, “Making sense of workplace restructuring” (1999) and “Best operating toolkit for workers” (2000). The project’s function of popularising content is also evident in the publications of the 1990s, which dealt with more complex issues: “Our political economy – understanding the problems” (1992), explanations of the “Johannesburg Stock Exchange” (1993/94), the book series on the five economic sectors examined as part of the “Industrial Strategy Project” (1994/95), “South Africa in the global economy: understanding towards alternatives” (1996/97) – this book, which deals with various aspects of globalisation, was a prompt political response to the GEAR. It is compulsory reading for the second year of the Sociology degree. Finally, the retrospective “Measuring change: South Africa’s economy since 1994” (2001).

<sup>75</sup>Cf. the online appendix SALB CONTENTS for the content of the “South African Labour Bulletin”.

The project's development was also evident in the holdings of its library and archive ("Resource Room"): in 1989, the collection consisted of 58 periodical publications, 175 books and 200 annual reports of businesses, as well as national statistics and a press archive. In 1992 this had already risen to 89 journals and 650 books. In 1994 the number of journals subscribed to fell to 57, as several oppositional magazines were discontinued after the transition process. At this time the librarian had created an index of literature on the national economy for the use of COSATU candidates standing for election. The annual report of 1993 stated that trade unionists, students and economists made use of the holdings (Trade Union Research Project, 1993: 9).

This part of the project suffered most strongly from the financial crisis of the late 1990s. In 1994/95, subscriptions to some of the more expensive journals were discontinued and part of the older holdings had to be given up due to limited space. In 1995/96, 121 new books and texts were purchased, so that the entire collection contained 769 items. Furthermore, the TURP subscribed to 55 periodicals and archived pieces from the daily and weekly press. In 1998, the year of the crisis, the project decided to cut spending on the Resource Room by half. Administrative and library staff were also cut in 1998.

### **6.13 Clients, staff development and funding**

While carrying out short-term services for individual trade unions of COSATU in the Natal region had been TURP's main priority in 1986, the 1989 report first mentions enquiries coming from a national level and from the umbrella organisation itself. The TURP continued to work on commissions from progressive trade unions that were not affiliated with COSATU. In 1990, its client base grew to include members of the National Council of Trade Unions (NACTU) and non-affiliated trade unions. In the mid-1990s the project served fewer individual trade unions overall, but its work for the umbrella organisation COSATU increased. On the one hand, this was probably due to the fact that the TURP had introduced fees for all of its services due to the difficult financial situation, but may also reflect the increased internal coordination of the trade unions on a national level (Trade Union Research Project, n.d.a: 4). This is also the context in which to see the improved coordination with the Labour Research Service in Cape Town, which since its inception had taken on exactly the same tasks as the TURP for the Cape Town region (Labour Research Service, 1987). Once the two organisations started dealing increasingly with the unions' central offices and individual unions' internal communication improved nationwide, this double offer was no longer as necessary as it had been before, despite the geographical distance. However, staff were concerned that weaker and newly developing trade unions in great need of the TURP's services were being neglected and that the contact to the local grassroots level was being lost as the majority of communication and business relationships were now with the central offices of the powerful trade unions and the umbrella organisation in the capital. After 1997 the client base diversified in a different direction, towards actors in the educational sector (DITSELA, Workers' College etc.).

As far as the TURP staff are concerned, our main interest is in what backgrounds the employees had prior to working for the TURP as well as where they went when

they left the project. Table 6.4 shows that the project did indeed consist of people with very different biographical backgrounds. A list of all TURP staff based on the annual reports and the interviews conducted can be found in the online appendix TURP STAFF.

The first “News sheet” lists Deanne Collins and Jillian Nicholson as contacts. After the first three years – for which no printed staff information was available – in 1989 the TURP decided to employ another researcher and a part-time librarian to address its needs. From 1990 onwards the project employed four researchers and educators as well as two part-time librarians. Another person was employed to carry out an 18-month research project on the metal industry. Information on the staff from 1992 onwards show that most research and education staff either had a trade union background or had joined the project as students on the IOLS programme. Some also combined working for the TURP with studying for a degree.<sup>76</sup>

The 1991 annual report first mentioned an executive board, the “Managing Committee”, made up of people from various sectors:

“Although TURP is linked to the Centre for Industrial and Labour Studies at the University of Natal, it is ultimately controlled by, and answerable to, a managing committee of five people who are from the labour movement and wider community itself. Some of them are academics with a special interest in labour and development issues. All managing committee members have a proven record of commitment to the labour movement and the disadvantaged community at large. The members of the managing committee play an important role in directing the activities of the project” (Trade Union Research Project, 1991: 4).

A complete chronological list of the Managing Committee members can be found in the online appendix TURP MANAGEMENT COMMITTEE. These executive members included: Ari Sitas and Charles Meth (a sociologist and economist at the University of Natal), Jace Naidoo, who worked in the University of Natal’s Industrial Health Unit, Gino Govender, Regional Education Officer of the COSATU in Natal, and Patricia Horn of the Chemical Workers’ Industrial Union. While Jace Naidoo and Gino

<sup>76</sup>Deanne Collins, who worked here for four years and then went to Johannesburg as editor-in-chief of the SALB, later worked for the University’s Development Foundation and as the editor of various journals. Jillian Nicholson, who had been employed during the TURP’s first eight years, had already gained experience in trade union and community work from the 1970s onwards, including “Black Sash”, a women’s and human rights organisation. Since then she had worked as a freelance writer and in consulting. Alfred Mafuleka also had a trade union background. He was employed 1992-98 as a field researcher and took a university degree at the same time. After he left TURP, he became coordinator of the “Health Systems Trust”. Mel Clark was a TURP member in the mid-1990s and then went into politics. And Jay Govender, who started here in 2001, had a background as a SACTWU organiser. He, too, matriculated on a degree course. The annual reports list Michael Koen as an associate. The former SASBO functionary was also matriculated on the IOLS Master’s degree and worked at the Workers’ College. Imraan Valodia had an academic background. He came from England, held an MA from Manchester and worked at the TURP from 1988 onwards. After an MA in Economics at Lancaster in 1994 he took up a lecturing position in 1995 and moved to the TURP Managing Committee. Shafika Isaacs, who was employed in 1990 for her experience in wage negotiating consultation among other things, gained a degree in social science in 1994. In 1996 she went to Sussex to take a Master’s degree. In 1998 she left the TURP and began to work as a consultant. David Jarvis became involved in the project in 1993 as an IOLS student, became its director in 1996 and had been a TURPassociate since taking up a research position with NALEDI. Gary Phillips, another student, worked for the TURP between 1996 and 2000 – he stopped in order to work for the church – and Jantjie Xaba, employed in 2001, was matriculated on an MA course at the RAU. Monique Marks, a lecturer at the Department of Sociology, was an associate, probably due to her work on the POPCRU projects in 2001.

Govender already left the committee the following year – the former for an NGO, the latter for a trade union –, the two academic members remained for many years, as did the later members with a university background, Imraan Valodia (Centre for Social and Developmental Studies, 1995-2001) and Debby Bonnin (Department of Sociology/IOLS, from 1998). Only the sociologist Yvonne Muthien was in the committee for just two years. The relationship between academic and unionist colleagues was always balanced, despite the greater fluctuation among the latter: Patricia Horn, who left the Chemical Workers' Industrial Union to become the Secretary-General of the Self Employed Women's Union, was the only trade unionist to be a member throughout the entire time period. As COSATU representatives for the KwaZulu-Natal region, the management committee included Magwaza Maphalala (Education Officer) 1993/94, Paulos Ngcobo (Regional Secretary) 1995/96 and Sphelele Zuma (Education Officer) 1998-2001. Thembilihle Nzuza (1996/97 PPWAWU Education Coordinator) and Geoff Schreiner (1993 NUMSA National Research Officer) belonged to independent trade unions. Moss Ngoasheng (1992/1993) joined the TURP management with an MA from Sussex taken after his imprisonment on Robben Island. He then left to work on the ANC's economic policies (Debby Bonnin Interview 18 February 2004). Finally, Mel Clark played a leading role in the Regional Economic Forum and then in the Regional Economic Council and was a member of the management committee from 1996/97 to 2000. Both the TURP staff and the membership of the executive board show this LSO's closeness to the trade union and, to a certain extent, to the civil society sectors as well as to the regional government.

The materials only sporadically contain concrete information on the project's finances. Here the question of interest is who actually funded the TURP's work. While all funds were administered by the university, they were won independently by the project itself. In 1990, sponsors included the Canadian Labour Congress, the Friedrich Ebert Foundation and the European Community, which provided funds via the South African Catholic Bishops' Conference.<sup>77</sup> It is striking that the TURP was completely dependent on foreign money. This was also the case for other LSOs.<sup>78</sup>

Given the process of political transition, it became obvious in the early 1990s at the latest that the project would not be able to count on this kind of funding for much longer. Accordingly, the TURP made plans to become more financially independent in future, for example by the aforementioned introduction of fees for the services provided and the sale of publications.<sup>79</sup> The interesting fact about the financial development is that the tables had turned, so to speak, with TURP moving from an

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<sup>77</sup>For 1990, a supplement with concrete information on funding is available. Around 141,000 Rand were provided by the Friedrich Ebert Foundation and around 73,000 by the European Community. The Canadian Labour Congress took on the cost of the long-term metal industry project with 56,350 Rand. The TURP earned 7,500 Rand from the sale of materials. The main expenditure were staff costs with 187,000 Rand and printing costs with 42,000 Rand.

<sup>78</sup>On the budgets, see the reports: International Labour Research and Information Group, 1985; Labour Research Service, 1987; Labour and Economic Research Centre, 1987.

<sup>79</sup>Initially a special agreement had been reached with the COSATU, according to which the umbrella organisation was to pay a fee for commissioned research. Since 1993, all services except short telephone consultations were subject to a fee. The level of fees aimed to take into consideration the fact that the poorer trade unions in particular required support, but were least able to pay for it.

institution that raised funds to support the trade unions to a project that lived from providing services to the unions.<sup>80</sup> Initially a mixed funding model emerged.<sup>81</sup>

As anticipated, the international donors changed their financing policy in the year of the first democratic elections. Funds for service organisations such as the TURP were reduced and usually only awarded in connection with specific projects. The 1995/96 budget was made up of basic funding, which the ICCO unexpectedly continued to provide, project-specific funding (FES, “African American Labour Centre”, Oxfam Canada), and about a third came from the TURP’s own income from the sale of materials and publications as well as fees for commissioned research and educational events (COSATU, individual trade unions, Workers’ College and independent organisations). One year later, income from service fees already made up 48% of the budget.

The project’s increased commercialisation due to the changed funding system also led to increased competition with other service organisations, which were also fighting for survival. In 1997, the DITSELA thus attempted to initiate greater cooperation and closer links between LSOs. Presumably the point of this was to make better use of the increasingly diversified possibilities through specialising in different areas, so that not every LSO ended up competing for the same funds for similar projects.<sup>82</sup>

When three related IOLS projects were forced to close in 1998 due to financial difficulties, the TURP was also thrown into a deep financial crisis: project-specific funds came with issues such as delays in payment, and the last remaining basic funding from the ICCO was due to come to an end in June 1999. However, the 1999, 2000 and 2001 annual reports revealed it was continued after all. Accordingly, as mentioned above, the project decided to halve spending on the library, reduce administrative costs by 80%, no longer allow pay rises and discontinue the publication of the “TURP News”. Director Shafika Isaacs, Alfred Mafuleka and administrator Tracey Harper left the project voluntarily with severance packages.

The large projects of 1999 were funded from individual budgets, increasingly from national and non-unionist sources such as the Department of Trade and Industry, Nedlac, the Department of Economic Affairs and Tourism, the Department of Transport, individual trade unions, the University of Natal and the ILO. Within two years, the 1998 crisis was thus overcome and the project’s finances had stabilised to the extent that two new researchers could be employed. In 2000 the TURP received

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<sup>80</sup>This kind of development seemed to have been planned in advance elsewhere, as the LRS announced as early as 1986/87: “The Labour Research Service will remain largely dependent on foreign unions for finance (...) until South African trade unions are large enough to carry the burden.” Labour Research Service, 1987: 15.

<sup>81</sup>In 1992, the Interchurch Organisation for Development Cooperation (ICCO) became another provider of basic funding (Trade Union Research Project, 1992a: 3). This may explain the expansion of the target group to include church and religious groups as presented in the annual report. Furthermore, in this year and the next one of the trade unions, the SACCAWU, was successful in raising funds via its international contacts in the International Federation of Commercial, Clerical, Professional and Technical Employees (FIET) for the projects it had commissioned the TURP to carry out. Thanks to earlier efforts, in 1994/95 the TURP was able to cover around a third of total costs itself. Money continued to be provided by the Canadian Labour Congress, the European Community, the FES, ICCO and Oxfam Canada.

<sup>82</sup>This can be discerned in the 1996/97 annual report. Trade Union Research Project, 1996/97: 16. TURP funds were now not only administered by the university, but were also audited by an independent auditor in Johannesburg, presumably for the purpose of transparency or control.

project-related funding from the South African Labour Development Trust via individual trade unions and the COSATU, the Department of Trade and Industry, the Dutch Trade Union Federation, the Clean Clothes Campaign, the DITSELA, the Strengthening Civil Society Fund supplied by the Department of Labour, the FES, the Manufacturing, Engineering and Related Industries Sector Education and Training Authority (MERSETA), the KZN Department of Economic Affairs and Development, the University of Natal and individual trade unions.

In the end, despite all its difficulties the project-related funding model was also seen to offer advantages, as it allowed for greater initiative. This fit well with the new economic and political developments on the national level, which required the development of independent perspectives.

### 6.14 Bridge heads – Labour Service Organisations as counterhegemonic elements

In order to highlight the LSOs' significance for the development of Labour Studies, the example of the TURP will be used to show their place within the academic community and society as a whole. Initially, the TURP was a member of the Economic Service Organisations Forum. According to the TURP, this membership served to coordinate activities in order to prevent unnecessary overlaps in research. This included the sharing of information and material between organisations.

The TURP continued to be linked to a network of its target groups, although these relationships changed over time. In the 1980s, the LSOs were a strategically significant part of the anti-apartheid movement, a kind of bridge head between the international communities that showed solidarity with and supported anti-apartheid efforts on the one hand and the various levels of the trade union movement on the other. This constellation both provided them with funding and justified their existence. Even though this constellation was not academic, contact with the academic community was already established in the 1980s.

The interviewees took very different views of the links between the TURP and academic life in the IOLS. Ari Sitas, who founded both institutions, saw clear differences between the academic Industrial, Organisational and Labour Studies (IOLS), the other projects embedded within it – the “Culture and Working Life Project”, the “Natal Workers' History Project” and the “Industrial Health Project” – and the TURP. However, he thought academic orientation and the orientation towards applicability complemented one another well.<sup>83</sup>

The other three individuals interviewed about TURP were among those seeing a “gulf” between the two. David Jarvis recalls that the LSO took over teaching a class here and there for the IOLS and that Sitas involved its staff in projects. Nevertheless,

<sup>83</sup>“In the old days, the Metal Workers' Union would come to TURP and say: ‘We need a study of the grades in the metal industry, because we want to develop a policy for narrowing the wage differentials.’ So research would be done on that. Or COSATU would say: ‘We need an educational book that explains the African economy because we need to use it in our education courses.’ Research would happen then. Whereas the other projects are much more theoretically driven. These are partner driven. So that's the difference. But a lot of people see a big gulf between the two. I see them as continuity. We need both.” Interview Ari Sitas 13 February 2004.

he thought there was little contact to the university staff overall.<sup>84</sup> This view held by the TURP staff has hardly changed to this day. Jay Govender described the relationship to the rest of the institute as “bad”, as the project was not regarded as a “field of academic activity” by the university.<sup>85</sup> He did not see himself as an academic, continuing to regard himself more as a trade unionist, probably due to his former work as an organiser. At the same time, he saw his work as mediating between different sectors.<sup>86</sup> Coming from the academic side, Debby Bonnin, IOLS sociologist, thought that the TURP’s activities took place at a remove from the academic system.<sup>87</sup>

As Rajen Naidoo described in regard to the situation of the Industrial Health Research Unit, this distance to academia was not really due to the differences between theoretical, academic and applied or commissioned research, for there were certainly close relationships between the LSOs and the more theoretically oriented projects within the IOLS. He explained this closeness by shared problems, for example in regard to funding, or to the stance taken towards the university management. However, he himself was primarily concerned with establishing links to the trade unions:

“There was quite a bit of comradery between the worker service organisations. (...) we had Industrial Health Unit which focused on occupational health, we had the Workers’ History Project, we had Culture and Working Life, the Trade Union Research Project (...). Certainly all those units functioned very closely. We all depended on funds from external donors, we didn’t receive anything from the university. The only thing we got from the university, because of efforts from people like Ari and others, we got space, but nothing else. So, we were totally dependent on external funding and that in a sense bonded us together (...). There was that comradery. But our interaction with the mainstream Department of Sociology was not that great. Certainly, with key individuals whose names I had mentioned previously (Ari Sitas, Mike Morris, W. K.), yes, but with the general sort of teaching staff, no. (...) But our relationships with the unions were at that stage very strong, and I think broadly because

<sup>84</sup>“At TURP, we didn’t have much links with the academic researchers at all. We occasionally did some courses for them, but we really were [...] like an outreach programme, very separate from the academic environment. So (...) most academics, some of them would use our library there, but none of them would look at our work and what we were doing and feed that into their courses. (...) it was quite divorced actually. Ari did involve us sometimes in projects (...), the actual link between academic staff and us was not there.” Interview David Jarvis 29 March 2004.

<sup>85</sup>“And how’s your relationship with the other academics here? – Bad, no relationship [...] it’s a very good question because this is not seen as an area of academic pursuit and should not be so.” Interview Jay Govender 12 February 2004.

<sup>86</sup>“I still refer to myself as a trade unionist and a lot of people can’t understand that and amongst the academics we’re also looked at very curiously [...] It’s very subjective, but I know the academics would not give us the same kind of [...] respect. I don’t know if respect is the word, I think it’s recognition of our capabilities or function, if you like, in the university space. But you see, the university (...) allows us all kinds of wonderful opportunity, for example, we can be the source for transformation in the workplace because (...) we take the intellectual ideas, transfer them into operational concepts and use them, academics can’t do that. The academics are limited to just the intellectual level, and it would be very incapable and very inappropriate to take it to a workplace or even to a trade union meeting and present a set of ideas. They would find it very hard, whereas for us, we don’t find the concept difficult to deal with, it’s not threatening, so it’s a kind of positive feature or characteristic [...]. And also (...) we can mediate between workers, business people, management, academics, so in a sense we’re not located in one specific point. We can traverse across the different sectors to engage with the different people.” Interview Jay Govender 12 February 2004.

<sup>87</sup>“The research that happened in the Trade Union Research Project, it was research for trade unions, it wasn’t academic research. (...) Trade unions wouldn’t want research on [...] the new world for migrant workers, for example. (...) They were working very independently, so the work that TURP was doing hardly impacted on the department.” Interview Debby Bonnin 18 February 2004.

in the unit, we were very politically orientated at that stage and occupational health was seen as an issue around which the unions could mobilize. We had very good relationships with all the trade union leadership, organisers and senior shop stewards, we would go there regularly and be invited regularly to address shop stewards councils etc.” (Interview Rajen Naidoo 19 February 2004).

Despite these different views, we can note here that staff overlap – particularly where the respective project founders were concerned –, premises in university offices, the use of TURP materials and the interaction with students created a link – however its intensity may have varied and been regarded – between the LSO and Durban Labour Studies as a whole. The institution’s importance for the students and thus for the reproduction of the next generation of Labour Studies specialists needs to be re-emphasised here. As employees or interns they gained skills and experience in empirical social research – which was all the more important as empiricism and methodology appear not to have been regarded as very important in the social sciences<sup>88</sup> –, were able to look at their own region’s problems from a social-scientific perspective and thus discover the meaningfulness of industrial sociology. At least part of the TURP staff had a university education, and their importance for the project presumably grew with the challenges of the 1990s. The employment of students also meant that a professional field for industrial sociologists emerged here, which contributed to attracting large numbers of interested students onto the respective degree courses.

The fact that the TURP over time produced valid empirical knowledge about the region further emphasises the significance of Labour Studies as a counterhegemonic movement. Initially this still took place on a small scale and not through long-term planning, as is more usual in academia. Nevertheless, during the transition staff were recognised as specialists for issues concerning the labour movement, industry and the economy in general. In this regard, the fact that a number of staff came from a trade union background was a strategic advantage for the project over purely academic institutions. These employees were able to contribute their unique personal experience to the project, some of them coming from environments more or less inaccessible to white academics due to the segregation of different groups of the population and the restriction of movement under apartheid. Conversely, it was difficult to employ non-whites or non-academics directly at the university. But precisely these individuals with trade union backgrounds had excellent access to the “field”, which was necessary for research; some of them also spoke African languages. Those who had gained the trust of the workers through unionist activity on top of this were at a clear advantage when carrying out empirical research.

Empirical access to the world of the workers was also made easier by the fact that the TURP was highly legitimate in their eyes. Research was always designed as action research in one way or another, directly serving the workers’ interests.<sup>89</sup> Govender

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<sup>88</sup>Mouton (1995: 27) observed this in his analysis of final theses (Master’s and BA theses) in the social sciences between 1969 and 1994.

<sup>89</sup>The paper on strategic planning contains the following thoughts on the effects of pure commissioned research: “The positive side to this is that in the eyes of the unions it has high credibility, its work is valued and it is very directly accountable to the unions. TURP makes relatively few decisions about what work it should and should not be doing. The negative side is that TURP staff have little control over the type of work they do inside the broad parameters of the project. This is causing problems in TURP and is resulting

characterised this form of research in the service of and including the working classes as having to make sense in the real world:

“(…), research in labour must explain intellectual ideas, but it must also make sense of it in the real world. In other words it’s application in society, so your economic policy must be interpreted on how it gets into institutions and (…) what that must lead to is a capability to transform that environment (…).” (Interview Jay Govender 12 February 2004).

The LSOs’ documentation centres also played an important role in the accumulation and use of the knowledge gained through such research. They functioned as a permanent organisational and spatial structure in which information, documents and research results could be collected. These could then be placed at the disposal of the academic community as original collections of local knowledge that no university library was able to offer: press reviews, unprocessed material such as business data, teaching and campaign materials and research reports.

The historic constellation in which the LSOs worked during the 1980s and early 1990s – that is, motivated and structured first and foremost by anti-apartheid resistance – could not survive the transition of 1994. Many of the LSOs were dissolved and those that remained were forced to restructure and reposition themselves. The introduction of fees was key here. The LSOs became dependent on the demand for their services, and this provided them with both a new legitimation and a new livelihood. At the same time, the changed political situation and particularly the COSATU’s inclusion in the tripartite alliance meant that broader and deeper research was required. Given the shift in funding options away from basic funding towards project-related funds, it seemed both reasonable and necessary to give priority to larger research projects. In contrast to their early work, which was strongly shaped by outside demand, the LSOs were now able to develop more initiatives of their own. This kind of research, which often took place in cooperation with other unionist, political or academic partner organisations, had shaped their work since 1994:

“This shift (in donor funding, W. K.) has not all been negative and there is much to be positive about it in spite of the great challenges this creates (...). Again, this shift has occurred at a time when the labour movement’s leadership has been weakened by

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in an inability to specialise or develop to meet future needs.” Trade Union Research Project, n.d.a: 3. However, this commitment to the trade unions also entailed certain ethical and political problems. Thus the LSO certainly had the potential to influence the trade unions, their activities and strategies, but was under no particular formal obligation towards them due to its independent status: “(...) the special relationship that service organizations have with the trade union movement [raises] interesting research questions. The problems of accountability have dominated discussions among service organizations themselves and between service organisations and the trade union movement. Service organisations have set up a range of controlling and managing structures that have no formal connection to the trade union movement. At the same time, however, service organizations are able to influence, and in some cases have influenced union policies. This ambiguity has led to a number of problems and tensions in the relationship (...). Service organisations could only be truly accountable if they (...) were to be absorbed into the trade union movement. This would allow unions to regulate and supervise the activities of service organizations.” Trade Union Research Project, 1992b): 2. There appear to have been incidents of this kind, which relate to the debate on the relationship between university-based intellectuals and the trade unions, as the following passage shows: “In particular, some service organisations have attempted to conduct policy oriented research aimed at ‘pushing’ unions to address and confront issues which the particular service organisation might honestly believe to be correct. While this might be acceptable to some unions, having no formal structures of accountability makes this form of policy intervention open to abuse by service organisations and persons with ‘hidden agendas’. Most unions have been able to stem this development.” Ibid.: 4.

ideological fracturing in progressive thinking and the overwhelming complexity and enormity of the challenges posed by neoliberal globalisation. This has allowed TURP greater freedom to pursue ‘initiated work’ and develop projects that identify both, problems and solutions, for the labour movement” (Trade Union Research Project, 2001: 3).

This new position necessarily entailed a surge in professionalisation: the expectations of paid commissioned research were doubtlessly higher than those of voluntary research. In a field in which the LSOs were now competing with the consulting sector, effort had to be put into establishing and maintaining strategic partnerships and client bases. Whether the TURP or other LSOs had become consultancy companies themselves following this change in funding, or where exactly the difference between LSOs and consultancies lay, may be something that those involved worry about, but is not decisive for us here.<sup>90</sup> The question is how the relationship to the academic community changed with the transition. In fact it did not do so markedly, although the new priorities in terms of content meant research practice grew closer to academic work. More large-scale projects generated primary data and used academic works as secondary literature. LSO staff could and had to become more specialised; their publications in journals or in book form also reached academic circles and were used in university teaching. The TURP itself carried out teaching on related degree courses, and papers at conferences were establishing a new position within academia for the LSO. The project was making a direct contribution to the development of Labour Studies. If its post-apartheid strategy was successful, then we could expect it to be recognised as a university research unit in the foreseeable future; it would then also be able to offer more stable working conditions.

In 1992, the journal “Transformation” published the results of a symposium held on the current state and the future of research in South Africa in response to the social and political change. Here, the research commissioned by other actors in society was accorded some significance. The editor’s preface listed a number of basic problems in condensed form, which were also discussed by the TURP here and there in its documents and mentioned by many of the interviewees: the tension between intellectuals and civil society; between academic freedom and the obligations to clients or a general relevance to society as a whole; between control and independent research; between the immediate needs of individual addressees and longer-term research perspectives. Before embarking on a final evaluation, these calamities will be brought to mind once more in a somewhat revealing quote:

“On the one hand, a variety of research activities and projects have had an important effect in empowering organisations to struggle against the apartheid system. The influence (and receptiveness of the different mass organisations) has not however been

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<sup>90</sup>This is suggested by the difficulties in justification that can be detected reading between the lines of the annual reports, as well as by interview comments. One point mentioned was that none of the TURP staff were prepared to work for business (Trade Union Research Project, n.d.a: 7). The 1999 annual report specified what the “mission and integrity” of a service organisation was supposed to be: “(…) our research has methodological integrity; although critical, it remains within the parameters provided by the labour movement; we have no political agendas independent of building the trade union movement; we consider ourselves accountable to the labour movement; we focus on accessible research; we encourage unions to lead the work that we do; we identify with union goals.” Trade Union Research Project, 1999: 3-4.

uniform. Some have resisted analyses from outside their own ranks which differed from their own policies, programs and agendas. Others have gained advantage enormously from independent research initiatives – whether these were abstract analyses, policy programs or service projects. However, in general, the relationship between research bodies and activities, and the mass organisations has not been an easy one. It has thrown up a number of contradictions – conflicts over academic freedom and accountability/relevance; between organisational control and independent analytic inquiry; between the immediate needs of organisations and the demands for more long-term research. As the emphasis shifts from the focus on the politics of opposition to that dominated by transformation, reconstruction, and policy research, there is a grave need to reflect on these issues.”<sup>91</sup>

The existence of labour service organisations was assumed to be a factor in the emergence of Labour Studies as a counterhegemonic current. On the one hand, they guaranteed a link between those with an academic interest in the subject and the realities of the labour and trade union movements. On the other, thanks to their research activity and their contacts with the unions, they were able to expand the knowledge base on local realities, going into greater depth and detail. Finally, they played a role in training specialists, some of which then moved to the universities. Personal connections, teaching commitments, publications and collections of material ensured their knowledge was transferred to the academic community, and through their commissioned research, educational measures and publications, they helped to popularise scholarly content for other social actors. In this sense, the Trade Union Research Project first and foremost represented what Michael Burawoy called “policy sociology”, while also taking on some of the typical tasks of “public sociology”.

To sum up this entire section, the IOLS was a creative, culturally committed Labour Studies institution during the years covered in this study. On the interviewees’ mental map of the country, it usually came in second place. Academic and application-oriented projects such as the “Culture and Working Life Project”, the “Natal Workers’ History Project”, the “Industrial Health Project” and the TURP, as well as the “African Renaissance” initiative or the “Livelihoods Project” in more recent years, had secured the IOLS wide-ranging contacts in the world of work and industry, in politics and government, so that Labour Studies research always remained up to date. How important these local social contacts and debates were to the emergence of an independent sociology is shown in Ari Sitas’s latest publication covered in this study, “Voices that reason” (2004), which will be discussed further below (see Chapter XI). The creation of a Global Studies programme with Freiburg and Delhi in 2002 established the IOLS as an academic centre on an international level and institutionalised some of the contacts made by Sitas as part of his increased international activity.

## 6.15 Industrial Sociology at the University of Cape Town

The University of Cape Town hosted the third of the country’s three main Labour Studies centres. Its sociology department initiated a degree programme in Industrial Sociology as early as 1972. But it was only eight years later that they advertised a

<sup>91</sup>Thus Transformation (1992: 1): “Editorial Preface”.

specialist position, which was filled by Johann Maree, who had just completed his PhD in Economics and Sociology at the London School of Economics. His appointment marked the beginning of this research field's development in the Cape.

Ken Jubber recalled the initial phase, during which many students from the field of Commerce Studies participated in Industrial Sociology classes. The paradigmatic shift towards "Marxism" introduced by Johann Maree attracted a different audience:

"(...) well, it was called industrial sociology, it was mainly from the labour perspective because we did a lot on trade unions, which was a neglected thing and we got commerce students who did no labour relations or labour studies, those days. It was first a compulsory subject for commerce students but then as sociology became more Marxist, you know, the commerce students were withdrawn from this ideological contamination and they made industrial sociology an option, which the commerce students didn't have to do, great pity" (Interview Ken Jubber 5 March 2004).

Jubber was able to see the change from management-oriented to worker-oriented industrial sociology in the new acquisitions for the UCT's library, for example: "1982 stands out as another year of attention to the purchasing of industrial sociology books. Comparing the 1968 acquisitions in this field with those of 1982 reveals clearly how it has changed in content and ideological orientation in twelve years. The shift is unmistakably from a management/capital to a worker/labour emphasis" (Jubber, 1983: 57).

Up until 1996, classes were only taught up to Honours level. Students had to carry out MAs and PhDs as independent, research-based projects. Only in the mid-1990s did the university develop Master's programmes with teaching modules in order to increase the numbers of students.

Despite its strongly "Marxist" orientation, industrial sociology at the UCT retained its focus on industrial relations. Sitas distinguished between Cape Town's focus and that of Johannesburg and Durban: "Cape Town is much more corporatist for that matter. You know, there's much more emphasis on corporatism, Mitbestimmung type of issues. Wits is much more: workplace as factory, as mine and so on. Whereas we look at the workplace as something broader than that, including what we call the informal sector, homework, women's labour (...)" (Interview Ari Sitas 13 February 2004).

The "Labour and Small Enterprise Project" (LSEP) belonged to the field of industrial relations. In 1989, Johann Maree began the "Industrial Relations Project" (IRP), which aimed to investigate the effects of national industrial unions on collective wage negotiations within the context of the Industrial Councils.<sup>92</sup> In 1999, the IRP was then combined with the "Small Enterprise Project" based in the Law Department, which until then had dealt with employment law in small enterprises and in the informal sector, coming together to form an interdisciplinary research programme, the LSEP. Shane Godfrey had been employed there as a researcher for several years:

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<sup>92</sup>On this, see Godfrey, 2004: 2.

“(...) two years on since that merger, in a way there’s still a slight distinction in the sort of research we’re doing. From the sociology side we brought a focus more on workplace industrial systems as well as industrial systems outside the workplace. Whereas on the law side the main focus has been labour legislation and how it has impacted on the market, small businesses, economic development. And (...) both of them can actually be captured under a canopy of labour legislation and industrial relation systems and their relation with economic performance development, whether at workplace level or sector level or at macroeconomic level” (Interview Shane Godfrey 3 March 2004).

In Cape Town, too, the shift from an oppositional to a reconstructive industrial sociology followed the demands of the neoliberal globalised economy. Towards the end of the 1990s, besides this more application-oriented work the project also produced basic research, for example, on the legislation for industry and work with a special emphasis on the “bargaining councils”, or on the development of small and micro enterprises. This thematic field was where Maree’s effort to establish a service centre to support these kinds of enterprises can be located:

“(...) the past ten years I was mainly working on industrial strategies for the textile industry, clothing and so on, in South Africa. I published a book in the end and (...) we tried to implement it in the Western Cape. That was how Clotex was created, a service centre to small business, mostly from disadvantaged communities, in the clothing industry. I was involved (...), I was active in setting that up, worked with the local forums and so on” (Interview Johann Maree 3 March 2004).

More recent research projects were concerned with casual forms of labour and employment agencies. The latter could be seen as a Labour Studies pilot project and deals with a new problematic area which is set to gain significance: “(...) we’re currently busy with a very big project around employment agencies and labour brokers. It’s a very under-researched area and it’s very much exploratory work” (Interview Shane Godfrey 3 March 2004). A large part of the research was funded via commissions, mostly for the government (the Department of Labour, the Department of Trade and Industry, the National Treasury and the Cape Metropolitan Council). Less frequently, trade unions either commissioned or cooperated in research (Clothing and Textile Workers’ Union, NALEDI). In 2004, the project employed two full-time researchers, who were then campaigning with Johann Maree as their academic partner to have the project recognised as a university Labour Policy Research Unit (Interview Johann Maree 3 March 2004).

Besides this, Industrial Sociology at the UCT had been the home of the ILRIG, a group started in the 1980s by David Cooper. This project saw itself as a research and information centre and among other things published a strongly politically motivated series on trade union movements in Latin America, Africa and Europe. For this reason several of the volumes appeared in African languages. The relationship to academic sociology deteriorated due to conflict over the ILRIG’s focus. Its founder defended a strict way of working in line with academic standards and a specialisation in the preferred topics that formed the group’s main focus, while a number of other members

wanted to follow the demands of the trade union and wider resistance movement more closely, carrying out more narrowly defined commissioned research:

“If you want to be based at the university, you must have a specialism and stick to a specialism. You can’t go so thin. So ILRIG, international labour, you can’t stop focusing on the bus boycotts of Cape Town (...). We were pushed down the developmental project route. (...) the unions would come up to us and say: ‘We don’t want to hear about Chile or European labour. We want to know about the bus boycotts in South Africa. (...) We want a course on administration, how you keep the union finances.’ And I said: ‘That’s not our field.’ (...) I took the academic link. There’s a role. (...) I was saying: ‘We must stick to fundamental applied (research, W. K.) as our anchor’, and the union said: ‘But that’s not what we need from you. You are the intellectual, teach us how to keep finances’” (Interview David Cooper 9 March 2004).

The last straw came in 2001, when the FBI tracked down the director of the ILRIG and arrested him. He was an American national, and as a former member of the legendary Symbionese Liberation Army had been on the “wanted” list since the 1970s. After this incident, “the university grew somewhat nervous” about the ILRIG (Interview David Cooper 5 March 2005). The project left the campus and renamed itself the “International Labour Resource and Information Group” in order to express its dissociation from the academic sector. Finally, in the 1980s Cape Town industrial sociology also had an initiative for health and safety in the workplace, the “Industrial Health Research Group” (IHRG).<sup>93</sup> Founded by a doctor and two researchers and based in the Department of Sociology for similar reasons as in Durban, this unit also left the faculty in the 1990s and moved into the medical faculty.

## 6.16 Signs of dissolution in the Cape?

At the time this study was produced, a pessimistic view prevailed at the UCT concerning the future of Labour Studies (just like the previous section, this would have to be reconsidered following Sitas’s move from Durban to the UCT in 2009 and other changes). In the interviews conducted in 2004, some missed the radical political aims of the 1980s, a criticism that seemed justified on an institutional level following the departure of the ILRIG. Several of the politically left-wing department members had become specialised in other fields in recent years, leaving Labour Studies behind: “(...) you’ll get examples in our department and elsewhere of people who did a paradigm shift or a subject shift or a focus shift (...). They left industrial sociology, labour, all that stuff behind and went into other fields like education, tertiary educational studies, sociology of health became a big thing, education in general became a big thing” (Interview Ken Jubber 5 March 2004).

David Cooper was investigating the reform of the apartheid university system and equal opportunities issues in education and research (Cooper, 2000). Judith Head was looking at health issues, which she too was linking with the problem of social stratification and poverty and unequal access to the healthcare system. And Jonathan

<sup>93</sup>On its activities, which were similar to those of the Industrial Health Unit in Durban, cf.: Industrial Health Research Group, 1982.

Grossmann was increasingly concentrating on human rights that were institutionally guaranteed in South Africa but had only been applied to a limited extent due to social and economic inequality. Cooper saw the Labour Studies approaches used thus far as outdated, given the new situation in the country and especially when compared to emerging postmodern theory:

“That I was teaching old world theory (...) was ancient. (...) then when postmodernism came, where class became almost rejected as a central category, you felt more dinosaur. So (...) I moved to teach research methods, to escape. So, a major area of my teaching for the past ten years has been research methods. (...) Postmodernism came here later than Europe, but it came here with a vengeance. (...) I mean, there’s a Centre for African Studies, and I look at the titles of the papers, nearly every paper has the concept identity as strong, very strong. So, it posed problems for people teaching Labour Studies and then the union movement also began to change here, in the ’90s, much more reformist and even corrupt in certain areas. My own solution was also to get involved in higher education studies as a field. (...)” (Interview David Cooper 5 March 2004).

This frustration was also linked to the changing university environment and the body of students: The atmosphere was very different from the activist, heated 1980s.<sup>94</sup> The new student generation’s careerism was offputting to politically motivated lecturers such as Judith Head:

“For progressive intellectuals who are working in this university, there is something very distasteful, about (...) furthering the ambitions of an elite whose only interest is to get out (of the country, W. K.). And who spend their time undermining rather than supporting the process of transformation in this society. It’s a very uncomfortable position to be in” (Interview Judith Head 8 March 2004).<sup>95</sup>

Judith Head explained this change in the student body with the fact that the UCT was seen as the country’s elite university and was able to choose the very best due to the high number of applicants:

“But, what’s interesting is that from 1994, although you would think that those questions (of social change through a working class movement, W. K.) would still be of major importance, there’s been a shift. Now, I don’t know if that’s a shift that reflects social interest or the class base of this university. And I suspect it’s the latter. Which is to say that this university has constituted itself as the elite university in South Africa. And it is now taking students essentially on merit, but in our context merit still means money. So there’s been an opening up to people of colour, but in class terms, it’s a fairly homogenous social group. So, it’s people who have been in private schools (...). And of course, the interests of this younger generation [...], well, first of all the world has changed (...). And given that this university is the university for, by and large, the rich, many of them white, who have no faith in South Africa’s

<sup>94</sup>“(...) most of our students (...) desperately want to become part of the elite. In a way that wasn’t the atmosphere in the ’80s. Some did, but not in this faculty.” Interview David Cooper 9 March 2004.

<sup>95</sup>And Lungisile Ntsebeza complained that his class on development theories was only attended by very few South Africans: “I have ten Masters students, and only one is South African. (The others) Germany, the States.” Interview Lungisile Ntsebeza 12 March 2004.

future, what they're looking for is what we often call cynically 'a passport to Perth'. So they want qualifications that will allow them to leave the country and be globally competitive, to use that cliché (...). There has been a huge shift, from labour studies to, interestingly, management and commerce studies" (Interview Judith Head 8 March 2004).

Jonathan Grossman took the same stance: "(...) I am very deeply and very seriously dissatisfied with my work here. Because I have to spend a lot of time for things I don't find important. For students, for example, who don't want to be here" (Interview Jonathan Grossman 4 March 2004).<sup>96</sup>

A glance at staff turnover at the UCT since the beginnings of Industrial Sociology is also worthwhile. The online appendix UCT STAFF contains a list of all the people who worked in the department's teaching and research projects over the years. Overall, Cape Town maintained a strongly academic profile. A majority of those employed on the projects – ILRIG, "Industrial Health Research Group", "Labour and Enterprise Project" – came from an academic background or had remained at university after graduating. Of the total of 33 employees, one came from an LSO, two came from trade unions, two were doctors, one was a lawyer and one an actress. Unfortunately, it was not possible to gain information on several individuals. In the 1980s and early 1990s, it had been possible to recruit staff from non-university sectors through research projects and a socially committed sociology, albeit to a lesser degree.

The later paths of former staff members were more varied. Without doubt, the UCT lost most early-career researchers to consulting: four in total. Another individual left for a trade union institution, one for journalism and one was working as a doctor in 2004: two had gone into government, two into non-governmental organisations, two into the private sector. As the online appendix UCT STAFF reveals, some university staff left the UCT for the University of the Witwatersrand. This shows that as a centre, Cape Town gradually lost its attraction and momentum. The unit was also less able to rely on strategic relations via former members that moved into other sectors.

All of these results show that at the time of the present study, the Labour Studies community in Cape Town was threatening to fall apart. It lacked a shared intellectual project liable to unite all representatives of progressive or critical social research in one broader context. Such a project might have been able to integrate issues of health, human rights, development as well as education. The reproduction of the community appeared to face challenges in the foreseeable future: Johann Maree, who advocated a strong industrial sociology, was soon to retire and his colleagues were already thinking of thinning out this area.<sup>97</sup> It was not possible to interview any UCT students, as none were present at the time of the research visit. The remaining Industrial and

<sup>96</sup>This also reflected Chachage's experience of Cape Town sociology: "There has been a significant drop of enrolment from 'disadvantaged' groups, this is very significant (a phenomenon observable in virtually all universities). It simply demonstrates the fact that the marketization of university education and issues of equity are incompatible." Chachage, 1999: 15.

<sup>97</sup>"(...) but some of us are saying (...) 'Why is there a special industrial sociology?' In actual fact, I think it could go, there could be a merger. Johann is very against it, Johann Maree. But I think, he's retiring in three years and I think when he retires it's going to change." Interview David Cooper 9 March 2004.

Small Enterprise Project only had insecure institutional structures and feared for its recognition as a university research unit, which promised fixed positions and pay.

## 6.17 Additional comments on the three centres

Before a final evaluation of results, some comments on the three centres will supplement and refine the picture drawn here. In all three cities, the fluctuation of staff between the academic and external sectors was striking. In some places, sociologists lamented the brain drain from their institutions into economic and political sectors; elsewhere they were able to maintain networks that continued to be of use to the academic community. This was the case in the SWOP, where former colleagues were appointed “SWOP Associates”.<sup>98</sup> The fact that von Holdt returned and became director of the SWOP shows that the method paid off.

However, interviewees also listed various reasons for this high turnover that applied to all three centres equally. In particular, the university-linked LSOs, which accounted for the majority of the staff movement observed, did not offer stable working conditions. Jobs were not secure and depended strongly on funding that was impossible to expect in advance. This was emphasised most strongly by David Cooper, who possesses in-depth knowledge of these issues due to his sociological research on educational and research structures (Interviews David Cooper 5 March 2004 and 9 March 2004).

The careers of black sociologists in particular were conditioned by their personal situation and by the general political and economic context. Political activism often continued to be more important to those involved than an academic career. Lungisile Ntsebeza for example explained why his academic path had not been a straight one:

“So, there are those gaps [...] of not having been as lucky as [...] my colleagues here who went through school, university, and finished a degree. Most of our experience, I mean blacks, most blacks, is that our degrees, they take longer. You do a degree and you do something else, and you go back, and in some cases your parents have enough money to take you through high school, and then you work until you can educate yourself (...). And I mean, I have been an activist, and, not that I regret it, I would do the same thing again, and [...] if politics was important at a particular stage, I

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<sup>98</sup>“I suppose for SWOP it (Karl von Holdt’s position as a SWOP associate, W. K.) means that they have access to me, it means that I’ve got a certain kind of commitment to them (...). I am an associate, I like to be involved in their stuff as much as possible. I’ve got access to SWOP (...). For me it’s a very valuable intellectual thing. Because the difference between SWOP and NALEDI is that NALEDI fundamentally does (...) policy orientated research that can be funded for trade unions. That imposes a certain set of restraints that I personally find quite limiting, whereas SWOP is, although SWOP also has those sorts of projects to some extent, but it’s got more intellectual space because it’s an academic institute. So for me, I’m quite torn, I like to have one foot in, (...). I think there’re two reasons (for not being able to do that kind of research from SWOP, W. K.), the one is that as NALEDI, we are part of COSATU, so when we go and work with unions it’s known that we are part of COSATU. We’re there as COSATU advisers, we’re not there as academics or neutral consultants. That gives us a credibility to work with unions in a way that I don’t think you can do outside of that. (...) the other thing is that the university is orientated towards academic outputs. I’ve spent half my life out in these work places, (...) so I’m going there all the time, I’m sitting in meetings with management, I’m sitting in meetings with shop stewards, I’m doing all of that stuff. My output in terms of peer review and articles and journals and all that is going to be low.” Interview Karl von Holdt 8 April 2004.

would concentrate on that and leave studies” (Interview Lungisile Ntsebeza 12 March 2004).

Two interviewees also reported that they had sometimes followed the instructions of the political organisations to which they belonged in their professional careers. One of them is Blade Nzimande:

“I was being drawn into all sorts of things and, by the way, the ANC said I must go and take over the directorship of the education policy unit in 1989, so I shifted completely now (out of IOLS) into education (...) at the University of Natal. On a unit that was formed quietly by the ANC and the National Education Crisis Committee, which was an umbrella body of progressive Anti-Apartheid education organizations. (...) (The ANC, W. K.) gave that instruction in the underground, that I must leave what I was doing and I was teaching Industrial and Labour Studies, that I must abandon that. The reason being that we started (...) an association of black sociologists under the umbrella of ASSA trying to promote black left wing sociological scholarship in South Africa. And then I started writing about black scholarship in South Africa (...). Basically, we prepared the education policies that the government is implementing now” (Interview Blade Nzimande 6 April 2004).<sup>99</sup>

The movement of staff between sectors had been a problem for the reproduction of the academic community from the very beginning, as David Cooper’s experiences showed, for example: “1989/1990, half the people (in ILRIG) were underground guerillas (...). But they were so involved in politics, particularly if you were African, postgraduate student and (...) the community was asking you to be there every night doing political work. And here I am saying to you: ‘Stay, (...) specialize, get a PhD! And long-term South African needs’. (...) It didn’t work. I couldn’t win it” (Interview David Cooper 9 March 2004).

After 1994 in particular, new professional fields opened up in various levels of government, for which sociologists in general and labour specialists in particular were especially suited. The directors of the three centres lamented the brain drain from their institutes to government offices and to the rising field of consulting, which also rendered the necessary steps to promote equal opportunities and equal appointments significantly more difficult, for black graduates, and especially female black graduates, were particularly in demand on the job market.

However, the interviewees scarcely mentioned that the transition had also brought about a certain amount of intake from non-university sectors. Three interviewees – Sakhela Buhlungu, Jay Govender and Devan Pillay – left trade union employment during that time in order to take up academic positions or positions in LSOs. Pillay, who had formerly worked as the director of the National Union of Mineworkers’ research unit, blamed this move on changes within the unions that did not meet his political and intellectual expectations:

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<sup>99</sup>Similar circumstances applied to the career of Bethuel Maserumule, who worked for the Friedrich Ebert Foundation when interviewed in 2004, although he had never worked in academia. Interview Bethuel Maserumule 1 April 2004.

“If it wasn’t for this particular moment in our history where the trade unions themselves were transformed, then I probably would have stayed longer in labour, but there again my expectations weren’t quite met. Because the trade unions were becoming more like business entities in some ways, not completely, nothing could be too much of an extreme statement to say that they had gone as far as being like American unions. The grassroots mentality is still there to some extent, but, you know, in this era it’s not as stimulating to work in the trade union as I would have liked. But let me say, perhaps my greatest disappointment is, they didn’t appreciate the role of an academic as much as I would have wanted. (...) there was a degree of suspicion towards intellectuals, some of it understandable, because intellectuals have come, made a contribution, then left, including this friend of mine that recruited me into the union, before I arrived he left (...) to join government as a trade consul in Canada. So there was a degree of caution shown to intellectuals. So, I wasn’t as involved in the life of the union as I would have liked to have been” (Interview Devan Pillay 25 March 2004).

Likewise, Sakhela Buhlungu no longer found the trade union to be an attractive work environment during the transition process and decided to resume his degree, which he had broken off because of his political and organisational activities. He subsequently found a position in sociology: “At that time there was a kind of relaxation of the repressive machinery. And some of the traditions (within the trade union, W. K.) began to unravel. And that is in fact (...) how I came to start the whole thing (...). And I was a union official and things started happening in different ways that were not familiar to me, and I just didn’t want to be part of that. So I thought: ‘Okay, maybe let me go and study’” (Interview Sakhela Buhlungu 7 April 2004). Jay Govender explained his decision to join the TURP as a result of the emerging Africanism within the trade unions, which he suffered from due to his Indian background:

“There was a curious thing occurring in the early ’90s, and the curious thing was in the effort to bring about racial integration, what happened was a rise of Africanism. It happened very naturally, where the African population was on the rise and expecting change. So the ’90s, you know, even in the general population: the recognition that the political change was happening. So (...) people like us who were functionaries in labour (...) had to bear the brunt of that rise of Africanism, which was also coupled with the belief, that [...], that preference [...], the African people would always be put first, in terms of what benefit they would be from physical and economic transition. So, that led to tension and conflict (...) amongst the different races who were involved in labour civics and education, so a kind of hegemony was developing amongst the African population and the African leadership (...). But, I basically was a victim of that, of that tension, and decided: too much pressure. Do the same thing, but in a different environment. Maybe not the same thing, but, you know, change of environment, but looking at labour issues, still working with the same issues. So even to this day, I still do shop stewards training, for example, which I used to do for the unions. I just come from a different source, a different location” (Interview Jay Govender 12 February 2004).

Govender is a special example, as he had benefited from the TURP's educational offer as a community and trade union activist himself. Not having followed the conventional educational path leading to research, he was able to expand his knowledge through unionist educational work in an LSO context; in his decision to start working for the TURP, he was in a way changing sides. As a TURP researcher, he was able to continue the work that he once benefited from at the point of time of this study (Interview Jay Govender 12 February 2004). Afterwards, following completion of his PhD, he moved on to the University of Port Elizabeth. This example shows particularly clearly that the Labour Studies community's constitution, which spanned various sectors, encouraged exchange with non-academic circles and created personal connections that remained of great importance for cooperations, commissions, funding and the trust in university labour specialists' quality and commitment to this very day. While the high staff turnover made establishing a stable and lasting academic community difficult, it also encouraged the integration of sociological research into society as a whole and its orientation towards relevant social-scientific issues. Accordingly, the sociography of the three centres described above is taken as a counterhegemonic element.

## Chapter 7

# No association, no journal. Special traits of the scholarly community

Now that the developments in the three main South African Labour Studies centres have been examined, further specific traits of the academic community as a whole that can be interpreted as counterhegemonic elements will be identified. We are here concerned with the fact that the academic community had not established its own specialised fora. As a popular journal, the “South African Labour Bulletin” also served other functions and accordingly merits attention.

Professional associations aim to facilitate communication and interaction within a community of scholars and provide an external framework that contributes to the legitimacy and recognition of the discipline or field of study. Until 2004, labour specialists had not created these kind of formal structures, but had always made do with the ASSA (now the SASA) as a forum for discussion and exchange. This sociological association had been and remained primarily focussed on themes under investigation here (Interview Johann Maree 3 March 2004).<sup>1</sup>

There are several possible reasons why South African Labour Studies had dispensed with a specialised forum or been unable to establish one. The strong political motivation that outweighed any thought of scholarly or academic interests was certainly key for the early period.<sup>2</sup> It was also clear that the research field needed no justification for its relevance: within the English-language universities, industrial and labour specialists dominated anyway. There was no need to engage with Afrikaans-speaking colleagues (whose views were presumably different), as the entire university and research system, sociology in particular, kept their dissent at bay. The sociologists scarcely needed any effort to achieve recognition outside the universities, and if in doubt would hardly have been able to achieve this by founding an academic association. Funding was available. Communication was excellent via close personal

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<sup>1</sup>This self-perception matched that of an outsider: “(...) even today, they have three or four big sessions and any other field like education, they just have one, so yeah, they’re still quite very dominant and in a way they’ve sustained the association.” Interview Ken Jubber 5 March 2004.

<sup>2</sup>This is also what Jubber suspected: “(...) the reason for that was that they were activists, they weren’t doing the professional thing. And so they published academic articles but in other journals, more general sociology journals or international journals.” Interview Ken Jubber 5 March 2004.

networks, both outside the university system in a political context and within the universities. This was encouraged by shared research interests, including interdisciplinary ones, and by mutual help as second markers, external examiners, or exchanging teaching content and materials for lectures and seminars within this comparatively small academic community.

In more recent years, there had been an unmistakable trend towards professionalisation, but not to the extent that specialised fora for conferences or publications had been established. This was probably also due to the academic community's modesty: these kinds of institutions were regarded as unnecessary or inappropriate given the comparatively small number of colleagues. Finally, one might almost say that the integration of the RC44 into the International Sociological Association (see Chapter X) meant the South Africans had simply leapfrogged the intermediate stage of a national association.

The same reasons could be brought up in response to the issue of the lack of a specialist academic journal, although the question of funding probably played a role here: "Because nationally it's an expensive business and it is not as if the stuff people write don't find (...) an academic publishing into the existing journals. The Labour Bulletin on the other hand is picked up by anyone who is a role player in the real world (...). And amongst the 20 or so of us who are working in the field and writing here, I don't think you could have a very frequent journal" (Interview Ari Sitas 13 February 2004). The most frequently mentioned journal for publications in the field of research examined here was the "South African Labour Bulletin", which will be examined more closely below. Interestingly, this is a non-academic, popular journal that targets a broader audience and trade union circles in particular, which again confirms the aim of local social relevance along with political motivation. During the initial phase, Labour Studies specialists also published their work in "Africa Perspective", "Social Dynamics" which was published at the UCT, the "Journal of Southern African Studies" and "Labour, Capital and Society". These were then followed by "Psychology in Society", the ASSA publication "South African Sociological Review" and "Work in Progress", another non-academic activist journal founded in the majority by students.

In 2004, many interviewees criticised the new methods for evaluating academic performance, which in their opinion laid too much emphasis on "international publications", that is, in international peer-review journals or in the national peer-review journals of other countries. For example, Ken Jubber, editor of the SASA publication "Society in Transition", thought this completely nonsensical:

"(...) a lot of our own authors don't publish, because you get more points, (...) promotion and income etc., once you publish in an international journal, which mean they're not South African. Which is a strange prejudice perhaps. (...) It's just the inferiority complex of the countries on the periphery. Which is another thing that prevents development, you see? 'Cause, you see, five people will publish a thing that really should be read locally in some obscure but international journal that no one can afford, that no one really sees, but that will just count more in your career, which is crazy (...). One day I just want to blow a whistle and say: 'Stop it!' (...) I suppose it's an infection that comes from the natural and medical sciences. There,

internationally, there are one or two journals which are cutting edge and you know real advances are made there. And anybody who's anyone will publish there. But there again, they're generalizing to social sciences and humanities so you get an absurdity of some local sort of issue of grammar and language here going into some international linguistics magazine. You know, that doesn't make sense!" (Interview Ken Jubber 5 March 2004).

Gerhard Maré, the co-founder of "Work in Progress" and "Transformation", also clearly advocated retaining local publications, even though he did not ignore the advantages of an international audience. He also linked the local focus to the situation under apartheid, when attempts were made to prevent the free circulation of ideas.<sup>3</sup>

### 7.1 "The Labour Bulletin is picked up by anyone who is a role player in the real world"

The editorial team of the first issue of the "South African Labour Bulletin" gave the following reasons for its decision to publish the journal in 1974 in the editorial:

"In this period of ferment in the field of industrial relations in South Africa, the Institute of Industrial Education feels that a regular publication on Labour Affairs in South Africa is highly desirable. This Bulletin will carry news concerning worker organisations, accounts of research being undertaken in South Africa into problems of industrial relations, and articles of general problems of industrial relations. It will also attempt to contribute to the loud debate over trade unions now going on in South Africa" (South African Labour Bulletin, 1974).

This journal can be seen as a further special characteristic of South African Labour Studies and will be analysed as such here. The founders of the "Bulletin" were members of Richard Turner's Institute for Industrial Education (IIE), which was founded after the 1973 Durban Strikes in that city. Eddie Webster stressed that right from the start, the "Bulletin" was not conceived as a purely academic endeavour, but aimed to serve the trade union movement. It wanted to document the workers' struggle and provide it with ideological support at the same time. For example, one of the early editions had the didactic aim of offering the workers a sense of historical perspective (Webster, 1992: 90).

As a publication that placed itself in the service of the labour movement, the journal sometimes also ended up between the frontlines of conflicts within the unions. It was not always easy to prevent it from being instrumentalised by the movement

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<sup>3</sup>"(Publishing in international journals) is important for me. (...) Obviously, both. But (...) I wouldn't publish in international journals unless I was also publishing locally. Once again, (...) it's how you perceive as an academic, intellectual. And I think it goes back to (...) Labour Studies and its relationship to the society in which we live. (...) So, yes, I (...) enjoy publishing internationally, because you get a different kind of response. (...). If I had to find a common thread in my own career (...) it's to make information and ideas available. So starting the journal called 'Work in Progress' was a deliberate attempt to make ideas available where they weren't. And I think the idea goes back to apartheid. Apartheid was trying to limit ideas through banning books, through banning people. It was a constant attack on ideas that diverged from what apartheid wanted us to think (...). And just recently I went through issues of 'Work in Progress'. It was banned regularly. The frustration of that! (...) So getting ideas out was with me (...)." Interview Gerhard Maré 9 February 2004.

but instead to maintain critical independence.<sup>4</sup> Several interviewees remembered the conflicts connected with the registration debate. Here, union intellectuals and officials had demanded that the journal stayed out of internal debates. The fact that the “Bulletin” refused to be silenced helped to establish its reputation as a committed and supportive but independent and critical voice within the movement:

“And there was (...) big fight with FOSATU and the ‘Labour Bulletin’ around the registration debate which was in 1980 (...) where Alec Erwin, when he was in FOSATU at the time, I think he was the general secretary at the time, basically threatened the ‘Labour Bulletin’ because they wanted to run the debate and they didn’t want the debate to be run. They said it’s an internal issue (...) And they came closer after that but they made a big fuss and said that the debate must be carried. (...) So even then it’s not like there was a smooth relationship, there was a struggle over control and in the ‘Labour Bulletin’ that was a key episode in defining what it meant to be trade union-orientated but independent. (...)” (Interview Karl von Holdt 8 April 2004).

Karl von Holdt’s appointment as editor-in-chief was also a cause of conflict. At the end of the 1980s, the editorial team was dominated by workerist members who criticised COSATU’s line as populist. As von Holdt recalled, this led to the journal being pushed to the margins of the movement. With his reputation as a mediating intellectual, he was supposed to help remedy this situation and restore equilibrium:

“When I came into ‘Labour Bulletin’ in ’88 it had been marginalized. In fact the editor of the ‘Labour Bulletin’ at the time was very critical of the ANC, (...), Jon Lewis. He is now education or research officer at the teacher’s union (...). Anyway, he was (...) pretty hostile to the ANC and he was deported. He was a British citizen and so he had to go live in Bophuthatswana in one of the homelands and teach at the university there. And they needed an editor, so that’s when I came in and then it was a case of re-aligning the ‘Labour Bulletin’ and winning the support from the COSATU leadership and stuff like that”. Furthermore: “(...) there was a big debate in the ‘Labour Bulletin’ about me being the editor because the ‘Labour Bulletin’ was dominated by the older, by that more workerist tradition and there were some people who were very hostile to me coming but others who said that the ‘Labour Bulletin’ was in danger of being marginalized because of the political shifts in the trade unions and therefore I should come on board” (Interview Karl von Holdt 8 April 2004).

Politically, it was also significant that despite all of the friction and differences, the “Bulletin” was oriented towards the COSATU. Thus the workers’ organisations in the “black consciousness” tradition organised through the NACTU were neglected (Interview Eddie Webster 5 April 2004). Due to its close connections with the political scene, the Publications Board kept an eye on the content published in the “Bulletin” and banned it several times in its early stages. Supposedly, two issues incited “worker uprisings” and “resistance” to the system of liaison committees as an alternative to

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<sup>4</sup>“The SALB was, then, never conceived of as a mere academic exercise. It was directly linked to the emerging labour movement and was concerned both to record its struggles and serve its needs. From its inception it contained a tension; was it an instrument of the emerging unions or was its role that of independent critic? It was, of course, to develop a degree of independence over the years as it began to serve a wider constituency of persons concerned with understanding this movement.” Webster, 1984: 2.

worker representation through black trade unions (Webster, 1984: 3).<sup>5</sup> In Vol. 1, No. 3 of June 1974, John Copeland had published an article titled “And what of Leyland?” on the disputes between the Metal and Allied Workers’ Union, which was not recognised, and the management of the Leyland Motor Corporation in Durban. However, it was not the content itself that caused offence, but rather that the text was used by the British anti-apartheid movement.<sup>6</sup> A second ban was issued following the article “The ‘labour aristocracy’ in Africa: introduction to an unfinished controversy” published by Peter Waterman in Vol. 2, No. 5 (1975). The reason for the ban was the dialectic “Hegelian-Marxist” structure of the argument.<sup>7</sup> Obviously, censorship was a somewhat random affair.

The journal’s content and readership changed over the years. While the “Labour Bulletin” was initially conceived primarily as a publication for the labour movement, in times of harsher repression it withdrew more into the realm of academia. At the same time, it continued to serve as a publication for labour and industrial sociology and as teaching material, as Johann Maree confirmed:

“There was always that concern about the readership of the ‘South African Labour Bulletin’. We consciously decided to write and publish texts that would be able to be read by an advanced worker. So there was not much theory, it was very practically oriented, real world issues. It’s not an academic journal, it was meant for trade union leadership. (...) But most read this journal in the universities also, in our discipline there is still a large amount of reference to the ‘Bulletin’. There are not so many journals in South Africa for our topics. Now, (...) (there have been) some shifts, I would periodise them differently. In fact, in 1976 there was a banning of trade unionists, that hit the ‘Bulletin’ hard, so we retreated into some kind of more academic writing, we were too much under the pressure of the state. (...) And a lot depended also on the editor. In the early ’80s we had a rather academic editor, rather academically oriented. (...) When Karl von Holdt came to be the editor, he was very conscious about this concern to be writing for workers. He just rewrote everything. And the actual editor is a former journalist, Renée Grawitzki. So during the last years the ‘Bulletin’ lost some of its solid contents. (...) The ‘Bulletin’ is still very useful when you want to cover a theme. I often use it in designing my courses.

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<sup>5</sup>On the repression of critical journalism under apartheid, see Nix, 1997.

<sup>6</sup>“I’m looking for the case of Leyland. There’s another reason, I can tell you why these two were banned and they were the only two banned (...). One, number three by Johnny Copeland. (...) This (Leyland, W. K.) is a motorcar company trying to get recognition in a union. We describe the struggle, we then try and analyse it and then we try to legitimise it by arguing that all they want is to resolve the disputes, to regulate them (...). But this struggle, it’s a British company and what was happening at the same time. Look: ‘On Wednesday Dr. Jacobsz who had come down to Durban, met workers’ delegates and told them that the strike by the British workers had necessitated retrenchment’. In other words what had happened is that workers in South Africa had linked up with workers in England through the anti-Apartheid movement. (...) So, the reasons they gave for the banning was because this article had been used in Britain for the anti-Apartheid movement. So, it wasn’t what we wrote, it was how it was used.” Interview Eddie Webster 15 March 2004. He reads aloud from Copeland, 1974: 15.

<sup>7</sup>“There are a few occasions where we used Marxist language and the case I have in mind led to the banning of the Bulletin, the 1976 edition, would have been volume two. The volume was banned because of an article written by a Dutch sociologist by the name of Peter Waterman, who used in trying to discuss whether there was a labour aristocracy in Africa, used the Hegelian method of thesis, antithesis and synthesis, to structure his argument. (...) And on the basis of that the issue was banned because the South African censorship board said that this is a classic example of Hegelian Marxist method.” Interview Eddie Webster 15 March 2004.

(...) In saying that academics mostly refer to this non-academic (...) journal you are pointing your finger to something. We write clearly for workers, but the articles are also good for students. This is maybe an unintended consequence, but there is a large part of student readership, you'll just find clear and simple texts there on relevant topics" (Interview Johann Maree 3 March 2004).

At the time of the study, in 2004, the "Bulletin" had existed for over 30 years and was funded by subscriptions as well as funding from the Department of Labour, the Friedrich Ebert Foundation and the Civil Society Fund. The journal was only able to survive the transition thanks to this financial support. Many other alternative publications were forced to shut down at this time.<sup>8</sup> Among Labour Studies specialists, the "Bulletin" was regarded as the South African specialist journal par excellence. Here two aspects of the "Bulletin" will be examined in greater depth, analysing and interpreting their significance for the counterhegemoniality of South African Labour Studies. These are the movements in the editorial board and the range of topics covered in the published articles. Schematised information on each issue analysed can be found in the online appendix SALB CONTENTS. The volume numbering corresponds roughly to one volume per year, made up of several issues appearing in intervals of a few months. For this analysis, the first issue of the respective volume was selected, corresponding more or less to one issue per year.<sup>9</sup>

## 7.2 The editorial board of the "Labour Bulletin"

Over the course of three decades, the "Bulletin" had changed its appearance: originally a small, grey, typewritten pamphlet, its layout had been updated several times and in the early 2000s it used high gloss paper and colour photographs. At the same time, the number of articles grew while the articles themselves became shorter. No longer written in the academic style of the first volumes, individual texts were then not referred to as "articles", but as "briefings", "features" or "cover stories". Since 1986, besides the editorial board several people were listed who dealt with administration, edition, management and marketing.<sup>10</sup> In 1991 the position of "managing editor" was created, held first by Karl von Holdt (1991-1995), then by Deanne Collins (1995-2000), Tanya van Meelis (2000-2001) and Renée Grawitzky.

An examination of the movement of staff on the editorial board (see online appendix SALB EDITORIAL BOARD) provides insight into networks within the academic community and with extra-academic actors. A first glance at the constellations reveals that the first two volumes were edited mainly by people from the Institute for Industrial Education. From the third volume onwards, the long-term representatives from Cape Town, Durban and Johannesburg started to appear. In 1983 and the fol-

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<sup>8</sup>Devan Pillay drew attention to this fact. He himself was the former editor of the alternative journal "Work in Progress" which was forced to close, and a former Media Officer for the new government. Interview Devan Pillay 25 March 2004.

<sup>9</sup>No issue was available for Vol. 26.

<sup>10</sup>Since then there had been staff positions such as "design and layout", "writer", "office manager", "distribution", "subscriptions", "coordination", "photographer", "circulation", "subediting", "administration", "reception" etc., a clear sign that the journal was becoming both more professional and more bureaucratic. The staff filling these positions were not taken into consideration in our analysis of the constitution of the editorial board.

lowing years an attempt was made to build up a branch in the Eastern Cape, but this endeavour came to nothing. The last striking fact is that from 1993 onwards, in parallel to the transformation of South African society and the international opening of science, research and communication, colleagues from abroad become members of the board.

These changes can be examined more closely according to region. Most of the first generation of joint editors came from the IIE, and presumably many of them were students. We know of Harriet Bolton, John Copelyn, Alec Erwin, Harold Nxasana and John Mawbey that they either came from the trade union movement or took up jobs there following their time at the IIE. The board did not list Rick Turner, as he was already banned at this point in time. Around the time of his murder in 1978, this first generation left the editorial team, making way for the first colleagues from the University of Natal: Charles Meth, who remained on the board until 1990 (with some gaps) and Rob Lambert, who continued to be a board member from his university appointment in Australia from the end of the 1980s onwards. Those not embarking on an academic career only remained on the board for a brief time: Ravi Joshi, Liz Hosken, Merle Favis. From 1983 onwards, Ari Sitas and the newly founded IOLS were able to ensure that the number of individuals from Durban in the editorial team remained constant. From the mid-1980s this region became even more strongly represented with Shamim Meer and Blade Nzimande. At the beginning of the next decade, longer-term collaboration with Ashwin Desai and Imraan Valodia created some stability, and in addition to university staff, trade unionists such as Thembeka Gwagwa and Geoff Schreiner joined the board for some years. At the beginning of the 21st century, in parallel to the transformation process and the concentration of capacities in Johannesburg, the number of board members active in Durban sank. Apparently the Durban group had also taken the decision to have a smaller but more actively integrated group of board members.

During the early stages, Johannesburg was only represented by Eddie Webster; from 1979 onwards he was joined by his colleague Phil Bonner. Both were already working at the university at the time and have been permanent members of the board since then. The circle of individuals involved in the *Bulletin* in Johannesburg grew slowly over the 1980s, although Halton Cheadle, Eddie Koch, Doug Hindson, Paul Stewart and Jon Lewis left the Johannesburg editorial branch again in the late 1980s. Over the course of the next decade, a new generation joined – Amrit Manga, Karl von Holdt, Avril Joffe, Monty Narsoo, Deanne Collins, Sakhela Buhlungu, Lael Bethlehem, Bethuel Maserumule, briefly supported by Moss Ngoasheng and Paul Benjamin. The Johannesburg members now outnumbered their fellows from the East and West. This strengthening of Johannesburg in the Labour Studies community needs to be seen in connection with the end of apartheid and the establishment of the new government, whose ranks included many Labour Studies experts and who commissioned them as well. A concentration of activities formerly distributed relatively evenly across the three industrial centres in Johannesburg can be observed. Since the beginning of the 21st century, this group has grown, in 2004 including Jane Barrett, Tanya van Meelis, Chris Bonner, Vusi Nhlapo, Sarah Mosoetsa, and Roger Southall; since 2003, Renée Grawitzky had been editor-in-chief.

Cape Town had been represented since 1976 by Johann Maree, who built up the local branch and had been the longest-serving member on the board after Eddie Webster and Dudley Horner. It is noteworthy that many of those involved in Cape Town were so for longer periods, all at least four years and most more than five. Thus three to four people were constantly present up until the early 1990s – unlike the swifter turnover in Johannesburg, Durban and the Eastern Cape: during the first decade Alide Kooy joined the first two members, in the 1980s Dave Kaplan and Debbie Budlender became active, as did Di Cooper, who remained involved until the end of the 1990s. The new generation of the 1990s included David Lewis, Henry Chipeya and Howard Gabriels. This meant that from the early to middle years of this decade, the number of Cape Town board members grew briefly, but since 2000 the trend already noted for Durban could be observed here on an even greater scale: a reduction of those involved to only two people at present – Johann Maree and Connie September.

In the Eastern Cape, Paul Stewart attempted to found a branch of the “Labour Bulletin” at Rhodes University in 1983, but moved to the University of the Witwatersrand the following year. Nonetheless, activities there were kept up for another three years by André Roux, Sarah Christie, Ian Macun and Ashwin Desai. From 1993 to 2001 Roger Southall was responsible for the Eastern Cape region on his own. As mentioned above, Labour Studies was not really able to establish itself at Rhodes.

Following the transformation process, the Labour Bulletin was able to gain international editors from 1993 onwards: Gay Seidman of the University of Wisconsin, who was integrated into the South African networks through her sister Neva Makgetla (COSATU) and was interested in comparative analyses of trade unions in the South; Jane Barrett, who in addition to a stay in England, had worked for the South African trade unions since 1982 (Transport and General Workers Union, including several years as its general secretary, as well as International Transport Workers Federation); and Rob Lambert, who had moved to Australia. Although the “Bulletin” was not a recognised academic journal, the board still appeared to entertain academic ambitions. Since the transition this could be seen, for example, in the attempt to situate the “Bulletin”’s activities on an international level. That this ambition – in connection with the growing institutional differences between the universities, the increasingly modernised trade unions and the new government – had not resulted in a purely academic journal of Labour Studies speaks to the sustenance of close ties with non-academic sectors and social scientists’ continued commitment to the needs of these sectors.

Accordingly, the appointment of “associate editors” from 1998 onwards might be seen as an attempt to maintain the connection to high trade union officials and to former trade unionists or sociologists then working for the new government: Enoch Godongwana, former NUMSA Secretary-General and in 2004 a member of the executive committee for finance and economics in the Eastern Cape; Vusi Nhlapo of the National Education, Health and Allied Workers’ Union, then working in the National African Federated Chamber of Commerce and Industry; and Connie September, COSATU Vice-President who gave her name to the September Commission, for which several sociologists worked (Buhlungu, von Holdt).

Looking at the editors' institutional affiliation over the years is also instructive. As mentioned above, the first generation consisted mainly of IIE activists, including several who came from the trade union movement or took up positions there later. After the "Bulletin" had been moved to the university, the proportion of academics and LSO staff grew. To name only those who were involved for more than five years and had significant influence on both the Bulletin and the academic community: Eddie Webster (Wits), Johann Maree (UCT), Dudley Horner (SAIRR, then SALDRU/UCT), Phil Bonner (Wits), Charles Meth (UN), Rob Lambert (UN then Australia), Ari Sitas (UN). These seven could be regarded as the second generation of the editorial board<sup>11</sup> and include the three founders of today's Labour Studies centres. The shift of the trade union and worker-oriented activities to the universities and the fact that these activities were led by persons established in academia with stable professional positions made a certain continuity possible, which short-term members from activist or union circles without any academic affiliation were less able to provide.

Since the mid-1980s fresh faces had appeared. Of these, some were based at the universities – Ashwin Desai (UN), Roger Southall (Rhodes, then HSRC), Deanne Collins (UN). Jon Lewis, Blade Nzimande, Shamim Meer, Di Cooper and Ashwin Desai represented the activist generation of the 1980s. However, several left the universities for other sectors – Karl von Holdt (Wits, then NALEDI), Avril Joffe (UCT, Wits, then consulting), David Lewis (UCT, government). Others took the opposite route: Imraan Valodia moved to the University of Natal from the private sector, and Sakhela Buhlungu moved from a trade union secretary's position to the SWOP. Finally, two others left the unions and went into politics: Howard Gabriels and Lael Bethlehem, although the latter simultaneously worked at the SWOP as a research associate.

This generation of the board – the mid-1980s and 90s – was somewhat more equal in terms of black and female members. Movement between sectors also seems to have been higher at this point.<sup>12</sup> Trade unionists were represented more strongly – Howard Gabriels, Sakhela Buhlungu, Di Cooper (who joined the Faculty of Medicine at the UCT in the 1990s as a researcher). However, several individuals were only members for a shorter period, such as Geoff Schreiner, Bethuel Maserumule, Chris Bonner, Vusi Nhlapo, Connie September and Tanya van Meelis. The increase in the number of union members on the editorial board may be connected to the fact that the workers' organisations had built up their own research and public relations capacities, whose staff were now sent to join the "Bulletin". Furthermore, due to higher wages and more stable jobs, careers were more linear than in the 1970s and early 1980s, when many were working for the unions on a volunteer basis or on casual contracts. The board's intake of individuals with non-academic positions could also be seen as a strategy to maintain the journal's credibility given growing institutional differentiation and the growing confidence of the workers' organisations. Financial considerations probably also played a role – the Friedrich Ebert foundation (to which Bethuel Maseru-

<sup>11</sup>Incidentally, these were all white men, a fact that had been criticised by black and/or female colleagues at the "Bulletin", but will not be pursued further here. Cf. Interview Sakhela Buhlungu 7 April 2004.

<sup>12</sup>However, this impression may have been distorted by the fact that, unlike earlier members, more information on these individuals could be accessed via internet research and it was thus easier to see where they had worked.

mule's joining of the board was probably linked) and the Ministry of Labour had been supportive of Labour Studies activities. The paths of several board members from the universities into the unions and politics (Dave Kaplan, Sarah Christie, Karl von Holdt, Avril Joffe, Moss Ngoasheng, David Lewis, Ian Macun) and from the trade unions into politics (John Copelyn, Alec Erwin, Harold Nxasana, Howard Gabriels, Enoch Godongwana, Vusi Nhlapo) confirmed both sectors' complaints regarding the phenomenon of the brain drain. However, this increased movement between sectors also encouraged networks that transcended sectors and thus counteracted the adverse effects of institutional differentiation or the new trends in education policy.

This analysis of the editorial board has yielded three main findings: firstly, the membership of the editorial board over the three decades reflected the close connections and movements between the three scholarly Labour Studies centres and between these and extra-academic sectors – trade unions, non-governmental organisations, and the new government. Secondly, national historic factors such as repression, anti-apartheid activism in the trade union movement and the communities, the transformation process, equal opportunities policies, the concentration of the centres of power and decision-making in Johannesburg and so on were reflected in the membership of the editorial team. Thirdly, along with this historic and political influence, the academic and the broader intellectual labour community developed strategies over the years: the creation of union-related activities in the universities, the search for exchange and cooperation with extra-academic actors at each stage, and internationalisation since the beginning of the 1990s.

Remarkably, a non-academic journal had been able to maintain its position as an intellectual platform for engaging with the topics of labour and industry. It allowed for continuous discussion between actors from universities, independent research organisations, trade unions, non-governmental organisations and the new government. At the beginning of the 2000s, the "Labour Bulletin" continued to be regarded as the main publication outlet of the academic community. This can be seen as an important element characterising this community as a counterhegemonic movement.

### **7.3 The range of topics covered in the "Labour Bulletin"**

An overview of the range of topics covered is represented here. For simplicity's sake, the entire time period will be divided into five-year periods. The articles were distributed across the different periods as listed in Table 7.1.

Table 7.1: "South African Labour Bulletin", content according to thematic fields, in time periods 1974-2003

Topic	Number of Articles						Total
	1974-1978	1979-1983	1984-1988	1989-1993	1994-1998	1999-2003	
Fundamental, theor. contributions	9	13	6	15	14	18	75
Individual trade unions	1	4	11	15	12	4	47
Strikes, forms of labour dispute	3	7	17	10	7	2	46
International issues	5	2	6	8	7	11	39
General economy, globalisation	-	-	2	4	12	11	29
Politics, current affairs	2	7	2	8	7	2	28
Rights and law	4	6	3	5	2	4	24
Personal issues	-	3	2	3	8	5	21
Concrete and practical Information	2	-	3	8	3	3	19
Businesses	-	1	3	9	-	2	15
Health and safety	-	2	2	1	1	6	12
New topics	-	-	-	-	6	2	8
Repression	1	4	1	-	-	-	6
History	3	1	-	1	-	-	5
Women/Gender	1	-	-	2	1	1	5
Culture	-	-	1	-	-	1	2
Other or unclear	3	3	7	16	24	24	77
Total	34	53	66	106	104	95	458

The attribution of the individual articles to the topics and the themes falling into the same subject area are listed in the online appendix SALB CONTENTS.  
Sources: Selected issues of the "South African Labour Bulletin" (see online appendix SALB CONTENTS).

Of course, this categorisation of titles according to individual key phrases does not do justice to the journal articles' complex content. For reasons of transparency, the online appendix SALB CONTENTS, column 3, contains the attribution to the respective thematic category. The analysis of this overview will therefore remain general and should not be accorded too much weight. The selection of a single issue can distort the picture, particularly in regard to topics that were not of key importance over longer periods, as these were often dealt with in special issues.

To start with the deficits in the content: gender issues were almost completely ignored for 20 years, and basic or internal trade union issues of racism and discrimination were dealt with so little that they did not get a column of their own in the above subdivision of themes. The fact that class issues were not mentioned could be explained by the watering down of content during the first two decades in times of repression. After 1994, reality caught up with the movement, the trade unions took on responsibility in the politics of the day, but here, too, the question of class played hardly any role. This shows that the university-based editorial staff and authors regarded their academic and scholarly interests and ambitions as less important than the labour movement's agenda.

Besides the political option for a broad alliance across racial boundaries, the ignoring of race issues within the unions was probably also due to the uncomfortable relationship between academics and workers, which shaped the labour movement and was not addressed in the "Bulletin" in a self-reflective manner. Only the involvement of individuals with multiple backgrounds – such as Sakhela Buhlungu – confronted the movement and its protagonists with the omissions in its memory and present-day state (Cf. Buhlungu, 2001). The lack of interest in race issues may also explain the neglect of cultural aspects. White intellectuals often had limited insight into the workers' cultural life and underestimated its influence on the movement. The lack of knowledge of the African languages acted as a barrier here. Well-known exceptions to the weight accorded culture were the "worker theatre" and Ari Sitas's artistic activity. However, his Durban group seemed not to have been influential enough for larger quantities of this content to appear on the pages of the "Bulletin". Finally, health and safety in the workplace seem not to have been a priority, which is astonishing given that industrial medicine and questions of safety were an impetus for the development of the subdiscipline and were represented at all three centres. Possibly more specialised contributions in this field were published as medical specialist literature or as expert reports.

Turning to the frequently discussed topics, the first thing noted is that fundamental theoretical and political issues constituted the topics of the majority of articles (see below). In this, the "Bulletin" was carrying out its mission of providing ideological support for the union movement through grounded information and arguments. Furthermore, reports on the affairs of individual trade unions and on strikes and labour disputes were often found. Apart from the first issues, which offered a kind of reflective overview of the South African labour movement, the journal was also strongly focused on day-to-day affairs: debates, opinions and recommendations on political issues within and outside the trade unions' information and analyses on legislation;

staff and policy developments in the individual trade unions and associations. The position of the unions in national politics and the question of the alliance were also constant topics of discussion. Here, the "Labour Bulletin" followed its aim to provide social and political actors with the necessary information and different opinions on controversial issues to contribute to a strong movement and well-founded decisions. Larger theoretical or ideological questions seemed to have been resolved after the first issues: the entire first issue had formulated the argument for black trade unions, providing both theoretical and political reasons; moreover, historical retrospectives intended to encourage the rebuilding of a black labour movement. The fact that fundamental questions, such as the future development of the South African economy and society aimed for, were not touched upon much subsequently cannot be explained by political censorship alone. Doubtlessly the journal's aforementioned pragmatic political orientation was a reason. This also explains why legislation for example was given comparatively much attention, a field rejected as reformist or even counterrevolutionary in more strongly theoretical and ideological circles, but one that played a key role in the black labour movement's strategy. It was not possible to find an answer to the question of the extent to which the published texts represented a compromise between different opinions, not only within the movement itself but also within the authors and editorial team.

The range of topics covered changed over the entire time period. The first years from 1974 to 1978 were dedicated to general issues and dealt with these in a more academic style and in article form. For example, the first issue printed the last chapter of the IIE and South African Institute for Race Relations (SAIRR) analysis of arguments for and against full trade union rights for black workers, originally published as a report. The "Bulletin" thus lent further support to the debate on the recognition of black trade unions, which the legislation of the day did not allow. The report thus represented the foundation for both the black trade union movement and for the "Bulletin" itself. International matters were also covered in the first five years, although this occurred mainly in a special issue "Namibia under colonial rule", apart from an article on British companies in South Africa. Thus there was less of a comparison between trade union movements in different countries to gain useful insights for the South African movement than might have been expected. The special issue on Namibia primarily shows the editors' and authors' anticolonial attitude, which was critical of the government. Three historical texts were also published in the early issues, one on worker consciousness in South Africa before 1953, two others also on Namibia. Between 1974 and 1978, some questions of relevance to the newly emerging trade unions on the legal situation were already focused on, for example in "Security of employment and victimization in South African Law" (Peter Galt, 1976), a matter of great importance.

Between 1979 and 1983 another large proportion of general questions were dealt with, such as thoughts on the relationship between unions and state, or the question of the alliance, which arose within the anti-apartheid movement after the emergence of the UDF. This was the time that strike coverage first appeared in the journal. This is also when the most reports about repression are printed, even though these are very few in total. Presumably this topic was covered in the coverage of the strikes in many cases.

While the “Bulletin” was concerned with legal issues continuously over the years, this period saw a particularly high number of articles on issues of justice and law.

The years 1984 to 1988 marked the high point of the anti-apartheid struggle on all levels. During this period the highest number of documentations of strike events and results appeared in the “Bulletin”. Thereafter the main focus expanded to include individual trade unions and associations. This means that during the second ten years of its existence the journal became more strongly activist and concerned with pragmatic political aspects, while fundamental questions, law and politics – this period is when there are the least articles on these topics, looking at the entire 30-year period – seemed to have been dealt with satisfactorily for the time being or were overshadowed by day-to-day conflict, apart from a few articles on deregulation, unemployment and the dissolution of investments in the context of the crisis of the mid-1980s. At the high point of the conflict, the milieu of the labour movement and Labour Studies seemed the best organised and best adapted to the situation. The preceding buildup phase had brought about the development of specialised Labour Service Organisations, which wrote regularly on particular thematic fields.<sup>13</sup>

Between 1989 and 1993 the focus lay on individual workers’ organisations and their umbrella organisations, but with the transition fundamental questions once again became a topic of discussion. Strike coverage began to decrease following the actual decrease in labour disputes. Instead, general economic questions gradually came to the fore as the role of the trade unions changed with the social and political transition. “Reconstruction” was the buzz word of the time. The overall picture of South African society, politics and economy became as prominent as the interests of the black trade union movement. This is when the most articles on national politics are to be found over the entire 30 years – including hot debates on COSATU and ANC conferences, the tripartite alliance or the new constitution, on the profile of individual trade unions and businesses – the roles and positions of power of all players needed to be reconsidered and re-established. Presumably to inform about and reflect on these processes, the journal issues examined that date from these years contain the highest proportion of practical information such as statistics, business data, information on inflation and so on. Following the end of apartheid and thus of South Africa’s international isolation, international issues were also debated more frequently. Changes in the workplace were reflected in articles on professional development, centralised wage negotiations or corporatism.

Between 1994 and 1998, the “Bulletin” continued to publish many fundamental and theoretical articles: on social partnership, participation and consensus; on new technologies; on the new government’s “Reconstruction and Development Programme”; on privatisation, international financial institutions and international competition. “Globalisation” entered the discussion, and its consequences for the South African economy were debated. Compared to earlier and particularly to the preceding time

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<sup>13</sup>The Labour Research Service provided the most important basic data (practical information, statistics, business data in the form of company files etc.), the Labour Monitoring Group followed strike events and progress, the Centre for Applied Legal Studies contributed legal knowledge and advice. These specialised groups published regularly in the “Bulletin” up until the transition, when these tasks were taken over by the enlarged editorial teams themselves.

period, during which general political questions played a major role, this period had the highest number of articles on general economic issues. Individual trade unions and associations and their new role in politics overall continued to be discussed, but there was a greater focus on individuals than in past years: new leaders in the economy, trade unions and politics were introduced. The “Bulletin”’s interest seemed to be slowly moving away from workers towards union leaders, many of whom moved into other fields, primarily politics. Previously underresearched topics began to be covered: casual labour, the informal sector, migrant labour, prostitution.

The most articles on fundamental issues were published during the last time period examined – 1999 to 2003. “International issues” were discussed most intensively in those more recent years. Authors continued to write on the economic situation. By contrast, there was hardly any coverage of strikes. Where conflicts within businesses were covered, these were mostly wage negotiations. Since transition, strikes have no longer been reported euphorically, but with a focus on mediation.<sup>14</sup> The 1999-2003 period also saw the highest numbers of articles on health and safety primarily due to the rise in prominence of the HIV/AIDS issue. Comparing the six periods, it is striking how closely the “Bulletin” remained focused on current events in each respective period. Conversely, it probably also shaped these events to a certain extent. However, this cannot be examined further in the context of the present study.

Early issues of the “Bulletin” clearly reflected the determination to make an intellectual contribution to the emerging labour movement. The first volumes’ predominantly academic and scholarly origins were shown once again by the fact that Webster published a collection of “Bulletin” articles in 1978 as a book titled “Essays in Southern African labour history” (see the analysis in Chapter IX), with the primary aim of providing a collection of texts for academic teaching purposes. The same also goes for Maree’s edition of further essays in book form, titled “The independent trade unions 1974-1984 – ten years of the South African Labour Bulletin” (Maree, 1987). This again confirms that university staff linked their commitment to the labour movement and their professional tasks.

By contrast, over the years the “Bulletin” had shifted away from its original academic form towards becoming a hybrid product which lived up to its aim of “intellectual formation”, as Sitas calls the networks and collaboration between supporters and activists in and outside the universities and trade unions. The “Bulletin”’s history doubly supports the characterisation of South African Labour Studies as a counterhegemonic movement in the sense described here. Firstly, it represented one of the starting points of university interest in the labour movement in South Africa. The academic community founded the paper to write about the black labour movement, a topic recognised as relevant, thereby contributing to its emergence. Secondly, through the “Bulletin” it was also able to institutionalise its contact with the movement – presumably without explicitly intending to. Over the years, the “Bulletin” consolidated inter-institutional relationships. It strengthened cohesion and exchange within the academic community – a role usually played by academic journals. It also

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<sup>14</sup>For example in the following cases: “Cover feature: PG Bison – negotiating the crisis” (1994); “The nurses’ strike – product of a messy bargaining process” (1996); or “Resolving disputes in the metal industry” (2003).

contributed to reinforce the ties with society at large, first during the struggle against apartheid and then throughout the transition and reconstruction of South African society. Finally, social scientists in the early 2000s still preferred the “Bulletin” for publications in the field of Labour Studies despite institutional differentiation, referring to it as a top-rate specialist journal; so far they had not deemed it necessary to set up a scholarly peer-reviewed journal to compete with or supplement this popular publication. This suggests that the Labour Studies community’s interests were still not purely academic.

Now that the discipline’s institutional, staff, funding and research developments in the three main centres have been examined, the development of theory will be outlined, following which the academic community’s international relations will be analysed.

## Chapter 8

# “We had to be very imaginative” – theoretical developments in South African Labour Studies

The previous section focused primarily on identifying the social relevance of Labour Studies. The current chapter aims to investigate whether this relevance to society has given rise to any theoretically relevant developments over the years. The first part of the analysis will consist of the academic community’s own assessment as provided in the interviews. Some central concepts will also be introduced. Subsequently, four key works will be investigated in more detail.

During its initial phase, Labour Studies had an interdisciplinary dimension due to the involvement of social scientists from a range of disciplines, but it always remained firmly rooted in sociology: The field’s main exponents were sociologists, the study programmes were preceded by basic studies in general sociology, and it is more apt to say that representatives of other disciplines moved into sociology, particularly via the ASSA forum, than to claim that Labour Studies was fundamentally an interdisciplinary project. According to Sitas, Labour Studies specialists saw themselves as “sociologists, but of a peculiar kind” (Interview Ari Sitas 13 February 2004). In terms of its relationship to general sociology, it was certainly not just Buhlungu who considered Labour Studies to be “leading” (Interview Sakhela Buhlungu 7 April 2004), and presumably many colleagues would agree with Debby Bonnin’s statement that they had “radicalised” the discipline as a whole (Interview Debby Bonnin 18 February 2004). Bozzoli’s speculation that the dominance of this specialised field was linked to the lack of activity in other subfields of sociology appeared to be justified (Interview Belinda Bozzoli 30 March 2004). This disciplinary “home” was important when considering the different theoretical influences on the field and, as we will see, decisive political and ideological ones. It seems pertinent to divide this analysis into at least two phases: the 1970s/80s and from the 1990s to the early 2000s. Our main focus will be the question of the reception of overseas theory and of local influences, which subsequently will enable us to assess the field’s theoretical development and its counterhegemoniality.

## 8.1 “Yes, but...”. Theoretical influences and debates in the 1970s and 1980s

Sitas recalled the many different influences on his work in the early days as a student and doctoral candidate in Johannesburg in the late 1970s and early 1980s. In addition to the theoretical debates that went on at the time, he interestingly noted that political discussions and the experience of realities were even more formative. His creative work particularly highlighted the inadequacy of available theory. As there were hardly any written records of these early debates, Sitas himself suggested reconstructing the “oral history” of the academic community, which will be attempted here by using longer quotes from the interviews. They suggest a mix of theoretical and political influences:

“I was there when industrial sociology was starting at Wits. So it was establishing itself [...]. From the stuff we were reading from overseas, it was always: Yes, but! It doesn’t quite apply to our context. So we were reading all the classics, but even kind of industrial sociology stuff like Richard Hyman’s work and, what you call them, Fox and [inaudible], reading Poulantzas, the French Greek guy and it didn’t quite fit. There was a creative tension, well, why doesn’t it fit? And, well, obviously because it didn’t address the issue of race, it didn’t, you know, it assumed a common modernity. It assumed capitalism to be capitalism to be capitalism. And that’s why (...) Johnstone’s text was influential, where he argued, you have to understand (...) race, class colour bars that were created, in order to understand how things developed in South Africa. And there was the work of oral history that was bringing in voices from below” (Interview Ari Sitas 13 February 2004).

Sitas then continued, stressing the effect of artistic and cultural activity and political debate on his social-scientific work:

“But, as I said before to you, (...) it was my exposure to the creative work that started bringing in voices. [...] we had to be very imaginative in how we link culture, consciousness, tradition, workplace, mobilisation, organisation. (...) I think, also, we were very much influenced by various political debates that were happening around [...] and those debates having to do with nation, class, race, issues of articulation. Harold Wolpe was the doyen of structuralism in South Africa, but he was in exile in England, so he wrote famous pieces in the early ’70s about cheap labour power and the emergence of apartheid. So we were grappling with these broader theoretical debates. (...) there were debates around the difference between the Russian and the Chinese model, debates about Africanism and Africinity, Frantz Fanon and other things [...]. Those you won’t find on paper, you’ll need an oral history to reconstruct the various debates (...) that were happening [...]. And we were trying to justify what we were doing [...]. There were a lot of ideas from Freirians (the school of Paolo Freire, W. K.) in Latin America coming through, primarily through the Black Consciousness movement, which was basically: (...) you build tomorrow today. So in other words, the structures you put in place and the structures you organise have to reflect a desired result, not what reality gives you. So therefore non-racial trade unionism. So, being involved in those debates plus democratic shop steward structures, as an activist, those things I could see developing. As a sociologist I was studying the successes and the failures. So it’s, there was a dialectical relationship between praxis and thinking

that influenced a lot of us, because we were creating a field, you know there was [...]. It was not in any way there” (ibd.).

In Sitas’s opinion, the engagement with Black Consciousness set one main trend, but classic and critical theory and above all the movement’s creativity and activity, which resisted all constraints and structures, were also key. He listed several influences that were taken up in an eclectic manner:

“The first one was the challenge of the Black Consciousness movement, which forced us to redefine a whole range of things and an intellectual debate around that. The second area was the growing area of Labour Studies, (...) we had the trade unions and we tried to understand how the trade unions, how the social movements – work, mobilisation, labour process, all these various themes – were coming there. But it had its own trend, you know. Because any book we would read was about the decline of all these things in Europe and in the United States, whereas what was happening around us was the growth of something. So that influenced us. Thirdly, at least in my cohort, a lot of theoretical work. Mostly in early years it was around political philosophy. And the fourth influence was, one of what we were discovering, the idea of self-activity, energy, kind of grassroots democracy, and opening up spaces for creativity and so on. We were practically discovering the limits of structuralism and structuralist type of arguments. Because everything was happening despite institutions, despite dominant ideologies, despite everything. That was a new reality. So in my early work, I tried to combine all kinds of things. The advantage I had there is working with a lot of people in creating plays and so on. In hostels, with migrants, we just started seeing different voices emerging and not a textbook voice, and how complex culture, ethnicity and other things were in trying to create forms of solidarity. So, you know, my eyes were opened. So I had total access to those areas because of my creative work. I was involved in project work in those areas, in those industrial areas, so I brought the two together for my PhD. So quite influential was, in social history, a lot of the ideas of history from below. E. P. Thompson was very crucial. So we were quite eclectically using a lot of theories to understand what was happening. So that was for the first years” (Interview Ari Sitas 13 February 2004).

Sitas mentioned further influences in an article on the discipline’s emergence and development:

“The emerging field was the result of a variety of ‘fusions’ between theoretical work, moral critique, commitments to struggles for worker rights, the mixing up of many anti-apartheid discourses and the challenge of major socio-economic struggles in the area. There were also echoes of Christian liberation theology, the communitarian traditions of Ethiopian and Zionist churches, brought to the projects through working class intellectuals” (Sitas, 1997a: 7).

As the interaction between the various influential factors was highly complex and much of it could no longer be reconstructed using written sources, this general overview will focus on “Marxism” as the central theoretical point of orientation and on the criticism of “Marxism” emerging from the Black Consciousness movement. In addition, several concepts significant for the development of the field will be examined.

Before investigating theoretical influences in closer detail, the reflections on labour and industry by the Communist Party that preceded them will be emphasised once more. As the SACP was banned, the works of Simons/Simons and Roux were not officially allowed to be disseminated and read. However, “Essays in Southern African labour history” (see the analysis in Chapter IX) showed that their writings were read during the initial phase in particular, even though post-’68 Marxism attempted to dissociate itself from earlier Communist Party Marxism. As mentioned above, Communist Party intellectuals had already started to import Marxism and adapt it to the South African context in the 1920s. These attempts at adaptation included, for example, the concept of a “special type of colonialism” or “internal colonialism”, which in Pillay’s view made a seminal contribution to understanding the social context:

“Marxism did come through workers from Britain and elsewhere and they introduced that to the South African working class, the black working class, that’s true. But it was also indigenised (...), in the sense that they combined a Marxist perspective with a Nationalist perspective, because South Africa had peculiar, South African conditions didn’t accord with the pure class conditions, let me say, that you might find in developed countries, Western countries. Because race and class and the question of national liberation were very much intertwined, so the socialist struggle and the Nationalist struggle were very much intertwined. So, that’s why the Communist Party, after a long period of debate, came up with the perspective of ‘colonialism of a special kind’ to describe the South African, peculiar South African situation. It wasn’t just a capitalist situation and it wasn’t just a colonial situation, it was a combination of capitalist oppression, capitalist exploitation and racial oppression, colonial oppression, colonial racial oppression (...). And (...) that was their unique contribution and of course alienated a lot of pure Marxists from the Trotskyist traditions who said: ‘This is not proper Marxism.’ But they were always minority intellectual strands. And that is really the perspective that Jack Simons, Eddie Roux were trying to grapple with in their books. Now, and that perspective was rejected as Stalinist by different schools of thought including the new Marxist perspective that emerged in the late 1960s, early 1970s” (Interview Devan Pillay 25 March 2004).

This early Marxism focused on the state and party level both in its theory and politics, and was enriched by the emergence of Labour Studies, which imported neo-Marxist approaches. First-generation Labour Studies representatives had become familiar with these approaches during their studies at European universities, where Marxist thought became widespread after 1968. Apart from Turner, who studied in Paris, all of these scholars had studied in the United Kingdom. Harry Braverman’s widely-read labour process theory in particular, which was discussed in Webster’s PhD thesis and more or less laid the programmatic foundation for the SWOP, was an ideal match for the political strategy of building up an independent grassroots labour movement in the workplace. Webster confirmed the influence of post-’68 Marxism and especially of Harry Braverman, even though he placed more emphasis on empirical evidence than on theory in his interview<sup>1</sup>:

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<sup>1</sup>After listing important South African Labour Studies texts, Bonnin ranked Braverman (1974) higher than all of them: “But these (South African texts, W. K.) are not really seminal texts. I mean, these are

“I got interested in labour initially as a student at Oxford in England in the late ’60s early ’70s. And I got interested initially theoretically at the kind of [...] revisiting of Marx that was going on at that time (...) and that led into literature around participatory democracy and people beginning to challenge established structures. But within Marxism, I think the most important influence was Harry Braverman’s book ‘Labour and Monopoly Capital’ which was published in 1974 and that sort of labour process informs the foundations of SWOP initially. Looking at work [...]. (...) so the influences are broadly within a Marxian, but particularly a labour process theory. But (...) I’m quite eclectic and basically take as my point of departure what I think is happening and so it’s more inductive. And what I argued in that ‘Taking labour seriously’ and listened to what workers were saying and doing. And that actually meant cutting across the dominant paradigms (...)” (Interview Eddie Webster 5 April 2004, referring to: Webster, 1991).

He named a range of other theoretical influences besides this initial “Marxism”, several of which were also cited by his colleagues. However, this comparatively broad spectrum, which also included literature from other countries of the global South, did not include any approach suited to addressing the processes unfolding before the eyes of the South African industrial sociologists:

“The Frankfurt School (...) had abandoned the working class. Secondly, there were those traditions in industrial relations theory going back to Robert Michel’s ‘Iron Law of Oligarchy’ that again saw labour as an actor that essentially became bureaucratized and oligarchic. Which didn’t help us understand what was happening, the self-activity of workers. Then, thirdly, there was the dependency theory, which world systems theory of Arrighi and Silver was just a development of, but essentially that idea (...): In the third world there is a labour aristocracy. So, (...) those theories that were dominant in social science (...), workers as being co-opted or in an elite, none of them helped explain what we were seeing inductively, which was labour emerging as a militant movement. So (...) we developed the theory of social movement unionism and then it meant looking at social movement theory, and [...] then looking at transition theory which (...), Przeworski, we call it elite pacting. (...) But in all these cases, we’re trying to critique dominant social, Northern social science, if you like, that it’s not explaining the world around us” (Interview Eddie Webster 5 April 2004).<sup>2</sup>

This meant that in the 1970s various theoretical approaches – from classic industrial sociology to Braverman, from Poulantzas, Fox and the Frankfurt School to Freire, Latin American dependency theory and world systems theory – were received. At the same time, intellectual activity was informed by local political debates on the trade union movement, Black Consciousness and the Congress tradition among others. These were sometimes culturally reworked in workers’ theatre and linked to the international context – the Russian versus the Chinese model and so on. For the purposes of this study, the most interesting fact was that all interviewees insisted

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important texts, but not seminal. In the sense that they haven’t influenced a series of other works. What influenced was the labour process approach.” Interview Debby Bonnin 18 February 2004.

<sup>2</sup>At the time this interview was conducted, Giovanni Arrighi and Beverly Silver were visiting Johannesburg and had each given a paper at the Department of Sociology and at the breakfast seminar respectively.

that none of the imported approaches were able to adequately capture local developments and that they worked in a more “inductive” and “evidence-based” fashion. Thus local debates between “workerists” and “populists”, between the SACP, the ANC, Black Consciousness and the rising trade unions were just as important a source of theoretical inspiration as the reception of foreign literature.

As nearly all interviewees cited “Marxism” as a decisive theoretical influence, it seems appropriate to go into their thoughts on the impact and understanding of this approach in more detail.<sup>3</sup>

## 8.2 Reception and influence of “Marxism”

Although nearly all interviewees described Marx and “Marxism” as of key importance for their own work, it was not always easy to detect this influence clearly in the works of the Labour Studies community. According to the representatives, this was mainly due to their fear of censorship and repression.<sup>4</sup> This was doubtlessly a reason why even some university-based intellectuals carried out their readings of Marx in other circles:

‘I’d done a seminar comparing western psychotherapy and what I characterized at that time as African psychotherapy and Grahame (Grahame Hayes, lecturer in industrial psychology at UN, W. K.) marked that (...) essay (...) and then he said to me (...): ‘You got quite a good mark’ (...). And he said: ‘I would have given you more, had you factored (...) social class into your essay. Because what you are dealing with are not only cultural issues, they are also class issues, you know? Because western psychotherapy tends to be more informed by bourgeois notions of individuality and what you are terming African psychotherapy is more dealing with the realities of the working class.’ I didn’t quite understand what he was saying to me at the time and he could see that. So he said to me: ‘If you are interested to follow these issues, I’m inviting you to a reading group’, which they had at the time in Maritzburg, a few lecturers and some postgraduate students. I think there were four or five of us, which was a Marx reading group (...). I accepted the invitation, we were doing it outside. There wasn’t much Marxism either, by the way, in that Honours programme they were doing, so my Marxism I didn’t pick up in class. I picked it up in this reading group. I stayed in that reading group for ten years thereafter from (...) 1980, September, to 1993 (...). Thirteen years, meeting fortnightly, called it the MRG, Marx Reading Group (...). I abandoned Black Consciousness. Not the notion of the national oppression of black people, but now I was understanding it differently, from a Marxist angle and the national question in Marxism and so on, and it really enriched me. I must say that it was the most liberating experiences ever, to come

<sup>3</sup>The reception of “Marxism” in South African sociology and in Labour Studies in particular merits a more in-depth investigation, which it was impossible to pursue systematically within the framework of this research. In the following, we highlight what Labour Studies representatives understood by the term and show that their understandings of it varied and frequently diverged quite strongly – which is why the term is placed in inverted commas here. On the development and different currents of Marxism, albeit without reference to the Marxist debates in the global South, see: Vranicki, 1974.

<sup>4</sup>“(...) although Marx was influential, you couldn’t publicly speak in that language, so that’s one of the reasons, but yes, Marx was read, discussed, disseminated and all the other things, you know, but it was the public persona that we muted. But when academic articles started getting published there were more explicit references there (...).” Interview Ari Sitas 13 February 2004.

across Marxism. A few things struck me, by the way, about Marxism. (...) it was like Marx was writing about my own conditions at that time, the township highly depressed, poor, where I come from, the conditions of the working class that I was growing up within. I was amazed at this, you know? That this thing was written in the previous century but it was talking about [...] like describing my own experience. So I got intensely attracted” (Interview Blade Nzimande 6 April 2004).

Nzimande’s recollections once again confirmed that the important debates of the time were hardly ever put in writing. The themes themselves were often already regarded as “Marxist”. Responding to the observation that while “Marxism” was cited as the most important theoretical influence by nearly all interviewees, the most popular organ of publication could not be called Marxist by any stretch of the imagination, Webster presented two arguments: the “Bulletin”’s main theme – collective labour disputes – was “Marxist”. However, because of the repression and in line with the chosen political strategy, they could only be published in the form of conventional sociological approaches:

“What is class other than the collective struggles of working people? So (...) the answer is twofold. I think it’s dealing with the practice of it and (...) the object of the ‘Labour Bulletin’ was to record these struggles, to analyse these struggles and to legitimise these struggles. And the way to legitimise these struggles was not to talk about Marxism, because if you talk about Marxism, you would illegi-timise them. (...) You had to talk about them in a classic sociological way, and the way we did that, (...) very consciously, very deliberately, was to say to them: ‘How do you regulate that conflict in a way that stabilises capitalism rather than reforms it?’ Because that would have been a statutory offence, because of the Suppression of Communism Act, to argue for radical change. (...) That’s how communism was defined: as a radical social change. So, it would have actually threatened and undermined the workers’ movement if we were to mention it. So if you find any reference to Marxism it would have been done either in ignorance of what the strategy was, or it would have been done in such an abstract way that it would have escaped the state” (Interview Eddie Webster 15 March 2004).

Thus the sociologists disguised their “Marxism” by using unobjectionable conventional phrases. While they described themselves as “Marxist”, they had very different understandings of the term. For example, like Webster<sup>5</sup>, Pillay characterised the “Labour Bulletin” as “Marxist in the sense that it was the first publication to focus exclusively on labour issues from a working class perspective”.<sup>6</sup> Among the LSO employees, who were engaged less in theoretical and more in commissioned and educational work,

<sup>5</sup>See above and: “Well it’s (the SALB, W. K.) Marxist in the sense that it’s practice, it’s dealing with the struggles of working people and describing in a quite ethnographic way the day to day struggles against capital, against management. And it’s Marxist because it is not only dealing with the conflict but with how people are challenging that and its struggles are around demands to improve the wages and working conditions of the class of the workers.” Interview Eddie Webster 15 March 2004.

<sup>6</sup>“Well, Marxist (...) not in the sense of being overtly, theoretically Marxist, but in the sense that it (the SALB, W. K.) was the first publication to focus exclusively on labour issues from a working class perspective. They didn’t wear the Marxism on their sleeves as it were. Whereas ‘Work in Progress’ was more overtly Marxist in the sense that they did cover theoretical issues dealing with Marxist theory and that sort of thing. The ‘Labour Bulletin’ wouldn’t do that, it was looking more at the trade union movement, supporting the trade union movement. But the people who were running it were all Marxists, of the [...] new left and social democratic Marxists.” Interview Devan Pillay 25 March 2004.

“Marxist” stood for “action-oriented”, “working towards social change” and “supporting the labour movement”.<sup>7</sup> Ironically, this understanding reflects the definition of “Communism” in the “Suppression of Communism Act” referred to by Webster (see above).

Two different currents criticised the emergence of “Marxism”. Ken Jubber and Henry Lever, sociologists who did not count themselves as part of the field examined here, attempted to represent its import and application to the South African context as a naive imitation of Western theory unsuited to understanding the local social situation.<sup>8</sup> However, in his article Jubber did not make clear to which extent “Marxism” was in fact unsuitable for analysing the South African context. Bozzoli explained his objection as a reaction to the dominance of those scholars returned from abroad – Jubber had studied and written his PhD in South Africa – who were stirring up the sociological community and marginalising colleagues who were not of their party. She was not convinced of the claim that the uncritical importation of “Marxism” had harmed the discipline:

“I think it was one of the most stimulating things that ever happened to South African studies which was really moribund before then. I mean, what were the great books in South African sociology before then? Suddenly we had this extraordinary flourishing of ideas [...] and it must have been very hard for people who weren’t in the, it was a little bit of a clique, and if you weren’t in the clique, it was very hard and I think that must have been stifling and bad weighed up against that. It was very stimulating and work was dynamic, it was good solid work, nothing airy fairy stuff and there has been a genuine attempt to make Marxism relevant, interpreted locally, so I don’t agree (with Ken Jubber’s critique, W. K.)” (Interview Belinda Bozzoli 30 March 2004).

The second point of criticism, which was more significant both in political and in theoretical terms as it led to widespread debate and internal schisms both in the labour movement and among academic intellectuals, was the accusation that a “Marxist” analysis of South African society ignored the central importance of the category of race. This objection arose in very different groups and contexts, but in the collective memory it was usually linked to Black Consciousness. Black Consciousness developed as an idea and a movement following the student uprisings in Soweto in 1976 and emphasised the experience of racial oppression shared by all blacks. As a consequence, blacks should unite to form a movement to topple apartheid, relying solely on their own strength and (at least at first) not forming strategic or political alliances with whites. This deeply unsettled many white people in the opposition.<sup>9</sup>

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<sup>7</sup>“( . . . ) it was a very broad Marxist idea of worker leadership, just some kind of a socialist agenda, not so much of the theoretical stuff ( . . . ). ( . . . ) we here have that concern to transform, to study society in order to transform, according to local practical needs.” Interview Jay Govender 12 February 2004.

<sup>8</sup>Cf. Jubber, 1983. Also: “One senses in some of the products of South African labour process studies a premature closure to the complexity of research findings induced by an unremitting exposure to Braverman and followers.” Lever, Henry (1982): Labour process and the sociology of work in South Africa – preliminary observations. Paper at ASSA Conference, University of Western Cape Belville, cited in: Webster, 1999: 37, footnote 2.

<sup>9</sup>For a brief overview of the arguments for and against Black Consciousness, see: Webster, 1974. This is the written version of a lecture given to students at the request of the NUSAS which served to provide them with information and orientation in dealing with Black Consciousness.

Against this background, the “Marxist” emphasis on the category of class, which saw the issue of race as of secondary importance, represented a way – thus the critics – for white university intellectuals to assert their position and their commitment to the anti-apartheid struggle and not be marginalised by Black Consciousness. Von Holdt recalled that in the struggle for the leadership of the umbrella organisation FOSATU, the workerist trade union and university intellectuals represented racial issues as a “veil for capitalism”:

“It was a real struggle over political direction and leadership. And in my view a lot of the (...) more workerist, if you like, or independent worker-aligned whites (...) really downplayed the racial issue and the colonial issue. And I suppose that can be ascribed to their particular experience (...). And if you read (...) Joe Foster, he was the general secretary of FOSATU in the late [...] ’70s, a coloured guy and he did a speech, it’s addressed to the FOSATU congress, ’79, I think. (...) which some of the guys [...], I know Eddie contributed something to that, (...) and it really talks about: the racial dimension of issues in South Africa was just a veil behind which capitalism, capital is the primary enemy and all the rest of it is just (...) veil. It’s an appearance, it’s not the essence. And by doing that, they were sort of ignoring the real issues that people faced as black workers, they wanted to see them as workers and not as black workers” (Interview Karl von Holdt 8 April 2004).

Shireen Ally also voiced the conjecture that “Marxism” may have seemed like a lifeline for white intellectuals within the context of growing black confidence and self-assertion (Conversation with Shireen Ally 23 March 2004). She based this on her scholarly engagement with the history of Black Consciousness and the history of South African sociology and intellectuals. Webster countered this accusation with two arguments: firstly, that Black Consciousness was not a coherent theory; and secondly, that this movement had one decisive factor in common with “Marxism”, namely the rejection of liberal pluralism. However, what was indeed skirted around in his opinion was the problematisation of the relationship between academics and the labour movement:

“I think that posing it like that, that Marxism was a way of avoiding race, is possibly a bit, a bit crude in the sense that (...). [...] Quite early on, we didn’t see the class category quite separate from race, but we saw race, class being contained in race. I mean that in a sense was the whole point of trying to understand the local, the South being where race was so central. (...) Black Consciousness is important to development, but on its own it doesn’t, being black is not a statement of being a revolutionary. Being black doesn’t give you a theory you know? The question is: ‘How do you explain society?’ (...) I would use class as a category embedded in race. (...) and secondly, (...) you have to understand the emergence of (...) Marxism, (as a) critique of the dominant liberal paradigm, that’s what it shared with Black Consciousness. (...) You know, what was driving the embracing of Marxism was a [...] an unhappiness with liberal, individualistic liberal categories, you know, that were, *they* were ignoring race. (...) What we were trying to do was reject, class was a way of rejecting the establishment, liberal theory, and embracing a transformative project which was a growing involvement of social sciences in the emerging movements, labour movements. It wasn’t simply a way of avoiding race. It was a way of engaging

with it, a way of engaging with black workers. But I think there’s a third problem (...). Sakhela (Buhlungu) has made the point (...) (in) his article ‘Rebels without a cause of their own’ (...) that really captures the argument. And he argues that those class contradictions or (...) class contradictions and race contradictions which were contained in that worker-student alliance, were suppressed, were avoided. I agree with him” (Interview Eddie Webster 5 April 2004).

Bezuidenhout also defended the “Marxists”, who often had good relationships with Black Consciousness on the one hand, and whose commitment also placed them at risk of state oppression on the other:

“I want to make two points there (...). I agree broadly that Marxism was a way out for a lot of left leaning students and scholars during the rise of Black Consciousness. But (...) some of them had very good relationships with the Black Consciousness movement [...]. Eddie, I think, was one of the scholars who had a more nuanced perspective, maybe, on race. (...) But I think one should also remember that these people got jailed, got shot at. Just to say that it was a way for them to deal with race is too simplistic. They made real sacrifices, the white activists, their lives were in danger and some were killed. So, to say that their commitment to the labour movement and to Marxism was only about race is way too simplistic. If that was the case, they wouldn’t be in the left at all. So one has to think carefully about that. Where I do agree with her (with Shireen Ally, W. K.) is that race as such, as a category, and approaches to race, that was a ‘no, no!’ People didn’t analyse that and they also kept quiet about the racial divisions or tensions in the labour movement or the liberation movement itself, because they had to hold the movement together” (Interview Andries Bezuidenhout 30 March 2004).

This meant that everyone more or less agreed that political practice and the relationships between white intellectuals and the black trade unions were not reflected upon or discussed in public sufficiently. As far as theory was concerned, interviewees nuanced the argument that the term of class had been used by white intellectuals to downplay the race issue. The concrete situation seemed much more complex. We will then show below to which extent racial issues were considered in individual theoretical and conceptual points.

However, it was not only Black Consciousness that accused the “Marxists” of a “false consciousness”. This criticism also tied in with the ANC strategy of a “two-stage revolution”, according to which overcoming racial oppression was the first aim; radical economic demands were not supposed to be made simultaneously. Rather, these were to follow in the second phase:

“So, there was a question (...) of the centrality of class-based movements. But most importantly, which took me about two or three years to understand where it was coming from, the ANC underground was starting to attack this and saying that the race question was not being stressed enough, (...) which I think was probably correct. It was correct that we were stressing class and not race enough. But more importantly, it linked to the ANC theory that we must have a two stage revolution, that we must first have a democratic revolution (...) where you don’t make radical

economic and particular social-economic demands, and then at the next stage you, it became a very bitter debate that you could raise socialist and critical economic demands at the beginning rather than saying what we first need is a black, I mean, in the crude sense, what we first need is a handover to a black majority, not those issues of economic redistribution. That you first get a black majority” (Interview David Cooper 5 March 2004).

Up to this point we can note that the reception of post-’68 “Marxism” played a key role in the emergence and development of Labour Studies. At the same time, from the very beginning “Marxism” was confronted with social trends that diverged from the Western “norm” – “capitalism is capitalism is capitalism” (Interview Ari Sitas 13 February 2004) – and with local political debates and strategies, and was adapted accordingly.

### 8.3 Executive floors and casualisation – theoretical developments in the 1990s

In thematic terms, as mentioned above, a considerable part of Labour Studies research at the time of the present study was concentrated on the upper trade union levels and on areas of political relevance, through which the discipline was aiming to support the COSATU in carrying out its national responsibilities. Furthermore, research focused on general political and economic questions linked to economic liberalisation and restructuring. This means that at the beginning of the 21st century, too, *realpolitik* shaped the development of Labour Studies, giving rise to a range of different reactions. Several times, interviewees criticised that the discipline was moving too far away from the realities of the working class.<sup>10</sup> When asked about the relationship between Labour Studies and general sociology, Grossman lamented that the core of the discipline was becoming ever more restricted. In his opinion, this was linked to the commercialisation of degree courses and focus on the job market. Both he and other UCT colleagues for whom Labour Studies had become too narrowly defined no longer regarded themselves as belonging to the field.

By contrast, in Durban the opposite route was taken and the understanding of “Industrial, Organisational and Labour Studies” was broadened so as to include different thematic orientations. This did not represent a break with the line taken thus far, as the IOLS had always included cultural formations outside the workplace, gender issues in companies and at home or the informal sector in its canon of themes.<sup>11</sup> In recent years, the IOLS had merged the projects not directly related to the workplace and

<sup>10</sup>Grossman still adhered to “Marxist” social analysis of a kind that he saw vanishing from the rest of the community: “People who were using Marx are no longer using him. I’m always talking about working class, because the working class and trade unions are not the same thing and the route that many of them took (...), the working class and the trade union become the same thing (...). And the visions of working class reality and struggles were shaped (...) through the prism of trade unionism. (...) You can describe trade unions in non-Marx terms. I do not think you can adequately describe working life as a struggle in non-Marx terms.” Interview Jonathan Grossman 4 March 2004.

<sup>11</sup>“Often people explore issues that weren’t only linked into the workplace itself. I mean Debbie Bonnin’s work is wonderful and she just goes into the community, she looks at issues of gender, race, culture and in a way it’s Labour Studies but it speaks to much, much broader concerns.” Interview Andries Bezuidenhout 30 March 2004.

trade unions into the “Livelihoods Project” and to the “Global Studies Programme” in their teaching offer.<sup>12</sup>

Mvusi Mgeyane, who was writing his PhD in 2004 both at the IOLS and in “Community Development” as part of the Livelihoods Project, saw this broadening of thematic scope as something required by reality, for in recent years, even the trade unions seemed to realise that their activities needed to be expanded to include unconventional topics such as retrenchments and unemployment (Interview Mvusi Mgeyane 10 February 2004). Sthembiso Bhengu was a representative of this younger generation and saw the need to rethink outdated concepts of labour:

“(...) I don’t think Labour Studies will continue to be on the cutting edge, if they continue to use (...) the old ways (of) thinking around work and around labour. (...) if Labour Studies continues to think only around work and labour in the conventional form, which has been the case of the past two decades, I think they will actually loose ground of what is happening. (...) in Labour Studies, it’s always been more emphasis on organised labour and then around formal work, formal economy (...). And not only in South Africa over the past four years, five years, continuing, not only in South Africa but in most European economies, the reality is that the so-called formal work is really increasingly loosing ground to all other forms (...) whether we call them informal sector, all sorts of things (...). The whole idea of formal employment, permanent, formal, long term (...) are running away. As unpleasant as that is (...). And so one of the issues is how do we conceptualise (...). In the last SASA these were some of the issues that we talked about. Around the challenge that, if we maintain the old ways of looking around labour, I think we gonna find ourselves very much inadequate and that there needs to be that case of new ways and finding new spaces around (...) concepttualising economy and work” (Interview Sthembiso Bhengu 16 February 2004).

The SWOP, too, was striving to broaden its focus. Interestingly, the SWOP member whose main research focused on the effects of retrenchments was linked to the Livelihoods Project in Durban. In the interviews, Webster drew attention to Mosoetsa’s project several times, calling it a “pioneering” work.

Several individuals – Judith Head, Belinda Bozzoli, David Cooper – linked the increased attention paid to questions of identity and culture to the rise of postmodern theory, which in their eyes posed a threat to the discipline’s achievements to date. For example, Judith Head was concerned that 20 years ago the focus lay on the shared aspects of human experience, particularly among workers, while in the early 2000s postmodern and poststructuralist approaches emphasised difference. Particularly in contemporary South Africa, where there was such widespread fear of “the Other”, she believed an emphasis on widely shared experiences among workers, such as capitalist exploitation, was important (Interview Judith Head 8 March 2004). Given the emerging postmodern currents, Bozzoli regarded Labour Studies as significant for sociology as a whole, since it remained focused on analysing real-life problems, while postmod-

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<sup>12</sup>On this, cf. also: Sitas, 1999.

ern influences took social scientists and above all students further and further away from existing social problems.<sup>13</sup>

Overall, in the 1990s, the “ideological crisis” led to theoretical tensions between those adhering to the concept of “working class” and focused on social issues such as casualisation, retrenchments, survival strategies, and culture and those concentrating on the more narrowly defined concept of formal work, linked with support for the upper levels of trade unions, the economy and the government through policy-oriented research. The following subsection addresses more specific theoretical and conceptual developments in connection with the question of South African Labour Studies’ contribution to the field as a whole.

#### 8.4 Between global trends and “exceptionalism” – South African contributions to the development of the Labour Studies field

Interviewees gave different answers to the question of what contribution South Africa had made to labour and industrial sociology in general. Pessimistic critics such as Jubber stated that South Africa had not produced any original theoretical development to date.<sup>14</sup> By contrast, Labour Studies representatives repeatedly stressed that imported approaches were only of limited use in attempting to understand the local context. First and foremost, as stated above, they did not take account of the dimension of race in colonial societies. Nor could the specific historical and contemporary developments be adequately grasped using existing approaches – the emergence of a strong trade union movement at a time when the unions’ activism and social significance appeared to be dwindling on a global level<sup>15</sup>; the links between trade unions and social movements beyond the workplace; trade union grassroots democracy, which contradicted traditional theories of bureaucratisation and oligarchy and so on. Accordingly, South Africa had always been caught up in a tension between global trends and local exceptionalism.<sup>16</sup> For sociology, the challenge was primarily to develop concepts and approaches that explained the realities observed. Interviewees listed a number of these “South African innovations”.

<sup>13</sup>Interview Belinda Bozzoli 30 March 2004. See quote p. 97.

<sup>14</sup>“South Africans have never been very original in knowledge terms. We were like the early Japanese, when they manufactured things, they just copied technology. So, we tended to borrow, I mean (...) even today I’m using Beck and Giddens and all these kind of things (...). We use the gurus that people use elsewhere and then we kind of apply it to South Africa and I think a lot of that Marxist stuff was like that (...). And it didn’t fit.” Interview Ken Jubber 5 March 2004. However, he basically contradicted himself in his next sentence: “That’s why Harold Wolpe and the rest, they were wrestling with that thing about class analysis and race how does that come in and ethnicity and all that (...).”

<sup>15</sup>To give an idea of scale: In 1976 around 670,000 workers were organised in trade unions, in 1989 it was 2,150,000, which amounts to a 310% increase in the membership of workers’ organisations in the late 1970s and 80s. In the early 1990s, 41% of workers were trade union members, a rate of organisation comparable to that in Germany and New Zealand and exceptionally high for countries of the global South, particularly in Africa. Cf. Webster, 1991: 51, the table in which he presents OECD statistics.

<sup>16</sup>When asked about the special characteristics of South African Labour Studies and its contribution to the subdiscipline as a whole, Maree drew attention to this issue. Interview Johann Maree 3 March 2004. On the debate surrounding South African exceptionalism in general, see Mamdani, 1996, and the “Mamdani Review Symposium” (1997) in: *African Sociological Review* 1, No. 2. Mamdani’s book also made waves in the Labour Studies community and was often referred to in the interviews.

In terms of methodology, Labour Studies in South Africa appears to have cut its own path. Bozzoli regarded its empirical, reality-focused orientation as typical. In many cases researchers chose participatory action research or ethnographic methods. When asked about South Africa’s contribution to the overall development of Labour Studies, Bozzoli replied: “I think it may be methodological. I think there’s a very impressive engagement with sort of experiential methodology, like all of our students go into factories, meet trade unionists, there’s an incredible methodological, what’s the word for it? [...] sort of [...] field-work based research, there’s field research of a very impressive scale” (Interview Belinda Bozzoli 30 March 2004).

It was striking that since the early stages, research had been linked to practical and political aims. This meant that many projects included those being investigated in formulating the research question, conceptualising the research, and disseminating and using its results. In some cases, workers participated in carrying out the research themselves. Other methodological tools employed were the analysis of oral and pictorial sources as well as support for the writing of workers’ biographies. Thus workers gained access to the research institutions and took over these kinds of tasks themselves.

Webster included field research in South Africa’s “methodological innovations” as well as what he termed a “recasting [of] Labour Studies”: “(...) there are two methodological innovations and that is the use of ethnographic research, (...) most of the studies today (...) are qualitative, they’re workplace ethnographies, let’s call them that. And secondly, recasting Labour Studies to take cognisance of the South. So, it’s a geographical shift in labour (studies) and recasting it from the North to the South and our critiquing it the way in which labour has been understood in particular in the North” (Interview Eddie Webster 5 April 2004. Cf. also Webster/Lipsig-Mummé, 2001). Explanations given for the latter aspect will be examined in greater detail below.

However, the discipline also produced theoretical and conceptual innovations over the years, which also reflected the debate over “class” and “race”. The idea of a “colonialism of a special kind” was followed on the macroeconomic level by the debate surrounding the concept of “racial Fordism”. Stephen Gelb had adopted the concept of Fordism from the French school and introduced it to South Africa. “Racial Fordism” now served to analyse the “caricature” of South African Fordism after 1945 – mass production in a country where the majority of the population was excluded from mass consumption (Webster, 1999: 32. Cf. also Webster, 2001: 199).

Sociologists also coined several terms that attempted to do justice to the racial and colonial dimension for microsociological analysis of structures of control within businesses. Following Burawoy’s publication of an essay on the “Politics of production”<sup>17</sup> in 1985, the concept of “racial despotism” met with approval. It referred to management structures based upon racist discrimination and control and became a key concept for a number of South African works.<sup>18</sup> In regard to strategies of busi-

<sup>17</sup> Webster refers to Michael Burawoy (1985): *The politics of production: factory regimes under capitalism and socialism*, London.

<sup>18</sup> “Research on the process of deskilling showed how white craft workers were able to maintain control over the job by resorting, through their craft unions, to explicitly racist forms of job protection. I called this

ness management, the terms “bifocal managerialism” or “colonial managerialism” also gained currency.<sup>19</sup>

Von Holdt continued this line of thought in his work on change in the workplace, using the term “(neo-)apartheid workplace regime” (see below for a discussion of his work). The issue remained current. Webster named it as one of the discipline’s three most important innovations – besides social movement unionism and the expansion of the term of labour (Interview Eddie Webster 5 April 2004).<sup>20</sup> All of these were conceptual innovations that sought to grasp specific local phenomena for which neither traditional liberal approaches to industrial relations nor “Marxist” macrocategories were appropriate.

## 8.5 Social Movement Unionism, identity and culture in the workplace and the trade union movement

Webster emphasised the term “social movement unionism” as one of the main achievements of South African Labour Studies.<sup>21</sup> While it was first coined by Peter Waterman, a Dutch sociologist, in Webster’s opinion the concept was elaborated, developed and empirically applied in South Africa:

“(...) the concept of social movement unionism (...) has an interesting intellectual history. It emerges first from a fellow called Peter Waterman at the Institute of Social Studies in Den Haag. (...) And it was an attempt to try and understand what’s different about labour in the South to the North – Third World workers. And we basically developed that concept here first, we applied it. (...) The point is that (the concept of social movement unionism, W. K.) was taken further here. Gay Seidman did a study comparing social movement unionism in Brazil and South Africa and then Rob Lambert (...) started to apply it in the Philippines. And then it (...) popped up in North America, as globalisation. [...] That’s the case where a concept is developed first here and then developed internationally” (Interview Eddie Webster 5 April 2004).

According to conventional theory – Richard Lester and Robert Michels were frequently mentioned – trade unions go through different developmental stages, culminating in bureaucratisation and oligarchy. These usually served to institutionalise conflict. However, the black trade unions emerging after 1973 did not fit into this model. The term “social movement unionism” was supposed to help grasp the political tradition

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system of labour control *racial despotism*: racial, because one racial group dominated through political, legal and economic rights denied to others; despotic, because coercion – both physical and economic – prevailed over consent.” Webster, 1991: 55, italics in the original.

<sup>19</sup>“Our first contribution was to understand a managerialism which was bifocal: there was the world of white managers, artisans and workers (and to a lesser extent of ‘Indians’ and ‘Coloureds’) which was governed by ‘modern’ statutes and collective bargaining. There was also the world of black workers, and ‘Zulus’ which, over and above the segregationist statute of the Apartheid years, was also governed by ‘traditional’ authorities. This style of governance of people at work, we can label as ‘colonial managerialism’. A managerialism that ruled African workers differentially and elicited traditional forms of control to maximise its modernised benefits. (...) What was peculiar about Natal’s industrialisation was the coexistence of ‘scientific management’ and bureaucratic forms of control alongside such ‘indirect rule’, ‘tribal’ or ‘traditional’ forms of consent and coercion (...).” Sitas, 1997a: 7-8.

<sup>20</sup>His third point has already been mentioned above. Social movement unionism will be discussed presently.

<sup>21</sup>For a detailed version, see: Webster, 1988.

of resistance among black workers, that is, the link between the workplace, the unions and the communities. These combinations were the result of the specific sociopolitical constellation in South Africa, in which the struggle for economic and unionist rights was linked to the national struggle for liberation (Webster, 1988: 176). Social movement unionism therefore served as both the form and the strategy of the labour organisations. By using this concept, sociology was also able to address cultural identities that were not tied to the trade unions or to social class.<sup>22</sup> Bezuidenhout claimed just as confidently that social movement unionism was only just emerging in the UK and the USA in connection with the rising activist labour movements at the beginning of the 21st century, while in South Africa the term had now almost been used to death (Interview Andries Bezuidenhout 30 March 2004).

While researchers in Durban in particular found labour process theory an acceptable starting point, it was also seen as limiting. By moving away from the workplace towards the life worlds of black workers – via workers’ theatre, biographical methods, links to the Durban Workers’ Cultural Local and following the protest movement in the workplace over the long term, both in the communities and in the homes of migrant workers<sup>23</sup> – the Durban sociologists encountered a whole number of identities that were not linked to class and gave rise to complex theoretical challenges.

For example, Sitas developed the concept of “defensive combinations” in order to comprehend organised protest among migrant workers as the result of class-based and cultural solidarity. He differentiated this from “cultural formations” as self-selected and self-designed social connections in a highly segmented society. Further concepts recently developed by Sitas in a general sociology book are “dissonance” and “alterity”, a revival of the term of “anomie” as an overarching category encompassing experiences such as “alienation”, “devaluation”, “disoralia” and “degendering” (Sitas, 1997a: 10).<sup>24</sup> Following the transition process, the IOLS also encouraged reflection on the term “ubuntu” (described as “African humanism”) as a resource for transformation and organisational change in enterprises (see the aforementioned PhD projects of Bhengu and Mapadimeng).

That the question of the interrelations of race, culture and class was again or still relevant in the early 21<sup>st</sup> century, more than a decade after the end of apartheid, became evident in thoughts on the decline of the direct democratic and radical shop steward structures that had shaped the black trade unions to date. Webster explained this with the disappearance of the conditions that encouraged the empowerment of shop stewards on account of their black African identities:

“To explain this decline in mobilization among workers, it is necessary to return to the relations between race and class in South Africa. As Ran Greenstein (1993) has argued, the mobilizing power of class discourse is derived to a large extent from its association with race and more specifically with African racial identity. The transition to a different political system is beginning to sever these associations. The removal

<sup>22</sup>“In a nutshell, it was necessary to confront the ‘hidden world’ of African nationalism – its traditions, political culture and consciousness.” Webster, 1991: 57.

<sup>23</sup>Besides the works of Ari Sitas, this was also the focus of Debby Bonnin’s Master’s thesis.

<sup>24</sup>For a general sociology using these terms, cf.: Sitas, 2004.

of political apartheid has broken the link between the state and racial despotism in the workplace, dissolving the specific articulation of class in that setting. (...). The precise outcome of this disarticulation of the racial national-class-political nexus is not yet clear. What is clear is that shop stewards are not simply a product of their class location and do not only have a class identity. The power they exercised under apartheid was not a pure class phenomenon but rather was contingent on a specific political articulation. The transition to political democracy has eroded that power. (...). Ironically, the transition to democracy has eroded the power and militancy of the shop steward while leaving the pillars of the apartheid workplace largely intact” (Webster, 2001: 208/209).

This section has referred to several concepts either produced by or decisively shaped by the academic community under investigation in the present study. That in at least two cases these concepts were inspired or stimulated by the North perhaps should be stated again at this point. In order to go into a deeper analysis of theoretical developments, the following section will take a closer look at several exemplary works that were written as part of South African Labour Studies.



## Chapter 9

# The sociological output of South African Labour Studies: four books

In all the interviews, interviewees were asked for their advice on selecting texts produced in South Africa that were influential on their field of research or were groundbreaking in programmatic terms. They could name books, articles or even unpublished documents. Appendix 2 contains a list of all texts that were mentioned, ordered according to how often they were named. This forms the basis for the selection of the four books discussed here: two books from the initial phase – “Essays in Southern African labour history” (Webster, 1978) and Webster’s “Cast in a racial mould” (1985) – and two works that provide an understanding of the younger generation’s orientation – Buhlungu’s “Democracy and modernization” (2001) and von Holdt’s “Transition from below” (2003). An in-depth analysis of these four texts made it possible to track the discipline’s theoretical development in concrete terms. As many Labour Studies exponents remarked critically, these are four publications that were produced in the milieu surrounding Eddie Webster in Johannesburg. This distribution can certainly be explained by the fact that the Johannesburg centre is the largest in the country and that most scholars were interviewed there, who in turn made reference to their local colleagues. Thus the selection is in line with the SWOP’s dominance, both in terms of sheer numbers and as it is subjectively experienced, and can be justified within the context of the present study. Admittedly, this may entail a certain narrowing of the spectrum examined.

### 9.1 “Essays in Southern African labour history” (1978)

The essay collection “Essays in Southern African labour history” (Webster, 1978a), published by Ravan Press in Johannesburg, was one of the earliest works of South African Labour Studies and was emphasised as particularly significant by the academic community. The volume is made up of five parts, each with a short introduction, made of 14 articles published in the first years of the “South African Labour Bulletin”, dealing with the history of the South African labour movement from its

beginnings up unto the end of the 1960s.<sup>1</sup> The essay collection's explicit aim was to explain the emergence of the black trade union movement from the structural context of the South African economy and in particular to show the reasons for the decline and failure of earlier workers' movements. On the one hand, this was supposed to provide instructive examples for the emerging organisations, using which they could weigh various strategies' chances of success of against the historic backdrop; on the other, they could strengthen their consciousness as black labour organisations through the knowledge of earlier experiences. Apparently the series of articles was commissioned by the "Labour Bulletin" due to trade union demand for teaching materials. The introduction states that these historical analyses intend to serve to instruct the labour movement and its supporters.<sup>2</sup> This purpose can be read clearly between the lines of the individual contributions.

In order to contextualise the book, the introduction also refers to international developments in labour history from the late 1960s onwards. Three conference were also held on South Africa (Oxford 1973, University of the Witwatersrand 1976 and 1978). It is also interesting that this brief introduction ("Labour history in Southern Africa": 1-3) already makes reference to the two works listed by Devan Pillay as the foundation of Labour Studies in South Africa: Eddie Roux, "Time longer than a rope" (1948) and Jack and Ray Simons, "Class and colour in South Africa" (1969), both written by Communist Party intellectuals. The introduction lists nine further works that emerged from the movement itself and not from the universities. Even though both of the aforementioned works were not referred to much over the course of the discipline's further development – Pillay suspected this was so as to avoid a connection being made between the new Labour Studies and the banned CP – this mention shows that these books by party Communists were certainly part of the discipline's fundus. The introduction also emphasises the influence exerted by the Canadian African Studies scholar Frederick Johnstone ("Class, race and gold", 1976) and the South African historian Charles van Onselen through his work "Chibaro – African mine labour in Southern Rhodesia, 1900-1930" (1976). Both can be classed as part of the emerging historiography of labour.

The texts from the ranks of the Communist Party have in common, thus the introduction, that they equate the working class with the organised labour movement and want to give it intellectual significance. The academic works of the new Labour Studies aimed to correct some of the weaknesses resulting from this equation. The new generation of historians' position in the universities made it possible to shift focus away from the institutions towards more informal resistance activity and systematically investigate the issue of the structural preconditions (proletarianisation) of workers' movements. This aim stood for a new, independent programme of research that the emerging Labour Studies set out to follow.

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<sup>1</sup>While the book's title is "Essays in Southern African labour history", its scope beyond the Republic of South Africa is limited to a few references to migrant labour from Rhodesia, Malawi and Mozambique and to the works of van Onselen, who had discussed Rhodesia's economic and labour history, and thus is not significant for the book's main content.

<sup>2</sup>Webster confirmed this aim: "Initially such work had a didactic aim, responding to a demand from the new unions for educational material." Webster, 1991: 54.

Two important factors for the rise of labour history in South Africa are mentioned: The new student generation of the 1960s and 70s entered the debate with a fundamental criticism of liberalism and shifted the focus of socioeconomic analysis from racial aspects towards class as the central category. Johnstone, who had explained racial segregation as arising from the structural preconditions of the South African economy, had marked influence here. Furthermore, the revival of the labour movement in the 70s required a deeper understanding of the systematic suppression of independent worker organisations in the past. To provide this was one of the aims of the “Labour Bulletin” since its first publication in 1974 (Webster, 1978a: 3).

The thirteen authors of the essays contained in this volume were nearly all active scientists and researchers.<sup>3</sup> The exceptions were John Mawbey, editor-in-chief of the “Labour Bulletin”, and Peter Warwick, who worked in an international publishing house in England. The authors’ institutional affiliation reveals the interdisciplinarity of early Labour Studies, ranging from history to sociology to economics. Moreover, their affiliation with English-language institutions and the liberal “Institute of Race Relations” is striking; only Jeff Lever was at Stellenbosch. However, compared with other Afrikaans-language universities, Stellenbosch had retained a certain independence and took a moderate stance. Finally, the inclusion of two students shows that this field of study was still in its early stages.

The book is divided into five sections, which will be dealt with chapter by chapter here. The first part, “Control and resistance in the mines” deals with the early activity of black workers in the mines. The introduction to this section places these contributions in the context of historical materialism: In the early period from around 1900 to 1920, the black miners’ position in the national and regional economy was characterised by the survival of subsistence economy in their rural regions of origin, meaning that proletarianisation was in fact incomplete. At the same time, the essays collected here confirm the emergence of class consciousness among the miners and thus provide a corrective to earlier literature that had represented the black miners as passive participants during this phase, as no formal workers’ organisations existed. By contrast, here informal resistance strategies are revealed, which can be interpreted as an attempt to restore the agency and dignity of those oppressed at that time and to provide a historical perspective and accordingly greater significance for the newly re-emerging labour movement.

The content of and works cited in the individual essays will be given briefly here (see also the online appendix ESSAYS... REFERENCES), providing insight into the position taken by the emerging Labour Studies in the international context. In “*Background to the supply and control of labour in the gold mines*” (Webster, 1978b), the author provides the necessary historical background and the central concepts

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<sup>3</sup>At the University of the Witwatersrand Philip Bonner (History) and Eddie Webster (Sociology), at the University of Cape Town David Lewis (Economy and Sociology) and Ian Phimister (Economic History), in Stellenbosch Jeff Lever (Sociology) and at the University of Dar-es-Salaam, Tanzania, Dan O’Meara (History), who later also taught at the University of the Witwatersrand, as the exam questions reveal (see online appendix WITS EXAM QUESTIONS). Places of study are listed for three authors: Rob Davies had completed his PhD at the University of Sussex, Jon Lewis was a student at Cambridge and Mark Stein at Warwick. Linda Ensor and Sean Moroney were researchers at the “South African Institute of Race Relations”.

for the following articles: Wages and profits in the mining industry; incomplete proletarianisation of the black miners; non-economic factors such as legislation (passport laws, labour tax, restrictions on land ownership; institutionalisation of migrant labour through the “Masters and Servants Act”) and recruitment via monopolistic recruitment agencies (“Rand Native Labour Association”); social-political and economic differences between white and black workers; class coalition among whites.

Drawing on the theory of Johnstone, Roux and Rex, Webster draws a specific picture of the South African economy from the beginning of the 20th century up to the Second World War. His depiction is strongly influenced by the Canadian African Studies specialist Johnstone<sup>4</sup>, but Eddie Roux’s “Time longer than rope” is also mentioned several times, once again confirming the reception of non-academic texts within the labour movement. An article by Rex published in volume 1, No. 5 of the “Labour Bulletin”, titled “The compound, reserve and urban location – essential institutions of Southern African labour exploitation”, is also important for Webster’s overview. This shows that as early as 1978, writers were already drawing on the insights of the newly emerging academic community. A reference to an essay by Dan O’Meara in the “Journal of Commonwealth and Comparative Politics” of 1975 confirms this. Denis Bransky, whom it was not possible to identify more closely, is referenced mainly for the historical sources and is not important in theoretical terms, nor is the reference to Taylor and Walton’s “Industrial sabotage” (1972), which is concerned with alternative and informal forms of worker protest.

In “*Black industrial protest on the Witwatersrand, 1901-1902*”, Peter Warwick (1978) corrects previous historiography that had depicted black miners at the beginning of the 20th century as passive elements in the economic system due to their lack of formal organisation. Using seven examples from various mines in 1901 and 1902, he provides the first evidence of worker resistance uncovered in the historical sources so far. The key texts upon which his analysis is based are van Onselen’s “Chibaro” and “Worker consciousness in black miners: Southern Rhodesia, 1900-1920” (published 1973 in the “Journal of African History”, Vol. 14, No. 2). These two texts argue that resistance against exploitation needs to be seen as a continuum and does not only begin with formal workers’ organisations and strike activity. Evidence of early manifestations of worker consciousness are, for example, individual desertion, the emergence of an information system concerning the working conditions in all mines in Southern Africa, walk-outs and strikes; an assessment that Warwick also adopts. Besides van Onselen as his theoretical foundation, Warwick uses many historical documents as well as two authors it was not possible to identify more closely here to illustrate his examples.

In his essay “*Mine worker protest on the Witwatersrand: 1901-1912*”, Moroney (1978) examines the developments studied by Warwick a decade further down the line. The decline in the rural economy made wage labour increasingly available. These labourers were confronted with a massive imbalance of power in the mining sector. Moroney also deduces various forms of spontaneous resistance from the available sources. His analysis reveals that organisational potential existed despite the lack of formal struc-

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<sup>4</sup>Johnstone’s essay “Class conflict and colour bars in the South African mining industry”, published in the Institute of Commonwealth Studies’ “Collected Seminar Papers No. 10” (1970), is referenced here.

tures and that the black miners quickly discovered the weaknesses of the exploitative system and adapted their resistance accordingly. In the article, Moroney appears to be reproducing the results of his 1976 thesis. He refers to South African literature among others (van Onselen, Warwick's article in the "Labour Bulletin", a publication of the "Agency for Industrial Mission") and to Johnstone's "Class, race and gold". However, in his use of works by Kornhauser/Dubin/Ross and Clark Kerr, he is also using conventional American literature on industrial relations.

Ian Phimister's article "*Origins and aspects of worker consciousness in Rhodesia*" (1978) is dedicated to aspects of worker consciousness in the early stages of the mining industry. It differs from the representation given in previous works, according to which this kind of consciousness only developed among miners from the 1920s onwards. Phimister also refers mainly to van Onselen, who had initiated a change in perspective in the analysis of the period between 1900 and 1930. He sees the informal information system as key to identifying worker consciousness. This system quickly led to north-south migration in line with wage differentials and to serious recruitment issues in northern regions. This suggests an informed strategy of wage rises which should be termed worker consciousness. Besides the historical sources, which are studied in depth, among the authors cited van Onselen is once again central as well as other South African literature (van der Horst, Ranger, Beach on agriculture). In his use of Luxemburg, Genovese, Memmi and Fanon, Phimister is referencing some of the great names of international literature.

The second part of the "Essays", titled "Classes, the state and industrial relations", contains two contributions on legislation. In a Marxist reading, the state is depicted as the servant of capital, as legislation aims to undermine the working class, in this particular case along racial divisions. For example, the "Industrial Conciliation Act" of 1924 serves the shared interests of the mine owners and the white workers – which points to their contradictory position.

In "*The class character of South Africa's industrial conciliation legislation*", Rob Davies (1978) offers a solid foundation for the debate on trade union rights for black workers current in the 1970s. To do this, he traces the systematic development of the legislation and interprets it within the context of historical materialism, also including legislation in Australia, New Zealand, the United Kingdom and Canada. Davies uses mainly historical documents and the press for his article. Besides these, he also quotes from three longer works, Johnstone's classic and two texts from the Communist Party – W. H. Andrews, "Class struggles in South Africa" (1941) and "Class and colour in South Africa" by Ray und Jack Simons.

In "*Capital and labour in South Africa: the passage of the Industrial Conciliation Act, 1924*", Lever (1978) examines the political decision-making processes involved in this legislation. He depicts the positions and strategies of those affected and those participating in the decision-making process and their respective representatives in detail. He focuses particularly on the debate on the exclusion clause for "natives with a passport". The "Industrial Conciliation Act" was a key element of South African labour legislation, determining the framework and the power relations for wage negotiations and influencing all subsequent trade union activity, as it codified a

two-track system of industrial relations divided along racial lines. The regulation and institutionalisation of wage negotiations for white workers and the exclusion of black workers from the regulations thus represents a lesson in political economy. While the Act regulated one problem successfully, it thus created another: the status of the black workers, which was once again being questioned now in the 1970s. Lever also refers mainly to historical documents – the texts of laws and sources on the political decision-making process. The literature referenced includes South African works (Hancock/Smuts, Simons/Simons, Gitsham/Trembath) as well as Johnstone yet again, but also contains Ralf Dahrendorf, “Soziale Klassen und Klassenkonflikt in der industriellen Gesellschaft” (1957). Both of the essays in the second section were able to delimit the legal framework of trade union activity, offering suggestions for future trade union strategies through their historic-materialist analysis and interpretation.

The third part, “Early trade unionism”, sketches the history of the African labour organisations after the First World War and presents case studies for the various time periods. The main problem at each of these various points in time was the exclusion from the Industrial Conciliation Act: The black trade unions were unable to force the business owners, the institutions of the existing system of industrial relations (Department of Labour, Industrial Councils) and the registered trade unions to cooperate, but were instead dependent on their goodwill. But as this was not forthcoming, each attempt at organisation was prevented through repression and restrictive legislation. None of the attempts to date had been able to move from a temporary movement to a stable organisation. These articles can also be interpreted pedagogically, as lessons for the newly emerging movements of the 1970s.

In “*The decline and fall of the ICU – a case of self destruction?*”, Bonner (1978) examines the rise and fall of the Industrial and Commercial Workers’ Union of Africa, founded 1919 in Cape Town, which in the mid-1920s was the largest trade union the continent had ever seen and which ended in 1931. Bonner enquires into the reasons for the decline of a movement with such massive potential and, going beyond the superficial explanations hitherto given, cited the weaknesses in the ICU’s ability to carry out economic and political analysis, which led to weaknesses in its strategies. Thus the ICU’s explicit and justified aim was a fundamental redistribution of economic and political power. But without any coherent theory on the country’s economy and society, it remained unclear how this was to be brought about. Thus organisation at the grassroots level, at company level, was neglected and no recognition of the trade unions was demanded. Nor did the ICU link its political rapprochement with the Labour Party with any demands for concessions. It soon came to regard international activity as a substitute for local activity, that is, it relied on international pressure instead of pressure at the grassroots level. Most of its members were not industrial but agricultural labourers, widely dispersed, isolated from one another and thus impossible to organise effectively or provide trade union protection for. Bonner saw the ICU’s main strategic mistake as not relying on the economic power of an organised body of industrial workers, but instead attempting to be politically active: an approach doomed to failure, given the structural conditions of the time. At least the ICU experience raised workers’ awareness. Thus he deduces: “In a sense the very memory

of the ICU was to prove instructive, an encouragement and a warning to all who followed on" (Bonner, 1978: 120). In his article, Bonner refers to early non-academic literature (Roux, Simons/Simons, Kadalie) as well as to academic texts by South African researchers and students (Diamond, Smith, Wickins, Slater, Swanson). The only foreign author cited is S.W. Johns (Brandeis University, University of Zambia, later Duke University), with his historical work on the South African trade union movement.

Jon Lewis (1978a) deals with the next time period in his essay "*The new unionism: industrialisation and industrial unions in South Africa 1925-1930*". After the old, established trade unions were politically incorporated after 1924 and the ICU had collapsed, the composition of the working class changed with the rise in the manufacturing industry. Government policies, economic problems and the capitalisation of agriculture increasingly drove the rural population – both white and black – into the new industries. White women and black factory workers played a significant role in the new trade unions from the mid-1920s onwards. This had different effects on the different segments of the working class: Many of the black workers carried out semi-skilled activities and therefore were not easy to replace in the workplace and more frequently settled in the cities. This "Bantu proletariat", an increasingly stable black working class, now had the chance to develop class consciousness. Unskilled white workers suffered most strongly from the disparity in income and were constantly at risk of being dequalified and having their wages lowered. They often played an ambivalent role in the emerging unions, of which Lewis examines the umbrella organisation FNETU (Federation of Non-European Trade unions) founded in 1928 more closely. He explains its decline following the world financial crisis of 1931 by its close links to the Communist Party, among other factors. Lewis emphasises the significance of these trade unions between 1925 and 1930 as an "interracial phenomenon". This was primarily due to the fact that the workers of different origins carried out similar functions in the manufacturing industries. The class situation was predominantly shaped not by race, but by the economy. Lewis draws on many historical sources. His list of references is extensive and includes mainly South African literature: Members of his own academic community (Lever, Bonner, Kaplan, Lewis), extra-university intellectuals (Kadalie, Wolpe, Roux, Hepple, Githsam/Trembath, Simons/Simons, Sachs). The only foreign references are Engels, cited in Hyman's "Marxism and the sociology of trade unionism" (1971) and Hinton's "The first shop stewards' movement" (1973).

In "*Max Gordon and African trade unionism on the Witwatersrand, 1935-1940*", Mark Stein (1978) recalls Gordon's efforts as secretary of the African Laundry Workers' Union and later of the Joint Committee of African Trade Unions and as the founder of the African General Workers' Union (1938). The first of these is one of only two African trade unions to survive the Great Depression. Gordon's success was based mainly on his activity on the Wage Board and on his cooperation with the Department of Labour. It is to Gordon's credit that he did not use the union as a political forum for his Trotskyism, but behaved very cautiously in political terms – once again, a lesson for the future. Stein draws on many historical sources in his article. He also refers to literature produced in Communist Party circles (Roux, Andrews) as well as

Saffery (South African Institute of Race Relations, trade unionist) and “The Bantu in the city” (1938) by an American missionary living in South Africa.

The fourth part of the “Essays”, titled “Class and Afrikaner nationalism”, contains contributions on the Afrikaner labour movements. The main concern here is to relativise the significance of nationalist ideology, emphasising this part of the working class’s class consciousness and pointing out possibilities of non-racial class alliances.

Thus Dan O’Meara (1978) provides an example of the relationship between Afrikaner nationalism and class consciousness in “*White trade unionism, political power and Afrikaner nationalism*”, using the example of the mining union and for the first time emphasising this nationalism’s class basis. He examines the time between 1933 and the beginning of apartheid, a time marked by steady industrialisation and economic growth on the one hand, and the rise of Afrikaner nationalist ideology on the other. O’Meara sees the class structure of exploitation and racial segregation emerging clearly in the tension created by the conflicts surrounding the South African economic and social system. He develops his own account as a review and criticism of Naude’s historiography<sup>5</sup>, which was an interpretation following the nationalist Hertzog and the “Nasionale Raad van Trustees”, an institution promoting the ideological strengthening and political enforcement of Afrikaner nationalism, behind which was the “Broederbond”. O’Meara counters Naude’s history of personalities with an analysis of structural conditions. His analysis of the socioeconomic conditions and political strategies reveals that the assumption of an essential unity of all Afrikaners that transcended all other identities was in fact a myth, and that the class interests of the Afrikaans-speaking mine workers were long opposed to cultural mobilisation. Only once the partly Afrikaans-speaking leftwing leaders were banned from trade union leadership following the Suppression of Communism Act of the 1950s was the Christian and nationalist ideology of the “Raad van Trustees” able to claim the Afrikaner miners. As far as references are concerned, this article represents a rare case of a detailed reading and criticism of an Afrikaans work. None of the other South African Labour Studies texts analysed as part of the present study does this. For his criticism of Naude, O’Meara also used Johnstone and, from the South African literature, Kaplan, Moodie and Hepple.

In “*Solly Sachs and the Garment Workers’ Union*”, Jon Lewis (1978b) describes a counterexample to O’Meara’s study of how a trade union was taken over by the nationalists. He examines the case of the Garment Workers’ Union (GWU) under the leadership of Solly Sachs, which was not as strategically important as the Miners’ Union. But Lewis also provides a number of further factors for resistance to the “Raad van Trustees”: The union organised primarily newly proletarianised, Afrikaans-speaking women, who had recently arrived in the cities and were working under conditions of extreme exploitation. The GWU served their interests through concrete offers of support. Furthermore, it respected the Afrikaner women’s cultural heritage and did not leave this potential resource for mobilisation to the nationalists. Sachs also pursued a policy of working class independence through political action. He was able

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<sup>5</sup>He refers to Naude, Louis (1969): *Dr. Hertzog, Die Nasionale Party en Die Mynwerkers, Nasionale Raad van Trustees*, Pretoria.

to explain and render comprehensible the Afrikaner women workers' situation within the context of class. Besides publications by Sachs himself, Lewis's article also draws on the works of O'Meara and Thomas, both South African authors, and by Carchedi (University of Amsterdam) and Poulantzas.

Following on from Lewis's article on the GWU, Mawbey's "*Afrikaner women of the Garment Union during the thirties and forties*" (1978) provides three annotated autobiographical extracts from the lives of GWU members as an homage to the trade unionists of the GWU and their interracial solidarity. The biographical portraits of Hester Cornelius, Katie Viljoen and Anne Sophia Swanepoel, which Mawbey took from the GWU archives, provide an impressive illustration of their working conditions, their efforts within the trade union and their defence of the GWU against the attempted takeover by the nationalists.

Finally, the fifth part of the essay collection, titled "Organized labour under Apartheid", analyses the relationship of the registered trade unions to the black trade union movement under the conditions of apartheid legislation, underlining the contradictory attitude of the recognised unions towards the question of coloured, Indian and African workers. The short introduction to this section characterises the 1940s as a time of industrial unrest – the increasing proletarianisation of the African population, their unionisation through the Council of Non-European Trade Unions (CNETU), for example, ANC activity, the 1946 miners' strike. In the 1950s, conflicts primarily concerned the racial segregation of the trade unions and job reservations for whites. On the side of the state, the interests of trade and industry, which wanted to stabilise the workforce, were opposed to those of the mine owners, who desired to preserve migrant labour. This was reflected in the contradictory policies of the United Party, which represented both sectors.

In "*TUCSA's relationship with African trade unions – an attempt at control 1954-1962*", Ensor (1978) investigates the Trade Union Council of South Africa's stance towards the African trade unions. The unions in the TUCSA had united with the coloured and Indian skilled and unskilled workers out of economic self-interest (mixed trade unions), but wanted to adhere politically to the ideology of white dominance. As the mixed trade unions had never campaigned for the rights of coloured workers and workers of Indian descent, rather hindering their political struggle, Ensor suspects that the TUCSA's demand to recognise the African labour organisations also represented a strategy of economic incorporation and institutionalisation of conflicts that aimed to prevent more far-reaching political conflict. The white unions' own interests were served in that a wage rise for black colleagues would lead to a rise in wages for all if wage disparity was to be maintained; in that an improvement of living conditions would aid farther-reaching political demands; and, thus the assumption, in that a rise in income would boost the entire economy, which would benefit everyone. If they did not want to accept a subordinate role within the registered trade unions, the conditions of the time factually left black worker representatives with no alternative to political struggle of the kind the South African Congress of Trade Unions (SACTU) wanted to carry out. In 1955, the SACTU's political programme made it a threat to the TUCSA. The SACTU took a political line, as the Afrikaner workers'

main problems were with the state and legislation. However, Ensor recognises that under the conditions of the time any political involvement automatically meant that any representative function in economic events became impossible. Nevertheless, for some years the SACTU was able to develop into a serious alternative. However, its fate was sealed by the fact that – aside from the existing structural challenges – the TUCSA refused any kind of cooperation and support. After bans and police operations, the SACTU thus came to an end in 1965. The author of this article draws nearly exclusively on historical documents. It was not possible to clearly identify the institutional affiliation of the author of the only book referenced, “The South African Congress of Trade Unions” (1975): E. Feit.

The essay collection concludes with Lewis’s “*Registered trade unions and Western Cape workers*” (1978). Lewis criticises that literature to date has hardly analysed the registered trade unions at all, as these were equated with representative bodies for the white workers. However, in the Western Cape many coloured wage earners and in Natal many Indian workers were also organised in the registered trade unions. In his essay he concentrates on the organisations in the Western Cape. To gain an understanding of their working, he examines not only ideological factors but also the composition of the working class according to educational level, the nature of the work process and the political context. Once again, South African literature predominates the last article – the Simons, Rob Davies, Muriel Horrell.

The online appendix ESSAYS... REFERENCES includes a list of the works cited and the respective frequency of their citation according to chapters. Table 9.1 summarises the citation patterns of all the articles and distinguishes between the type and origin of the texts<sup>6</sup> (Table 9.1).

Even though the individual contributions’ use of references is very different, the overview shows clearly that the book is about history: 231 of the total 386 references in the “Essays” refer to printed documents, mainly historical sources in trade union archives. Some authors refer to journalistic texts. The high proportion of local and regional rather than overseas literature used is also striking: almost 4/5 of references are to South African or African texts. When compared to the statements made in the interviews, it is somewhat irritating that publications from the ranks of the Communist Party were used heavily. This contradicts the assertion that the Labour Studies community took these works into consideration but took care not to let any connection become publically visible for strategic reasons. While this may hold true for its political work, the claim is blatantly wrong in regard to its publications. This is all the more surprising as “Essays in Southern African labour history” brings together articles from the “Labour Bulletin”, which, as mentioned above, was a popular journal and thus did not benefit from the protection offered by academic freedom to the same degree. One partial reason for this contradiction may be that the “Bulletin” fell back increasingly on academic writing shortly after its initial phase due to increased repression, something also encouraged by its editor at the time, Jon Lewis. Nonetheless, the articles examined here clearly aim to work through the trade unions’ past for

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<sup>6</sup>Chapter 12 (Mawbey, 1978) is left out here, as this article is an edition of biographical portraits that does not use any secondary literature, as already mentioned above.

Table 9.1: Reference patterns “Essays in Southern African labour history” , ed. Eddie Webster, chapter by chapter according to type of reference

Author	Reference type									Total
	European and American Literature	(South) African Literature except students' theses	Student Theses	Non-academic Journals	Interviews	Press	(Historical) printed documents	Statistics	Others and unclear	
1. Webster	1	2	-	1	-	-	-	-	4	8
2. Warwick	1	3	-	1	-	-	-	-	-	5
3. Moroney	3	2	3	1	-	-	-	-	-	9
4. Phimister	3	16	-	-	-	9	48	-	6	82
5. Davies	1	2	-	-	-	6	15	-	-	24
6. Lever	2	4	-	-	-	6	52	-	2	66
7. Bonner	1	8	1	-	-	-	-	-	-	10
8. Lewis	2	30	-	3	-	-	72	-	-	107
9. Stein	3	3	-	-	-	2	15	-	1	24
10. O'Meara	1	4	-	-	-	-	-	-	-	5
11. Lewis	2	4	-	1	-	-	-	-	-	7
13. Ensor	-	-	-	-	-	3	20	-	1	24
14. Lewis	1	3	-	1	-	-	9	-	1	15
Total	21	81	4	8	-	26	231	-	15	386
<p>“Historical and printed documents” includes all references to archive materials such as minutes of meetings, statements, union publications, as well as materials and texts by the government, non-governmental organisations and courts. “Statistics” includes all references from which numerical information was taken.</p>										

the unions, to increase their consciousness by identifying continuities and to reveal strategic options such as the mistakes of the past. Thus the contradiction cannot be resolved.

Around a fifth of the literature referenced comes from overseas, exclusively from Europe and the USA. Many of the 21 references are to Johnstone. Besides the aforementioned strong reception of texts from the Communist Party, it is also striking that the authors avoid making explicit reference to Marx, although the influence of historical materialism is unmistakable in their works. Whether this indicates that Marx was “even more forbidden”, so to speak, than the Simons, Roux or Wolpe, or that

he was hardly read in the original, only through secondary literature, must remain undecided.

“Essays in Southern African Labour History” can be seen as the starting point of South African Labour Studies in three ways: in terms of its theme, the book deals with the past experiences of South African labour history and thus lays the foundation both for academic work on labour and industry since the Durban Strikes and for political action and trade union strategy. The researcher-activists of the time thus doubly needed the material, and it could be used for educational purposes in the trade union movement. By editing groundbreaking articles from the “Labour Bulletin”, the volume also created an academic community made up of representatives from various disciplines, who became recognised as Labour Studies specialists through their work’s publication in this book. The references made within articles to contributions within the same volume already suggests some solidarity and mutual attention among the authors. Lastly, the book laid the foundation for the academic teaching of the new Labour Studies, as has become evident in the interviews and has been confirmed by the analysis of exam questions in industrial sociology.

## 9.2 “Cast in a racial mould – labour process and trade unionism in the foundries” (1985)

Eddie Webster’s “Cast in a racial mould” was cited most frequently in interviewees’ responses to the question of which books and essays were of central importance for South African Labour Studies (for a complete list of all the texts mentioned as important in the interviews, see Appendix 2). Based on Webster’s PhD thesis of 1983, this work was published by Ravan Press in Johannesburg in 1985. It introduced labour process theory to South Africa, which was to significantly influence the discipline. In this discussion of the work’s main hypotheses, first its main content and the structure of its argument will be presented.

The text’s starting point was the debate raging in South Africa in the early 1970s on whether economic growth and industrialisation would have a liberating effect and cause the downfall of apartheid (O’Dowd, liberalist thinkers), or whether to the contrary, capitalist development would in fact strengthen the country’s social system based on racial segregation (Johnstone). Webster noted that the way this discussion was carried out focused one-sidedly on the nation’s dominant institutions, while emerging organisations – in concrete terms, the rising black trade unions – were being ignored.

Following the 1979 Wiehahn Commission and the changes introduced to the system of industrial relations in its wake, South Africa for the first time had the basis for national mass trade unions. Webster’s work was devoted to the question of the effects of changes in the labour process on the workers’ organisations, illustrated by and discussed using the example of the foundries. He thus linked the transformation of the labour process to the segmentation of the labour market. Non-economic factors, particularly the attitude taken by the South African state as well as political movements, needed to be taken into consideration. The book is divided into three parts and 12 chapters overall, preceded by an introduction which provides the theoretical

foundation. The following summary of the content will follow this structure, after which an analysis of the works cited will follow in order to draw conclusions on the structure of the book's content.

The introduction locates this study in industrial sociology within the theoretical framework of Marxist political economy, the most important research, authors and writings of which are briefly sketched, justifying the relevance of the book's research and line of investigation. The first volume of Marx's "Capital" provides the foundation for Webster's research framework and conceptualisation.<sup>7</sup> The definitions of the most important concepts – the workforce, the accumulation of capital, absolute and relative added value, the various phases of the labour process – also draw on secondary literature and theories that develop Marx's approach further (Landes, Marglin, Palloix, Maxine Berg). Webster then introduces Braverman's "Labour and Monopoly Capital" as a theoretical framework, according to which the transition from competitive to monopoly capitalism entailed a key shift in the labour process (Taylorist control of work).

The literature on the strategies employed by capital in its attempt to subordinate labour in the production process motivated Webster to investigate the opposite viewpoint. In his opinion, Braverman had neglected to identify which opportunities the development of machine manufacturing opened up for organisation in the workplace. It was Webster's express aim to show how workers resisted subordination to and control by capital. In order to do this, he studied the trade unions in the South African foundries from the end of the 19th century up until the beginning of the 1980s. In his reference to the trade unions' power of resistance, Webster set out to challenge all existing socialist theories – Lenin, Michels, Trotsky – and industrial sociologies – such as C. Wright Mills, Lester, Flanders, Bell, Coser, Kerr, Dahrendorf, Lipset – which claimed that even workers' organisations were unable to withstand the inherent tendency of every organisation to turn into an oligarchy. Webster bases his criticism of the oligarchy hypothesis on Hyman's works among others. Hyman re-evaluated the pessimism over the trade union development following the rise of trade union movements in the 1960s, defending their potential to counter the dominant structural functionalism.

Authors such as Elger, Penn and Parkin take this as the starting point of their research. The introduction of modern production technologies created new power relations within factories, enabling the strategy of closure to control the labour process that craft unions pursued; and new forms of worker organisation in the phase of machine production: the industrial unions. The criticism and development of Braverman's theories by Hyman, Elger, Edwards and others formed this fundamental basic hypothesis for Webster's study: "These two forms of worker resistance – the resistance of deskilled craft workers and the new forms of workplace organization among semi-skilled and unskilled workers – provide the basis for this study."<sup>8</sup> Moreover, he

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<sup>7</sup>"The foundations for an analysis of the transformation of the labour process were laid over a century ago by Marx in Volume I of Capital. It is thus appropriate to begin with an exposition of that forbidding, unavoidable book. This chapter is not, however, an exercise in social theory so much as an attempt to provide the non-specialist reader with an understanding of the concepts which constitute the theoretical ground of this study." Webster, 1985a: 1.

<sup>8</sup>Webster, 1985a: 14.

aimed to examine the conflicts between the different types of worker representation arising from the situation described above. These emerged particularly strongly when changes in the labour process were not synchronous, but instead – as is shown for South Africa – different labour processes took place side by side in the same factory.

Webster chose the foundries for his study as these formed one of the most important branches of the metal industry and of South African industry as a whole; furthermore, he had access to the necessary material. He based his study on the development of two workers' organisation in the metal industry, the "Iron Moulders Society" (IMS) and the "Metal and Allied Workers Union" (MAWU).<sup>9</sup> Webster chose to use several different methods of analysis. For the early developments in the workers' organisation he used historical documents from the IMS archives; in order to capture contemporary data he carried out four semi-structured interviews. Biographical excerpts from the lives of five workers in the metal industry supplemented, deepened and illustrated the conditions existing at various points in time and in the various branches of the foundries.

The leading question in the first part of the book – "Part I: The colour of craft" examines the skilled foundry workers' reaction to the devaluation of their qualification and their loss of control in the labour process following the transition from craft to machine production. The second chapter, "The heyday of the labour aristocrat: the stage of manufacture 1896-1930", traces the early phase of the IMS, founded in 1896 by skilled craftsmen, to which all foundry workers of a factory were obliged to belong ("closed shop") and which supervised training and negotiated rates of pay. This strong position in the early days was gradually weakened by the introduction of machines and the employment of less qualified non-white workers in formerly reserved positions from the 1920s onwards. This started long discussions on whether these competitors should be admitted to the IMS or excluded from it. This process is traced in the third chapter, "Contesting skill – deskilling and the transition to machinofacture", which covers the 1930s to the 1950s. The fourth chapter takes a closer look at Taylorist theory and practice in the foundries following the Second World War.

In the fifth chapter, "From craft to colour: the IMS and job protection, 1944-68", the main focus lies on how the skilled foundry workers reacted to technological innovation after World War II. The opening up of the IMS to production foundries in 1944; its use of its position in the national industrial council to reserve jobs for its members; and the dividing lines between the African "operators" and white "skilled workers", which were increasingly defined along lines of race rather than qualification, are of interest here: "The age-old form of craft protection – the closed shop – now appeared in racial guise; craft and colour coincided" (Webster, 1985a: 94). This was only made possible by the legislation of the Industrial Conciliation Act of 1956. The government had thus intervened in industrial relations and tried to solve problems through racially defined job reservation: "It was out of the complex interaction between state policy, employer strategy and iron moulder reaction that a more racially-explicit form of protection for iron moulders emerged" (Ibd., 106). The only power to negotiate remaining to

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<sup>9</sup>The IMS had moved its archive to the University of the Witwatersrand, where Webster had easy access to the required historical documents. The MAWU was particularly active in Transvaal, the region around Johannesburg, and was thus easily accessible.

the Iron Moulders Society was its members' skin colour. Webster thus concludes: "The very necessity of formalizing their protection by resort to colour was a measure of their defeat. If they saw it as a victory, it was clearly a pyrrhic victory as the subsequent decade so clearly revealed" (Ibd., 117).

The first part of Webster's work thus delineates the craft workers' resistance to the devaluation of their skilled craft and to wage reductions. These workers were able to retain their privileges and the technical control over parts of the labour process for much longer than technological progress would have led one to suppose. Skilled jobs were preserved for a long time in the foundries, which contradicted the theory that craft skills lost their significance over the course of changes to the labour process. At the same time, privileged positions in the factories were defined ever less by qualification level and ever more by skin colour. According to Webster, this was to lead to a crisis of control in the foundries in the 1970s.

The second part of the work is concerned with this control crisis. The main issue it investigates is whether an analysis of the foundries is able to confirm a possibility that Braverman neglects: that machine production leads to new forms of worker organisation, thus changing the power constellations in conflicts over control at the workplace. In order to work out how the assumed crisis of control in the South African foundries came about, Webster outlines the dualistic structure of industrial relations in greater detail: The National Industrial Council provided a legal and institutional framework within which both white and coloured workers could assert their rights. By contrast, African workers by definition were not employees, held no negotiating power and were subject to unilateral despotic control. Following the Durban Strikes, the Bantu Labour Act set up "liaison committees" that upheld the segregated system. These committees were made up of management and workers, but were usually dominated by management – for example, the chairman was appointed by management – and had a purely advisory function.

"Managerial resistance to Black unions, 1973-1977", the sixth chapter, traces the beginning of the control crisis, which began with first attempts among black workers to organise themselves in trade unions and thus challenge the dualistic structure of industrial relations. Since the 1960s, which is when Webster identifies the restructuring of capital and transition to monopoly capitalism, the black skilled and unskilled workers had become central to the labour process, so that the preconditions for industrial trade unions now existed: a homogenous workforce, connected through the technologisation of production, which furthermore was developing the class consciousness needed as a result of the rising struggle against apartheid. Webster illustrates the development of the black trade unions using the example of the MAWU, founded in 1973. The recommendations of the Wiehahn Committee played a decisive role here. Following the broad anti-apartheid movement after 1976, the Committee was tasked with undertaking an analysis of the South African economy; in 1977, it recommended registering African unions in the Industrial Council system and thus rendering them subject to control. The aim of this deracialisation of industrial relations and inclusion of black workers in the Industrial Council system was supposed to separate industry from the political and urban movements.

In the seventh chapter, "Opening the closed unions: restructuring the racial division of labour", the author analyses the reactions of the established white workers' organisations. This trend of more and more job categories opening up to Africans continued, although the craft unions had agreed under the condition that their members were given better positions. 1978 marked a turning point, in that the craft unions now decided to include Africans in registered labour organisations, thus falling into line with state strategy following the Wiehahn Commission. One year later, the IMS opened up membership to blacks as the first registered trade union to do so. The goal was to control trade union membership and prevent the formation of separate unions. In contrast to the tactics employed by other unions, the main concern was not an expansion of the organisation into an industrial mass trade union, but simply the preservation of control over the foundry industry. Black workers were now confronted with the development of two rival types of organisation: on the one hand the formerly white trade associations, which were now opening up to and massively recruiting blacks, and on the other hand the emerging independent black trade unions.

The opening up of the formerly white trade unions also made it more difficult for the newly formed unions to establish themselves and develop a strategy. Webster shows their reaction in the eighth chapter by looking at the international relationships between trade union movements among other factors. He uses the example of the International Metalworkers Federation's (IMF) regional activities, which were coordinated via the South African Coordinating Council (IMF-SACC) founded in 1974.

The third part of the book focuses on the developments of the black trade unions after the Wiehahn and Riekert reforms, which relied on incorporation and new segmentation.<sup>10</sup> During this time period, resistance to the planned incorporations rose, facilitated by the federation FOSATU. This resistance, which ran counter to official expectations and aims, ultimately was the result of the one-sided and limited orientation towards deracialisation in the workplace while failing to include and change the context of society as a whole, which continued to be racially structured. This in fact increased both the demands at the workplace and their vehemence. Drawing on Cassim and Edwards, in Chapter 9 Webster characterises the South African labour market as divided into three segments: the secondary, the subordinate primary and the primary labour market. Each segment corresponded to a specific form of company control: simple control in the form of a foreman or supervisor in the secondary labour market, technological control through the technologisation of the labour process in the subordinate primary labour market, and bureaucratic control through the institutionalisation of hierarchical power in the independent primary labour market. The employment structure in the foundries – three segmented labour markets – was the result of the historical segmentation of the labour process. Here Webster adopts Edwards's analysis, according to which segmented labour markets are not first and foremost tied to the different qualifications of the working population, but rather to the respective functioning of the labour process and the associated systems of control.

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<sup>10</sup>The Riekert Commission, tasked with formulating suggestions for using the potential of South African workers, recommended a new segregation within the African workforce, between those with indefinite leave to remain in urban areas on the one hand and those without such an unlimited permit on the other.

The link between control in the factories and outside the workplace was of central importance here. Different control mechanisms in the labour process were possible because workers were also subject to different regimes outside the factories. The power constellations in the factory needed to be placed in the wider context of white power and black powerlessness. That is, the intervention of the apartheid state played a key role in the fact that blacks worked in the secondary labour market and whites in the primary labour market. Migrant workers were subject to the influx control system and thus were faced with the most difficult conditions, but precisely this made them the most militant segment of the working class. While they were easy to exploit, the migrants lived crowded together in large hostels and were all confronted with the same problems every day, which made it easier for them to communicate and organise themselves. Due to their specific situation, they were more likely to form an active trade union movement than local residents of black settlements. Without any chance of promotion, they needed to improve their current and only possible job if they wanted to improve anything at all.

Chapter 10, “Reform from above: first steps in the deracialization of the Industrial Council System” looks at the change of industrial relations on a national level. The conservative trade unions in the National Industrial Council opposed the unionisation of their black colleagues, who they saw as a political threat, and supported the continuation of the liaison committees. Others decided in favour of mediating strategies such as setting up black parallel unions or directly recruiting blacks into separate branches, as in the IMS for example. The latter thus supported the incorporation of the black trade unions into the National Industrial Council and demanded it be restructured accordingly. In 1983 the MAWU was supposed to join the National Industrial Council as the largest independent trade union. Webster rejects the commonly accepted opinion that this represented a victory of the incorporation strategy and takes a closer look at the particular details of this joining.

The eleventh chapter, “The challenge from below: the rise of the shop steward movement”, analyses the MAWU structures in greater detail. These were based on three organisational principles: building up stable grassroots representation, negotiations at factory level and worker control. Given the rise in membership, the appointment of a full-time administrator in 1982 and the increasing complexity of the agreements reached, Webster comes back to the question of bureaucratisation. In his opinion, bureaucratisation is not always the case, as the oligarchy theory ignores informal procedures. For example, in the shop steward movement in the East Rand, the figure of the trade union official only appeared afterwards. The opinion prevalent in the MAWU that the trade union should be controlled only by organised workers is historically rooted in the struggle against the liaison committees. After all, supporters of the oligarchy theory, such as Michels, only looked at the national level and at where decisions were centralised, in the case of the MAWU at the close connection to the FOSATU, which thus initially appears to confirm the hypothesis. However, member participation on the factory level needs to be taken into consideration; worker control should not be reduced to participation, and other mobilisation structures in the workplace need to be considered. The small-scale, clear relations of the shop steward councils for example are well-suited to direct democratic practices. The organisa-

tional principle of worker control in the MAWU is significant as it is able to disprove the theory of the institutional tendency towards oligarchy, which supposedly is also inherent in trade unions. Furthermore, this represents an organisational foundation upon which the working class is able to maintain their political independence within the wider political movement.

The role of the shop stewards as a link between the workers and the popular movement has remained unresolved so far. However, in the MAWU's demands, Webster saw a clear connection to superordinate political aims beyond the workplace.<sup>11</sup> Drawing on Thompson's distinction between "production politics" (wage negotiations) and "global politics" (disputes over property and production distribution on the level of society as a whole) as trade union strategies, Webster develops the hypothesis that a new type of trade union movement has emerged with the independent black organisations. In his summary in Chapter 11, the concept of social movement unionism already begins to emerge.<sup>12</sup>

Chapter 12, "Cast in a racial mould: the birth of a working class politics" summarises the work's key insights. Capitalist development had not toppled apartheid; far from it. The special feature of the labour process in South Africa was its racially defined social exclusion.<sup>13</sup> In recent events of 1984 – the national stay-away, which students and community groups also participated in – Webster saw further signs of the emergence of a new quality of trade union politics, which he refers to as "working class politics".<sup>14</sup>

Looking at the development in South Africa from a comparative perspective, as Webster does in the last pages of his book, the importance of state intervention on the level of production through the legally regulated segmentation of the labour market is striking. This state intervention had three aspects: "This intervention is aimed at maintaining a racial division of labour (through the industrial council system); at confining blacks to secondary labour market jobs (through influx control); and at containing black unions (through their exclusion from the formal collective bargaining system before 1979)" (Webster, 1985a: 279). This is contradictory in that the state itself thus turned the economic struggle into a political one. According to Webster, in the UK or the USA the state reduced class struggle to a dispute over working

<sup>11</sup>For example, when the trade union protested against clearances of barracks settlements, spoke in favour of unemployment support or of worker participation in control over pension funds, or demanded a social wage that made it possible to support dependent family members.

<sup>12</sup>"What has emerged on the shop floor in the metal industry, then, is a type of trade unionism that has not existed before in engineering – the national mass-based industrial union. Its central features are not those of the industrial unions of syndicalist theory, or the 'business unionism' of social democratic practice: instead, emerging shop-steward structures rooted in a theory of worker control are at the heart of the promise of the new unionism. (...) The challenge facing MAWU as it grows in size is to build representative structures which can be made accountable in a real way to the rank and file." Webster, 1985a: 255.

<sup>13</sup>"The specificity of the South African labour process lies in the explicitly racial form taken by social closure. Capitalist development did not, in the short term, lead to an undermining of the racial order; instead it led, as shown in Part I, to an intensification of the racial division of labour in the foundry." Webster, 1985a: 261.

<sup>14</sup>"A mass-based, non-racial, industrial union has emerged for the first time in the foundry industry. An important feature of this union is its concentration on building shop steward structures in the foundry. By establishing independent working class organizations, the emerging unions have created the embryo of a working class politics in South Africa. This can be seen most clearly in the evolving shop steward councils which readily concern themselves with non-foundry issues, pushing unions beyond pure-and-simple trade unionism." Webster, 1985a: 278.

conditions in businesses and thus amputated its political dimension. The state served to guarantee general conditions for capitalist development, so that the capitalist conditions of production themselves no longer represented a political issue. By contrast, in South Africa the specifically racial orientation of state intervention in production and society led to a connection between politics in the workplace and general politics. This means that

“(...) the transformation of the labour process has created the potential for mass-based industrial unions, while failing to provide the conditions for their political incorporation. The dilemma facing South Africa’s system of racial capitalism lies in the fact that a process of ‘deracialization’ of the workplace has begun without an accompanying ‘deracialization’ in society at large. Rather than facilitating a separation of ‘economic’ and ‘political’ struggle, the contradictions generated by capitalist development have given birth to a working class politics. The central issues now confronting the organized working class is the form and content of this politics” (Ibd.: 279/280).

In this last chapter, Webster illustrates emphatically what the main themes discussed in the study meant for the lives and experiences of five men who worked in the metal industry at different times and in different branches: two white foundry workers from different generations, a coloured production foundry worker, and two black workers from different generations.

### 9.3 “Cast in a racial mould” – a case study for Braverman’s labour process theory?

In his thesis, Webster attempted to grasp a highly complex set of problems in both historical and theoretical terms. The work’s basic structure followed the historic and systematic sequence of management strategies attempting to gain control of the labour process. Each of these steps was then optimistically countered with the counter-strategies of the workers involved, aiming to relativise and correct the one-sided concentration on the role of capital in changes in the labour process in Marx and Braverman.

One central problem of “Cast in a racial mould” is the inconsistent definition of the term “labour process” and thus also of the term “control”, which is probably linked to the specific industrial and social context in South Africa.<sup>15</sup> Furthermore, as Webster

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<sup>15</sup>At first Webster referred to the labour process within factories, that is, the organisation and interaction of means of production, tools and workers, taking workers’ levels of qualification in the production process, which was based on the division of labour, into account. This corresponded to a focus on company-level control as in Braverman, that is, on management’s attempts to determine the use of working power in the production process, taking control of production away from those directly involved in producing. Webster countered this with the opposite viewpoint: workers’ attempts to determine how their working power was spent. Had he restricted himself to company-level control, Webster would have had to limit his analysis to the conflict between labour and capital in the immediate production process. Through concentrating on the trade union movement, Webster then links this narrower view with an analysis of the different institutions and structures through which both management and workers expressed and defended their respective positions in the struggle for control. He thus moved into trade union sociology and organisational studies, blurring the key terms defined in his first chapter. Control now also refers to management dominance in the liaison committees and work committees; the power relations in the industrial council are encompassed by it as well as the relations between the different types of workers’ associations; the control of the craft unions over their trade; and the direct democratic functioning of the black trade unions is also referred to as “workers’ control”. Finally, Webster went one step further – necessarily so! – and included the context

was able to prove, Braverman's dequalification theory – which plays a key role in the study – did not apply unequivocally to South Africa. In Webster's opinion this is due to the skilled workers' resistance. Obviously these workers were primarily able to protect their interests by making changes to the organisational structure here and there because the production structure in the foundries was a dual one – mass production and special production departments, which continued to exist side by side even after the introduction of modern casting procedures. However, this was not due first and foremost to the skilled workers' resistance, but rather – as Webster himself explains – to the nature of the regional market, in which mass production was not always worthwhile and many orders were still placed for small numbers of items. Thus there was a lack of Braverman's theory being adapted to contexts that differed from those of the USA – which also led to different results in labour sociology in Europe, by the way – or, even better, further thoughts and theorising on the situation in South Africa that went beyond mere criticism and were produced in the country itself.

Finally, the reference to Marx and Braverman led to a key weakness in the analysis of the labour process in the South African foundries: it was impossible to account for the role of the state within the same conceptual framework. In the extreme case of the strongly interventionist apartheid state, this would have led to fatal flaws in both analysis and results, had Webster not represented and analysed the role of the state appropriately in each of the processes examined, albeit without this being supported by his conceptual framework. However, particularly because of its independent broadening of focus from a two-part to a three-part constellation in industrial relations – labour, capital and state –, the book remains somewhat disappointing in regard to our question of the theoretical development of South African Labour Studies: after the elaborate empirical analysis, Eddie Webster's theoretical contribution in regard to the problems of the labour process in the South African context is somewhat more modest. The further analysis based on the concrete studies basically only covers the last two pages: the apartheid state, which initially had disproportionately strengthened the position of the white skilled workers, ultimately played a key role in the rise of the black trade unions' struggle to become a key factor in the anti-apartheid movement, moving beyond the contradictions of capitalist development. The racially structured system of segregating and exploiting various parts of the population meant that the black workers did not restrict their demands to the situation in the workplace, but instead aimed to change the wider social context.

These insights would have merited a more central position in Webster's work. Unfortunately, there is no reference back to Marx and Braverman. In which way did this result thus correspond to the initial hypotheses that Webster adopted from these two theorists? What are the insights that an analysis of the situation in South Africa could contribute to the international research context? The "comparative perspective" (Webster, 1985a: 279). aimed at that Webster mentions on the very last page

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of society as a whole: Any examination of relationships in the workplace cannot neglect the restrictions in force outside the factory – control once more, "influx control". But here he arrives more or less at where Marx situated the labour process in society as a whole – the organisation of social relations in the labour process of all of society, as opposed to the factory labour process. This leap between different levels would have needed to be developed in greater theoretical detail, which is however lacking here, so that some of the accounts given occasionally become confusing.

thus remains modest at best. Furthermore, it does not focus on other countries with a similar historic background as settler colonies, which would have seemed a natural way of proceeding. In this regard a discussion of the overlap between class and race in the South African context, if not in colonial societies more generally, would have been crucial. And when Webster speaks somewhat magnanimously of “working class politics” at the end, then the question arises of whether these – as assumed in classic Marxist theory – aimed at the abolition of capitalism and the socialisation of the means of production, or whether they rather referred to the struggle against apartheid – or both, and if so, in which order? The difficulties cited are obviously connected with the reception of foreign literature. An analysis of the works cited is able to cast further light on this issue.

The online appendices WEBSTER OVERSEAS REFERENCES on the foreign literature cited, WEBSTER SA REFERENCES on the South African literature cited, and WEBSTER SALB REFERENCES, which lists literature cited from the “South African Labour Bulletin”, provide a complete list of all texts referenced by Webster. First of all, the quantitative distribution of his citations according to their provenance and type will be analysed. In order to identify the types of reference used, the following categorisation of references is suggested here: references to non-African texts, which in this case are from the USA and Europe exclusively – the location of these references in Webster’s book, their significance for his representation of the state of research, for his theoretical framework and key concepts is decisive in determining the content’s dependence on or independence from developments in the centre. Conversely, the references to writings produced in Webster’s own region can be evaluated.

Student works are not listed under (South) African literature but are numbered separately, as the number of references to student papers gives an insight into a research field’s level of development. When such a field is still emerging and the academic community has not yet produced a great number of texts, first dealings with the topic often occur in student papers, to which the supervisors have easy access. The assumption is that the tendency to reference student works will decrease at a later point in time when sufficient publications by established scholars are available. On the one hand, their insights are integrated into larger and broader studies, on the other they possess less academic authority.

“Non-academic journals” represents a further category that provides information on the use of publications in alternative magazines, first and foremost the “South African Labour Bulletin”, as well as various categories of empirical material (interviews, press, printed documents, statistics).<sup>16</sup> Texts that could not be categorised clearly are listed

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<sup>16</sup>The disadvantage of this rather crude categorisation is that the conceptual, theoretical and historiographic contributions of the “organic intellectuals” who published in trade union magazines or similar journals are excluded from the “literature” category. However, Webster’s work made particularly frequent use of precisely these writings: He cites extensively from the minutes of meetings and gatherings of both workers’ and entrepreneurs’ associations, from publications by said associations and from interviews with individual representatives. These are often profound reflections and theoretical discussions of the issues confronting the working class. In particular, texts on trade union history – such as reviews of anniversary or annuairevents – often reveal high levels of abstraction, analysis and interpretation and were adopted as such by Webster in his work. The classic distinction between “theorists” and “informers” is thus not always appropriate here. Attention should once again be drawn to the fact that the black thinkers of the labour

under “Other”. Table 9.2 represents how much South African and foreign literature Webster referred to in each chapter and which empirical material he used.

At first sight, the structure of a case study in referencing is clearly evident: the first chapter develops the work’s theoretical framework based on key literature from the centre (68 of 75 references). The theoretical dependence is obvious: besides Karl Marx (24 quotations and references in total) and Harry Braverman (10 quotes and references), Webster also made use of other big names of American, Marxist and industrial sociology: Richard Edwards/University of Nebraska (six references) as well as L. Baritz/University of Massachusetts, Harry Cleaver/University of Texas, D. S. Landes/Harvard, Stephen Marglin/Harvard, F. Parkin/Oxford, Frederick W. Taylor and Eric Olin Wright/University of Madison, referred to once respectively.

Furthermore, in the first chapter Webster cites many theorists of the University of Warwick, where he himself had studied – Richard Hyman (London School of Economics, up until 2000 University of Warwick) (three references), Tony Elger (three references in total), Maxine Berg (two references) and B. Schwarz (one reference) – as well as several representatives of the University of Cardiff, with whom he probably became acquainted during his time in the UK – Theo Nichols, H. Beynon and Tony Lane (one reference each respectively). The same probably goes for the “Brighton Labour Process Group” (three quotes and references), on which it unfortunately was not possible to gain further information. Finally, Webster referred to individual other theorists well-known and recognised in international industrial and labour sociology circles, such as Christian Palloix/Université de Picardie (three references), Alfred Sohn-Rethel/Universität Bremen and Michel Aglietta/Université Paris X (one reference each). It was not possible to identify the institutional affiliation of P. Penn and Alan Alridge (one reference each respectively). The only reference to a South African text is P. Steward’s “A worker has a human face” – the title suggests that Labour Studies still had some way to go in intellectually legitimising the black trade unions – a 1981 student final dissertation from the University of the Witwatersrand. Parts of the biographical material on one of the five workers used by Webster to illustrate his theories are taken from this thesis. In the eighth chapter, which deals with the international relationships of the South African trade unions, Webster once again uses a larger amount of overseas literature.

The rest of the book uses a wealth of empirical material to describe one particular case – the South African foundries. More than a third of all references are to printed documents, most of them historical sources, analysed by Webster in the archives of the labour organisations under scrutiny. Materials such as the “Board of Trade and Industries Report”, “Eastern Province Yearbook”, “Department of Labour Annual Report”, texts by the employers’ union SEIFSA and publications by the government, non-governmental organisations and court decisions are also mentioned.

References to such documents are found from the second to the last chapter throughout, but understandably are concentrated in those parts of the book concerned with the history of the trade unions. Conversely, interviews and the press are drawn on

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movement in particular appear predominantly in the categories “historical documents” and “interviews” due to this categorisation.

Table 9.2: Reference patterns Webster, "Cast in a racial mould", by chapter according to type of reference

Chapter	Reference type									Total
	European and American Literature	(South) African Literature except student Works	Student Theses	Non-academic Journals	Interviews	Press	(Historical) printed documents	Statistics	Others and unclear	
1	68	2	1	-	1	1	-	2	-	75
2	5	4	-	13	1	-	56	3	1	83
3	2	4	1	13	3	2	63	-	8	96
4	8	1	2	19	5	-	41	-	2	78
5	-	7	2	5	11	-	82	5	6	118
6	6	7	4	12	12	4	18	-	4	67
7	5	4	6	2	5	4	38	7	1	72
8	8	1	-	4	3	1	19	-	2	38
9	19	19	7	6	6	2	10	2	1	72
10	3	3	1	11	12	4	12	-	5	51
11	8	6	5	15	14	12	12	2	5	79
Total	132	58	29	100	73	30	351	21	35	829

"Historical and printed documents" includes all references to archive materials such as minutes of meetings, statements, union publications, as well as materials and texts by the government, non-governmental organisations and courts. "Statistics" includes all references from which numerical information was taken.

more frequently in the later chapters. Webster seems either not to have had access to statistics, or he mistrusted them. This category included only a few references to materials such as "Union statistics for fifty years: 1910-1960", "Industrial Census", the SAIRR "Survey of Race Relations" or the 1984 ILO "World Labour Report 1. Employment, incomes, social protection, new information technology". Moreover, Webster frequently quoted from journals that can probably be attributed to the metal industry, such as "The Engineer and Foundryman", for example. In a total of 62 references, he used 39 contributions from the Labour Bulletin (online appendix WEBSTER SALB REFERENCES). This provides clear evidence of the journal's significance during Labour Studies' initial phase.

As far as local and regional literature is concerned, Webster quotes from a total of 36 different publications including student works, and does so 87 times across the entire

book – compared to 132 references overall to 49 foreign works. These references to African literature occur mostly in chapters six to eleven, which deal with the contemporary developments described and analysed by Webster's colleagues.

Some of the authors were still active in South African sociology and in the field of Labour Studies at the time the book was published, such as Ari Sitas, Debbie Budlender, Paul Stewart, and Duncan Innes. It is striking here that in terms of numbers, student works carry the most weight: Claasen's "Riekert and Wiehahn: union and migrants" (Industrial Sociology Honours dissertation, University of the Witwatersrand, 1980) was the most frequently cited work (seven references), followed by M. Cullinan, "Deskilling, technical and industrial training, and white craft unions" (Industrial Sociology Honours, University of the Witwatersrand, 1980) (six references). Paul Stewart's article "Pushing the frontiers of control: a shop floor struggle" (five references) and "Capital, State and white labour in South Africa, 1900-1960" (Brighton, 1979) by R. Davies, who worked at the African Studies Centre of the Universidade Eduardo Mondlane in Maputo (five references) also proved interesting for Webster. B. Bloch's "The development of manufacturing industry in South Africa, 1939-1969" (four references) was a UCT Master's thesis of 1980 and Jane Hlongwane, who published "The emergence of African unions in Johannesburg with reference to the engineering industry" in Coetzee's "Industrial relations in South Africa" was a trade union secretary. As her book contribution was published in an academic work, it was included in the literature of the academic community.

In summary, we can note that the references reflect the developmental level of an emerging sociological field: The Labour Studies community had only produced limited work thus far, a large part of which was not academic publications but appeared in the Labour Bulletin. The references to a large amount of student work – around a third of all references to (South) African literature – also indicates Labour Studies' youth. Given the lack of concepts and theories, Webster drew on the approaches he had become familiar with during his studies in the UK.

Thus a critical colleague saw "Cast in a racial mould" as an important, but not a groundbreaking work. "Groundbreaking" was rather applicable to labour process theory:

"But I don't think this book (Eddie Webster, 'Cast in a racial mould', W. K.) has been a seminal text in Labour Studies and in industrial sociology in South Africa. It's an important book, and there (...) are not many books published, intensive researched books, not edited selections. It's been one of the few. And 'Cast' is in this tradition. But it was not seminal in the way (...) that it would influence a series of other works. I think what did influence a series of other work was the labour process approach" (Interview Debby Bonnin 18 February 2004).

In regard to "Cast in a racial mould" we can thus agree with Sitas's criticism that the early generation of South African sociologists simply produced a series of case studies on European and American theory.<sup>17</sup> This reflects the "culture of application" in which

<sup>17</sup>Sitas sees an application of Poulantzas in R. Davies's "Capital, State and white labour in South Africa" (1979); of Goffman in van Onselen's "Chibaro" (1980); of Barrett and socialist feminists in Jacklyn Cock's "Maids and Madams" (1980); of E. P. Thompson in van Onselen's "Studies in the social and economic

sociologists from the periphery create case studies for theory from the centre. For the present study, this means that the first Labour Studies generation, of which “Cast” can be taken as representative, exhibits the traits of peripheral sociology. Webster’s thesis clearly shows a conceptual dependence on the theorists he had studied in Britain.

What detracts somewhat from the harshness of this criticism is the fact that Webster clearly aimed his work at a South African audience – and thus did not see himself as an exotic “data gatherer” for the producers of general theory in the centre. This becomes clear when he refers to geographical names without including any further explanation – had the book been written for an overseas audience, a reader-friendly map or explanation of locations might have been included. Similarly, the knowledge of some South African specialist terms is taken for granted, for example the division of wage categories or paragraphs of apartheid law. The note on the introductory theory chapter is also revealing, which intended to provide a foundation in the key terms used “for non-specialists”. So Webster either had a student readership in mind, or readers who were not trained in the social sciences, possibly non-academics. Taken together with the book’s orientation towards local readers, this corresponds to the assumption that the production of context-relevant and socially committed social science means that the academic community and its recognition are less important than the dissemination of knowledge in extra-academic circles.

#### **9.4 “Democracy and modernisation in the making of the South African trade union movement: the dilemma of leadership, 1973-2000” (2001)**

Buhlungu’s PhD thesis<sup>18</sup> deals with a problem that has been debated in industrial and labour sociology since the publication of Beatrice and Sidney Webb’s “Industrial Democracy” in 1897: the contradiction between democratic control on the one hand and organisational modernisation to increase efficiency on the other within trade unions’ organisational structure and way of functioning. Buhlungu analyses the issue using the example of the changing role of full-time trade union functionaries<sup>19</sup> in the workers’ associations emerging after 1973 in South Africa and registered under the umbrella organisation COSATU. These unions are known for their efforts to prevent

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history of South Africa, 1886-1914” (1982); of Louis Althusser in Harold Wolpe’s “Race, class and the apartheid state” (1988) and of course of Braverman in Webster’s “Cast in a racial mould”. Cf. Sitas, 2006: footnotes 48-50.

<sup>18</sup>Buhlungu’s work was only mentioned three times in response to the question of important literature (cf. Appendix 2), which may be due to the fact that it has not been published in book form. However, the fact that it was one of the most recent larger works produced in the field at the time of the present study – and furthermore the only work by a black sociologist referred to more frequently – and thus represents the new generation speaks for its inclusion in this book. That several colleagues mentioned it emphatically even though the work has not been published yet also speaks for including it here. Two books were recommended more frequently than Buhlungu’s: Maree, 1987, similar in style however to the “Essays” discussed above, and Baskin, 1991, which is more historic and descriptive in nature than theoretical; furthermore, Baskin is not a member of the academic community in the narrower sense.

<sup>19</sup>This is not based on the common definition of “functionary”; rather, Buhlungu includes all persons employed and paid by the trade unions, from the secretary-general to the cleaning staff. He distinguishes them from the office-holders elected to certain positions.

a concentration of power among functionaries by using a system of democratic worker control.<sup>20</sup>

Before the content of Buhlungu's work is examined more closely, a few quotes from the interviews with him will provide further information on his background. In contrast to the trend towards professionalisation observed in the subdiscipline, some members of the younger academic generation did not arrive in the field on straightforward career paths. Buhlungu studied African Studies in Cape Town in the 1980s and during this time worked in the ILRIG on labour movements in the Third World. In 1987 he broke off his Master's degree in History to take up work as an education officer in the Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union (CEPPWAWU), a COSATU union. He himself experienced the events his present-day colleagues wrote about: "(...) it was a very exciting moment in terms of consolidation of the movement itself. You know, the formation of COSATU, (...) the politics, the merging of political traditions within the union movement. You know, what people were writing about at the time, I was involved in it from the inside. (...). So, it was great" (Interview Sakhela Buhlungu 30 March 2004).

After the intense years spent far away from academia, Buhlungu was among those leaving the unions during the transition process as they were not happy with more recent developments:

"So I got into the union (CEPPWAWU, W. K.), I got into these issues, I got so absorbed, so immersed in the kind of day-to-day issues of the union. So then my intellectual, university-based connections (...) receded (...). It wasn't an issue. I made new connections, new networks, political, struggle or labour movement networks, independent of whatever and whoever I used to know before. And at that time, as I was saying, I didn't have much of a contact with the university-based intellectuals. I had contact with more kind of grassroots intellectuals in the movement. And besides it was busy, I was travelling a lot and I didn't have time for any other, you know, for any of these things. (...). And so in (...) early '92 I left to study. And at that time I didn't know what exactly, and where to locate. (...) I wanted to do something (...) on labour. Just to (...) give me time and a platform to make sense of that experience, that very (...) compressed, very hectic experience. So I wanted something (that) would allow me to then make sense of it intellectually. You know: What was it about? (...) What was going on? And this is the time when the ANC is unbanned, remember, so, the ANC was unbanned, and I was beginning to think to myself. And I was seeing so, the ANC was back, this is two years after the unbanning of the ANC, so the Communist Party is back, the ANC is back, (...). And there was a lot of (...) currying favour with the newly unbanned ANC (...) within the labour movement. So there were those debates, I'm sure if you look at the 'Labour Bulletin', and you will see those debates, about two heads and three heads and so on and so forth. So, I thought, one thing, I don't want to be juggling for po-

<sup>20</sup> "Worker control" is defined and understood very differently in the literature. In British debate in particular, it usually refers to the control of production in a factory by the workers. Buhlungu uses the term to refer to the control of the trade unions – committees, representation, decision-making processes, and so on – by the grassroots-level workers. Worker control is assured through measures such as the accountability of functionaries and elected office-holders, imperative mandates, and workers' right to take up leading positions in their own trade unions.

sitions anywhere. (...) some traditions within the labour movement were beginning to unravel, a little bit. And that kind of close bonds and solidarity (...). When we were working with people all the time and were facing a common enemy, there's no time to fight really, you're kind of focussed. And the traditions tend to be stronger than usual. At that time there was a kind of relaxation of the repressive machinery. And some of the traditions began to unravel. And that is in fact (...) how I came to start the whole thing, in the preface of my PhD I write about that. And I was a union official and things started happening in a different way that was not familiar to me, and I just didn't want to be part of that. So I thought okay, maybe let me go and study" (Interview Sakhela Buhlungu 30 March 2004).

After Buhlungu gave up his functionary position, he worked as the editor of the "Shopsteward", a journal for trade unionists that the COSATU had commissioned from the Labour Bulletin. Karl van Holdt, the Bulletin's editor-in-chief at the time, knew Buhlungu from their time together in Cape Town in the 1980s. He entrusted Buhlungu and Fiona Dove (formerly in Durban) with editing the new journal. Two years later, in 1994, Buhlungu left the "Shopsteward" to take up a research position at the SWOP. At the same time he was made a member of the editorial board of the Labour Bulletin, thus becoming fully integrated into the scholarly community.<sup>21</sup> For him it was important that despite the twists and turns in his career – something he has in common with many black researchers – he did not come to university Labour Studies as a complete novice. He wanted to bring his experience of working for the CEPPWAWU and the knowledge gained there into his research:

"Now, one of the things that changed with me moving into SWOP and later moving into sociology, was the fact that now I had to write, I had to engage, now I was in the field, in the intellectual kind of field, basically. (...) So that's when I started, like wearing a different hat and doing things from the other end as opposed to doing things from the inside. (...) if you had asked me in 1992, I wouldn't have said I want to be in sociology as a career or something like that. If you had asked me in 1980, something that's even, (...) that was something completely unthought of and unheard of. So (...) one thing led to another and to another, and (...) my whole life was improvised from that kind of view. (...) And there's no long-term (...) career plan that I came with. (...) because I'm not like the kind of student who did a degree, a higher degree, a PhD and got into the thing, so I didn't have that. I had long breaks between studying. So, I (...) told myself then that to make up for that lost time, if you like, I would draw on every experience I have during the breaks from study and intellectual work. I draw on those experiences directly, rather than finding new areas, for example. (...) I think there's a whole lot of issues that I have, that I would like to engage with intellectually and I want to draw on that experience. Because then it means I'm not a newcomer. Because, and this is important, because

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<sup>21</sup>“(...) two things happened then in that year (1994, W. K.). I moved out of the 'Shopsteward' and into SWOP, in terms of employment, but also then I moved out of the staff of the 'Labour Bulletin' to be an editorial board member of the 'Bulletin'. (...) So, the editorial board! (...) the icons of Labour Studies were all part of it. It was kind of that select, select club of, you know, they, all of them were there. (...) at that time you had Eddie Webster and Karl von Holdt and Phil Bonner and Ari Sitas and Johann Maree, and all of them were part of the thing. And it was very much, very much a white board. That's what it was, it was very much, very, very much a white board. Mainly men, but also some women, Avril Joffe and others.” Interview Sakhela Buhlungu 30 March 2004.

when I came to the university, I was not a newcomer any more. I could engage with people from a very solid base of knowledge that I had accumulated. The university was just there to help me, say, deepen, deepen things” (Interview Sakhela Buhlungu 30 March 2004).

Now to return to his thesis. In the first appendix, Buhlungu reflects upon some of the methodological problems of his work. He mentions methods and approaches from qualitative and quantitative social research and justifies his own eclectic approach with the object of his research: quantitative in a questionnaire survey, qualitative in three case studies and a series of interviews with selected trade unionists. Moreover, in many cases he draws on materials accessed through archive research (trade union documents, reports, publications and so on). This triple gathering of information on the same topic aims to balance and create a check for his own personal experience as a functionary, which otherwise might become too dominant.<sup>22</sup>

The first part deals initially with the contrasting organisational needs of a trade union that cause the leadership dilemma, as well as with the issue of how organisational modernisation heightens this contradiction. The first chapter, titled “Democracy versus administrative efficiency: the dilemma of leadership” discusses the relations between the union grassroots and the shop stewards elected from it on the one hand and the full-time functionaries on the other. Moreover, the first part deals with the origins of the tradition of worker control (Chapter 2).

When discussing the current state of research, Buhlungu lists the Webbs’ pioneering study “Industrial democracy”, which traces the historical development of trade unions from “primitive democracy” to the “power of the functionaries”. Lester described a similar development in workers’ organisations in the USA. In order to classify the various approaches, he uses the categorisation suggested by Hyman and, in a similar form, by Kelly.<sup>23</sup> Buhlungu criticises these different approaches as simply reproducing the picture drawn by the Webbs. Furthermore, they refer predominantly to formal structures and fail to explore the real distribution of power across all levels of the organisation. More recent studies on gender issues, the succession of generations or generational conflict in organisations and the aforementioned Australian debate have been more productive here. In his opinion, the “Marxists” have little idea of how unionist organisations actually function; on this, Max Weber is far ahead of them. Fundamentally, none of this research provides satisfactory results on the contradictory organisational needs of the trade unions.

The trade unions emerging in South Africa after 1973 placed great value on strengthening the role of the grassroots and their shop steward representatives from the very

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<sup>22</sup> Appendix 2 of Buhlungu’s work contains a list of interviewees and information on their union, position, location and date. Appendix 3 is the summary of an expert report he wrote with Eddie Webster for a SAMWU workers’ lawsuit against a SAMWU functionary. Appendix 4 contains a list of several labour support organisations from 1971 to 1999.

<sup>23</sup> This categorisation distinguishes between: optimistic approaches – Marx/Engels, who were optimistic about internal developments, even though they were sceptical of workers’ associations’ revolutionary potential; pessimistic approaches – Lenin’s integration theory, the oligarchy theory of Michels, Trotsky’s incorporation theory; pluralist approaches, which assume a more gradual differentiation between democracy and oligarchy – Banks, James; and current theories, which test the oligarchy theory and take opposing factors into consideration – Hyman and Fryer, Hemingway, Voss and Sherman and, from the Australian literature, Bramble, Kelly and Heery.

beginning, so as to prevent a concentration of power with the functionaries (a direct democratic versus a bureaucratic or oligarchic model). Buhlungu now poses the justified question or what the effect of this organisational structure is on the unions' efficiency.

Of the South African authors, he consults Friedman, Maree and Webster, all of which write very optimistically on the democratic functioning of the South African trade unions, but without having examined their internal decision-making structures in greater detail. With his PhD thesis, he thus aims to create the first systematic study of the role and position of full-time trade union functionaries in South African trade unions. Their working conditions had already been dealt with by MacShane, Plaut and Ward, Baskin and Collins, and by Buhlungu himself in his preliminary research (Master's thesis). He agrees with South African literature to date in that it appears to contradict Michels's oligarchy theory.

Sociologists such as Webster and Seidman recognised some time ago that trade union movements in emerging countries or transitional societies differ from those in industrial nations and coined the term of "social movement unionism" to describe them. Buhlungu now claims that the specific issue of the functionaries' role also differs between Southern countries and those countries from which the majority of sociological literature on workers' movements stems.<sup>24</sup> The concept of the dilemma of leadership, applied to the South African context, thus offers the possibility of doing justice to the setting and at the same time make a theoretical contribution to general sociological debate – thus Buhlungu's claim.

At the end of the first chapter, Buhlungu finally summarises the key terms of his theoretical framework. Referring to Moodie and Schumpeter, he distinguishes between "rudimentary" or "primitive" democracy and representative democracy. The author appears to have coined the central concept himself: "dilemma of leadership". Thus he continues his investigation of an issue he was already involved in outside the university, and not only as part of his earlier activity as a union official. In 1993, 800 SAMWU members protested against the firing of four shop stewards in a legally unsanctioned strike in the Springs Town Council. The circumstances under which these workers had been made redundant were unclear in terms of their chronology and the role of the trade union functionary. The workers thus turned to the organisation with a demand for compensation, arguing that the official should have stopped them engaging in illegal strike activity and was thus also responsible for their firing. Buhlungu and Eddie Webster were tasked with drawing up an expert report for the court case, in which they formulated the idea of the dilemma of leadership: "In the circumstances of industrial action, trade union officials face a dilemma: on the one hand, they are expected to advise and lead the membership; on the other hand, they are constrained in this role by the expectation that they act upon a mandate from the members themselves" (Buhlungu, 2001: 360-61, Appendix 3). Referring to the strong tradition of worker control in the South African trade unions, they argued against the

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<sup>24</sup>"The above points to the specificity of societies in transition from authoritarian rule where social movement unionism emerged and suggests that the conditions and role of full-time officials in these societies will be different from those of their counterparts in the metropolitan countries where the bulk of the literature originates." Buhlungu, 2001: 16-17.

fired workers' demands and defended the functionary's position. This case initiated the present work.

Buhlungu counters the oligarchy theory with the concept of organisational modernisation: The organisation moves away from "primitive", "traditional" forms towards greater structure, building up capacities in order to act within modern economic, social and political contexts. The main focus here lies on increasing the trade union's administrative efficiency<sup>25</sup>, which can be regarded as the aim of the concrete modernisation measures taken. This efficiency contradicts the direct democratic tradition of worker control. For Buhlungu, it is important that "modernisation" does not always refer to a development that is always the same, but that this development can take place in many different ways, each of which is shaped by ideological and cultural factors and by differences in class, race, gender and generation. In the case examined here, the difference between generations is particularly significant, which – as shown by White, Mannheim and Fraser – influences the cultural transmission of traditions. In his analysis of this, Buhlungu groups activists of the 1960s with those involved in the social conflicts from 1976 onwards into the 1980s as the first generation; this first generation was shaped by the shared experience of anti-apartheid resistance and authoritarianism in industrial relations and in society as a whole. By contrast, after 1990 a new generation emerged in the context of the nation's democratisation and liberalisation.

In his work, the central aspects of this stocktaking of the modernisation projects advocated by these two generations and the resulting contradictions are the following: Organisational management (professional human resource management, regulations on employment, control, training and continuing training, support for functionaries, introduction of tiered salaries); organisational governance (constitution of decision-making processes and structures); organisational culture (traditions, norms, values and ideological orientation); unequal power relations along gender lines; differentiated salary structures and segmentation of the job market for functionaries; global economic and political context (decline of utopias, dominance of free market ideologies, a lack of progressive alternatives to capitalism).

The second chapter deals with the "invention of the democratic tradition in the trade unions after 1973"; Buhlungu adopts the idea of the "invented tradition" from Eric Hobsbawm. In South Africa, the democratic tradition was created<sup>26</sup> by the liberation movement as a whole – political movements, trade unions and civil society organisations – and was shaped by the economic and political context. Grassroots democracy was a survival strategy in an environment of state and entrepreneurial repression.

<sup>25</sup>This concept includes the following elements: official regulations, the creation of hierarchies, distribution of responsibilities, use of the written word, the need for specific qualifications to carry out special activities.

<sup>26</sup>In this context, Buhlungu several times explicitly criticises the claim that white intellectuals and students were the ones to first disseminate democratic thought among the black workers. Rather, this tradition emerged from a number of traditional, political and intellectual influences, many of which are neglected in literature to date (religion; tradition of consensus-based decisions, particularly among migrant workers; experiences in cultural or sports organisations; conflict in the school system; institutional approaches taken from the mutually supportive structures of, for example, funeral cooperatives or savings clubs; earlier trade union experience; activities in the UDF or the Black Consciousness movement; liaison and works committees; fear of repression). Buhlungu also distinguishes between different kinds of intellectual in the labour movement.

Undemocratic organisational forms were frowned upon because they were associated with the apartheid system. Finally, the international context inspired the idealising of democracy – the liberation movements in Southern Africa (Mozambique's independence, 1975); the world crisis of capitalism; the crisis of “real-life socialism” in events in Hungary and Czechoslovakia.

The work's second part consists of three case studies, the aim of which is to show the emergence of the democratic tradition and the dilemma of leadership in three very different trade unions: the South African Municipal Workers' Union (SAMWU, third Chapter), the Chemical, Energy, Paper, Printing, Wood and Allied Workers' Union (CEPPWAWU, fourth Chapter), and the National Union of Metalworkers of South Africa (NUMSA, fifth Chapter). In each of the three case studies, Buhlungu goes through the aforementioned aspects and examines the organisational processes of modernisation and the changes in the role of the full-time union official. Despite significant differences in their respective development and history, their sector and labour market and their access to intellectual resources, the trends in the three cases are similar. He concludes that all three stood in the worker control tradition, with the level of democracy comparatively the highest in the NUMSA and the lowest in the SAMWU.

The third part of the work systematically deals with the tension between the tradition of worker control on the one hand and modernisation processes on the other, taking the results of the case study analysis as its foundation. However, Buhlungu first inserts another chapter about the profile of current full-time trade union officials (Chapter 6). This chapter was produced using a 1997 questionnaire survey of functionaries of the COSATU and its 18 member unions. The survey confirms the trends already observed in the case studies. The seventh chapter is titled “Comrades, entrepreneurs and career unionists: organisational modernisation and new cleavages among union officials”. The class of trade union officials has always been segmented and hierarchical, as the case studies demonstrated in regard to race, gender, level of education and professional position. In connection with the modernisation processes and against the backdrop of political transition and South Africa's integration into the global economy, a new division is now emerging. The character of the “activist organiser”, who united the role of the political activist and trade union official after 1973, is now disappearing. This is connected to the changing generations and the high rate of fluctuation that influence the trade unions' traditions and practice. Currently, the unions' organisational culture is changing significantly. Besides the differences between generations, tensions are emerging between three new types of officials: the “ideological type”, the “entrepreneurial type” and the “career type”. These categories aim to show the radical shifts in the power relations between the functionaries and the union grassroots. The “ideological” and the “career” official also appear in traditional literature and require no further explanation here. Buhlungu's category of the “entrepreneur” is new, however; its appearance is possibly due to the specific situation in South Africa in the 1990s.<sup>27</sup> Buhlungu notes a certain convergence of the interests of

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<sup>27</sup>“The third type of union official, the entrepreneur, deserves some examination here as it does not feature in conventional debates on full-time officials. Indeed, it would seem that the emergence of this category may be a function of the accelerated processes of class formation spawned by the deracialisation of South

the “entrepreneurial type”<sup>28</sup>, the “business union” trend expressed, for example, in the creation of unionist investment companies and new opportunities for advancement in business, state and politics. This type’s strongly individualist modernisation project is destroying the democratic tradition of worker control. Buhlungu also locates the leadership dilemma problem of the South African trade unions in the historical and the current national and global context.

The social and political changes since 1994 and the various opportunities for advancement particularly for black union officials, the introduction of centralised institutions of negotiation and consultation between workers, businesses and the state, in which a new elitist and secretive style of negotiation has become established and the economic deregulation have led many workers and shop stewards to rely on officials’ expert knowledge in recent years, which has led to a clear shift in the balance of power towards the officials. Against this background, three modernisation trends can be identified in the trade unions, which Buhlungu represents as ideal types of three different modernisation projects:

The minimalist modernisation project, represented by the “ideological official”, limits the dilemma of leadership by strengthening the direct democratic leadership of the workers. This can be achieved through educational work and the introduction of full-time shop stewards; furthermore, officials should be given no power to decide over trade union matters. Efficiency and democracy are seen as mutually exclusive. The maximalist modernisation project, represented by the “entrepreneur” types, is a conservative model according to which the functionaries should best make all of the decisions, as imperative mandates and accountability are seen as obstructive. The leadership dilemma is resolved in favour of the strong official, whose scope for action and decision-making is not limited by democratic measures. Thus the officials become “powerful business agents providing services to passive union members in return for monthly membership subscription” (p. 307). Buhlungu thinks both these projects are currently unrealistic. The moderate modernisation project, which Buhlungu regards positively, seeks a balance between democracy and organisational modernisation, which are seen not as mutually exclusive but as complementary. Thus it heightens the dilemma of leadership in a “creative tension”. For Buhlungu, the intensification of the leadership dilemma represents the solution to the contradiction between organisational modernisation and increasing efficiency on the one hand and democratic worker control on the other hand.<sup>29</sup> The eighth chapter deals with “The revitalisation of the union movement: towards a resolution of the dilemma of leadership”.

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African society and related notions of black economic empowerment as well as economic liberalisation which has created vast opportunities for a few entrepreneurial individuals. The fact that some of these entrepreneurs find themselves in the unions is simply incidental as they are present in all other social institutions as the trailblazers of the predominantly black new middle class.” Buhlungu, 2001: 227/228.

<sup>28</sup>It is important to note here that trade union work in South Africa, as the interviewees pointed out, is an excellent field in which to gain professional experience and key organisational qualifications. For the younger generation, it enhances their careers to have a few years as trade union officials under their belt.

<sup>29</sup>In a way, Buhlungu here contradicts himself by generally equating organisational modernisation with the maximalist project and thus indirectly negates his distinction between three different modernisation projects.

According to Buhlungu, in theoretical terms the dilemma of leadership concept makes it possible to overcome the dead end of democracy versus efficiency without renouncing conventional sociological concepts such as oligarchy or democracy. Furthermore, he states that while oligarchic tendencies apparently are always present in organisations, it is certainly not possible to speak of an oligarchy rule as proposed by Michels. The concept of the leadership dilemma also makes it possible to recognise organisational modernisation as processes within organisations.

## 9.5 Counterhegemonic claims as an expression of increased confidence

The fact that Buhlungu conceptualises his work in a fundamentally different way than Webster does is of central importance for Labour Studies' development as a counterhegemonic current. Instead of selecting a theoretical approach and applying it to the South African context, he uses very different and sometimes contradictory sociological traditions (see reference analysis below), creating his own framework with the aim of developing his own key concept: the dilemma of leadership. Based on empirical material, he hopes to contribute to Labour Studies' theoretical development with this concept. This aspiration expresses an increased self-confidence among South African scholars. Initially, Buhlungu draws a clear distinction between the social situation in South Africa and in the "metropolitan countries". At the same time, he notes that the sociology of the centre is also conditioned by its own context. While he first presents the dilemma of leadership as a South African phenomenon, he aims to develop it into a sociological concept that can take its place in the general literature:

"The importance of this discussion is that virtually all the literature on full-time officials originates in the union movements of developed and western societies and, too often, concepts from union movements in these societies are applied uncritically to developing societies without regard to specificity or context. Thus, many who have studied unions in developing societies have applied analyses and concepts developed in the context of developed societies and have, in the process, failed to identify the theoretical and conceptual opportunities presented by certain developments in developing societies. The dilemma of leadership is an example of a theoretical construct that draws on conventional sociological debates and the specificity of a union movement in a society in transition. (...) The foregoing serves to caution against a mechanical application of concepts from metropolitan union environments as this may conceal or obscure realities which warrant rigorous examination and analysis" (Buhlungu, 2001: 16/17).

It is slightly disappointing that Buhlungu does not return systematically to this initial distinction between central and peripheral context at the end of his work. Precisely this demonstration of the general sociological relevance of the concepts he has developed is lacking. A certain vagueness of generalisations, general concepts and specifically South African developments fails to live up to his claim to make a contribution to sociological debate on developmental trends in trade unions in general. However, first the references will be examined more closely before a more extensive conclud-

ing evaluation is undertaken. Table 9.3 provides a first impression of his referencing patterns, quantifying references according to chapter:

Table 9.3: Reference patterns Buhlungu, “Democracy and modernization”, by chapter according to type of reference

Chapter	Type of reference									Total
	European and American Literature	(South) African Literature except students' theses	Students Theses	Non-academic Journals	Interviews	Press	(Historical) printed documents	Statistics	Others and unclear	
Preface	1	-	-	1	-	5	-	1	1	9
1	56	9	-	-	-	1	-	1	3	70
2	16	27	4	20	-	1	-	4	6	78
3	8	3	2	29	-	16	-	8	1	67
4	6	17	1	13	-	28	-	7	-	72
5	5	22	1	34	-	35	-	19	5	121
6	1	4	-	-	-	-	-	8	1	14
7	-	-	1	10	-	2	-	2	1	16
8	6	2	-	4	-	-	-	-	-	12
Appendix	18	3	-	-	-	-	-	-	-	21
Total	117	87	9	111	-	88	-	50	18	480

“Historical and printed documents” includes all references to archive materials such as minutes of meetings, statements, union publications, as well as materials and texts by the government, non-governmental organisations and courts. “Statistics” includes all references from which numerical information was taken.

Overall, it is striking that Buhlungu uses only slightly fewer South African works than European and American ones, and if the references to non-academic journals are included – in this case exclusively to the “South African Labour Bulletin” with 50 references – then even significantly more. This is due to and illustrates the fact that South African literature production has grown enormously in the 25 years since Webster’s “Cast in a racial mould”. The balanced relationship between South African and external literature also shows however that, after having sketched the current state of research and placed his work in the context of international sociology of work and organisations, Buhlungu does not see any of the existing approaches as having great importance for his own academic project. His topic was inspired more by his personal experiences than by the engagement with international literature on the theme.

The question now arises which authors and texts from South Africa and from other countries he considers in “Democracy and modernization”, and which conclusions for the development of South African Labour Studies can be drawn from the referencing pattern. The online appendix BUHLUNGU OVERSEAS REFERENCES includes a list of all the non-African literature mentioned. In terms of sheer quantity, Hyman is in first place with twelve references in total to his various texts, followed by Kim Voss and Rachel Sherman, “Breaking the iron law of oligarchy: union revitalization in the American labor movement” (2000), which is referred to ten times. The Webbs are in third place, with eight mentions of two of their books. These various influences on his PhD thesis will be categorised according to chapter and theme below.

However, the list of (South) African literature (online appendix BUHLUNGU SA REFERENCES) is long, too. On the one hand, this speaks for the productivity of the Labour Studies community, on the other hand for Buhlungu’s extensive knowledge of their works. The author refers to the Labour Bulletin 50 times in total (online appendix BUHLUNGU SALB REFERENCES). With twelve references, Johann Maree’s “Developing trade union power and democracy: the rebirth of African trade unions in South Africa in the 1970s” takes first place, followed by “Cast in a racial mould” with ten and Donovan Lowry’s “20 years in the labour movement: the Urban Training Project and change in South Africa, 1971-1991” with nine references. Rob Lambert’s doctoral thesis (eight references) is included in the list of South African literature, as Lambert had not yet left the country at the time he wrote it. It is striking that Buhlungu – despite the availability of social-scientific literature from academic circles on the issues discussed – still makes extensive use of the Labour Bulletin in his work. Despite the establishment of the academic community and the existence of structures for traditional scholarly exchange, the journal has thus not lost its significance for the community of Labour Studies specialists. Buhlungu takes mainly information, discussions and analyses of concrete events as well as statements from interviews with trade union officials from the Bulletin. In addition, he carried out a considerable number of interviews himself, which are quoted extensively throughout the entire text.

Following the structure of the work, the citation patterns are as follows: Nearly half (57 of 119) of all references to texts from the metropolis and to a few Australian authors are in the first chapter, which sets out the thesis’s conceptual foundation and the state of current research. The majority of overseas authors used in the work overall are mentioned here. Many of the references are placatory or decorative mentions of the most important literature on the topic, the aim of which is to establish Buhlungu’s position within the international community of industrial and organisational sociologists. He does not even provide bibliographical information on a number of theorists mentioned in the text, such as Marx, Lenin and Trotsky, for example. The classic Michels, against whose oligarchy theory he rails repeatedly, is only mentioned once in the whole thesis, which may indicate that the theory has assumed an existence independent of its author in academic debate. Other classics, such as Lester or Beatrice and Sidney Webb, are quoted more frequently. These classics set the thematic benchmark for his work. Even though he repeatedly argues against the polarity be-

tween democracy and modernisation formulated by the Webbs and touted since then, this theory is what forms the basis of his attempts to overcome it.

Apart from this, no clear adoption of any particular paradigm or theory can be detected. The overview of the existing literature is a broad representation that does not give preference to any particular theoretical or conceptual approach, even though the familiarity with the “Marxist” orientation predominant in Labour Studies (probably transmitted through his doctoral supervisor) is obvious: Engels, Flanders, Hyman, T. Lane, E. P. Thompson. By contrast, Webster’s central points of reference – Marx and Braverman – are missing here. Even though Buhlungu often refers to this “Marxist”-influenced literature, it cannot be said that it had any strong methodological or theoretical influence on his work. Instead, Buhlungu’s organisational sociology is expanded through the inclusion of Max Weber and Joseph A. Schumpeter, both of which are little used in South African sociology.

In the conceptual part of his work, Buhlungu refers to some of his South African colleagues, mainly to the classics; using these, he defines the context of his work and the history of the labour movement in South Africa. It is interesting to note here that Maree’s text, the South African text he cites most frequently, has not actually been published. This can be seen as a sign of the lively exchange within the academic community, which is not dependent on formal routes of academic communication for sharing knowledge. In his article on democracy and oligarchy, Maree had taken a similar thematic direction on the specific problem of the role of the trade union functionaries. Baskin’s book on more recent developments in the COSATU was also useful in this regard. As a classic South African text, Eddie Webster’s “Cast in a racial mould” takes second place, as mentioned above.

Buhlungu’s eclectic manner of proceeding is noticeable even in regard to literature dealing with specific problems. Over the course of the work, for sociological engagement with trade union officials he quotes Bramble for Australia, Kelly and Hemingway for Great Britain, and C. Wright Mills for the USA. On issues of gender relations, he refers to the more recent studies of Kelly and Heery, Pocock, Reskin and Roos, Lawrence. On the problem of generational shifts, he draws on general sociological literature – on Mannheim – as well as on the concept of “invented tradition” – on Hobsbawm. His assertion of the necessity of upholding and strengthening the grass-roots is confirmed by Voss and Sherman. As all of these groups of themes are already taken up in the first chapter, this is where the respective references can be found.

The detailed discussion of the role of intellectuals in the labour movement in general and in South Africa in particular follows in the second chapter. Due to the chapter’s theme, this is also where Buhlungu deals with a whole number of South African contributions. He refers to Lowry’s work on the history of the labour movement in South Africa; presumably Lowry was a history teacher, but it was not possible to locate him in the academic context; furthermore, the works of Friedman and an article by Webster are cited. The profile of the COSATU officials had already been examined in 1992 by Pityana and Orkin. Ginsburg and Webster had published a book on the issue of democracy, and he was able to draw on von Holdt’s thesis on the more

current developments in the trade union movement. Furthermore, he was also able to use the extensive analyses of the influences on the black trade union tradition.<sup>30</sup>

Chapters three to six contain the case studies on individual trade unions. Accordingly, the majority of references here are to interviews with those involved, namely to those interviews that Buhlungu carried out himself, some of which were published in the *Bulletin* and some that were conducted as part of student assignments. The second large reference category are various kinds of document, usually those of the organisation itself. Furthermore, Buhlungu was able to draw on the studies of his South African colleagues, who had dealt with the history of the labour movement in quite extensive detail, in his account of the origins, developments and traditions of the trade unions examined.

In the two last chapters, Buhlungu summarises his results and cuts to the chase of his own thoughts. The seventh chapter contains his own conceptualisation of the three types of union official. It also contains only few references, a few quotes from the interviews he uses to support his distinction between the three types. The last chapter includes Buhlungu's suggestion for "resolving the dilemma of leadership", which is supposed to consist of intensifying said dilemma. By referring to the situation in South Africa, he once again contradicts the metropolitan literature – Lane, Lester, Michels, C. Wright Mills –, which had claimed that the establishment and recognition of trade unions by the state and businesses led to bureaucracy and oligarchy in some form or other. To support his own view – the need to revive and strengthen the tradition of worker control – he once again draws on Voss and Sherman. Tarrow is used to support his recommendation to keep the collective memory of the labour movement alive. In comparison to the previous chapters, the seventh and eighth chapter are short and succinct, including hardly any kind of reference. On the one hand, this speaks for Buhlungu's independent work. On the other hand, it confirms that the systematic contrast between his findings and the literature cited at the beginning falls somewhat short. Towards the end of the work, he spends hardly any time on concluding general insights and opening up perspectives for further development.

In summary, we can state that Buhlungu has a broad and varied overview of the international literature, but that it had no decisive influence on his own work, for which the debate in South Africa was more important. That academic communication within the scholarly community works well even in the absence of conventional, institutional resources is shown by the references to unpublished works by his colleagues and several students, including material as transient and hard to access as notes taken at colleagues' lectures during the 1970s.<sup>31</sup> However, without a doubt the most decisive influence on his research question and the answer he arrives at is his own personal experience as a union official and his continued engagement with trade

<sup>30</sup>Traditional influences – the anthropologist Hammond-Tooke – and cultural influences – Sitas, Coplan, Webster and Kuzwayo; further Hiron and Hyslop on resistance in the educational system; Couzens and on sports; Debby Bonnin's Master's thesis on earlier organisational experiences under the SACTU. Buhlungu and Metcalfe had worked on the influence of the different categories of intellectual for South Africa, as well as Webster, Callinicos, Nzimande, and the student dissertations of M. Ginsburg and Sephiri. On this issue, Buhlungu made extensive use of interviews published in the *Labour Bulletin* as well as three workers' biographies – Petrus Tom, Mandlenkosi Makhoba und Alfred Temba Qabula. The latter are listed under "Others" in the list of the number of references.

<sup>31</sup>Johann Maree's notes on a lecture by John Ernstzen, 1977.

union issues, both of which find expression in the interviews cited and the empirical sources used.

As far as theoretical influences are concerned, the empirical analysis conducted here confirms Buhlungu's claim that his scholarly work is eclectic and does not have any particular icon (Interview Sakhela Buhlungu 7 April 2004). There can be no question of any dependence on theories from the centre. By contrast, Buhlungu's dependence on overseas literature in questions of methodology is obvious; he reflects on this in an appendix.<sup>32</sup> In this regard, South African sociology still appears to be suffering from a lack of adequate literature. However, Adler's contribution shows that the academic community would actually have something to contribute to general methodology.

Thanks to his own trade union experience, which he is now able to reflect upon at a distance from his university position, Buhlungu has a great advantage over "pure academics" who have never left the ivory tower and remain unaware of the weaknesses of or errors in their theories:

"(...) university was good in the sense that, which I didn't have before, it gives you the discipline to think about things in a structured and systematic way. Two, (...) it's evidence-led, rather than, you know, sentiment, or political, (...) it's evidence-led, that's the key thing. (...) The third thing is that it gives you the ability to (...) move, take a step back from the detail and get the big picture (...). That's where theory comes in. You get back from the detail, (...) because you get sucked into the detail and for me that was a, it was quite a thing. And I was conscious of it and, I knew (...) I had to work on it. Because you, compared to the detail that I was engaged with all the time in the union, I mean, I knew every guy, I almost knew so and so had so many children and so that's why he's doing, so that's why [...]. You have that, but then you have to take a step from it (...). And that was the style which was different. And at times, it was limiting, there were times when I felt it was limiting, and there were times when I felt that it was not kind of accurately connected to the reality out there. (...) And also, there was a time when I felt that you could get away with bullshitting, a lot of bullshitting and caricature. (...) you caricature the reality out there, (...) as long as you embrace some theoretical framework from somewhere. You can then kind of have a caricature of the reality. And let the theory that you have borrowed somewhere (...) lead you instead of (...) drawing on the evidence. And I felt there were times like that, I felt there were issues like that (...). I saw it in general, within the academic, as opposed to the thing" (Interview Sakhela Buhlungu 30 March 2004).

It is interesting that Buhlungu, who as Webster's doctoral student more or less directly represented the generational shift in Johannesburg industrial sociology, took up a problem that his teacher had already discussed in his own doctoral thesis twenty-five years earlier. In "Cast in a racial mould", Webster also dealt with the traditional assumption that the degree of bureaucratisation and oligarchisation grew with in-

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<sup>32</sup>To support his methodological way of proceeding, he draws extensively on a range of texts, all of which apart from one (Adler, "The politics of research design during a liberation struggle") come from Europe or the USA: Babbie, Goode and Hatt, Locke and Thelen, Stacey, Burgess, Kvale, Neuman (one of the most frequently mentioned overseas authorities with seven references). These are all standard works of empirical social research.

creasing organisation, growing membership and integration into society as a whole. Webster already countered this classic theory advocated by the Webbs and Michels with the South African experience. Even though this problem was not his work's main focus, his criticism of established industrial sociology and optimism concerning the South African trade unions' development were unmistakable. Buhlungu now takes up this question once again, making it the central object of his work. Compared to Webster's thesis, his theme is much more specific. This suggests that the subject-matter of South African Labour Studies has developed further. Whereas Webster had attempted to be broad and sweeping in both his theory and the object of his work, Buhlungu is now able to systematically work on individual concrete issues. Like Webster, despite many objections and differentiations Buhlungu retains an optimistic view of his country's trade union movement.

The context in which the book was produced is important for its evaluation in regard to the issue of counterhegemonic movements. In addition to the author's aforementioned non-academic activities, it should be mentioned that he carried out the questionnaire survey of the COSATU officials' profile as part of the September Commission.<sup>33</sup> The SAMWU conflict, as part of which Buhlungu and Webster wrote an expert report for the court case, has already been mentioned. This context gave rise to the idea of the dilemma of leadership that Buhlungu conceptualises and works through empirically in the present work. Incidentally, the case was symptomatic of the traditional position of South African intellectuals. Their emphasis of the democratic tradition and the leadership dilemma in South African trade unions was directed against the plaintiffs' argument that the union leadership should have done something to prevent the workers going on illegal strikes. This was embedded in a broader concept of "business unionism" and was represented by the expert Schalk Nel, who – perchance by coincidence – worked at the Afrikaans-speaking, conservative and formerly apartheid-loyal University of Pretoria. As Buhlungu criticised in an interview, this expert ignored the history of the South African trade union movement.

Similarly to Webster, Buhlungu thus used data in his work that he had already gathered for non-academic purposes. However, Buhlungu is more systematic in his representation and interpretation of the data, according the survey its own scholarly value – unlike his supervisor, who in some places included empirical elements that are interesting particularly in regard to the context of his discussion, but did not go into further detail on their overall extent and the methodical question of how the material was gathered. The assumption of counterhegemonality is strengthened by his direct link between scholarly work and social experience, conflicts and problems in which the

<sup>33</sup>In 1997 this commission, presided over by COSATU vice-president Connie September, was tasked with developing visions, goals and strategies for the future of the trade unions in the century to come, particularly with regard to the National Congress. The September Commission thereupon established contact with the research network of the Labour Studies community. Buhlungu was commissioned to write a study on trade union functionaries. In consultation with a number of commission members and researchers from various institutions, he conceptualised the questionnaire survey: Shele Papane (COSATU Education Department); Gino Govender (NUM Education Department); Karl von Holdt, Roselyn Nyman and Bob Rees (NALEDI); Ian Macun (Deputy Director, SWOP); Bobby Marie and Chris Bonner (DITSELA). Buhlungu was able to agree that after reporting to the commission, he would be able to use the results for his own scholarly work. The survey certainly benefited from the fact that the COSATU had encouraged and supported the study, for example by writing to all officials asking them to participate. The commission report can be found on the umbrella organisation's website: <http://www.cosatu.org.za/> (May 2006). For further information, see among others: Webster/Adler, 1997.

researcher is involved personally, as well as by the work's claim to be evidence-driven rather than guided mainly by imported approaches.

## 9.6 “Transition from below – forging trade unionism and workplace change in South Africa” (2003)

Karl von Holdt completed his studies at the UCT and SWOP in 2000 with a doctoral thesis on the workplace in the South African transition process. “Transition from below – forging trade unionism and workplace change in South Africa” was published as a book in 2003 and is thus the most recent significant publication of the Labour Studies community in the time period under investigation. Colleagues mentioned it as frequently as Webster’s “Cast in a racial mould” as one of the most important works (Appendix 2). The context in which the work was produced is typical of the Labour Studies community: von Holdt was not only a student and later a researcher at the SWOP, but for many years was also active in the community and labour movement, first as a member of the Adult Literacy Project in Cape Town, then at the Johannesburg Technical Advice Group and from 1989 onwards on the editorial board of the Labour Bulletin, where he was editor-in-chief from 1991 to 1995. Along with Sakhela Buhlungu, he was involved in coordinating the September Commission and at the time of the present study was working as a researcher at the NALEDI. As a SWOP Research Associate, he still maintained contact to academia.

In his preface he claims his work has made a contribution both to the thriving of the discipline as well as to the progress of the labour movement.<sup>34</sup> The author also thanks Michael Burawoy (UC Berkeley) and Dunbar Moodie (formerly Wits, now Hobart and William Smith College, USA), with whom he engaged in critical exchange during the research process.

As Eddie Webster’s student, von Holdt in a way develops Webster’s “Cast in a racial mould” further.<sup>35</sup> “Transition from below” is an ethnographic study on a micro-institutional level on the transition process (1980s to 1996) in a steel factory in the city of Witbank, “Highveld Steel”. The book shows clearly that for years, the author was acquainted with key figures among the workforce and trade union NUMSA – which developed directly from the MAWU that Webster analysed at the beginning of the 1980s – in this factory and was in regular contact with them. Besides interviews with trade unionists, workers and representatives of the city council as well as a factory human resource manager, the research includes countless detailed observations and pieces of knowledge on the complex interpersonal and institutional relations. Numerous quotes from interviews, in which the unionists reported on their situation and their struggle with sometimes astonishing clarity, provide an impressive illustration of the study’s abstract terms and high level of theoretical content, rendering it com-

<sup>34</sup>“I would particularly like to thank Glenn Adler, Sakhela Buhlungu, Ian Macun and Eddie Webster for providing the kind of lively, searching and rigorous intellectual environment that not only sustains a project of this sort (...) but also nourishes the hope that it has some kind of meaning and value both to the intellectual community of which we are part and to the labour movement with which we work so closely.” Holdt, 2003: VII.

<sup>35</sup>Thus he himself writes: “Indeed, in many ways this book is built on the foundations of his seminal work, *Cast in a racial mould*, which investigated change on the apartheid workplace during an earlier period.” Holdt, 2003: VIII.

prehensible and easy to read. The author's journalistic background is evident in the study's accommodating style.

Von Holdt's status and reputation within the labour movement were an important factor in the research process. His earlier engagement and his role as editor-in-chief of the *Labour Bulletin* during the research phase may have made it significantly easier for him to gain access to the workers. At the same time, the factory refused to support or facilitate the research, probably because of his prominent position within the intellectual and activist community – a considerable limitation in methodical terms, as he was not even allowed to set foot on the factory grounds (he then did so secretly several times).<sup>36</sup>

A number of key concepts run through the entire book, which traces the change in relationships and power relations in the factory and the workers' activities in their social, cultural and political contexts, as a main theoretical thread. The concept of the "workplace regime" adopted from Burawoy and Moodie elucidates the change in the respective historically conditioned social structure in the factory, which distributes rights and resources unequally between the different parties. In contrast to other public and private spheres, in the factory blacks and whites existed side by side and in direct contact with one another even during the apartheid era.<sup>37</sup> Their relationship was regulated by the despotic apartheid workplace regime, which is examined more closely in the second chapter, titled "A white man's factory in a white man's country".

The distribution of skills, authority and control is similar to the conditions described by Webster in "Cast in a racial mould". At the same time, von Holdt also points out the internal differences within the black workforce: local workers, who lived with their families in the African township in Witbank and usually had a certain level of education on the one hand, and migrant workers, usually Pedi-speaking men from the Transkei, who were housed in hostels and only had a very low level of formal education on the other hand. This difference played a decisive role for their position within the labour process, for their political orientation and their attitude towards the trade union and towards the business over all the years of the study and outlived the transition process.

The third chapter examines how the granting of industrial rights through the Wiehahn reforms and following the unionisation of the workforce in the NUMSA challenged the apartheid workplace regime. This was a complex process. The workers now had industrial rights, but continued to have no political civil rights. This meant that the trade union took on a general political significance beyond the factory, while at the same time the legal situation on concrete matters became extremely vague. This led to chaotic conditions, to constant spontaneous strikes for example, as the union used the legal procedures to assert its rights – particularly to prevent unfair dismissals

<sup>36</sup>"This book has lost something by the company's refusal to co-operate, but it has gained immeasurably by my status in the labour movement." Holdt, 2003: 12.

<sup>37</sup>"The different points of origin of the black people and the white people who entered the steelworks every day were mirrored by their different destinations in production. (...). Nonetheless, they worked alongside each other and with each other – which was what distinguished the workplace from the town, where blacks and whites lived far from each other and schooled, travelled, bought stamps or tickets, were entertained, worshipped, went to the toilet, got sick, died and were buried separately." Holdt, 2003: 2.

and racist attacks – but at the same time refused to recognise the management’s side. These early NUMSA activities initially secured a specific, more clearly defined distribution of tasks in the workplace, so that the black colleagues were no longer everyone else’s servants but employees with a fixed scope of work.

However, racist discrimination and racial division of labour remained institutionalised; apartheid was obviously more strongly established within the company’s structure and practice than in the legal system. The poor incorporation of the black workers also led to inefficiency and low productivity. Paid lower wages than the whites, the black workers also wanted to work less, and agreed on a permanent “go slow” strategy. Through links to Chapter 4 on social movement unionism (see below), von Holdt shows in the fifth chapter that attacks on the apartheid workplace regime through the observed non-compliance strategies (spontaneous strikes, “go slow”, a basic attitude of blacking towards management and so on) corresponded to the tactics of ungovernability employed by the communities in their struggle against the apartheid system. The aim of these activities within and outside the factory was to topple the regime, and no distinction was made here between the white man’s factory and the white man’s government.

Over the course of the transition process in the early 1990s, the apartheid workplace regime was replaced by a neoapartheid workplace regime; the racial division of labour remained in place. After the democratic turn, following which the workers’ civil status was acknowledged and the trade unions were given responsibility in the alliance with the government, the democratisation of the workplace was now to occur at last (Chapter 9). The transition phase produced three competing models for a post-apartheid workplace regime: Management wanted a restoration of authority with only minimal loss of control to the workers. The trade unionist representatives, in line with the national NUMSA line, pursued a strategic unionism project (see below). Both of these approaches failed due to more or less mutual blockades. In some factory sectors, “wildcat cooperation” between progressive managers and those members of the workforce involved, who worked towards improving their production area independently of the union, was able to achieve a certain success. The last chapter provides an outlook onto possible future developments after 1996.

Von Holdt lays particular emphasis on the fact that the transition phases were chaotic, marked by unpredictability and great “disorder”, in contrast to the traditional concept of “workplace order”,<sup>38</sup> contradicting the widespread assumption of a “negotiated transition” that assumes clear agreements between clearly defined and homogenous groups of players. Much of “Transition from below” is a detailed observation and understanding analysis of this disorder. In this, von Holdt also draws a clear line between his work and mainstream literature, which in his opinion offers to suitable approaches that do justice to the specific colonial dimensions of apartheid society and are thus unable to adequately grasp the transition process in the workplace:

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<sup>38</sup>Cf. especially Chapter 3, which reaches the following conclusion: “The recognition of NUMSA did not produce a new, negotiated order based on agreed procedures or the new law, but rather ushered in a period of unstable and fiercely contested transition.” Holdt, 2003: 71.

“(...) much of the literature on the South African workplace under apartheid tends to interpret the evidence through the concepts of workplace order provided by metropolitan sociology. (...) When in a detailed study of shopfloor dynamics at Volkswagen SA and other places, the behaviour of shop stewards and workers failed to conform to these expectations, and instead displayed highly disruptive and politicised practices, these are treated as incidental anomalies with external causes, rather than as distinctive features of militant trade unionism in workplaces shaped by apartheid” (Holdt, 2003: 7).

The fact that European approaches are unable to do this is obviously due to the context in which they emerged:

“The metropolitan sociology of workplace trade unionism – while inspired by Marx’s analysis of production relations during the period of early industrialisation when class antagonism was high – was elaborated in the period of developed capitalism, when the working class had already been incorporated and bourgeois hegemony established. In contrast, under the colonial conditions of apartheid, the trade union movement was politically excluded, became a participant in the national liberation struggle to overthrow apartheid, and developed a new strategy of reconstruction in post-apartheid South Africa. What is distinctive, then, about this study of the workplace is that it captures the process of construction and contestation of workplace order and incorporation – condensed in a very short time span – and focuses on the generation of disorder that characterises these processes, rather than the ‘negotiated order’ (Hyman, 1975), the ‘manufacture of consent’ (Burawoy, 1979), the ‘manufacture of compromise’ (Webster, 2002) or the ‘regulation of labour’ (Edwards et al 1994) characteristic of the workplaces of metropolitan capitalism” (Holdt, 2003: 8).<sup>39</sup>

In his view, his colleagues’ empirical findings went in the same direction as his own, only their terminology and interpretations were inadequate.

To gain an understanding of the trade union as an institution and as a movement in the context examined here, the concept of social movement unionism is key. Thus far, it served to denote militant trade union movements going beyond the workplace in emerging countries such as Brazil, South Africa, South Korea and the Philippines in the 1980s.<sup>40</sup> On the one hand, “Transition from below” confirms this classic term: The linking of popular, political, class and workplace identities (the book avoids the term “consciousness” and speaks of “identity”) strengthens the solidarity among workers and between these and the wider cultural and political context. This becomes clear in Chapter 4, which is concerned with the connections between popular resistance to apartheid, the COSATU branch, the UDF coordination committee, the ANC and the

<sup>39</sup>He is referring to: Richard Hyman (1975): *Industrial relations: a Marxist introduction*, London; Michael Burawoy (1979): *Manufacturing consent: changes in the labour process under advanced capitalism*, Chicago; and to Webster, 2001.

<sup>40</sup>“Social movement unionism is characterised as a highly mobilised form of unionism based on a substantial expansion of semi-skilled manufacturing work, which emerged in opposition to authoritarian regimes and repressive workplaces in the developing world. Social movement unionism is fiercely independent, but establishes alliances with community and political organisations. It demonstrates a commitment to internal democratic practices and to the broader democratic and socialist transformation of authoritarian societies (...). More recently, social movement unionism has been used to describe the emergence in North America of more militant trade unionism with a strategic commitment to forging community alliances.” Holdt, 2003. This last refers to K. Moody (1997): *Workers in a lean world: unions in international economy*, London.

NUMSA, as well as the adoption of the communities' "ungovernability" strategy. Even though the Highveld steel shop stewards' stand for more direct democratic practice in the various organisational structures was their own achievement, von Holdt also shows clearly that they did not develop an independent political project of their own, but that the conception, goals and strategies of the ANC and UDF resistance played a decisive role.

On the other hand, the author also challenges the traditional conception of social movement unionism, as this combination of political and unionist approaches and groupings also led to breaks and the formation of different fractions, despite the existing solidarity. Different groups within the NUMSA interpreted the "rules" of the unionist activities in different ways. The acclaimed direct democratic practice did not always exist in reality; conflicts over leading positions, power and control, which were often accompanied by mutual distrust due to different contexts of origin and action, often led to physical violence. Thus the NUMSA never succeeded in uniting all of its members in Highveld Steel.

On the one hand, Chapter 5 shows how the trade unions established their own order within the factories. For example, a strike committee with policing functions attempted to enforce solidarity by taking brutal action against strike breakers and introducing a jurisdiction of its own among the workers. At the same time, there was massive disagreement over this new order and internal discipline as well as over the significance of the trade union overall, which found expression in opposing tactics in the factory. In 1987, Highveld Steel used this to its advantage and turned a strike into a lockout, which greatly weakened the union. Conflicts and lines of separation within the workforce were usually between local and migrant workers, as shown in Chapter 6. These were in evidence throughout the time period observed, with high points in 1987, 1990/91 and again in the mid-90s, when individual groups broke away from the NUMSA and pursued goals that differed from the union's and were often even diametrically opposed to them.<sup>41</sup>

Von Holdt explains the sometimes downright anti-union attitude of some parts of the workforce with their position in the labour process, among other factors. This is where the legacy of his doctoral supervisor Webster becomes clear. However, von Holdt is far more differentiated than Webster. He adds cultural and social factors to the "Marxist" and Braverman-influenced view of the problem:

"Their harsh working conditions, their strategic location in the production process, their mutual dependence on the work team in the labour process, their own history of struggle, their shared sense of themselves as migrants among whom Pedi culture was predominant, and their sense of losing power within the union they had founded, produced a strong collective solidarity and militancy among the tappers. They preferred direct action and self-representation to handing matters over to shop stewards and procedures over which they had little control and from which they were alienated

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<sup>41</sup>"In place of the democracy and open debate identified in the literature as a core feature of social movement unionism, this study highlights a coercive approach to solidarity at Highveld Steel and the failure of democracy to empower unskilled migrants in the union. The result was a fierce and recurring internal struggle over power, leadership strategies and practices." Holdt, 2003: 148.

by language and education. The disciplinary committee, the action committee, and the election stayaway were manifestations of this culture” (Holdt, 2003: 273/274).

Traditional literature on social movement unionism has ignored the realities of the shopfloor and focused one-sidedly on the labour movement’s external effects on the national political level. Von Holdt now turns this perspective around: It was not unions motivated by social movement unionism who became active in the communities, but community alliances that were continued in the structure of the trade unions – “the community was in the trade union”. Von Holdt summarises this challenge to the concept of social movement unionism as follows:

“This analysis of the internal life of social movement unionism at Highveld Steel contrasts with the literature in several respects. In the first place, it reveals the union to have been as much a popular organisation as a class-based one, constituted through an amalgam of collective identities forged both beyond and within the workplace. Secondly, its internal organisational culture and practices, its goals, strategies, tactics and meanings were subject to continuous contestation and redefinition. Thirdly, and arising from this, the internal practices of the union were not unproblematically democratic and committed to open debate. Indeed, the failure of union democracy to empower the less literate migrant workers led them to resort to coercion to empower themselves. The thread of violence runs through the entire period of union formation covered in this book. Solidarity was forged through revolutionary bullying. Contending notions of union order generated intensely violent conflict along migrant/township resident and political lines” (Ibd.: 175).

Thus the study also shows that national factors need to be considered when applying the concept, which cannot be transferred from one context to another at whim.

The seventh chapter deals with the effects of political transition on the black trade union movement, which thus far had defined itself through linking the struggle against white dominance in the workplace with political resistance to apartheid. After the COSATU had advanced to a significant political player on a national level and the NUMSA adopted its policy of reconstruction and development, the factory trade union strategy also re-oriented itself. South Africa was no long a white man’s country. However, at the same time the unionists found themselves in the unenviable position of wanting to support the new government while at the same time wanting to continue to fight management to achieve democratic change in the workplace. They knew very well that struggles in the workplace could have negative consequences for the government – “Killing the economy of this factory would be killing the economy of the entire country”, as one worker put it (Cited in: Holdt, 2003: 183). Von Holdt terms the unions’ re-orientation “strategic unionism”, drawing on an essay published in 1995 by Joffe, Maller and Webster<sup>42</sup>, in which they adopt this term from the Australian trade union movement.<sup>43</sup> Its main focus is a strategy for the reconstruction

<sup>42</sup>He is referring to Joffe, Avril/Maller, Judy/Webster, Eddie (1995): “South Africa’s industrialisation: the challenge facing labour”, in: S. Frenkel/J. Harrod (1995) (Eds.): *Changing labor relations in industrializing countries*, New York: 88-109.

<sup>43</sup>He sketches this approach, looking at four of its aspects: “union involvement in wealth creation, not just redistribution; proactive rather than reactive unionism; participation through bipartite and tripartite institutions; and a high level of union capacity in education and research”. Holdt, 2003: 188. He adopts

of the entire economy and business. However, this was difficult to reconcile with the economic pressure to become internationally competitive through liberalisation and globalisation. Highveld Steel introduced new technologies and reorganised production, retrenched staff and outsourced tasks. Accordingly, the trade union started to focus increasingly on educating its members and developing their skills.

The transition from the resistance of the 1980s to the reconstruction project after 1994 was a marked rupture in developments until then and led to an ideological crisis in the trade union movement: “This transition is going to confuse us all. What is our ultimate objective? When do we say that the struggle is over now because we’ve reached our objective (...)?” This was how Nhlapo, one of von Holdt’s interview partners, expressed his doubts (Holdt, 2003: 291). Furthermore, the new programme was highly complex and difficult to understand for most of the workers; it contained contradictory economic trends and political claims that rendered its content incoherent. “Strategic unionism” concentrated power within the union more unequally than before in the hands of those with expertise and language, legal and negotiation skills. In addition, the best and brightest of the NUMSA used the new class formation process as a chance to rise within the ANC or move into management themselves. The complex power struggles and internal dynamics of the worlds of politics and business caused them to soon lose touch with the union. As Buhlungu already showed, the unionists that remained soon developed a new elite culture of their own and worked more to further their own interests and personal careers than for the good of the workforce (Cf. Buhlungu, 2001). This set in motion a fundamental change in the NUMSA’s organisational culture and practice (Chapters 7 and 8). The solidarity between workers disappeared, which von Holdt explains primarily through the contradictory management practices – authoritarian restoration here, wildcat cooperation there – besides all the other factors mentioned above, all of which increased the tension between skilled and unskilled workers, township dwellers and migrants and resulted in never-ending frustration particularly for the marginalised workers (Chapter 10). The democratic change had brought them no workplace improvements whatsoever.

Besides contributing to the empirical application of and theoretical debate on workplace regime and various trade union strategies, “Transition from below” also makes a significant contribution to transition theory. Research to date had examined union strategies with the framework of political democratisation and economic restructuring, analysing the unions’ role in the alliance with the ANC and the SACP as well as the issue of codetermination in corporatist institutions. According to von Holdt, his colleagues’ analyses were governed by the idea of a transition managed by elites, along the lines of the model of social change in Eastern Europe and Latin America. They looked mainly to which extent these agreements between elites restricted redistributive politics’ chances of success in times of liberalisation and global competition. In “Towards a class compromise in South Africa’s ‘double transition’: bargained liberalisation and the consolidation of democracy”,<sup>44</sup> Webster and Adler developed the idea of a double transition (political democratisation and economic liberalisation).

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this definition from the document “Strategic unionism: ACTU/TDC Mission to Western Europe” in: B. Ford/D. Plowman (1989): *Australian unions: an industrial relations perspective*, Melbourne.

<sup>44</sup>The article was published in 1999 in *Politics and Democracy* 27 No. 3.

Von Holdt's micro-analysis shows that this view is insufficient and adds a third dimension: the deep social change from apartheid society to a postcolonial society: "This latter dimension of what is actually a triple transition implies a deeper and broader process of social transformation: a multitude of struggles, compromises and pacts best understood as a process of internal *decolonisation* and *reconstruction* of society" (Holdt, 2003: 3.). The transition from the colonial apartheid society to a postcolonial society went hand in hand with the political involvement of the working class in the new democracy on the one hand, and with the restructuring of social classes in general on the other – the emergence of a black political and economic elite. Both of these processes directly affected the relations between trade unions, state and businesses, trade union structures and activities, and not least the workplace itself (Chapter 10). Von Holdt concludes from this that the struggle in the workplace is not primordial, but that rather the mechanisms governing the political inclusion or exclusion of social classes in the state shape the strategies and politics of the labour movement and of workplace struggles. This view contradicts his two teachers Burawoy and Moodie. However, the political inclusion of the working class does not result directly in the workforce's incorporation in the factory. The strategic struggles between management and workers' organisations had a greater impact on workplace conditions than government policy and legislation. These thoughts clarify one of the key points that his intellectual predecessor Webster had not been able to grasp adequately in his thesis using Braverman's analytical tools.

The distribution of references across book chapters and according to different types of source is given in Table 9.4. The referencing is markedly different from the other works examined in two points. Around three quarters of all references are to the interviews that von Holdt conducted with the workers and unionists of Highveld Steel. This suggests that his study was consistently realised as a workplace ethnography, living up to its title "*Transition from below*": Here, he allows the voices of real actors at the grassroots level of the factory, of the union and of the social change to be heard.

Secondly, it is striking that the vast majority (132) of references to literature refer to texts from his own academic community. This goes both for the absolute number as well as for the proportion of texts used: The online appendix HOLDT OVERSEAS REFERENCES contains 24 works from overseas, and the online appendix HOLDT SA REFERENCES contains 55 from (South) Africa. In the case of this author, the use of articles from the Labour Bulletin (online appendix HOLDT SALB REFERENCES) is less surprising, as von Holdt as the former editor-in-chief knew the journal particularly well and had shaped it himself. The frequent references to locally produced texts speaks for the progress of South African Labour Studies. Von Holdt is able to build on a broad body of social-scientific research on the labour process, industry and the labour movement in transition.

Von Holdt deals with the majority of the total academic and particularly European and American literature in the first chapter, in which he positions his research question and his overall results within the current research and demonstrates where he is able to add new insights. Nearly all of this literature comes from the USA or the UK. In the first chapter, von Holdt situates his project within the international literature

Table 9.4: Reference patterns von Holdt, "Transition from below", by chapter according to types of reference

Chapter	Reference type									Total
	European and American Literature	(South) African Literature except students' theses	Student Theses	Non-academic Journals	Interviews	Press	(Historical) printed documents	Statistics	Others and unclear	
1	35	42	-	1	3	-	4	2	1	88
2	4	36	-	1	81	-	11	-	-	133
3	1	6	-	1	63	-	-	-	-	71
4	1	13	-	3	84	7	-	-	-	108
5	3	9	-	2	74	-	7	-	-	95
6	2	8	-	1	161	-	3	-	-	175
7	-	4	-	11	84	-	-	-	2	101
8	-	-	-	-	27	-	-	-	-	27
9	-	2	-	2	105	1	10	-	-	120
10	-	-	-	-	61	-	-	-	-	61
11	2	12	1	5	3	2	-	-	-	25
Total	48	132	1	27	746	10	35	2	3	1004

"Historical and printed documents" includes all references to archive materials such as minutes of meetings, statements, union publications, as well as materials and texts by the government, non-governmental organisations and courts. "Statistics" includes all references from which numerical information was taken.

and mentions the most important writers to have researched his particular problem: the book "Going for gold: men, mines and migration" (1994) co-authored by Dunbar Moodie and Vivienne Ndatshe, listed here under overseas literature because of Moodie's American academic affiliation, was the most important in terms of numbers (nine references). But the writings of Burawoy (five references in total to three publications), Waterman (four references in total to three publications), Moore (3) and Hyman (two references) are mentioned. On the effects of economic liberalisation and globalisation, von Holdt draws on Edwards et al. (three references) and Moody (three references). He also takes other countries of the global South into consideration: Burawoy's research on Zambia, Gordon's on Namibia and Mamdami's on Africa; he also refers to: Lambert, Ewer and a trade union publication on the Australian labour movement; Seidman on Brazil, de Villiers and on Spain and Brazil; Lambert and

Scipes on the Philippines; Munck on the “Third World”. Thus von Holdt broadens the perspective of South African Labour Studies, strengthening his criticism of the irrelevance of metropolitan approaches, which are unable to grasp the significance, reality and way of functioning of labour movements in other national contexts.

The author deals very closely with the scholarly writings of his SWOP colleagues – Glenn Adler, Sakhela Buhlungu, Avril Joffe, Jean Leger, Bridget Kenny, Judy Maller, Sarah Mosoetsa, Rahmat Omar – and in other departments of his university – Phil Bonner, Belinda Bozzoli, Peter Delius, T. Lodge. However, he also uses some work from Cape Town and Durban, and to locate the events in Highveld Steel within the national economic and political context he draws on various literatures, for example on the UDF and the ANC (Seekings, Swilling, Labour Monitoring Group and his own writings). Some are from extra-university circles, mainly the articles from the Labour Bulletin, although around half of the articles mentioned from this journal were actually written by himself.

Apart from the 17 references to the official history of Highveld Steel presented by Hocking – an important source given the management’s refusal to contribute to von Holdt’s research as it gives the management view of the time period examined – von Holdt refers most frequently to Webster’s “Cast in a racial mould” (twelve references) and to a whole number of other writings by the same author. This finding confirms von Holdt’s own self-definition as following in his teacher’s footsteps. He also takes over Webster’s view of the labour process without going back further to Marx or Braverman.<sup>45</sup> The content summary noted that, compared to Webster, von Holdt took the cultural dimensions of the factory and the labour movement into account much more. Here, Sitas’s unpublished doctoral thesis proved useful (seven references). Gordon’s studies on the conditions in the Namibian mines were useful in that Gordon had worked as a mine manager himself under apartheid and his book thus provides valuable insights that remain excluded from the other literature to a large part.

An attempt to categorise the literature thematically shows that most of it is concerned with the South African transition process (Adler/Webster; Joffe et al.; Eidelberg; Götz on union strategies within the framework of political democratisation and economic restructuring as well as the alliance with the ANC and the SACP; Baskin/Freidman/Shaw; Maree on codetermination in corporatist institutions). Von Holdt’s account sees the problem of “elite pacting” versus redistributive policies was treated by Adler and Webster, de Villiers and Anstey. He also ranks his study among the research on social change in Latin America and Eastern Europe (Munck, Waterman, Cohen, Seidman, Lambert).

The central concept of “workplace regime” is adopted from a comparative work by Burawoy (1985); Moodie and Thompson are also discussed in this context. His assumption that the mechanisms of political inclusion or exclusion of the working class in the state condition the strategies and policies of the labour movement and the struggle in the workplace contradicts Burawoy and Moodie. Social movement unionism was probably brought into scholarly debate by Waterman in 1984. However,

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<sup>45</sup>Marx is mentioned once, but this is more of an ornamental reference than any adoption of key concepts or research approaches. The same goes for Gramsci.

the concept had been conceptually honed and given an empirical grounding in South Africa and in the comparative literature (Seidman, Lambert).

The second chapter features a range of South African works on the conditions within and outside factories and migrant labour under apartheid. The entire middle section of the book contains hardly any references to scholarly texts. Here, von Holdt works with observations and interviews in order to deal with an issue that neither historical documents, press nor statistics would have helped him to analyse. The ethnographic method, which corresponds to his engagement with the cause of the labour movement, was the only appropriate one here; accordingly, von Holdt quotes extensively from interviews and conversations with NUMSA unionists in Highveld Steel. In the last chapter he returns briefly to the works of his colleagues<sup>46</sup> and occasionally draws on the Labour Bulletin in reference to individual events and debates. Primarily he is concerned to show that his empirical results correspond to those of his fellow South Africans' earlier studies, but that these were less innovative and went less far than his own.

## 9.7 “Transition from below” – sociology from below and theoretical relevance

Taking “Transition from below” as the last significant work of the period under investigation, it clearly speaks for progress in the content covered in Labour Studies. The references to national scholarly production are much more frequent than those to foreign literature, in marked contrast to “Cast in a racial mould”, the PhD project of von Holdt's supervisor. By contrast, the references to student works have decreased, aside from one mention (Buhlungu's Master's thesis), although this may be due to the fact that von Holdt did not teach in academia and thus has less access to these kinds of texts. At the same time, the importance of non-academic publications continues unabated, despite the fact that von Holdt edited the Labour Bulletin for many years and his book is probably not a representative reflection of the journal's significance for the academic community.

The book itself and the results of his analysis support the assumption of counterhegemony. As a researcher, von Holdt was able to draw on the experiences, acquaintances and reputation he gathered over many years in the South African trade union movement. These were a key influence on the realisation of his work, both in terms of methodology and content. At the same time, von Holdt anchors his work in scholarly debate. In order to do so, he draws on a whole range of overseas texts, mainly from Britain and the US. However, the importance of these texts for his work has changed when compared to Webster's large 1985 project. He does not enthusiastically adopt an entire research approach, instead selecting useful concepts from the relevant literature, not without criticising or challenging them – and this even though he knew several representatives personally – Burawoy and Moodie, Seidman and Lambert, all of whom had been in contact with the SWOP for many years; Munck, Waterman and Cohen had also been guests there. Thus we can see a more balanced relationship than

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<sup>46</sup>He mentions texts by Baskin, Buhlungu, Friedman, Kenny and Webster, Maller, Moodie, Mosoetsa, Mtshelwane, Theron, Webster, Webster and Omar.

that of his intellectual predecessor to Marx, Braverman and Edwards. Moreover, von Holdt's research is not conceptualised as a case study, an application of a particular paradigm; rather, it aims to make a contribution of its own to general theory on the workplace and the labour movement in transition processes. He emphasises that the available foreign works would not have been able to provide this from a South African perspective, and criticises his South African colleagues for not adequately covering their own realities in their adoption of imported concepts.

This general statement is substantiated using his observation of disorder in the workplace. Von Holdt expressly dissociates himself from the international literature. Furthermore, he criticises his South African colleagues for having taken over foreign approaches, which in his eyes skews their analyses (Webster; Lambert and Webster; Pityana and Orkin; Maller). As in Buhlungu's case, the influence of the criticism of Eurocentrism over the last decades are evident here. However, von Holdt does not retreat into South African exceptionalism; instead, using Mamdani he opens up his analysis of transition processes to colonial societies in the entire continent. As stated above, his results thus challenge the idea of a "double transition" as developed by Webster and Adler, adding a third, social dimension: the shift from a colonial to a postcolonial society. Another key point that contradicts social-scientific assumptions to date is that in colonial societies, hegemony and the political inclusion and exclusion that determine labour disputes are established primarily through the state and legislation and not through the conditions in the factories. This means that he adds the dimension of the state to the opposition between capital and labour. His colleague Peter Alexander of the Rand Afrikaans University is convinced that von Holdt's study is a groundbreaking one:

"Karl von Holdt (...) has produced a lucidly written and theoretically challenging book, which, in time, will doubtless come to be regarded as seminal. (...) it blends the strengths of serious scholarship with the best of activist journalism. (...) It is accessible to workers as well as intellectuals, showing that academic writing does not have to be dull and lifeless to be scholarly. At another level, the author raises important issues about the internal dynamics of the part that workers played in the overthrow of apartheid."<sup>47</sup>

Sitas admitted the book made him "green with envy" (Conversation with Ari Sitas Nov. 2005). Von Holdt's theoretical reflections also garnered praise from those colleagues whose work he challenges or disproves in his study. For example, Burawoy writes: "Karl von Holdt has delivered a *tour-de-force* on the dilemmas of challenging the old South Africa and building the new. I have not read such a powerful analysis of post-apartheid reconstruction, seen from below through the eyes of trade unionists, nor such an exemplary use of extended case method to turn the transition literature on its head" (Burawoy, 2003: 11).

In this regard, "Transition from below" is representative of a new phase in Labour Studies. The many years of scholarly backing for the labour movement have pro-

<sup>47</sup>Alexander, 2003: 11. Alexander also writes: "Von Holdt's book is a sympathetic, yet brutally honest, account of the strengths and weaknesses of working class action against apartheid. It must be read by any student who wants to understand industrial, political or historical sociology and contemporary transition politics. It is also a model of ethnographic research that blends theory and empirical detail."

duced a level of knowledge that makes it possible to produce independent theoretical developments. Von Holdt also caused a stir in the international scholarly community and made a contribution to the discipline as a whole. This example shows that, once sufficient grounding in society and local consolidation have been established, it is possible to open up to the international stage without losing connection to one's own society and giving up the integration into the local academic community. At the same time, such profound contributions appear to be balancing out the international relationships. Karl von Holdt's position towards Michael Burawoy or Dunbar Moodie is an egalitarian one, between specialists of equal rank.

This concludes the analysis of South African Labour Studies' theory production within the framework of this case study. The last section will sketch the development of the scholarly community's international relations. Thereafter, a final answer will be given to the question formulated at the beginning of the study.

## Chapter 10

# “Scouts on the periphery”? – Labour Studies and its international relationships

The position and reception of South African Labour Studies on the international stage will now be discussed. In order to arrive at a reliable, empirically based evaluation, we would need to analyse international literature and debate in regard to the perception and reception of South African “Labour Studies”. It is not possible to do this here. Instead, we can merely give an account of the overall pessimistic views of the interviewed representatives on the situation. However, in the early 2000s, South Africans had been able to increase their visibility through their activity in the International Sociological Association’s research committee RC44. A glance at their contributions at international conferences completes the picture of the situation.

International relationships were constitutive of South African “Labour Studies”, whose first exponents had nearly all studied in the United Kingdom. Unlike later generations that simply followed the trend among the English-speaking middle classes of sending their children to British cities, during the 1970s there was a real dependency on foreign institutions, as there was not enough qualified local staff to supervise theses in the field of labour and industrial sociology.<sup>1</sup>

Wealthy families sent their children to study in Britain at their own expense, while scholarships, some of which were funded by large mine owners, were available to others. In line with the “colonial connection” and the analysis of how staff were channelled through the different disciplines within the social sciences, these scholarships were usually tied to British universities’ study programmes in the field of “Area Studies”.<sup>2</sup>

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<sup>1</sup>The interviews and material gathered provided information on where a number of the sociologists who shaped the discipline from its early years up until today gained their qualifications: Belinda Bozzoli, Jeff Waters and David Ginsburg completed their doctorates at the University of Sussex, Johann Maree at the London School of Economics, Rob Lambert, Eddie Webster and Jonathan Grossman at the University of Warwick, Devan Pillay at the University of Essex, and David Cooper at the University of Birmingham. Of the interviewees from early departments who later rose to prominent positions, only Gerhard Maré, Ken Jubber and Ari Sitas began their academic careers in South Africa.

<sup>2</sup>“( . . . ) the scholarship was in a sense directed towards London, Oxford, from here through the Institute of Commonwealth Studies, through Race Relations in Oxford, and if you were good in the social sciences and you got a scholarship you ended up somewhere there.” Interview Ari Sitas 17 February 2004. This

## 10.1 “We stewed in our own juices” – academic boycott, import substitution and South African exceptionalism

In the 1970s and 1980s, international relationships were affected by the academic boycott of apartheid South Africa. However, study and scholarship programmes continued, so that personal connections abroad were maintained even after students returned home. As “Area Studies” syllabi during this time were shaped both by British left-wing scholars and South African expats, and as many students were probably politically active abroad, these international relationships frequently survived not only as purely academic networks, but also as political networks of oppositionists and the international anti-apartheid solidarity movement:

“(...) people in labour and industrial sociology, they’re the ones who tend to be high flyers and travel around the world and the rest of us stay home (...). I don’t know what the explanation is. I suppose it’s partly historical because when this whole emphasis began in the late ’60s and early ’70s the sort of people who initiated it had studied at sort of Warwick and Essex and Sussex and places like that. So, they had the international contacts anyway, whereas most sociologists studied locally, so when these sort of activists returned they had these contacts, (...) they remained in contact with, from exile and stuff like that, so I would guess that, that was part of it. That it was internationalized from the beginning, overtly and in an underground way (...) because of those international links people got invitations, they got money and platforms, they were in the international research groups. And the kind of stay-at-home dimensions, even today they haven’t made those connections” (Interview Ken Jubber 5 March 2004).<sup>3</sup>

By contrast, it is clear that the boycott strained the relationship with other African countries. Contact with “the rest of the continent” was “difficult, virtually nonexistent” (Interview Ari Sitas 21 February 2004). For Africa, the apartheid regime was completely beyond the pale and relationships with the Cape were avoided as far as possible.<sup>4</sup> For their part, critical South African academics observed the boycott. The ideology of “exceptionalism” that excluded the “white” South from Africa as a geopolitical unit also had a negative impact upon continental perspectives. Despite all of this, Sitas cited personal contacts with the universities of Lagos, Nigeria and Eduardo Mondlane, Mozambique, and with prominent individuals such as Mahmood Mamdani, Claude Aké or Samir Amin. The situation as it stands today, almost ten years after the collection of data for this study, is in need of a fresh review.

That sociology of labour and industry in particular did not operate on a pan-African level also had to do with its subject area. In the continent’s less industrialised coun-

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also meant that, because of the staffing and academic orientation of African Studies at British universities, South African students of sociology returned home as social historians: “(...) there was an emphasis on social history as opposed to sociology. So you left here as a sociologist and you came back a historian. That (...) is the legacy of area studies. So we never had contact with sociologists, we had contact with multiple disciplines within these spheres.”

<sup>3</sup>More rarely, contacts came about as a result of critical intellectuals visiting South Africa, such as in Burawoy’s case: “Michael Burawoy from Berkeley, his connection to South Africa was that (...) in the early ’70s, he came through here whilst he was studying nationalization in Zambia. And he met during those days Luli Callinicos and Eddie Webster and stayed in touch with South Africa since then.” Interview Ari Sitas 23 February 2004.

<sup>4</sup>Cf. the somewhat distanced, wary representation in Akiwowo, 1980.

tries, labour movements and trade unions played a comparatively unimportant role. Resistance to colonial rule did not originate in the working classes, but in the nationalist middle classes or in rural guerrilla movements (Webster, 2001: 196).<sup>5</sup> Accordingly, social scientists there were more concerned with topics such as rural development and the Labour Studies community could not see many points of convergence.<sup>6</sup>

The material gathered did not provide a coherent picture of other connections with the global South. Developments in Latin America were observed here and there – Che Guevara, Freire, liberation theology, Cardoso, dependency theory and debate on the development of underdevelopment were all familiar. ILRIG dealt with South America as part of their series on the international labour movement. Ari Sitas referred to a text by García Marquez about Cuban support for the Angolan war of liberation, which was immediately banned. Therefore, while some of the Latin American achievements were acknowledged, there was no coherent reception to speak of, if only because of the language barrier. The comparative works regarded as necessary could thus not come about either; regretful remarks were made on the fact that Gay Seidman had provided these from the USA.<sup>7</sup>

It is impossible to ascertain the true impact of the academic boycott irrespective of all other factors. However, it is certain that the South African academic community subjectively perceived its access to international developments as restricted. This gave rise to a further question; to stick with the vocabulary of political economy, that of possible “import substitutions”. When asked whether this relative isolation had promoted the development of their own ideas, Sitas actually replied:

“Yes, in a sense yes, because the isolation, you couldn’t go to conferences, there was the academic boycott. If you were progressive you observed the boycott, you didn’t want to be black listed in terms of your colleagues or others (...). So you didn’t know, there was no internet then, you know, whatever journals you managed to pick up before the state banned them, so, they were too critical, so there was isolation and then we stewed in our own juices, you know. We started inventing the world” (Interview Ari Sitas 21 February 2004).

Much more thorough analysis would be required to identify clear relationships between the influencing factors mentioned here. Still, it is quite likely that the academic boycott led South African academics to stay within the confines of their own society, as they had little access to the world stage. This may have contributed to the counterhegemony of South African Labour Studies to a certain extent.

However, some interviewees reversed the argument, claiming that belief in South African exceptionalism, increased by the lack of international communication and comparison, rendered the country’s sociology peripheral, as its connection to African

<sup>5</sup>Cf. the various liberation movements’ theoretical essays, such as Cabral, 1973; 1983; Fanon, 1961; 1968; Nkrumah, 1970; Nyerere, 1976.

<sup>6</sup>“(…) they have more of a development focus, not that much labour. Their unions simply have no capacity (...). I remember when Eddie Webster went to Mozambique, and when he came back I asked him about the union movement in Mozambique, and he said: ‘Well, they don’t really have a union movement there.’” Interview Johann Maree 3 March 2004.

<sup>7</sup>“But we didn’t have that much direct access to (these) things (Latin American sociology, W. K.). So the comparative stuff between Brazil and South Africa was done by Gay Seidman (...).” Interview Ari Sitas 23 February 2004.

theory development in particular was severed and scholars were focused on the United Kingdom.<sup>8</sup> Jonathan Grossman made this connection for his own career.<sup>9</sup>

International audiences were also intrigued by South Africa's exceptional history and present. However, this also meant that South African sociologists were reduced to representatives "of the country where Nelson Mandela sometimes lives". This again corresponded to the aforementioned definition via the local and exotic that was shown to be an element of the centre-periphery problem. Grossman expressed this idea very clearly:

"South Africa is peripheral (in the global knowledge economy, W. K). This again is connected to the South African exception. This is at least my experience of going to conferences overseas. I realised that South Africa has become a place where Nelson Mandela sometimes lives. And the South African academic is regarded as important because of that image of South Africa. But South Africa is not that important, it is attributed a kind of false importance. [...] This is because the world also promotes this South African exceptionalism, the world has this image of South Africa being exceptional. So international thinking was much focussed on South Africa. This may probably change with the younger generation; they won't run into the same localism" (Interview Jonathan Grossman 4 March 2004).

## 10.2 Opening up to the international community after 1994 – elements of marginality

All of the respondents agreed that South African sociology rapidly became "globalised" following the end of apartheid and of the boycott. The academic association contacted other associations and the ISA; researchers travelled outside the country and appeared at international conferences. Sitas in particular, who was president of the South African Association during the transition phase, benefited from international activity

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<sup>8</sup>Interestingly, this matches Tamari's (1994) observation that the isolation of Palestinian sociology also forced a version of exceptionalism there.

<sup>9</sup>"Well, the academic boycott had a major psychological effect on academics. I don't know if you have come across the book of Mamdani, what he wrote about South African exceptionalism. Now, I was living in England and when I came back at the beginning of the '90s, it was a time when everybody was just rushing around. So, I had taken the decision to be here again. And in me the academic boycott probably promoted a version of South African exceptionalism. I mean, we had that massive struggle, it was exceptional, and our visions were very much shaped by that, thinking of the unique and very exceptional context of South Africa. The academic boycott also played a role in that. Intellectually South Africa was isolated from African thought. There was growing euro-centrism among the whites." Interview Jonathan Grossman 4 March 2004.

and contacts at the time.<sup>10</sup> There was also a heightened interest in and knowledge of developments in Labour Studies in other countries.<sup>11</sup>

Yet, as the country was opening up, the centre-periphery dynamic of its relationships was also becoming particularly visible. For example, Buhlungu noted this regarding the choice of locations for sabbaticals. In his opinion, the fact that colleagues preferred the United Kingdom or the USA for research visits abroad showed that even then they did not believe that Africa was capable of producing great theory and thought they were better off in the centre.<sup>12</sup>

Looking back on several research visits to Berkeley, Sitas confirmed that relationships were still very unequal. He related this to study programmes and cited the “Global Studies” programme with the Universities of Freiburg and Delhi as the only positive example in which equal relationships existed: “(...) it is very difficult to relate to Berkeley and to any other place on equal terms like we are relating to Freiburg at the moment. They are ready to send their students here to have some fun, but our students can’t go there because, obviously, they were lesser stocked than their students. And their PhD programmes are very prestige and ours are shit. I suppose, you know. So it’s a one way, still a one way” (Interview Ari Sitas 23 February 2004).<sup>13</sup>

Material disadvantages were cited as the main reason for inequality in these relationships, whether in regard to study programmes and scholarships or research funding.<sup>14</sup>

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<sup>10</sup>“For me, very influential during those years, I happened to become the president of the South African Sociological Association at the time when the opening started, you know. I was president from (...) ’96-’98. So, at the time of the integration of South Africa (...) beyond the academic boycott. (...) every senior sociologist (...) in the world was visiting South Africa at the time. So a lot of exciting things. And at the same time Immanuel Wallerstein was the president of the International Sociological Association and started leading delegations here and started organising regional conferences, and we became members of the International Sociological Association. We immediately went to India and met the Indian colleagues. You know, it was a lot of (...): ‘There’s a world out there!’ And a lot of exciting ideas. So I was fortunate in a sense, from ’96-’98, because of all that quick exposure of South Africa. I was elected in the International Sociological Association in the executive, and then the next round into the vice-presidency. So you know, I got globalized very fast. So that was something new, totally new.” Interview Ari Sitas 13 February 2004.

<sup>11</sup>“But I think also industrial sociology is far more conscious of what is happening internationally. I mean, it always was, but I think now it is starting to integrate them.” Interview Shane Godfrey 3 March 2004.

<sup>12</sup>“Never the sense that something [...] path breaking could emerge out of here. People were still (...) speaking to networks in the North. (...) Where do people here go on sabbatical? Labour studies, now, where do people go on sabbatical? They don’t go to Nigeria up the road. Or Mozambique, or Zimbabwe, or something. ... They go to Oxford. They go to the US. Of course they won’t go to France because they don’t speak the language. Or to Portugal. They don’t speak the language. Or Spain. They go to: England! And the US! That’s what they do. (...) Isn’t that how theory gets transmitted across the globe? It’s through readings and it’s through travel and through conferences and presentations and most importantly, where do people spend their sabbatical time? People here spend their sabbatical time there!” Interview Sakhela Buhlungu 7 April 2004.

<sup>13</sup>He added, placatingly: “But at the individual basis you manage to do other things, like Gillian Hart and myself now setting up this livelihoods project (...), getting the funds together, getting the local students (...). And she’s committed to being three months a year here and being part of the program (...).”

<sup>14</sup>“Their PhDs (USA and UK, W. K.) are well funded and full time. Our PhDs are working, cannot be full time, because those resources do not exist (...). Their research funds are (...) phenomenal in comparison to what we have here. (...) We don’t have such resources in our National Research Foundation. And we won’t get them for a long time to come.” Interview Ari Sitas 23 February 2004. Mosoetsa qualifies this regret concerning the comparatively poor conditions for academic work and thinks that many African countries naturally prioritise other things: “Why do you expect Zimbabwe to be saying: ‘We want to produce 20 books, while 20 people are starving?’ (...) What comes first? Also in Zambia, there was a strike by lecturers, top academics, about the fact that they can’t make ends meet (...). There’s no money, they are not paid well. Than why do you, how do you expect those people to be producing? (...) tons of resources just spent on my book (...). And if a country has no resource to even take care for its citizens,

Jubber mentioned the lower level of development and the small size of the South African academic community, which was unable to compete with Western Europe and the USA, as yet another reason for this peripheral position. In order for top theorists to emerge, a broad "critical mass" was necessary. But as this was lacking in South Africa, academics to date had stuck to simply "copying" theory. Furthermore, important contributions on South Africa did not come from the country itself, but were produced by African Studies overseas:

"(South African sociology, W. K.) is (...) very underdeveloped. And there's very much, you can call it derivative, copycat. (...) I think you need a very strong scholarship base and support base. You need thousands and thousands of very qualified, to produce one top theoretical sociologist, so I don't hold it against South Africa, we just don't have the infrastructure, we don't. (...) the people who come and half theorize for us (...) like Heribert Adam, he comes here for half a year and he lives in Canada, are very good (...). There's also Pierre van den Berghe (...), a Belgian (...). So there are people who are near the top (...) and they do what South Africans should do for themselves" (Interview Ken Jubber 5 March 2004). Godfrey also saw South African exceptionalism as a hindrance in the sense that it caused scholars to refrain from fundamentally challenging international theory.<sup>15</sup>

However, the orientation towards a foreign audience as well as the reception and use of overseas approaches was also linked to science policy and funding models, particularly the pressure to publish internationally. In order to get one's own work into prestigious journals, one had to accept and follow the rules of the centre:

"But, let me make my point, which is related (...). Where do we draw our theoretical inspiration, from insides and so and so forth? It's very much the North. In many cases it's not (...) a question of choice. And I don't want to overgeneralize this, in many instances it's not simply a matter of choice by the scholar in the South, (...) it's a matter of realism. You got to be pragmatic and realistic that I want to publish. I want to get published. And (...) I must (...) look around and see what people'll be saying. And the reference point has got to be some things. You've got to speak to the great theories of the North. That kind of thing. That's that. And I think because of the pressures of publishing, the pressures of work, and so on, some people can go completely, well, can go very far down that instrumental route. Of not thinking about what they're doing, but just doing it, (...) of just borrowing things" (Interview Sakhela Buhlungu 7 April 2004).<sup>16</sup>

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why do you expect that country to put more money for research and knowledge production?" Interview Sarah Mosoetsa 7 April 2004.

<sup>15</sup>"I think what characterises it (South African sociology, W. K.) is that it has this lack of international integration and a lack of [...] developing theory to explain South Africa, what is happening with South Africa, around various South African issues. And also a lack of challenging internationally, really confronting theory that has been developed in really advanced industrialized countries, those industrial theories. Really confronting them with the South African situation, rather than saying, well, South Africa is a unique case and explaining it away in that way. Really confronting the international theory on South Africa and modifying the theory in that way." Interview Shane Godfrey 3 March 2004.

<sup>16</sup>When asked about the prioritisation of international publications criticised by many respondents, Tessa Marcus of the NRF rejected this accusation. In order to be granted funding by her organisation, the only decisive factor was a list of peer-reviewed journals in which national and international publications were ranked equally. Interview Tessa Marcus 26 March 2004.

One student also stated that undergraduate courses, particularly in the first years of study and in the field of classical sociology, covered hardly any (South) African work and thus contributed to the younger generation's lack of knowledge of local production and their failure to learn to appreciate it. In her opinion, less time could be spent on reading classical texts and more on South African literature from the very first semesters on:

"I think it was only until the final year that I did South African sociology. All the years I had been doing sociology it had been Marx, Durkheim, and all the other things. And it was only until my 3<sup>rd</sup> year that I did industrial, South African industrial sociology. So I think there is a marginalisation. But I wouldn't blame it on the international arena. I would rather blame it on us, we tend to focus more on what the sociologies of other countries than, of ours (...). I think that should be integrated, that should be used in trying to understand our own sociology and comparing it to theirs, not ours being more secondary to that one. Because now the problem is that people don't see a point of being sociologist. (...) Because they can't go and study American sociology, they can't go and work as American sociologists, and that's the market they understand (...). But if we turn to teach them more about our own local production of Labour Studies, I think that could make a difference" (Interview Andziwiwe Zenande Tingo 20 February 2004).<sup>17</sup>

Finally, the peripheral position had to do with the poor reputation both of the academic community and of South Africa as a society and location for sociological research. For example, Johann Maree faced the typical experience of foreign colleagues ignoring contributions from his country even concerning issues for which it would have been useful to consider South Africa, such as in the field of internal codetermination:

"So South Africa is a part of Africa, part of the margin, (...) we are marginalized and not looked at seriously by the global community. For example, there was that paper by an Australian scholar on questions of codetermination, 'Mitbestimmung' in Australia. So he looked at one country, Britain (...) I don't know really why Britain, but he didn't mention South Africa, while we had so many experiences and negative experiences (...) in the last years with codetermination. And there's so much literature here about this issue. So I said to him: 'You could learn from looking at South Africa.' And he said: 'Yes, I could.' But he didn't look at the South African literature, because it's not in his way of looking for references to turn towards South Africa (...). So we're linked, but still part of the periphery" (Interview Johann Maree 3 March 2004).

Belinda Bozzoli was less charitable, accusing – in this case British – colleagues of academic narrow-mindedness, although she perceived "problems there and problems here":

"Well, has any sociologist in the US ever *heard* of South African sociology? I mean African studies is on the periphery. I went to the British Sociological Association conference a couple of years ago, their annual conference. And I'm on their editorial

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<sup>17</sup>During the summer of 2007, the author had the opportunity to give a sociological theory lecture for third-year students at the UKNZ as a visiting lecturer. Discussions with students confirmed that they had barely covered any African theorists.

board of their journal and everything, but they've never heard of Africa, they've never heard of African studies. There is not one third world paper to them and I think it's a criticism of them. But their idea of sociology is completely first world and a lot of it quite trivial. A lot of it about, I don't know, [...] how a housewife organizes her time between looking after the baby and going to work. Ya, okay, you can argue that it's relevant, it's about gender and everything, but it sort of gets reduced to the trivial and I was quite shocked actually. And I don't think that would have been the case twenty years ago. I think the British Sociological Association twenty years ago probably had a lot of Neo-Marxists in it who were saying: 'Think about the poor, think about the Third World.' Now it's just: 'Study yourself!' I must say, I was quite shocked. I don't see it as a criticism of us, because I think our work is quite strong, maybe not as strong as we think it is, and there still aren't very many substantial books coming out of South African sociology. A lot of interesting articles, but the idea of writing a book is not really embedded enough in our discipline, and that's how you make your name known elsewhere, (...) having the monograph is the main means of communicating yourself as a substantial thinker, rather than just another contributor. So, problems there and problems here" (Interview Belinda Bozzoli 30 March 2004).

The lack of interest in South African sociology was due, among other issues, to the unequal international division of labour sketched above. Accordingly, contributions from South Africa were usually seen as "case studies", for which the North provided both the theoretical framework and the academic standards. After mentioning the material and institutional reasons for these unequal relationships, Sitas also brought up this additional point:

"(...) there are subtler forms of the unequal relationship. It is from journals, it's from recognition of journals, it's from publishers. (...). If we do something from here it is a case study. What others do over there is not a case study, because they are defining things in terms of any concept or any process you dare think (...). That's why you are in constant alliance with the post colonial theorists (...). At least they open up a space for different representations" (Interview Ari Sitas 23 February 2004).

It was the North that provided general theory. Like many colleagues from other countries in the global South, Buhlungu above all criticised North Atlantic theory's claim to universality and power to set international standards. In South Africa it was usually accepted that the North was the general benchmark, even though the theories developed in the North were often ill-adjusted to local conditions. While he confirmed that this was a constant subject of debate, Buhlungu made sure to note that this did not apply to Labour Studies to the same degree:

"(...) most of the time, I can tell you now – and we're talking about this all the time – most of these theories don't fit here. They don't fit in the form that they come. (...) You've got to make allowance for context. It doesn't matter where. And theory that doesn't take contexts into account is bad theory, in my view. (...) It's always been like this. (...) Look, scholars in the South have always seen themselves as, many of them, not all of them, have always seen themselves as, [...] you know: The reference point is the North. The reference point of knowledge is the North. The

reference point of civilization is the North. The reference point of modernity is the North. The reference point of whatever is good is the North. The reference point of what is distorted and bad and dysfunctional and corrupt and so on is the South. So, what I'm saying is that even scholars here sometimes get surrogates of scholars in the North. They're simply kind of repeating and regurgitating stuff from the North. Without themselves making kind of any effort. (...) in the field of Labour Studies, let me say that, I haven't said that. In general, (...) in the field of Labour Studies, there were areas where people were beginning to make sense of the reality as it came" (Interview Sakhela Buhlungu 7 April 2004).

In Ken Jubber's experience, South African contributions were not regarded very highly, and it was very difficult to publish and market general theory works. Whoever dared to address general issues had to struggle against the perception of South Africa as a terrain for local applications and the low international prestige of his or her academic community. This image was also prevalent in the publishing industry:

"There again, if it's a book on South Africa, fine, those were reasonably easy to publish in South Africa, or abroad. If it's something that will sell elsewhere. But if you are a South African and you want to publish a book on philosophical theory, something like that, which has very little or nothing to do with South Africa, you will really struggle. (...) the local publishers will probably not be interested, because they'd say they do not have the infrastructure to distribute it. So you would have to go to an international publisher. And the international publisher would say: 'Why must I publish you, I'd rather publish some American or British person, who can then get on the book selling circuit, a known name'" (Interview Ken Jubber 5 March 2004).

The international relationships described thus far were of course similar in many southern countries, but in the case of South Africa, the ideology of exceptionalism had an additional negative impact. For example, Godfrey described the attempt to form a collaboration with the French "Centre National de la Recherche Scientifique" (CNRS). While the South Africans were interested in a comparative project involving South Africa and France and possibly other European countries, the CNRS researchers wanted to study South Africa only and were searching for local partners to do this. The cooperation was unsuccessful (Interview Shane Godfrey 3 March 2004).<sup>18</sup>

However, in some respects South Africa's image as a special exotic case also benefited the Labour Studies specialists, who in the post-apartheid years moreover appeared in a heroic light because of their political resistance to apartheid. At least they were invited and heard at international conferences. Jubber, who did not belong to this narrow circle, seemed somewhat resentful of the international demand for his colleagues, emphasising that they always spoke about very specific local problems and served as a data basis for sociology in the centre:

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<sup>18</sup>This was a planned cooperation on "Casualisation, Globalisation and Social Reactions" with Dr. Beatrice Appay, CNRS, Prof. Liane Mozère, University of Metz and Prof. Jacques Charmes, University of Versailles. Mosoetsa also recognised the widespread pattern in which South Africa served as a database, accessed by foreign scholars in order to develop theory in Europe. She also linked the colonial structures in knowledge production with the heritage of apartheid: "(...) knowledge production has always been and is still shaped by our past. You know, race. Where (...) data collectors, researchers are black people, those who produce these books and articles are white people." Interview Sarah Mosoetsa 7 April 2004.

"(...) there again, (...), why industrial sociology can travel is because they are always saying something specific and they're talking about South African labour movements and historical events and very descriptive stuff. So they're going to tell people, like journalists, about what was happening, this Durban strike, the Fattis and Monis strike, the mineworkers' strike and all that. Very little grand theorizing, except people like Wolpe and that, who do theorizing, Dan O'Meara (...). But when you travel as a South African sociologist, you don't go and talk theory in Australia or in America. You go and tell them about something very specific, very concrete, that's what the audiences want. That's why they invite the South Africans. They want to know what's happening on the ground, they don't want them to come there and talk high-falluting theory to them. Because that's what the Europeans do very well and some of the Americans do very well. The nice grand theorists, but we are like scouts on the periphery. Don't know what's going on: 'What's happening down there? Come, tell us!' You know? 'We need some data to work with'" (Interview Ken Jubber 5 March 2004).

At international conferences, the South Africans struggled with hierarchies in reputation, which were also linked with the degree of abstraction in sociological work – case studies versus general theory. Buhlungu was indignant that on the one hand he was expected to write in a way that catered to the interests of an international audience; the topic of his paper could be more or less random. However, at the same time colleagues from the North wanted to write their paper "on his paper". That is, his papers were supposed to be subordinate to those of northern colleagues in their scope, range and degree of abstraction:

"(...) we're linking to these international networks, so you get lots of feed back on that front. On the international front. But sometimes the international people, for as much as they do, they want to (...) write their own paper on top of yours, or put it on top of yours, you see what I mean?" (Interview Sakhela Buhlungu 7 April 2004).

In addition to the randomness of the topic – "You may as well be writing about, (...) I don't know, elephants in the Kruger Park. And not about the subject (of discussion)" (Ibd.) – there was the arrogance of the foreign sociologists who claimed to be "specialists" of a southern country after only minimal work on the topic. By contrast, because of their peripheral position it would be impossible for South Africans ever to be regarded as specialists on the societies of the North:

"The South is that exoticized thing. It doesn't matter what the person (the South African at an international conference, W. K.) was talking about. You (...) know, 'We heard South Africa last week.' (...) Especially the Americans, they're very, very parochial. You know, the parochialism of the North. (...). You find it in Labour Studies, too. And if a person from the North, whether from this field or that (...) if they've read one book on labour from the South, then: that's it. That's it! That then makes them an expert! Makes them an expert! I mean, you could read 50 books about the labour movement in the USA, if you live here, it doesn't make you an expert at all" (Ibd.).

Sitas also reported similar experiences. In contrast to overseas colleagues who had been in close contact with the Labour Studies community since the 1980s, in the 1990s many social scientists suddenly appeared eager to cobble together a quick publication on South Africa and to establish – once again, deeply unequal – contacts with local colleagues in order to do so. These were typical cases of “parachuting”, as Buhlungu called this practice, in which foreign sociologists appeared out of the blue, so to speak:

“Through the ’80s at personal levels, they would come to visit to understand the struggle in South Africa basically (...). But none of them set out to exploit us like a lot of the other American colleagues did (...). (...) Just running here (...), your contacts, three weeks visit, write a book on the struggle in South Africa, despite any local kind of research, quick, quick, quick books that came out on South Africa. There were also some Germans who did that, who will remain nameless (...). They think they have their theory and publish the next year. (...) There was no proper long term research and engagement (...) South Africa was sexy. Bang! Quick publication! And because South Africa was sexy as well a lot of research programs designed by them. We were asked to play second fiddle” (Interview Ari Sitas 23 February 2004).<sup>19</sup>

The randomness of the topic – all contributions on South Africa were stuck in the same regional, thematically unspecific pigeonhole – as well as the possibility of quickly making a name for oneself in the North as an “expert” on the South while excluding the opposite set-up also showed that southern societies were not appreciated in their complexity. This reflected the evolutionist assumption that the latest level of human and social progress always took place at the centre. By contrast, the South had nothing truly original to offer social theory. J. Maree also hinted at this idea in this conclusion to the discussion about unequal international relationships: “Well, I guess it’s because they are the vanguard of development, they don’t have anything to learn from us here. We can’t inform them on the questions they are dealing with now” (Interview Johann Maree 3 March 2004).

Besides issues concerning the level of development (material infrastructure, size of the academic community), based on the interviews in this section we were able to identify the following additional reasons for South Africa’s peripheral position within the international community: the low prestige of southern sociologists; parochialism in the North; the pressure to produce international publications; not completely independent of this, localism and the self-representation as the exotic Other; the South African ideology of exceptionalism; and the evolutionism inherent in the discipline. These impressions and experiences confirm the centre-periphery relations within international sociology from the South African perspective. Nevertheless, the present study argues that at the beginning of the new millennium, a slow international integration and recognition of South African Labour Studies had been taking place. For example, the essay collection “Worlds of Work” included South Africa in essays on international cooperation and the constitution of an international field of research (Cornfield/Hodson, 2002, containing Webster’s contribution on South Africa: Web-

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<sup>19</sup>He cited contacts with Michael Burawoy, Manuel Castells, Michael Watts, Gay Seidman, Immanuel Wallerstein and Jean and John Comaroff as examples of long-standing relationships.

ster, 2002). Most notable were the developments in the research committee RC44 of the International Sociological Association.

### 10.3 RC44: South African Labour Studies enters the international stage

The integration of South African Labour Studies into Research Committee 44 (RC44) on labour movements of the International Sociological Association illustrates a shift in international relationships. The results of a study on the South African community's activity in this committee confirm that once counter-hegemonic movements are consolidated on a local level and establish themselves internationally, they may challenge the centre-periphery structure. This analysis is concerned with the conditions under which the South African researchers joined the committee and whether international exchanges took place on an equal footing there.

RC44 dates back to the late 1980s; it was recognised as a research committee at the 1990 World Congress of the International Sociological Association in Madrid. Initially it was made up mainly of West European and American researchers. Unfortunately no points of reference were available for the time before E. Webster's activity on the board;<sup>20</sup> therefore it remains unclear what the committee's activities prior to 1998 looked like. However, the programme for the World Congress in Montreal in 1998 gives us some indication. At this Congress, RC44 was one of the largest research committees and organised twelve sessions. Of the 15 people chairing the individual sessions, one came from Italy, one from the Netherlands, three from Canada, three from the States, three from the United Kingdom, two from Australia and one from South Africa: the programme was led primarily by colleagues from the North.

No evident effect on content can be inferred from the available material. The programme, which listed only the titles of entire sessions, not the names of individual papers or speakers, included five titles of sessions on general issues: "Trade unions and social pacts" (Chair: Marino Regini, Italy), "Renegotiating class compromises" (Eddie Webster, South Africa), "Le syndicalisme et la représentation à l'établissement" (Mona-Josée Gagnon, Carla Lipsig-Mummé, Canada), "New constituencies, new unionism" (Pamela Roby, USA, Peter Leisink, Netherlands) and "The State and labour" (Peter Fairbrother, UK). Two sessions addressed globalisation: "Transformation of work and women's labour organization in the context of globalization" (Suzanne Franzway, Claire Williams, Australia) and "Micro-Meso-Macro: rearticulating union strategies in the context of globalization" (Gregor Murray, Canada). One session had a clear comparative focus: "Cross-national comparison of labour movements" (Richard Hyman, UK). Finally, a number of sessions dealt with regional or country-specific issues: "Labour in post-communist societies" (Simon Clarks, UK), "Industrial relations and labour politics in Asian industrialization" (Hagen Koo, USA), "Labour movements and state-building in new democracies" (Volker Frank, USA) and "Union democracy in developing countries" (S. L. Hiremath, India).

<sup>20</sup>The biannual issues of the RC44 Newsletter December 1998–October 2001 were available on the Association's webpage, and the issues from April 2002, November 2002 and June 2003 were available on SWOP. Cf. ISA Research Committee 44. The following reflections draw from these sources as well as from interviews with Webster, Buhlungu and other researchers involved.

Overall, there were more events on general questions than on regionally specific ones, only a few on globalisation issues, which affected all countries equally, and there was only one opportunity for discussion of comparative questions. Southern representatives acted as chairs of various sessions.

At the conference in Montreal, Richard Hyman was elected as president and Eddie Webster as secretary and editor of the newsletter.<sup>21</sup> They made sure that the improvement of geographical representativeness and strengthening of ties with labour movements were put on the agenda.<sup>22</sup> While the latter goal confirmed their awareness of social situatedness and relevance and their will to reduce the dominance of traditional approaches, the former aimed to create a balanced ratio – at least in terms of numbers – between representatives of different countries. The realisation of these two goals will now be described for the years that followed.

In 1999, Hyman noted that in addition to their academic work, many RC44 members were also politically active, often in trade unions. He declared himself in favour of strengthening the entire committee's ties with labour movements: "(...) the challenge is not merely academic: most of those who study labour movements do so not as detached intellectuals but as co-participants. In the past, the practical engagements of many RC44 members have not been mirrored at the level of the Research Committee itself. This needs to change, and I know it is a priority of Eddie as our new Secretary to forge much closer links with international labour."<sup>23</sup>

Three years later, the focus was no longer on RC44 members being active beyond their research, but on including activists in the committee's circle: "(...) demonstrate our relevance to those whose activities we research, make them co-participants in our research agenda (...)" (Hyman, 2002: 7). The material available does not reveal the extent to which this endeavour was actually successful. Two trade union representatives presented their work at the 2002 World Congress in Brisbane.<sup>24</sup> However, the desire for a strong connection between national academic communities and the respective labour movements and between international trade union or civil society movements and RC44 was evident, not simply as a matter of political conviction, but also for the purpose of setting priorities when conducting academic research –

<sup>21</sup>Other members of the board included Varkey Jose (ILO, Geneva), Carla Lipsig-Mummé (University of York, Canada), Pamela Roby (UC Santa Cruz, USA), Rob Lambert (University of Western Australia, Perth) and Regina Morel (Federal University of Rio de Janeiro, Brazil).

<sup>22</sup>Webster justified transferring the newsletter to Johannesburg in these terms: "We have decided to produce it (the Newsletter, W. K.) from Johannesburg. We hope that by locating RC44 firmly in the South, we will encourage labour-linked intellectuals from developing countries to participate in RC44." Eddie Webster in: ISA Research Committee 44, 1998: 1.

<sup>23</sup>Richard Hyman in: ISA Research Committee 44, 1999: 3. That the committee was also intent on giving itself a particular political profile when Hyman and Webster were elected in 1998 becomes evident in the following passage from the statutes that were revised in Montreal: "RC44 strongly affirms its support for the following core labour standards which it holds to be fundamental human rights: 1. Freedom of association; 2. Right to organise and bargain collectively; 3. Prohibition of forced labour; 4. Elimination of exploitative forms of child labour; 5. Non-discrimination in employment or occupation." ISA Research Committee 44, n.d. 1. Underlying this was the understanding that political activity could be reconciled with academic research and was indeed desirable: "Most of us recognize that intellectual activity is a political process: scientific rigour is not incompatible with practical engagement, and indeed any idea of academic detachment or neutrality easily becomes an alibi for acceptance of existing patterns of domination and exploitation." Hyman, 2002: 7.

<sup>24</sup>Jess C. Walsh of the "Australian Liquor, Hospitality and Miscellaneous Workers Union" and Karl von Holdt of the NALEDI, who gave two papers.

"mak[ing] them co-participants in our research agenda". The present study argues that local social relevance promotes the development of independent, original sociology. Hyman as president and Webster as secretary made contacts with social actors a priority and purposefully advanced both the internationalisation and the relevance of RC44's activities. The South African experience may even have served as a model for this step. If this was to be achieved comprehensively, then the role in the committee of the South, which was in contact with local trade union movements, needed to be strengthened.

In 1999 Webster reaffirmed the intention to balance out the North-South divide in membership: "We are especially keen to recruit members into RC44 from Africa, Asia and Latin America. (...) these countries continue to be under-represented in RC44 and in many cases, these are the parts of the world where labour movements have been most innovative over the last decade" (Eddie Webster, in: ISA Research Committee 44, 1999: 1). Hyman, too, considered this the committee's primary goal: "The first (main challenge, W. K.) is to consolidate our membership in those parts of the world where it is fairly weak (...). We have a handful of members in Africa, Asia and Latin America where many vigorous, expanding and innovative labour movements are located. A key aim in the next few years must be to make our activities truly global" (Richard Hyman in: ISA Research Committee 44, 1999: 2).<sup>25</sup>

Representatives from the global South were initially in demand so the circle could gain knowledge of labour movements in these countries. However, regional specialists from the North could have made this contribution just as well. In Webster's and Hyman's statements, the interest in labour movements in the South seemed more important than the contributions to social science that might be expected of the African, Asian and Latin American academic communities. Reports printed in the RC44 newsletter would make more information on academic and trade union activity available to all committee members.<sup>26</sup>

It was only in 2001 that the RC44 newsletter drew attention to the theoretical significance of staffing the committee according to regions of origin: "The changing nature of the state-labour relationship needs to be examined in a new light, contrasting Northern and Southern parameters and possibilities. (...) What can the North learn from the South? Above all, the geographical scope of labour theorising needs to be broadened, so that the European particular is no longer taken for the universal" (Webster/Lipsig-Mummé 2001: 3). The increasingly internationally staffed commit-

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<sup>25</sup>He later included the question of language in this challenge: "We have to grasp the issue of language: there is much innovative research, as well as valuable academic-trade union links, in French- and Spanish-speaking countries." Hyman, 2002: 7.

<sup>26</sup>Over the years, these reports included for example: "The Indian Ocean Trade Union Initiative" (Rob Lambert), Nalini Nayak's contribution "'No women, no fish' – a feminist perspective on fisheries in developing countries" on the question of working conditions outside the industrial sector; conference reports from various countries; a call from the "Central Única dos Trabalhadores" to take part in the 2nd World Social Forum in Porto Alegre; a report on the "ICFTU Asian and Pacific Regional Organisation" by Kim Sung-Jin; articles on "Industrial Relations in Australia"; about the conference of the "Southern Initiative on Globalisation and Trade Union Rights" 2001 in Seoul; on the "Australian Research Centre on Work and Society" (ARCWS) and the "Australian Council of Trade Unions" (ACTU); a research paper on "SIN-TRAEMCALI and social movement unionism: a case study of bottom-up globalisation in Colombia" and many more. Cf. the ISA Research Committee 44 newsletters listed in the bibliography.

tee's activities over the previous years may have contributed to this insight into the theoretical relevance of international exchange and cooperation.

All of these efforts led to a “shockingly” high level of South African participation at the 2002 Brisbane Congress (Interview Ari Sitas 23 February 2004). The board elected there presented itself as “representative of nearly all regions of the world”: Eddie Webster took on the presidency and Carla Lipsig-Mummé (“Australian Research Centre on Work and Society”, Deakin University, Australia) the vice-presidency.<sup>27</sup> The presence of the South in Brisbane now outweighed that of the North.<sup>28</sup>

In 2002, the geographical distribution of all 55 members was as follows: 16 members came from North America, 12 from Europe and Africa (predominantly South Africa) respectively, six from Australia, five from South America and four from Asia. The North-South divide was more or less balanced out (Metcalf, 2002: 8). Of the 50 people presenting papers in the RC44 sessions at Brisbane, 33 had academic affiliations in the South, with Australia and South Africa most strongly represented. The South African contributors were Franco Barchiesi (Sociology, Wits), Andries Bezuidenhout (SWOP), Debby Bonnin (IOLS), Sakhela Buhlungu (SWOP), Karl von Holdt (NALEDI), Bridget Kenny (SWOP), Rahmat Omar (SWOP), Shaun Rugunan (IOLS) and Eddie Webster (SWOP), with some of them presenting papers in several sessions.

In terms of content, all of the sessions were general, unlike the programme in Montreal, which had divided sessions into general, international and regionally specific topics. Individual papers were concerned either with general issues (ten papers, distributed equally between northern and southern representatives) or with regional specifics on countries of the South (20, most of which were given by local sociologists), the North (two, given by local sociologists) and two papers on North-South comparisons by an American and an Australian. The only case that reflected traditional role distributions was the session on “Globalisation, manufacturing and the labour movement”.<sup>29</sup> In the other sessions, all kinds of combinations were represented, although the low number of contributions from and about the North and Europe in particular was striking. This might have had to do with the morose state of the European trade unions and the current lack of innovative research practice in that field. Going into closer detail would require a look at the activities of related research committees, which is not

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<sup>27</sup>The rest of the board consisted of: Secretary: Rob Lambert (University of Western Australia), Treasurer: Donella Casperz (University of Western Australia), Newsletter Editor: Sakhela Buhlungu (SWOP), board members: Kwang-Yeong Shin (Chung-Ang University, Seoul, Korea), Mona-Josée Gagnon (University of Montréal, Canada); Bob Carter (University of Leicester, UK); Varkey A. Jose (International Institute of Labour Studies, ILO, Switzerland), Suzanne Franzway (University of South Australia), Angela Araújo (University of Campinas, Brazil), Robert O'Brien (McMaster University, Ontario, Canada), Lee Pegler (Institute of Social Studies, Den Haag, Netherlands), Newsletter and Membership Coordinator: Anthea Metcalfe (Cape Town, South Africa). However, there were no representatives from Russia or Eastern Europe.

<sup>28</sup>“There was a strong input from the south (South Africa, Brazil, Korea, China, India). We will need to work hard to ensure a stronger turnout from the North at the next ISA in South Africa.” Rob Lambert in: ISA Research Committee 44, 2002a: 5.

<sup>29</sup>Lee Pegler of the Institute of Social Studies in the Netherlands as coordinator of the comparative “White Goods Manufacturing” project already referred to in connection with SWOP research activity, held a comprehensive introductory talk on this subject, “The global re-organisation of production: implications of recent developments in the white goods industry”, while collaborators from Brazil (Angela Araújo), Australia (Rob Lambert), and South Africa (Andries Bezuidenhout) provided the respective case studies.

possible here. It is conceivable that RC44 had developed into a forum for South-South contacts and in particular had institutionalised the long-standing exchange between South Africa and Australia, which was facilitated primarily by Rob Lambert.

When taking up the office of RC44 president, Webster defined the key questions to inspire the committee's research agenda based on the discussions in Brisbane. In doing so, he referred to current problems affecting the worlds of work, industry and labour movements across the globe, which could be suitably addressed by an international forum. In his view, a more balanced composition of the committee was not a goal in itself. The subdiscipline's subject area required geographical representativeness and comparative transnational work. He also argued that academic research could have political relevance for trade union strategy.<sup>30</sup>

Around 2002 the idea emerged for an international journal on the issues facing labour movements in the South. In the same breath, Webster pointed out that this kind of exclusive focus could reinforce the North-South divide, which was not the aim of RC44 (Eddie Webster in: ISA Research Committee 44, 2002a: 1). Probably because of this objection, the project's main focus soon no longer was research in and about the South, but was comparative instead.<sup>31</sup> This kind of comparative undertaking seemed appropriate and promising for the development of the subdiscipline. It allowed for the inclusion of both social developments as well as their analysis by the social sciences in as global a manner as possible, as well as the academic discussion of the findings of an international community of researchers.

RC44's activities since the end of the 1990s indicated a speedy, appreciatory integration of the South African Labour Studies community into this international forum. Until 2004, Johannesburg sociologists had made a significant contribution to the internationalisation of RC44. Thus they had ensured that their research and insights into their own labour movement had contributed to the development of the field as a whole. In turn, this internationalisation had required the South African community to expand its horizons, counteracting its introversion so far and the widespread "exceptionalism" hypothesis and encouraging the comparative research that was urgently needed for the field to progress.

In South Africa itself, the potential contribution of the country's experience, and that of southern countries in general, to international debate was becoming clearer. Webster and Lipsig-Mummé had identified the need to link labour movements to broader social movements given the context of globalisation and had observed new forms of labour internationalism. In their opinion however, this also required a reintegration of

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<sup>30</sup>“(...) is the nature of work changing in a way that fundamentally changes the terrain on which labour organises? What impact is the growing informalisation of work having on traditional forms of trade union organising? How, and who, is to represent these new types of workers? Is organised labour beginning to find allies among the new social movements emerging in the anti-globalisation activism prominent since Seattle? Surely new models of unionism will have to be invented, models appropriate for a mobile, service oriented and knowledge-based economy in which women, immigrants and people of colour are in the overwhelming majority in the world.” Eddie Webster in: ISA Research Committee 44, 2002b: 4.

<sup>31</sup>“Comparative labour studies warrant greater scholarly recognition. Such a venture would cross traditional scholarly boundaries. The focus would be labour in the era of globalization. This necessitates the crossing of boundaries. This would be a global journal seeking to understand labour on a comparative basis.” ISA Research Committee 44, 2002c: 6. Webster suggested “International Journal of Comparative Labour” as a possible title. Eddie Webster in: ISA Research Committee 44, 2003a: 3.

labour sociology, trade union sociology and the sociology of social movements, which were drifting ever further apart intellectually. They attributed this trend to the euro-centrism of the sociological schools of thought, whose analyses were informed by the development of trade unions in large capitalist cities: bureaucratisation, incorporation into state structures and isolation of social movements. The innovative strategies of the South African or indeed Brazilian, Polish or Korean trade union movements appeared instructive. For example, articulating demands pertaining to health, education, transport or drinking water through the unions could be included under “social movement unionism”. Accordingly, then separate social science traditions needed to be brought together, and the South could make an important contribution to this:

“The sociology of labour movements has not, in the past, reflected the innovative labour movements emerging in the South. Nor has it recognised the new labour studies, which have developed in isolation from the mainstream sociology of labour movements. (...) Will Third World workers, once relegated by labour studies to the status of exceptions to the rule, now provide models of how the North can revitalise welfare-state era unions? Will the issues that separated North and South, bring them together, as labour worldwide faces the challenge of an increasingly internationally integrated world? Could it be that theories of labour and strategies of labour action will now travel in the other direction – from South to North? (...) Clearly, the twin issues of creating new forms of international labour solidarity, and creating new forms of ‘knowledge transfer’ are coming on the agenda” (Webster/Lipsig-Mummé, 2002: 261-262).

With this suggestion, Webster and Lipsig-Mummé were taking attitudes influenced by evolutionism, according to which the newest social and social scientific developments were always found in the societies regarded as the most highly developed, and turning them upside down.

When this study was completed, these thoughts on international integration and recognition were only tentatively formulated, as South Africa’s inclusion in RC44 was still a rather recent phenomenon within the timeframe of research development. Furthermore, the significance of the reputation gained by researchers through their activity in institutions – even prestigious ones – should be nuanced by the distinction introduced by Pierre Bourdieu between “temporary” and “academic” capital. Those holding higher positions in institutions and administration possess “temporary” capital in the field of academia. By contrast, “academic” capital in the narrower sense is only produced by academic achievements that capture the community’s attention (Shinn/Ragouet, 2005: 149/150). In this regard, Webster’s and Buhlungu’s positions as RC44 president and as editor of its newsletter represented “temporary” capital. This does not mean that their sociological contributions were not recognized. The programme that Webster and Lipsig-Mummé had designed for future RC44 activity without doubt contained not only the organisational but also the theoretical potential to restructure the international Labour Studies community, creating more equal relationships in every respect.

## 10.4 South African Labour Studies in the international arena

Besides the organisational integration into RC44, the thematic contributions made by South African Labour Studies to international events also provided an insight into the development and state of international relationships. Between 1988 and 2003, SWOP annual reports mentioned 75 appearances by SWOP members in front of an international audience. The following analysis summarises papers given at international conferences, at conferences abroad, in foreign or international organisations, institutions and universities (see the online appendix SWOP PRESENTATIONS for a list of all papers). The respective context and thematic orientation give some indication of the appreciation and recognition accorded the South African Labour Studies community.

First of all we will examine the geographical distribution of the papers presented abroad. Here we must distinguish between international events – the concrete location of which can be ignored here – and nationally oriented meetings and appearances in foreign institutions and organisations. Of the 75 papers, a total of 33 – almost half – were presented at international events, the majority of which were international conferences on the social sciences in general (17), mostly those of the International Sociological Association. However, the international conferences also included two international meetings in Latin America and three contributions to CODESRIA activities. In 12 cases they were forums on the subject of work, the labour movement and industry. In only one instance, a SWOP representative was invited to speak about the "Third World" at a meeting; according to the annual reports, no SWOP member had taken part in any international African Studies events.

SWOP researchers travelled to North America remarkably often, where they presented papers within the context of general social science meetings in 16 cases, but only eight times within contexts where Africa was the main focus. In Europe, they presented papers on social science topics at eight events, mainly in the United Kingdom, but also in Poland, Sweden and Portugal, and three in European African Studies. These 35 appearances in the USA, Canada and Europe reflect an orientation towards the centre and confirm Sitas's observation that the main focus had shifted over the years from the UK to the US (Interview Ari Sitas 21 February 2004). It is however worth noting that only in barely half of these cases the researchers were "informants" for overseas African Studies. Generally they travelled to attend international conferences.

Finally, only very few trips abroad were in the global South: SWOP representatives spoke to an African audience three times and to an Australian and Latin American audience twice respectively. This dearth of South-South connections and particularly the lack of any continental integration was linked to a range of factors – primarily an orientation towards the North Atlantic centre.

Examining the geographical distribution of stays abroad alone is in itself insufficient to provide a clear picture of the South African Labour Studies community's position internationally. Researchers participated in both general and more work- and industry-specific international conferences. In contradiction with the hypothesis of unequal relationships according to which southern researchers are relegated into area

studies, they were actually less often invited to regionally specific events than to general ones. However, only in a few cases does this speak against the claim that SWOP members were given the role of “informants”, as a short thematic analysis will now show.

Thematically speaking, virtually all of the SWOP specialist areas were covered over the years. In the first years in particular it was unsurprising that international audiences were presented only with the results of local research, for this was initially by far their main priority. Yet, even as time went on, remarkably few papers addressed international issues. Over three in four papers referred exclusively to the speaker’s own country of origin. This confirms Jubber’s statement that in the majority of cases colleagues were invited to talk about specific local problems, not as widely recognised experts on work and industry.

Nine papers dealt with Africa or the southern African region. The first was Webster’s “Zimbabwe’s first decade of political independence: lessons for South Africa and Namibia” at the Institute for Southern African Studies at the University of Zimbabwe in 1990. Adler and Webster followed with “Bargained liberalisation: the labour movement, policy-making and transition in Zambia and South Africa” at the 1997 17th World Congress of the International Political Science Association and at a CODESRIA meeting the following year, Bezuidenhout with “Changing colours: trade liberalisation, production regimes and the white goods manufacturing industry in Southern Africa” at the University of Cardiff in 2000, research that was part of a larger, international comparative research project, as has already been mentioned (see the section on RC44 above). Webster’s 2000 contribution on new labour internationalism from the perspective of southern Africa at the University of Coimbra and his paper on labour movements in the region at the International Labour Organisation in 2001 also fell within this category. Finally, in 2002 and 2003 Webster spoke on structural adaptation programmes in Africa at a meeting in Harare and David Fig spoke on “The decision of Zambia to ban genetically modified food aid” at a meeting of the ISA research committee 44 at the third World Social Forum in Porto Alegre. All of these topics suggest that the South African research community was looking beyond its own borders and had gradually begun to situate itself within the region since the end of apartheid. Still, the number of regionally oriented topics remained comparatively low.

There were almost just as few papers on truly general themes, i.e. ones with no specific connection to the region. According to the categorisation undertaken above, these may constitute “academic authority” and thus confirm that SWOP researchers were valued as Labour Studies specialists in and of themselves. Five presentations also fell into this category, most of them given by Webster: In 1996 he took part in a debate on transition theory in Warsaw, giving a unique and theoretically fascinating talk that both supplemented and challenged the approaches that had been coined for Eastern Europe. This could be regarded as a contribution of the South African Labour Studies community to the development of sociological theory in general. The same goes for Webster’s contribution “Work and social citizenship in a globalising world” as the keynote speaker at a meeting on labour and the global economy at

Madison University in 2000 and "What is new in the new labour internationalism?" at the 2002 World Congress in Brisbane. He also presented the latter paper in a working group on international labour movement networks in Leeds in 2003. Those issues were researched in SWOP and were at the forefront of current Labour Studies research on international developments. Finally, he gave an overview of the concept of "social movement unionism" at the University of California and at the Department of Sociology in Los Angeles. This may reflect the idea sometimes expressed by South African specialists that the USA, where radical and activist labour movements had emerged over recent years, could learn from the South African development of the concept.<sup>32</sup> A critical reassessment of the evolutionism inherent in general social theory is encouraged by such appearances.<sup>33</sup>

Within the context of his RC44 activities, around 2002 the SWOP director shifted his attention increasingly towards general reflections on the subject area, which he presented in various forums: at the symposium of the Latin American Sociology of Work Society with "The sociology of labour: new perspectives", at a 2000 ISA meeting with "Recasting labour studies in the New Millennium". This paper was again presented under the same name with Carla Lipsig-Mummé in Brisbane, where he made a name for himself and was then elected to president of RC44. We can deduce from this short series of fundamental reflections on the branch of research that Webster really was confidently representing his academic community externally and initiating a mental shift in the relationships between North and South. This applied both to changes in the relationships between academic communities and to his plan to shift the focus towards the South, as it was there that he claimed developments in the labour movement setting a precedent across the globe were taking place.

Despite a vast majority of papers on domestic issues, South African Labour Studies were gradually gaining international exposure. In order for researchers to make a name for themselves as global academic authorities, many more efforts would be required to introduce these new theoretical impulses to the international stage. That the potential to do so existed was shown by Webster's few papers on theoretical and conceptual questions such as transition theory, "social movement unionism" and social citizenship as well as the latest product of "Labour Studies", von Holdt's "Transition from below" (On this, cf. also Burawoy, 2003).

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<sup>32</sup>This is the sense in which the secondment of Glenn Adler is to be understood. His knowledge of the South African labour movement was supposed to "revitalise" the movement in the USA: "He resigned at the end of 2000 to return to the United States to join the Service Employees' International Union as a researcher. The SEIU is leading the campaign to revitalise the American labour movement. I am sure that Glenn's experience of the social movement character of the South African labour movement will be invaluable in his new job." *Sociology of Work Unit*, 2002: 4.

<sup>33</sup>Webster produced all contributions in this category. This reveals the internal hierarchy and division of labour in SWOP: as the director, Webster summarised individual research findings as larger theoretical issues and as abstracting tendencies. It also reveals that even SWOP might face difficulties in the reproduction of the academic community in the foreseeable future. Similar analyses for the IOLS and the UCT could not be conducted within the framework of the present study. They would provide insights into whether SWOP and especially Webster made a name for themselves alone, or whether the entire South African Labour Studies community participated in the international integration. This was at least the case for the IOLS and for Sitas based on the statements he made in interviews.

## Conclusion: South African Labour Studies as a counterhegemonic current

This book's conclusion will now summarise the arguments presented, suggesting that South African Labour Studies can be regarded as an example of counterhegemonic currents. This summary will also once again clarify the idea of the *development* of such tendencies in peripheral sociologies.

### 10.5 “Quite as important as the influence of intellectuals on the labour movement, after all, was the influence of this social movement on intellectuals”<sup>34</sup>

Given the context in which it emerged, South African Labour Studies was conceived as counterhegemonic currents from the very beginning. Even in the very early stages, while still strongly influenced by teachers in Great Britain, Labour Studies specialists noted that the approaches they had read were unable to capture local realities suitably, in particular the growing labour movement with its great potential for creating a social and political impact. The continued exchange with this movement thus served not only to bolster said movement, but also led to a reconsideration of the traditional assumptions of labour and industrial sociology and ultimately laid the foundation for the entire field of research, as Webster recalls:

“To understand, and contribute to, the development of this movement, a new generation of sociologists stepped outside the classroom. We began to interview workers and learn about their past. We developed a relationship with the workers' movement emerging in the early seventies among industrial workers in South Africa. (...) the research programme (...) grew out of this relationship. I argue that by taking the rise of this movement seriously, sociologists in South Africa were forced to rethink and to reconceptualise their research programme in a manner very fruitful for the social sciences. I seek to show this by advancing three propositions. Firstly, in responding to the rise of labour, as well as the emergence of class theory in sociology, a research programme emerged in the seventies that began to take labour seriously. Secondly, in trying to understand the labour movement, new concepts and methods emerged. Sociologists were drawn beyond a study of the workplace and trade unionism to the social relationships which surround and shape the conditions under which labour lives

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<sup>34</sup>Quoted from Webster, 1991: 54

and works. Now, however and this is my third proposition, the worldwide restructuring of work has drawn sociologists back to an examination of work and economic life” (Webster, 1991: 52).

This branch of research was able to develop into one of the dominant fields within the discipline as a whole in South Africa, as its object was of the greatest social and political relevance.<sup>35</sup> All interviewees unanimously agreed on this fact. However, it was not always easy to establish the practices of Labour Studies, which were participative in nature, in an academic environment. Involved and active social science was always at risk of losing its scientificity through its political activism. This was recalled by Sitas, who nevertheless remained convinced that the path taken by the IOLS had a positive effect on sociology:

“University was always ambiguous about these projects (early Labour Studies projects like TURP at the University of Natal, W. K.). It gave it a good international profile, that it is part of an antiapartheid padampadam, but at the same time a lot of colleagues were very angry and pissed off that space was being taken by things that were not exactly academic (...). And it was more practical and applied than what they would have liked to see. But the dialectic between the teaching staff and students and these projects enriches everything” (Interview Ari Sitas 13 February 2004).

By supporting the labour movement and engaging with it constantly, Labour Studies was able to establish roots in South African society, which was to prove particularly fruitful for the formation of original approaches. This went hand in hand with a shift in the primary focus of sociological works towards local fora. Shane Godfrey explained the concentration on local issues during the apartheid era as a shifting of the stage towards a local scholarly community and society as a whole, rejecting the claim that this had mainly to do with the academic boycott and the isolation it created: “I think it would be very much the former (the commitment to local struggles, W. K.), that’s where all the focus and attention was. What Richard Hyman said at Warwick would be of interest, but that is sort of academic, compared to what was really important in the country. I’m sure the academic boycott didn’t make things easy but it was more the former option” (Interview Shane Godfrey 3 March 2004).

Another advantage of the links to the trade union movement was the legitimacy that the Labour Studies specialists gained through their commitment to the anti-apartheid cause. They were thus able to access life-worlds that remained closed to social scientists working on a purely academic level. That this exposed position could also limit scholars’ work in the field is shown by Highveld Steel’s refusal to cooperate with von Holdt and by Devan Pillay’s similar experiences as a “public intellectual”<sup>36</sup>.

<sup>35</sup>“(In the ’70s and ’80s Labour Studies, W. K.) was one of the dominant fields. Because it was one of the major, major axes of struggle in this society.” Interview Judith Head 25 March 2004.

<sup>36</sup>“My problem, personal problem, as well is, because I have a fairly high profile as a Sunday Times columnist, everyone knows my views, so some people are avoiding me. I think those who are on the further left, people on the Communist Party are fine, people in COSATU I have quite relatively easy access, but I’m wondering why the others are not returning my calls. So, that’s the danger of being a public intellectual. I’ve noticed that others, they can write criticisms in their journals, nobody reads these obscure journals except other academics. So, they can get away with it, but once you start writing for a newspaper every month you get associated with certain ideas and certain people don’t like what you are saying. But I do enjoy being a public intellectual.” Interview Devan Pillay 25 March 2004.

However, the discipline's rootedness in society and its reputation among the trade union movement were unanimously regarded as benefiting its scholarly work. This also goes for the financial assistance that Labour Studies received through anti-apartheid solidarity and its contacts to the COSATU and to the government.

However, the close contacts to the movement above all affected the orientation and practice of sociological work: they created a "dialectic relationship between practice and thinking" (Interview Ari Sitas 13 February 2004) in the discipline's emergence and development, reducing its dependence on imported theory. Thus all interviewees mentioned that they aspired to work mainly in an inductive manner guided by evidence, regardless of where their theoretical approaches came from. Thought was not inspired by some abstract reality observed from afar; rather, it followed on from engagement with the movement and thus with the voices of those working in the factories and living in the townships or hostels. This was what triggered the reassessment of traditional concepts and theories, as E. Webster stated in a conversation quoted above (Interview Eddie Webster 5 April 2004).

The integration of the concepts of "public" and "policy sociology", that is, socially relevant practice within alternative arenas, into a development-oriented concept of counterhegemonic currents has proved successful. At this point, the significance of participating in the development of a counterhegemonic sociology needs to be addressed. Even in the early 2000s, the Labour Studies community defined itself by its "commitment" and "critical engagement".<sup>37</sup> For Sakhela Buhlungu, Charles van Onselen thus was not one of the circle of specialists, even though his work had been influential:

"At this moment, he's a (...) labour historian (...). But that's way back then, okay. And it ('Chibaro', by Charles van Onselen, W. K.) makes an important intellectual contribution, I make no mistake about it, it's important. It's important. But it's labour history. [...] So that's that. I think Labour Studies, in the main, in South Africa, has been (...) not about labour history, something that's removed from the day-to-day struggles. (...) and it's not labour history for its own sake, but it's labour history that's oriented towards understanding the present. That's one, and labour history that's oriented towards changing the present. Two. Now (...) on both counts van Onselen is absent. (...) He absents himself on that reason. He remains purely as a labour historian and he always has this thing about detachment from his, you know. Detachment. Whereas the kind of mainstream Labour Studies that we have had in South Africa is an engaged Labour Studies. An engaged Labour Studies. You're engaging with a real movement. So in that sense then he is absent. Does that make a difference? (...) He's never pronounced on, and he's never, nobody knows what

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<sup>37</sup>Jay Govender was even more emphatic about the desire to effect change in his institution's sociological work: "(...) European, Western sociology is very much concentrated on elaborating concepts, models and theories, very so-phisticated intellectual paradigms, but without any practical perspective. Whereas we here have that concern to transform, to study society in order to transform it, according to local practical needs. I had an interesting discussion with European students on this question. Here we want to transform, so the research agenda is a very different one than in Western sociology. It's about practical, transforming value, in opposition to a profound, overhead theoretical value in paradigms, models, concepts and so on." Interview Jay Govender 12 February 2004.

he thinks about, he's never been engaged with the labour movement. That is just a fact" (Interview Sakhela Buhlungu 30 March 2004).

Even though the tightrope walk between action and reflection, between intellectual support and unconditional service to the movement had often not been easy, Webster remained convinced today that "the best research (...) comes from a judicious balance between intellectual curiosity and a commitment to social development" (Sociology of Work Unit, 2002: 4), and that "the rootedness of sociological work in the workers' struggle is a significant source of analytical strength" in his field of research (Webster, 1991: 64). For Buhlungu it was clear that Labour Studies was only able to become the most exciting field of research in South African sociology thanks to its social commitment:

"There was a time when Labour Studies was in the lead in terms of sociology, and (...) the intellectual energy came from Labour Studies. The intellectual energy came from their engagement. Their engagement. (...) This is (...) '70s, '80s, '90s, okay? (...) in my understanding of sociology, (...) sociology derives its energy and vibrancy and its intellectual kind of spark from engagement. It doesn't matter what kind of area of engagement (...) one is talking about. It engages with issues on the ground. It could be issues of social dislocation, issues of crime, it could be issues of labour mobilisation, it could be issues of, I don't know, [...] civil society mobilisation or (...) residential kind of mobilisation, whatever. But sociology, once it engages, it gets a lot of inspiration and energy from it. And the thing is, once you disengage, then you can see it, (...) it becomes something else. Then there is a process of drift there and you never know, some of it (...) disappears into cultural studies, post-modern whatever, and so on and so forth, all those other kinds of things (...). That's because you disengage now. You're talking about other things. You're talking about things and subjects that you don't know any more" (Interview Sakhela Buhlungu 30 March 2004).

While this argument may appear somewhat parlous in terms of theory of science, the case under discussion here shows clearly that a sense of responsibility for the realities analysed and for the research results – which were often translated directly into political action – went hand in hand with the academics' commitment; for these reasons, sociology was bound to take its social surroundings seriously, perhaps more seriously than any conventional theory. This also meant respecting the workers' views<sup>38</sup> and allowing oneself to change received theory or to develop one's own approaches based on empirical evidence. Maybe this "reality check" through exposure to extra-academic social actors – not acknowledged by conventional social science epistemology – was more efficient to produce high quality sociology than established systems of quality control, like international peer review. Cooper sees this as the reason that even in

<sup>38</sup>However, in this context the unresolved language issue needs to be pointed out once more. It had not been reflected upon much, but raised the issue of the power relation between the researcher and his or her "object". Thus sociology was also in danger of inventing realities, according to Buhlungu: "The risk is that you could be writing about (...) a working class that's a figment of your own imagination. That's the risk all here, I'm not saying that they did. The risk is that you could be. You could be inventing a working class in your own mind. You can't communicate with that working class meaningfully, and it's a process that is constantly, and this one really, constantly mediated by translation. And translation, I know translation in this country, translation in this country is full with problems. And power relations." Interview Sakhela Buhlungu 30 March 2004.

the early 2000s, industrial and labour sociologists were less likely to be impressed by international developments than colleagues in other fields:

“I think there is a real problem of South African academics. They jump onto every band wagon that happens. Why that happens I don’t know, why that happens is complicated. My own theory is that deep down they have a colonial complex. (...) they think the best fashions are in Paris and even academically, so when Althusser and Poulantzas were the rage, everybody became Althusserian and Poulantzas here, I was horrified when I came back here at the kind of uncritical [...] Poulantzas, Althusser were like the gods in a quite crazy, uncritical way, (...) and now the same has happened with postmodernism, (...) my faculty is probably more postmodernist than any faculty overseas. So, I think there is this tendency. Now, I don’t think that happened in Labour Studies. Somehow, I think, there was this self confidence and a kind of links to the union movement so people did not, they kind of said: ‘We must look at what’s happening here and analyse it from the bottom’, the grounded theory. Now, I don’t know why that happened, it might be because of people and personalities and [...] there were lessons, the people who were in the trade unions who said: ‘We’re not going to go underground’, which was ANC. ‘We’re not going to turn to guerilla activity, we’re not going to follow that route’. ‘hat we’re going to do is build a legal trade union movement and find a space to build a legal’ that was an unusual approach. (...) But now to take that step was actually (...) unusual, you had to defend yourself intellectually. I mean, I think the Brazilians started to do that as well, but it was quite novel. You weren’t just following an international thing and I think because the unionists we knew had a kind of intellectual arrogance almost to do their own thing. I mean, I had a friend, my sister’s colleague in the union, Dave Lewis. When the General Workers’ Union tried to build, the ANC actually said to him: ‘You’re absolutely crazy, you will never build a trade union (...). You either go into guerrilla activity or you get smashed.’ Now there was a group of people who were saying like [inaudible] ‘No we can actually build’, and when the government came up with this registration, they wanted to register the trade union. I don’t know if you know the whole background of ‘should we register, shouldn’t we’, ‘should we go legal or should we not’. They had to really think through on the ground of what to do. There were no other examples of what to do. They had to, you know, the philosophy emerged that we must analyse what’s going on here and our trade union friend, he said: ‘I must analyse and get to know what’s really going on.’ And so there was this kind of self-confidence to analyse the situation and to develop theories out of it. So, I think the same kind of thing happened in academia and so, we must see what theories work here (...)” (Interview David Cooper 5 March 2004).

Cooper thus also fittingly emphasised that the development of independent theory could only result from a comprehensive understanding of and in-depth empirical knowledge on one’s own society, which had been highlighted as an important step in the emergence of counterhegemonic currents. Discussion of original topics and concepts (social movement unionism, culture and identity in the workplace and in the trade union movement etc.) and analysis of selected works revealed how theoretical relevance was gradually achieved, as Karl von Holdt recently highlighted so impressively in his work “Transition from below”.

However, developments since the end of apartheid in particular were ambiguous and could not yet be evaluated conclusively in the mid-2000s in terms of their significance for counterhegemony. At the beginning of the 21st century, Labour Studies found itself facing new challenges in a changed social and academic environment. Its local roots meant that its representatives were not leaving, as colleagues in other disciplines were; instead they reaped the rewards of their efforts in past decades. For example, the extended networks created by the movement of Labour Studies and union staff into the new government had proved useful in gaining public funds for projects:

“It does make sense, why they’re (Labour Studies academics, W. K.) still here, because (...) Labour Studies has established a lot of people. These people (...) are now recognised internationally, because of their input in terms of Labour Studies here. (...) and they built big units and their universities are [...], they built good profiles. But also (...) their relationship with government and different government structures (...). I don’t want to sound sinister, but it wouldn’t really make sense for them to leave, because there are a lot of benefits for them to be here. Particularly because most of them were part of the labour movement in the struggle, and so obviously it means when the ANC government took power effectively, they stand to gain a lot and they are gaining a lot because of that. We talk about the struggle, their names are mentioned, a lot of times, and some people who are in very serious positions in government are very close to them. It really wouldn’t (...) make sense for them to leave. (...) And certainly after ’94, some of their students, some of their colleagues, they went to join the government. Now are ministers, director generals, very senior, very senior people in government, in what used to be government parastatals. And when these tenders they go out for [...] development of this model or that, usually they get a lot of funding, benefits from that. Because some of those things, they happen, reality of the matter, it happens everywhere. Issues of networks, who you know, is very important in everything. I mean we can pontificate all we want, about the best proposal will be in, the best. But the reality is that the proposals that are submitted in the end for a tender, all of them being grouped, in the end the one that is taken, clearly [...]. There are also such things that take place. Some of it might be the people who fought in the struggle. They are part of us, you know. So, for me it does make sense that they haven’t left, it really does make the best sense” (Interview Sthembiso Bhengu 16 February 2004).

However, the legitimacy of Labour Studies had decreased following the transition and into the 2000s. Under apartheid, academics were able to speak for the majority as critical intellectuals. The democratic government met fairly widespread approval and had received a clear mandate for political action. Following the transition, academics risked being reduced to pure technicians producing research results, while the government drew up strategies for the country’s development and made decisions. The academic community itself reflected on this novel situation: “Whether it is possible for progressive intellectuals to regain such a position of influence in the era of globalization depends on their ability to combine engagement with the transformative objectives of the democratic movement while structuring an autonomous environment that avoids being drawn into work merely as specialized technicians in service of this movement” (Webster, 1996: 4). This book does not cover the more recent developments from

the mid-2000s onwards. In 2004 the former Rand Afrikaans University, now University of Johannesburg, had started to set up a labour studies program which has in the meantime grown and attracted leading scholars in the field. More recently labour studies has taken root in the University of Pretoria. There has been considerable staff mobility between the various labour studies centers in more recent years. Assessing the significance of those developments is unfortunately beyond the scope of this book.

Beyond this, new trends in research policy and funding from the 1990s onwards were decidedly not conducive to social commitment and engagement.<sup>39</sup> Individual evaluation in particular undermined Labour Studies' ethos as a collaborative and non-commercial project, the possibility of combining university work with social engagement, and finally the significance of the local stage for scholarly communication:

“To concentrate on the long-term goal of capacity-building may cut across the need for individual scholars to build their own research profiles. This tension between short- and long-term goals or individual and collective goals has been exacerbated by the introduction for the first time in 2002 of the National Research Foundation's system of individual rating for the social sciences. While there are positive benefits to such a system, especially the opportunity of self-assessment and peer feedback, there is a danger that researchers become narrowly preoccupied with the singular goal of attempting to publish in what are popularly seen as the leading international journals. Unless carefully managed, this could lead to a neglect of the other three goals we have identified: capacity building, teaching and public engagement with problem solving. Importantly, it could also lead to a decline in local journals as scholars target an ‘international’ audience.”<sup>40</sup>

Furthermore, the difficulties in reproducing the scholarly community due to movement into other social sectors should be pointed out.<sup>41</sup> By contrast, optimists amongst the interviewees thought that this was both eminently possible and urgently needed in order to reconnect with the critical stance of the earlier phases. Sitas for example voiced this in his plea for an engaged Labour Studies, thus distancing himself from the practice of carrying out well-paid, policy-oriented research for the higher levels of unions and government and thus losing sight of the grassroots level: “Scholars of Industrial and Labour Studies in the next decade will have to be at war within their souls: at the heart of participation, cooperation and innovation for growth and the meeting of basic needs and a radical inquisition of the real gains ordinary people make. Our worth will not be counted by the applause of the powerful, but by the discomfort the honesty of our craft sustains” (Sitas, 1997a: 17-18).

<sup>39</sup>“Much of the future of freelance intellectuals depends on what happens in our universities. For the young academic today to write for the labour movement is to risk being thought insufficiently academic. It also places at risk tenure. In a contracting academic market, the old wisdom of ‘publish or perish’ is uppermost in the minds of most academics.” Webster, 1992: 91.

<sup>40</sup>The attraction of lucrative “consulting” posed a further threat to the subdiscipline and the reproduction of its academic community: Sociology of Work Unit, 2003: 2-3.

<sup>41</sup>“I think we'll get to a point where we develop a home-grown (...) theory of Labour Studies, that speaks to the global (...) body of scholarship. But I wonder, I have one thing: You don't develop theory outside of training. Outside of building PhDs, outside of reproducing a community of scholars. You don't do it like that, it's not a matter of you sitting in your room and you (...) think it out. You do it in the context of research, and of teaching, and of research, and of teaching, and so on and so forth. That's how you do it. And (...) I think we're lying behind, we're lying behind very badly.” Interview Sakhela Buhlungu 7 April 2004.

## 10.6 “Universally comprehensible”, “arrogantly local”

Despite all of these difficulties, the academic community gained confidence between 1994 and the early 2000s, as shown by the position it was granted in Buhlungu’s and von Holdt’s works, the analyses of the RC44 activities and the examination of presentations in international fora. This may be a contributing factor in overcoming the much criticised introversion of the field. Perhaps in the meantime there has been more of a comparative approach. That South Africa was then able to command respect in international circles was evident for example in Webster’s participation on the essay collection “Worlds of Work” (Cornfield/Hodson, 2002; see the contribution by: Webster, 2002) and in von Holdt’s work (2003). This strengthens the argument for the development of counterhegemonic potential in several stages, from the connection to local social realities and the disconnection from North Atlantic sociology to the development of relevant theory to the (re)integration on an international level.

However, in the field of general sociology, Sitas (2004) recently presented a volume that called into question many widespread assumptions in the discipline: “Voices that reason – theoretical parables”, the (preliminary) result of his parable project. Based on intense engagement with the working population and its struggle against apartheid, with problems in the workplace and at home, with the situation in their rural regions of origin, with the cultural formations in the industrial centres and the effects of neoliberal globalisation, this work of general sociology was produced one year after von Holdt’s publication.

As in the earlier African indigenisation debate, the book’s focus lies on the sociological significance of bodies of knowledge from orally shaped cultural contexts. The first part of the book contains a number of parables refashioned from popular narratives from the KwaZulu-Natal region. These texts process this cultural material both creatively and theoretically, and present them in a form typical of the representation and transmission of knowledge in oral cultures. By calling them “theoretical”, the author laid emphasis on their “sociological surplus value”. Sitas subsequently discussed the parables in university seminars and community meetings with the people who had inspired their themes, forms and method. In the process, they discovered together people’s views on South African society and its problems – from exploitation and oppression under apartheid and the experience of migrant labour and urbanisation to transition and globalisation.

The content covered varies, as Sitas takes up basic sociological assumptions, discusses different theoretical approaches and generates concepts of his own. The focus always lies on modernity, which arrived not with the transition from feudalism to capitalism, but with colonialism. The core statement of all of the parables is that modern institutions – factories, prisons, universities – discipline individuals, sometimes causing their navigation systems, cognition, language and interactions to break down. However, there is always a certain degree of dissonance, resistance, and imaginative transgression between each individual and social institutions, an asymmetry between structure and action, system and practice, interpellation and subjectivity.

The parable project questions a whole range of sociological certainties. At least for a time, it removes the distance between sociologist and object on which the discipline has rested since Comte. In doing so, the concern is not to deconstruct and uncover power relations between researcher and object, but to experiment with a shared process of discovery and theorising. A similar line of argument is presented by Edgardo Lander, who sees the Latin American university system as an “instrument of internal colonisation”, which negates the subjectivity of students, lecturers and researchers, instead focusing them on a supposedly general and modern, universal mode of knowledge. According to Lander, more crossover needs to be created so as to include specific features of the region and the experience of those that live there in social-scientific knowledge.<sup>42</sup> Similarly, the “theoretical parables” reflect Sitas’s experience in research, teaching and engagement with social and political movements, as the following passage makes clear: “The ‘researched’ talked back, argued, resisted the classifications and pointed out that the researcher, professor sir or madam, was also part of the field, part of its domain” (Sitas, 2004 : 41).

This is the point at which social relevance can become theoretical relevance. Furthermore, the assumption that the parables form part of social reality and reflect it at the same time removes the difference between academic/sociological knowledge and non-academic/popular knowledge. The uncertainty involved in this process goes so far that it raises the question of where sociology begins and ends.

In his own theoretical reflections, Sitas draws on both classic and postmodern theory, valuing and criticising both in equal measure and on a fundamental level. His aim is nothing less than a South African sociology, “neither pre-modern, nor modern, nor post-modern”, “universally comprehensible”, simultaneously “arrogantly local” and “communally accessible” (Ibd.:23). “Voices that reason” puts an end to the South’s lament over dependency, irrelevance and marginality and at the same time defends itself against hegemonic and marginalising tendencies in the international scholarly community:

“We do have much to contribute to one another and, of course, to the rest of the world: if we could only harness what is almost there, full of potential and promise. We cannot remain data collectors, immune deficiency samples, genetic codes, case studies, junior partner for others, forever. We need to take hold of the trove of traditions and wit (‘there is wit and strength in the children of Nonti’ – orated Mafika Gwala in the bad old days) that characterise our work, our failed social experiments, our distinctive voice” (Ibd.:8. Quotes taken from: Gwala, Mafika (1982): No more lullabies, Johannesburg).

Historically, sociologists in the South had to deal with conditions that made it more difficult for them to contribute original approaches to the discipline and gain international recognition. Neither critical deconstruction nor the constructive indigenisation

<sup>42</sup>Lander sees the construction of the academic subject in the universities as a “brutal process”: „In reality it was a mechanism of colonisation and the exertion of extreme violence against our societies, for it negates their living conditions, cultural history, historical experience and plurality, under the pressure of ‘having to’. It is immaterial whether this frame of reference is liberal, positivist or neoliberal; for at was always based on this ideal, which originated elsewhere and corresponded neither to the realities nor the historical experience of the majority of the population, but instead correlates to other cultural experiences and above all the desires and ideas of some elites [...]” Lander, 2004: 174, transl. W. K.

experiment have been able to significantly weaken existing relations of domination. For this reason, it was argued here that the search for local social relevance and the engagement with social actors in one's own society as a rejection of dominant sociology and of the international arena are suitable, as a first phase, to subvert their domination of one's own work. In doing so, the purposeful negation of the positivist distance to the object and the differentiation between "preconceptions" and sociological categories, which always followed from the exchange with the trade union movement and with which Sitas experiments so specifically, can form an innovative challenge to traditional approaches. The activities of a locally committed academic community, taking the form of "public" or "policy sociology", may then result in approaches and sociological insights of wider interest that gradually become established in international circles and contribute to the development of the discipline as a whole. South African Labour Studies and industrial sociology is a prime example of this. Based on the detailed knowledge of its own society and the engagement with its actors, in "Voices that reason" a general sociology emerged that can justifiably claim to be both local and global. The South African contributions presented here were firmly rooted in their local social context and were not primarily driven by the search for international recognition. Based on this they were able to make an autonomous, original contribution to the discipline.

The present study also shows clearly that the social sciences follow a different logic from the classical natural sciences in their international constitution and local developments, and that other conditions need to be met in order to strengthen the academic landscape in the continents of the global South. The science policy strategy of "catching up with international developments" only appears to make sense here to a limited extent, or indeed to be completely inappropriate depending on the respective starting conditions. The present study aims to help gain an understanding of the neglected questions of the possibilities and conditions affecting social-scientific development in the periphery. These questions are not only of historical interest, but are crucial in ongoing debates on the internationalisation or globalisation of social science disciplines.

## Appendix 1: Interviews carried out in South Africa, ordered alphabetically according to city

The information on the interviewed persons refers to their situation at the time the interview was carried out. Further information is provided on interview partners who have no university affiliation and/or are only referred to in passing in the main text, so the reader is better able to place them in context. The interviews are available in the author's private archive as audio files and transcripts.

<b>Interview</b>	<b>Date</b>	<b>Personal information</b>
<b>Durban</b>		
Sthembiso Bhengu	16/2/2004	PhD student and lecturer, IOLS, UKZN
Debby Bonnin	18/2/2004	Senior lecturer, IOLS, UKZN
Jay Govender	12/2/2004	Researcher, IOLS-Research (formerly TURP), UKZN
Simon Mapadimeng	16/2/2004	PhD student, lecturer, IOLS, UKZN
Gerhard Maré	9/2/2004	Prof. Sociology, UKZN
Mvusi Mgeyane	10/2/2004	PhD student, lecturer, Community Development, UKZN
Rajen Naidoo	19/2/2004	Dir. IHU, UKZN School of Public Health and Family Medicine
Ari Sitas	13/2/2004	Prof. Industrial Sociology, IOLS, UKZN
	17/2/2004	
	21/2/2004	
	23/2/2004	

<b>Interview</b>	<b>Date</b>	<b>Personal information</b>
Andziwe Zenande Tingo	20/2/2004	PhD student, junior lecturer, IOLS
<b>Cape Town</b>		
David Cooper	5/3/2004	Associate Prof., Sociology, UCT
	9/3/2004	
Shane Godfrey	3/3/2004	Labour Enterprise Project, UCT
Jonathan Grossman	4/3/2004	Prof. Sociology, UCT
Judith Head	8/3/2004	Senior Lecturer, Sociology, UCT
Ken Jubber	5/3/2004	Assoc. Prof., Sociology, UCT
Dave Kaplan	12/3/2004	Prof. of Business–Government Relations, Dept. of Economics, UCT; founder of the Science and Technology Research Centre at UCT
Lungisile Ntsebeza	12/3/2004	Assoc. Prof., Sociology, UCT
Johann Maree	3/3/2004	Prof. Industrial Sociology, UCT
<b>Johannesburg</b>		
Andries Bezuidenhout	30/3/2004	PhD student, SWOP researcher, Wits
Belinda Bozzoli	30/3/2004	Prof. Sociology, Wits
Sakhela Buhlungu	30/3/2004	Senior lecturer, SWOP, Wits
	7/4/2004	
Hlengiwe Hlela	25/3/2004	Hons. stud., SWOP Intern, Wits
Karl von Holdt	8/4/2004	Researcher NALEDI
David Jarvis	29/3/2004	Researcher NALEDI
Ian Macun	2/4/2004	Dept. of Labour, Government
Neva Makgetla	25/3/2004	Fiscal, Monetary and Public Sector Policy Coord., COSATU
Tessa Marcus	7/4/2004	Social Sciences, NRF
Bethuel Maserumule	1/4/2004	FES Johannesburg, former metal worker and trade unionist

<b>Interview</b>	<b>Date</b>	<b>Personal information</b>
Tanya van Meelis	7/4/2004	Trade and Industry Policy Coord., COSATU, former editor SALB
Sarah Mosoetsa	7/4/2004	PhD stud. SWOP researcher, Wits
Blade Nzimande	6/4/2004	General Secretary SACP
Devan Pillay	25/3/2004	Prof. Sociology, Wits
Eddie Webster	15/3/2004	Prof. Industr. Sociology, SWOP, Wits
	5/4/2004	
	9/4/2004	



## Appendix 2: Central texts of the South African Labour Studies community, ordered according to how frequently they were mentioned and alphabetically according to author

This table includes all texts produced by the Labour Studies community that the interviewees considered to have played a key role in that community's development. The information in the second column refers to how often a text was mentioned in total across all of the interviews conducted. Where no precise bibliographical information is available on a text mentioned in an interview, this is marked with a question mark.

Reference	M.
Holdt, Karl von (2003): Transition from below – forging trade unionism and workplace change in South Africa, Pietermaritzburg	7
Webster, Eddie (1985a): Cast in a racial mould – labour process and trade unionism in the foundries, Johannesburg	7
Webster, Eddie (1978a) (Ed.): Essays in Southern African labour history, Johannesburg	6
Baskin, Jeremy (1991): Striking back – history of COSATU, London, New York	5
Maree, Johann (1987) (Ed.): The independent trade unions 1974-1984 – ten years of the South African Labour Bulletin, Johannesburg	4
Buhlungu, Maxwell Sakhela (2001): Democracy and modernisation in the making of the South African trade union movement: the dilemma of leadership, 1973-2000. PhD thesis, University of the Witwatersrand, Johannesburg	3
Simons, Jack/Simons, Ray (1969): Class and Colour in South Africa, 1850-1950, Hamondsworth	3
Onselen, Charles van (1976): Chibaro: African mine labour in Southern Rhodesia, 1900-1933, London	2
Roux, Edward (1948): Time longer than rope – a history of the black man's struggle for freedom in South Africa, London	2
Adler, Glenn (Ed.): Against the State (?)	1

Reference	M.
Adler, Glenn (2000) (Ed.): Public service labour relations in a democratic South Africa, Johannesburg	1
Adler, Glenn/Webster, Eddie (2000): Trade unions and democratisation in South Africa, 1985-1997, Johannesburg	1
Anstey, Mark (1990) (Ed.): Worker participation: South African options and experiences: proceedings of the 1989 conference on Worker Participation, Kenwyn	1
Bond, Patrick (2002): Unsustainable South Africa: environment, development and social protest, Pietermaritzburg	1
Bonnin, Debby (1999): “‘We went to arm ourselves at the field of suffering’, traditions, experiences and grassroots intellectuals”, in: Labour, Capital and Society 32 Nr. 1	1
Bonnin, Debby: MA thesis on Sarmcol workers (?)	1
Labour Market Commission (1997): Restructuring the South African Labour Market. Report of the Presidential Commission to Investigate Labour Market Policy, RP98/1996, Pretoria	1
COSATU, Organisational Review Report (?)	1
COSATU, Secretary Report of Congress (?)	1
Davies, Robert H. (1979): Capital, state and white labour in South Africa, 1900-1960: a historical materialist analysis of class formation and class relations, Atlantic Highlands	1
Desai, Ashwin (2002): We are the poors: community struggles in post-apartheid South Africa, New York	1
Freedom from below: the struggle for trade unions in South Africa (1989), Durban, Braamfontein	1
Friedman, Steven: Breaking the mould (?)	1
Friedman, Steven (1987): Building tomorrow today: African workers in trade unions, 1970-1984, Johannesburg	1
Gelb, Stephen (1991) (Ed.): South Africa's economic crisis, Cape Town, New Jersey	1
Holdt, Karl von (2002): “Social movement unionism: the case of South Africa” in: Work, Employment and Society 16 No. 2: 283-304	1
Huberman, Leo (1945): Man's worldly goods: the story of the wealth of nations, London	1
Lewis, Jon (1984): Industrialisation and trade union organisation in South Africa, 1924-55: the rise and fall of the South African Trades and Labour Council, Cambridge	1
Maree, Johann: Manuscript of his PhD thesis (?)	1
Meer, Shamim (1986): Divide and profit – Indian workers in Natal, University of Natal, Durban	1
Morrel, Rob, publication of the Natal Workers' History Project (?)	1
NALEDI (1994): Unions in Transition: COSATU at the dawn of democracy, ed. Jeremy Baskin, Bridget Kenny et al., Johannesburg	1
NALEDI (1999): Unions in transition: COSATU in the new millennium, ed. Ravi Naidoo, Johannesburg	1
Sitas, Ari (1996): “The new tribalism – hostels and violence”, in: Journal of Southern African Studies 22 No. 2: 235-248	1

Reference	M.
Sitas, Ari (1990): "Ethnicity, nationalism and culture in Natal's labour movement", in: Institute of Commonwealth Studies – The societies of Southern Africa 15 No. 38: 267-278	1
Sitas, Ari (1997): "Neither gold nor bile: industrial and labour studies and socio-economic transformation in KwaZulu-Natal", in: African Sociological Review 1 No. 1: 99-112	1
Sitas, Ari (1985): "Formations and struggles amongst migrant workers on the East Rand", in: Labour, Capital and Society 18, No. 2: 372-401	1
Standing, Guy/Sender; John/Weeks, John (1996), Restructuring the Labour Market: the South African challenge, International Labour Office Geneva	1
Toit, D. du et al. (2000): Labour relations law: a comprehensive guide, Durban, 2000	1
Turner, Richard (1978): The eye of the needle: toward participatory democracy in South Africa, New York	1
Webster, Eddie (1985): "The rise of a new labour studies in South Africa – a brief report on current labour research activities". Department of Sociology, University of the Witwatersrand, Johannesburg	1
Webster, Eddie (1988): "The rise of social-movement unionism. The two faces of the black trade union movement in South Africa", in: Philip Frankel/Noam Pines/Mark Swilling (1988) (Eds.): State, resistance and change in South Africa, London/New York/Sydney: 174-196	1
Webster, Eddie; Glenn Adler (1995): "Challenging transition theory: the labor movement, radical reform and transition to democracy in South Africa", in: Politics and Society 23 No. 1: 75-106	1



## Appendix 3: List of online appendices, short titles and titles

In order to document the empirical results, a series of online appendices are available on the website of univOAK (Open Access to Knowledge - Archives Ouvertes de la Connaissance), the institutional repository for Université de Strasbourg (Unistra) and other higher academic and research institutions in the Alsace region. The PDF-file is directly accessible under the following link: <https://univoak.eu/islandora/object/islandora>The online appendices are referred to according to their short titles throughout the text. They are also numbered from O1 to O24. The person index refers to the online appendices using this numbering.

Short title of online appendix	Full titles of online appendices	Person Index
SWOP VISITORS	„SWOP Visitors” and „SWOP Visiting Research Associates“, chronological according to first stay at SWOP	O1
SWOP RESEARCH PROJECTS	SWOP Research projects, chronological according to starting date of project and according to thematic focus areas	O2
WITS EXAM QUESTIONS	Exam questions in Industrial Sociology at the University of the Witwatersrand, chronological for selected years	O3
SWOP THESES	SWOP-graduates and topics of their theses, chronological	O4
SWOP STAFF	SWOP-staff development, chronological according to first year in SWOP	O5
TURP RESEARCH PROJECTS	List of all TURP-research projects, chronological	O6
TURP PUBLICATIONS	TURP-Information material, didactic material and publications, chronological	O7
TURP STAFF	TURP-staff development (research staff), chronological	O8
TURP MANAGEMENT COMMITTEE	TURP – development of the „Management Committee“, chronological	O9
UCT STAFF	Industrial Sociology at University of Cape Town, Staff development, chronological according to first year of employment	O10

Short title of online appendix and name of the corresponding PDF file	Full titles of online appendices	Person Index
SALB CONTENTS	„South African Labour Bulletin“ – schematic presentation of „Editorial Board“, contents and thematic areas for chosen issues, chronological	O11
SALB EDITORIAL BOARD	„South African Labour Bulletin“-Editorial Board, according to cities and chronological	O12
ESSAYS... REFERENCES	„Essays in Southern African labour history“, ed. Eddie Webster, referenced literature by chapter, according to number of references and alphabetical according to referenced authors	O13
WEBSTER OVERSEAS REFERENCES	Webster, „Cast in a racial mould“: referenced overseas literature, according to number of references and alphabetical according to referenced authors	O14
WEBSTER SA REFERENCES	Webster, „Cast in a racial mould“: referenced South African literature, according to number of references and alphabetical according to referenced authors	O15
WEBSTER SALB REFERENCES	Webster, „Cast in a racial mould“: referenced texts from „South African Labour Bulletin“, according to number of references and alphabetical according to referenced authors	O16
BUHLUNGU OVERSEAS REFERENCES	Buhlungu, „Democracy and Modernization“: referenced overseas literature according to number of references and alphabetical according to referenced authors	O17
BUHLUNGU SA REFERENCES	Buhlungu „Democracy and Modernization“: referenced South African literature, according to number of references and alphabetical according to referenced authors	O18
BUHLUNGU SALB REFERENCES	Buhlungu „Democracy and Modernization“: referenced literature from „South African Labour Bulletin“, according to number of references and alphabetical according to referenced author	O19
HOLDT OVERSEAS REFERENCES	Holdt, „Transition from below“: referenced overseas literature according to number of references and alphabetical, according to referenced authors	O20
HOLDT SA REFERENCES	Holdt, „Transition from below“: referenced South African literature, according to number of references and alphabetical according to referenced authors	O21
HOLDT SALB REFERENCES	Holdt, „Transition from below“: referenced literature from „South African Labour Bulletin“, according to number of references and alphabetical according to referenced authors	O22
SWOP PRESENTATIONS	Presentations by SWOP-staff for foreign/international audiences, chronological	O23

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