

## **Worker Education in South Africa: Lessons and contradictions** **Formation des travailleurs en Afrique du Sud : leçons et contradictions**

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### Résumé de l'article

La formation des travailleurs a joué un rôle déterminant dans le développement du mouvement syndicaliste en Afrique du Sud et dans l'ensemble des luttes pour la transformation sociale. Cet article survole les moments-clés et les dynamiques de l'évolution de la formation des travailleurs en Afrique du Sud. Nous soutenons que les développements sur le plan international, la montée du néolibéralisme et les compromis négociés entre le Congrès national africain (ANC) et le gouvernement d'apartheid, ainsi que le corporatisme, ont provoqué des changements dans la formation des travailleurs. Alors que la forme sous laquelle elle existait dans le passé s'est affaiblie, le cœur de ses activités réside désormais au sein d'organisations communautaires, où des formes diverses d'apprentissages et de créativité se poursuivent. Malgré les défis et les échecs au cours des dernières années, il reste encore un héritage important et une influence des traditions de la formation des travailleurs et du mouvement militant syndicaliste en Afrique du Sud, desquels il est possible et essentiel de s'inspirer.

# WORKER EDUCATION IN SOUTH AFRICA: LESSONS AND CONTRADICTIONS

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**ABSTRACT.** Worker education played a crucial role in the development of the trade union movement in South Africa and in the broader struggle for social transformation. This article reviews key moments and dynamics in the trajectory of worker education in South Africa. We argue that international developments, the rise of neoliberalism, and the negotiated compromise between the African National Congress (ANC) and the apartheid state, as well as corporatism resulted in changes to worker education. While the latter as it existed in the past has weakened, the centre of gravity has shifted to community organizations where various forms of learning and creativity continue. Despite the challenges and setbacks of recent years, there remains a significant legacy and influence of the traditions of worker education and militant trade unionism in South Africa, which can and should be drawn upon.

## FORMATION DES TRAVAILLEURS EN AFRIQUE DU SUD : LEÇONS ET CONTRADICTIONS

**RÉSUMÉ.** La formation des travailleurs a joué un rôle déterminant dans le développement du mouvement syndicaliste en Afrique du Sud et dans l'ensemble des luttes pour la transformation sociale. Cet article survole les moments-clés et les dynamiques de l'évolution de la formation des travailleurs en Afrique du Sud. Nous soutenons que les développements sur le plan international, la montée du néolibéralisme et les compromis négociés entre le Congrès national africain (ANC) et le gouvernement d'apartheid, ainsi que le corporatisme, ont provoqué des changements dans la formation des travailleurs. Alors que la forme sous laquelle elle existait dans le passé s'est affaiblie, le cœur de ses activités réside désormais au sein d'organisations communautaires, où des formes diverses d'apprentissages et de créativité se poursuivent. Malgré les défis et les échecs au cours des dernières années, il reste encore un héritage important et une influence des traditions de la formation des travailleurs et du mouvement militant syndicaliste en Afrique du Sud, desquels il est possible et essentiel de s'inspirer.

Worker education played a crucial role in the development of the trade union movement in South Africa and in the broader struggle for social transformation – especially in the two decades since the re-emergence of worker militancy in the early 1970s. Despite that rich tradition, worker education has suffered a serious decline in the post-apartheid years. In order to understand this decline and draw the appropriate lessons, it is vital to view South Africa's experience with worker education against the backdrop of the socio-economic and political shifts that accompanied the end of apartheid, and to grasp the economic and ideological agendas that inform worker education discourses and practices. It is also useful to review both the richness of the worker education tradition that played this vital role, as well as some of the key points in its trajectory.

Worker education was simultaneously a consequence, a platform, a site, and a weapon of struggle for the oppressed people of South Africa generally and the black working class in particular. With its humble origins in the adult night schools education movement throughout the first half of the twentieth century, the tradition of South African workers and their allies to provide emancipatory, politically meaningful learning for themselves and others would eventually achieve their fullest expression in the dynamic 1980s, with its dramatic upsurge in literacy programs, workers' cultural manifestations, and educational efforts to support trade union organizing and industrial action. These activities both arose out of and catalysed the vibrancy in the union organizing of those years, which would ultimately play a crucial role in putting an end to white minority rule.

The strike wave of 1972-73 and the Soweto uprising in 1976 led to the legalization of black union structures (albeit within tight constraints) by the apartheid state in a failed attempt to control workers and tame their militancy. The dramatic upsurge in union membership and activity that followed changed the conditions for, and the nature of, worker education in the ensuing years. These activities took a wide variety of structured and unstructured forms, and were often marked by remarkable ingenuity and creativity – particularly considered against the backdrop of decades of ferocious repression, and the apartheid state's "Bantu" education system. The latter inspired Steve Biko's aphorism, "The most powerful weapon in the hands of the oppressor is the mind of the oppressed" (cited in Arnold, 1979, p. xx).

Formal worker education efforts took the form of highly structured seminars, workshops, and training programs. Informal efforts varied from treating mass transportation of workers as "rolling classrooms"<sup>1</sup> to a dizzying range of cultural and mass-media forms, including the writing and production of plays, poetry readings, songs and musical choirs, and dozens of community-based and trade union newsletters. These efforts aimed to provide everything from general literacy and technical work-related skills to running democratic and

accountable union structures, organizing, political consciousness and social mobilization.

Trade unions in this period were referred to both as “schools of labour” and “laboratories for democracy” where workers could test out new ideas, arrive at new understanding, and develop and enrich collective practices (Vally, 1994). In the context of an apartheid system, where basic democratic processes were denied to the majority, unions played a crucial role in introducing concepts such as accountability, representation, participation, report backs, and the principle of recall. Through their informal learning experience as well as the intensive education carried out in shop-steward councils and workshops, worker representatives gained confidence to engage with their unions’ officials on contested organizational and political issues (Vally, 1994). It was a period in which “[w]orkers searched memory, each other, history, the world, political texts, for ideas and knowledge, bringing everything into their intellectual embrace” (Cooper, Andrews, Grossman & Vally, 2002, pp. 119-120).

Education was grounded in the structures of the unions (where education committees linked to shop-steward councils featured prominently in some of the more militant unions; see Vally, 1994), and played a key role in linking the struggles of workers who were geographically dispersed and located in different industries. Union education also encouraged the development of a large leadership layer of workers who, despite limited formal education, went on to play a crucial role in the strengthening of the broader anti-apartheid movement. During this period, as Cooper et al. (2002) wrote:

The production and sharing of knowledge was consciously linked to cultural work such as the production of songs, plays, and poetry and mass media was used to inform workers and build the basis for campaigns. Even more significant were the schools of labour where workers developed important new insights and understandings through a wide range of experiences: everyday struggles on the shop-floor, experiences of meeting, organising, and taking part in collective decision-making, and the experience of mass action such as strikes or stay-aways. (p. 112)

While worker education played a vital role in the genesis and rise of the trade union movement in South Africa – and thus in the eventual overthrow of the explicit policy of apartheid – macro-economic and educational policy decisions in the years following the 1992-1994 transition decisively reshaped the policy, political and material environment in which such efforts were pursued. Those changes seriously undermined the robust and self-consciously political tradition of worker education in South Africa.

## THE RISE OF THE INDEPENDENT TRADE UNION MOVEMENT AND RADICAL WORKER EDUCATION FORMATIONS<sup>2</sup>

While systematic and widespread worker education in South Africa only emerged in the wake of the 1973 strikes in Durban, the country's tradition of worker education can be traced back to the formation of the first union for black workers in 1919. That year, the first black trade union was formed by dock workers in Cape Town: the Industrial and Commercial Workers Union (ICU). Shortly after its establishment the ICU formed branches in all of South Africa's provinces and claimed a membership of 100,000 (Lacom, 1989, p. 69).

However, the ICU was prohibited from organizing at the mines or the railways — key points in South Africa's production processes — and so was effectively limited to rural areas and townships. Internally, the organization had no clear structures ensuring worker control, and suffered from serious ideological differences as well as widespread corruption. This combination of external constraints and internal divisions led to its decline in the late 1920s. The expulsion of Communist Party members robbed the ICU of a number of people centrally involved in worker education activities.

Worker organizing and education efforts were severely impaired over the next several decades, not least due to the election in June 1948 of the National Party government and imposition of the party's racial policy of apartheid. Black trade unions remained illegal and all but non-existent until the Commission of Inquiry into Labour Legislation also known as the Wiehahn Commission (Republic of South Africa [RSA], 1979) finally called in 1979 for the legalization of trade unions. The Commission was established following the Durban strikes of 1973 and the Soweto uprising of 1976, and its report called for sweeping reforms, including most crucially the granting of legal recognition to black trade unions (albeit with tight restrictions).

The 1970s were decisive in the emergence of intensive worker education programs in South Africa. Rising worker militancy encouraged the formation of a range of organizations committed to worker education. This rising militancy was the result of several factors. Repression and division of black workers through the 1960s combined with increased monopolization of key industries brought dramatic increases in economic growth, even as the majority suffered increasing poverty. Inspired by liberation struggles in neighbouring countries, conscientized by the Black Consciousness Movement, and outraged by the glaring inequality produced by the system they served, workers felt increasingly compelled and emboldened to challenge the state and capital.

The first sign of the emboldened workers movement was a series of strikes in 1972 and 1973. Over the course of 1972, roughly 20,000 Namibian contract workers brought the mining industry to a halt (Lacom, 1989, p. 161). The strike — a direct attack on the migrant contract labour system — was broken by force, with mass arrests and killings.

The peak of strike activity in the period was reached in 1973 when an estimated 100,000 workers participated in a series of short but widespread industrial strikes mainly in the then Natal province, mobilized around the slogan "*Ufimumuneti, Ufe Usadikiza!*" ("The person is dead, but his spirit is alive!"). In the first three months, 61,000 workers were involved in 160 strikes (Lacom, 1989, p. 163). The scale of this strike wave was likely due in large part to the fact that Durban's industrial working class was concentrated in large factories located in close proximity to each other, facilitating the rapid spread of action from one factory to another. As a result of this strike wave, workers' wages increased 15%-18% throughout South Africa (Lacom, 1989, p. 167).

The success of this wave instilled a new sense of confidence and consciousness among black workers, leading to a marked resurgence of radical trade unionism. This resurgence in trade union militancy in turn quickly renewed interest in worker education programs. In response, a range of new educational projects were initiated throughout the country, and existing initiatives saw rapid expansion. The Urban Training Project (UTP), which had been formed in 1971 in Johannesburg, soon had branches in several additional cities (Durban, Port Elizabeth, Vereeniging, Pretoria and Klerksdorp). Activists with the South African Students' Organisation (SASO) and the Black People's Convention (BPC), many of whom had been deeply influenced by the writings of Paulo Freire, were keenly involved in non-formal education, setting up the Black Workers Project in 1972. The following year saw the formation of the Institute for Industrial Education (IIE) in Durban and the Industrial Aid Society (IAS) in Johannesburg.

Countervailing initiatives set up by capital, such as the Institute for Industrial Relations (IIR) (formed by Bobby Godsell and Alex Boraine of the mining multinational Anglo-American in 1976), sought to counter this burgeoning militancy and political consciousness and shape worker attitudes in favour of employers (Seftel, 1983).

UTP and IIE were instrumental or closely involved in the formation of the Council of Unions of South Africa (CUSA) and the Federation of South African Trade Unions (FOSATU) respectively, the forerunners of the National Council of Trade Unions (NACTU) and the Congress of South African Trade Unions (COSATU). UTP is particularly important as it served the educational needs of CUSA, of unaffiliated unions such as the Commercial, Catering and Allied Workers Union of South Africa (CCAWUSA) and the Food and Canning Workers Union (FCWU), as well as some FOSATU affiliates; UTP also served NACTU until 1990.

UTP arose after the Trade Union Council of South Africa (TUCSA), a union of several dozen mainly white and mixed unions, had changed its constitution in 1969, effectively excluding black trade unions from membership (after having allowed them membership a mere seven years earlier). By 1973, UTP

had initiated the formation of eleven different trade unions, which together formed the “Consultative Committee of Black Trade Unions” (CCOBTU) (Vally, 1994, p. 26).

From its earliest days, UTP foresaw a close relationship between education and organization; its aims were “to educate workers on how their lives and needs as people can be met, for example, through establishing sound workers organizations and independent trade unions with leaders elected by the members” (UTP, 1977). This ambitious, worker-centred vision found fertile ground amongst the rapidly radicalizing black working class. In 1975, attendance at its courses and seminars stood at less than 1,000. By 1985 it was recorded that twenty-four unions with a combined membership approaching 200,000 used UTP’s services (UTP, 1976, p. 13). Throughout its existence, but especially during the heady period of 1984-86 – seen as a period of heightened mass mobilization and increased state repression – UTP’s personnel faced harassment from the state, with several educators detained at various intervals.

In its educational activities, UTP recognized and strove to apply what it called “generally accepted Worker/Adult Education Principles.” These included:

- Education to be active and not passive;
- Education to actively use the experiences of course participants to highlight significances of events affecting them;
- Education to be based on the needs of those receiving it thus respecting their self-determination;
- Education to equip those receiving it to help themselves. (UTP, 1985, p. 5)

These principles were manifested through a method used by the Young Christian Workers (YCW) organization, and adopted by UTP. The YCW called this the “See, Judge and Act” method. It was similar to Freire’s method of “conscientização” [conscientization], stressing solidarity of labour and aimed at securing concrete change in the reality of the lives of working people through action.

Among UTP’s first worker education activities was the publication of a “Workers’ Calendar.” Between ten- and twenty-thousand copies were distributed in the first few years (initially through churches, later through unions at factories). They contained minimal text (written in isiZulu, seSotho and English), relying heavily on illustrations, and were designed to serve not simply as calendars but as organizational and educational tools. According to UTP founding organizer Eric Tyacke: “We decided on a calendar because it would not be kept in people’s pockets but put in their homes, so that when visitors came it could be a discussion point” (quoted in Seftel, 1983, p. 52).

Each edition of the calendar would focus on issues directly affecting workers that year, so that it became part of the organizing program of the unions. The first edition, for example, covered the inadequate regime of legal protections and benefits available to workers. In 1973, to coincide with and support the

tentative steps toward forming independent unions, it focused on collective action at the workplace. For 1974, it highlighted and explained the differences between “liaison committees” formed by management and trade unions formed by members. Later editions would explore the functions and duties of unions and their members, as well as issues such as the basic conditions of employment, health and safety rights, grievance procedures, retrenchment (or layoff) policies, working hours and leave policies. Many of these continued to serve as valuable reference points and discussion tools long after the year for which they had been printed.

The initial courses convened by UTP consisted of five two-hour sessions, generally only loosely structured, and organized around participants’ needs and priorities. Specific activities included discussion groups, simulation games, and role plays; the latter were found to be especially important due to the lack of self-confidence amongst participants. In response to the dramatic increase in demand for worker education opportunities that accompanied this upsurge in membership and organization, residential courses over a period of two to four days became the norm and courses were conducted in languages preferred by workers.

Union membership and activity rose dramatically in the years following the presentation to parliament in May 1979 of the report from the Wiehahn Commission (RSA, 1979). This resulted quickly in the formation of two new trade union federations: the Federation of South African Trade Unions (FOSATU), and the Council of Unions of South Africa (CUSA). Union membership around the country rose dramatically, and new union formations and structures proliferated. As Cooper et al. (2002) wrote:

Amongst all these unions, the influence of the 1976 student generation was evident. Growing worker militancy was expressed in the large number of strikes in the early 1980s, and in a number of cases, workers began to enjoy systematically organised and widespread solidarity action from students and the community at large. (p. 117)

The formation of FOSATU was a particularly significant event in South African labour history. Despite harassment by the state (numerous leaders of the union movement were banned and detained), the strong shop-floor organization of the new unions forced the state to realise that it could not crush the unions by force alone. Between 1978 and 1981, legislation was enacted allowing unions greater freedom. In this way the state attempted to control unions – a process involving a combination of repression and reform.

In the early 1980s, FOSATU concentrated on building a strong shop-floor organization based on democratic worker participation. Broader community issues were neglected although this changed in 1984. At FOSATU’s 1982 congress, Joe Foster, secretary of the federation, alluded to the formation of a workers’ party. This speech, drawn up by a leadership collective in FOSATU,



confirmed that FOSATU was looking for an alternative to traditional forms of political organization. FOSATU's thinking constituted an open but unstated challenge to the African National Congress (ANC), the South African Communist Party (SACP) and its exiled trade-union partner in the alliance, the South African Council of Trade Unions (SACTU). According to Foster:

Workers need their own organisation to counter the growing power of capital and to further protect their own interests in the wider society. However it is only workers who can build this organisation, and in doing this they have to be clear on what they are doing... This organisation is necessary to protect and further worker interests and to ensure that the popular movement is not hijacked by elements who will in the end have no option but to turn against their worker supporters. (quoted in Callinicos, 1988, p. 95)

A series of articles in the FOSATU newspaper *FOSATU News* on the birth of the Workers' Party of Brazil and the independent trade union movement Solidarity in Poland helped to popularize the idea of struggling for a similar development in South Africa.

The educative role of other cultural forms such as choirs also needs some mention. In the early eighties, choirs formed by workers from companies such as Pretoria Auto Plastics, Frame, Simba Quix, Kelloggs and Braitex were popular. Khosi Maseko from the Braitex choir, explaining the wide repertoire of her choir, had this to say:

We sing international songs like "Solidarity Forever," "Ballad of Joe Hill" and "The Working Folk of this Country Rise Again".... We also compose our own songs, sometimes using old tunes. We sing mostly in English and Zulu and we have just composed a Sotho song. We have prepared new songs for the FOSATU Education Workshop. One is a greeting song where we sing: "Even if I die I will still remember FOSATU." Another song is about GST [General Sales Tax] and income tax. The choir sees the recent exemptions as proof of the power of unions. Also we wrote songs about workers' unity. (quoted in South African Labour Bulletin, 1984, p. 114)

From 1982, FOSATU held national "Education Workshops." The direction of these workshops changed in 1983 in that a greater cultural dimension was introduced. Courses and lectures were combined with cultural events. In 1984, the two-week workshop culminated in an "Open Day" which was a festival of plays, choirs, dance groups, storytelling, children's events and videos.

The shop-stewards' councils played an important educative role in that different struggles were discussed, issues analysed and lessons learned. The councils relied on report backs and mandates, thereby encouraging worker democracy from below and the development of worker leadership. The first council was formed by shop-stewards in the Germiston area of the East Rand in April 1981 (Lacom, 1989, p.191). At this point the FOSATU constitution made no provision for shop-stewards' councils. Nevertheless, the initiative spread from the East Rand to all areas in which FOSATU had a presence. In April 1982,

FOSATU formally amended its constitution to include shop-stewards' councils as part of the structures of the federation. These councils became the foundation not only for FOSATU affiliates but for most other industrial unions.

The South African state in the 1980s faced simultaneously an economic and a political crisis. Economically, South Africa was in the throes of a severe recession. It was faced with a fiscal crisis, balance of payment problems, the depletion of its foreign exchange reserves, and the low value of the rand, inflation and unemployment. The years 1984-85 were also considered by some to be a period of insurrection. It was in these years that new forms of struggle by workers and students came to the fore. Factory occupations, alternate education and street / defence committees made their embryonic appearances. In 1984, there were 469 strikes, mobilizing 181,942 workers (Callinicos, 1988, p. 102). On October 30<sup>th</sup>, 1985, the Congress of South African Trade Unions (COSATU) was formed with a membership of over half a million. After four years of attempts at unity between different federations, CUSA and the Azanian Confederation of Trade Unions (AZACTU) remained outside COSATU and later combined to form the National Council of Trade Unions (NACTU).

During the four years of unity talks, significant debates took place which still have resonance today. These debates revolved around the role of trade unions in the liberation struggle. At the base of these debates are fundamental questions such as democracy, specific representation of trade unions in political fronts, alliances, and most importantly the independence of worker organizations. These debates were also in part characterized as one between the "workerists" who supported the adoption of a Workers' Charter as the expression of the workers' independent voice, and the supporters of the ANC/SACP or the "populists" who favoured adopting the ANC's Freedom Charter. The ascendancy of the ANC/SACP supporters and the decline of the "workerists" is well documented elsewhere (Vally, 1994; Cooper et al., 2002).

In the townships as well, struggles continued unabated. Between 1984 and 1986, thousands of students boycotted school in protest against "gutter" education. The Tricameral Parliament (derisively dismissed as a "kitchen" parliament by the democratic movement – an attempt by the apartheid regime to reform the whites-only parliament) was effectively undermined through resistance. Out of the 34 municipal councils elected in December 1983, only three were still functioning by the end of 1985. Two hundred local councillors were forced to resign (Callinicos, 1988, p.48). The regime made its opponents pay a high price for challenging its rule: during 1985 alone, the first state of emergency was declared, nearly 1,200 people were killed, many were maimed, and nearly 25,000 were arrested (Vally, 1994).

The struggle in these years, while heroic, was wracked with internal contradictions, an absence of long-term perspective, and plagued with sectarianism that on occasion gave rise to vicious internecine conflict. Many of these factors created

an opening for “agent provocateurs” and for the police, who often channelled the discontent into physical struggles among the oppressed (Vally, 1994).

Antonio Gramsci (1971), describing Italy before the fascist takeover, could well have been referring to South Africa when he wrote: “The old order is dying, but the new refuses to be born, in this great interregnum a whole series of morbid symptoms arise” (p. 58). The application of the “necklace” method — the horrific practice of summary execution carried out by forcing a rubber tire, filled with petrol, around a victim’s chest and arms, and setting it on fire — came to symbolize the apocalyptic situation into which South Africa was plunged. Although this was meted out to collaborators, it was often used against those where mere suspicion or circumstantial evidence was present. More ominously, it was also used against ideological opponents in the liberation movement (Vally, 1994).

The promulgation of the second state of emergency in June 1986 saw the trade union movement become one of the prime targets of the state. The fear of the regime that their actions would trigger a general strike by the unions did not materialize. It was largely the Commercial, Catering and Allied Workers Union of South Africa (CCAWUSA) which came out on strike. What existed in CCAWUSA was a rank-and-file confidence and organization which allowed it to build a strike wave on the initiative of workers. The union continued to function and fight despite many officials and leaders being arrested or going into hiding. COSATU’s slowness in supporting CCAWUSA’s actions was disappointing. Its indecisiveness in building on CCAWUSA’s militancy appeared to allow the state and employers to control the situation.

The demoralization in the second half of 1986 was again broken by CCAWUSA. This came in the form of the strike by 11,000 O.K. Bazaars shop workers over a period of 10 weeks. On the heels of the O.K. strike came massive strikes by the South African Transport Services (SATS) workers as well as postal, municipal, SASOL and mine workers. Not all of these strikes were successful but they opened space for tremendous militancy throughout 1987.

In 1987, the campaigns for a living wage and the mobilizations against the Labour Relations Amendment Bill (LRAB) overlapped. The LRAB was an attempt to curtail the gains won by the union movement. Unfortunately, conflicts between unions in COSATU and the rivalry between NACTU and COSATU largely put paid to the effective initial coordination of these campaigns nationally. These campaigns were revitalized in June 1988. COSATU and NACTU jointly mounted the biggest three-day stayaway in South African history. Three million workers came out in support of the call.

Worker education programs in the unions in this period pivoted around the struggle for a living wage and against the new labour relations bill. COSATU widely distributed a “Living Wage Campaign Newsletter” which explicitly

linked the struggle for a living wage to the struggle against capitalism and for a worker controlled society.

At the high point of the struggles of the 1980s, major trade union structures had developed and entrenched an expansive and profoundly politicized vision of worker education. Gramsci argued that the institutions of the workers' movement should provide an educational context that "should effect a radical transformation of the workers' mentality and should make the masses better equipped to exercise power" (Hoare, 1977, p. 68) while emphasizing the importance of providing literacy and cognitive skills as well as technical education for workers. Gramsci's perspective informed a number of workers' education interventions in South Africa. An extract from the 1985 handbook on education produced by the Johannesburg branch of CCAWUSA provides an indicative example:

The primary objective of the Education Department is to equip members at all levels of our union with knowledge to strengthen their hand in struggles with the bosses and the state. We believe in Education for Liberation. The long term of all our programmes will be geared to:

1. Politicise, organise and mobilise our members so that they play the leading role in the transformation of our society into an economic, social and political system controlled by workers to satisfy the needs and interests of those presently oppressed and exploited.
2. Develop the practice and understanding of democracy which will allow for maximum participation and decision making power for workers now and in the future socialist society we wish to build.
3. Develop the human potential of all our people to the fullest, to create and transform skills and abilities so that they are accessible and useful to our people. (CCAUSA, 1985, p. 2)

Reflecting an orientation and set of influences and a similarly radical vision for education – and with an explicitly internationalist perspective – the Congress of South African Trade Unions (COSATU) in 1987 argued that worker education should:

discourage individualism, competitiveness and careerism; be directed against racism, sexism, elitism and hierarchy; promote a collective outlook and working class consciousness; be linked, as part of the struggle for socialism to production "in a creative, liberating way" as opposed to entrenching exploitation; and build working class leadership of the struggle for a transformed society. Education should be a way of ensuring maximum participation and democracy; it had to serve the needs of workers and their allies and develop an understanding among the working class "that their struggle forms part of the world struggle against oppression and exploitation. (Cooper et al., 2002, pp. 111-112)

The Paper, Printing, Wood and Allied Workers Union (PPWAWU) understood workers education as the bringing together of the experiences and lessons of

previous working class struggles. These include factory and community-based struggles, nationally and internationally. According to the PPWAWU, the purpose of working class education was twofold: first, to strengthen existing struggles, and second, to build a working class cadre that can lead the struggle for socialism:

If working class education is the lessons of previous struggles, then it becomes clear that education is inseparable from struggle. Our education programme must therefore be informed by the current struggles the working class is fighting. These struggles include those in the factory, community and the broader political struggle.

Equally, it means that every single act of working class struggle contains within it an aspect of education, of drawing lessons and conclusions for future struggles. It is this last point that is most often neglected in terms of how we work in the organizations of the working class generally, including in PPWAWU. (PPWAWU, 1992, p.3)

#### FROM “NEGOTIATED SETTLEMENT” TO “NATIONAL QUALIFICATIONS FRAMEWORK”: THE TRANSITION TO DEMOCRACY AND THE TAMING OF WORKER EDUCATION

When attempting to come to terms with the precise nature, dynamics and constraints of the ensuing shifts in worker education, it is important to bear in mind the dramatic nature of the social and political backdrop against which the negotiations with the apartheid state and the discursive shifts took place. Despite fierce repression by the state in defence of capital, the workers’ movement continued to grow in strength and sophistication. The dramatic increase in worker-led resistance of the 1980s, combined with increasing international pressure, eventually compelled the apartheid government to agree to enter into talks with the liberation movement aimed at negotiating an end to minority rule. At the same time, international developments at the end of the 1980s and early 1990s dramatically shifted the terrain against which these negotiations would proceed.

Alexander (2002) recounts how the collapse of the Soviet Union and the rise of what has come to be described as a new configuration of dominant capitalism called “neoliberalism” together profoundly reshaped the landscape for political struggle in many colonial and industrializing contexts. Although such factors undoubtedly had a significant effect in determining the *timing* of South Africa’s political transition, he argues, the primary *impetus* for that transition must be seen to lie in “the overt and covert internal struggles of the oppressed people of South Africa against the economic and social deprivations of the system of racial capitalism coupled with international sanctions and diplomatic isolation” (Alexander, 2002, p. 44).

Nonetheless, the loss of a supporting superpower after the fall of the Berlin Wall, for the ANC in particular, all but eliminated militarized resistance as

a viable tactic in pursuit of revolutionary social transformation, requiring radical reconsideration of strategy and tactics. The ANC faced substantial additional pressure to adopt peaceful, “realistic” tactics from the various liberal and capitalist donors and Western countries. Although the ANC had been from its inception a multi-class organization, Alexander (2002) observes that its “dominant, indeed hegemonic, ethos” has always been that of “the upward-striving black middle class” (p. 48). According to Alexander:

The complete pragmatism of the ANC leaders in matters economic is now well attested. Mandela’s notorious somersault on the question of “nationalization” (of mines, monopoly companies, banks, etc.) is one of the more dramatic examples of this phenomenon. The ditching of the social democratic Reconstruction and Development Programme (RDP) for the neo-liberal Growth, Employment and Redistribution (GEAR) strategy was the logical outcome of this trajectory within the global context of the transition. (pp. 48-49)

In part due to this highly radicalized recent history of the liberation movement, Alexander (2002) suggested that the ANC’s rapid and enthusiastic embrace of neoliberal orthodoxy caught many by surprise — including crucially the ruling apartheid National Party. Simultaneously, from the perspective of the intellectual and economic elite representing the “white” Afrikaner minority, although they may not have secured all they had hoped from the process of negotiations, they were clear and resolute as to what they were unwilling to give up.

It is against this backdrop, Alexander (2002) argued, that the “Madiba factor” can and must be understood: the decisive role played by former President Mandela — one of Alexander’s fellow prisoners on Robben Island — in effecting the negotiated settlement that brought political democracy, even as it effectively entrenched existing economic relations, advantages and incentives through the new constitution’s property and sunset clauses. The politics of reconciliation and “social partners” thus became essential components in the process of suppressing awareness of real, material divisions and managing majority dissent and unrest. Mandela’s unmatched combination of political savvy, personal charisma, “struggle credentials,” and commitment to parliamentary democratic institutional forms made him the ideal leader of such a project.

Alexander (2002) summarized the net effect of these contextual factors, movement dynamics and exceptional personalities — “the entire dilemma and tragedy of the national liberation struggle” — as follows:

To put the matter bluntly: the capitalist class can be said to have placed their property under new management and what we are seeing is the sometimes painful process of the new managers trying to come to terms with the fact that they are managers certainly but not by any means the owners, of capital....

Ownership and control of the commanding heights of the economy, the repressive apparatuses of the state... the judiciary, the top echelons of the civil service, of tertiary education and strategic research and development, have remained substantially in the same hands as during the heyday of apartheid. (pp. 61-64)

The vicissitudes of worker education during and since the negotiated denouement can only be meaningfully comprehended with these broader political and economic developments firmly in view. Even as negotiation talks started, the state and capital continued their attacks against progressive forces. Thousands of workers aligned to progressive structures were murdered by “third force” groups supported by the apartheid state machinery, Inkatha in the then Natal province, the Witdoeke in the Western Cape Province, and others. The trade union movement itself was deeply divided, with powerful factions eager to cooperate with capital interests in reaching a settlement that would prevent radical shifts in economic and social relations to serve the interests of the long-oppressed majority. As Cooper et al. (2002) wrote:

By 1988, it was clear that the broad movement was being led into a course of negotiation with the apartheid state. The labour movement came under pressure to review its role, as well as its strategies for change and its vision of the future. In line with the newly dominant politics of a negotiated settlement in the late '80s and early '90s, the trade union leadership responded by shifting its declared vision from that of opponent and adversary towards a stated goal of “equal partner” with business and government.... Increasingly, the leadership of the labour movement insisted on a partnership with the former “capitalist enemy” and a common commitment to international competitiveness and appeals for foreign investment. (p. 123)

Accompanying this conceptual and ideological shift, the dominant conception of “worker education” increasingly changed. From a tradition in which the dominant self-conception of workers’ engagement with their own learning involved images of worker-led choirs, plays and poetry – aimed at entrenching the self-consciousness of the working class as a force capable of demanding progressive change in the interests of the oppressed – new images came to dominate, of individual employees earning certificates and filling out paperwork in pursuit of their own advancement. This would have two main impacts on worker education activities:

Firstly, the priorities, form of delivery, and key target audience of trade union education were shifted; secondly, the labour movement was to become increasingly involved in workplace training issues guided by a new commitment to increased productivity and international competitiveness. (Cooper et al., 2002, p. 123)

In the years following the 1994 transition, the trend continued of a rapid move away from mass worker education and towards the provision of more specialized, modular training programs for sharply defined groups of workers. Dramatic changes to the country’s economic, social, and political environment in the wake of the transition had profound implications for the trade union movement, and consequently for worker education. As Cooper (2007) observed, this led to a change in the role of the leading labour formations from being in an adversarial relationship with the state, to attempting to negotiate as an “equal partner” with business and the state. Despite its stated commitment

to socialism and worker control, COSATU has been key to the tri-partite alliance's retention of unassailable political dominance.

Unsurprisingly, shifts in the conception and forms of worker education in post-apartheid South Africa largely parallel the wider shifts that have occurred globally with the rise of neoliberal macro-economic policy regimes and political imperatives. By the year 2000, the radical vision of worker education that had animated so much of its practice during the struggle against apartheid had dramatically dissipated, having lost ground with the rise of a dominant "consensus politics" led by the ANC, which "assumes the essential compatibility of all 'stakeholder' interests" (Cooper et al., 2002, p. 112).

As Hamilton (in press), drawing on Cooper (2005) has argued, with the transition to a liberal democratic political regime, worker education has gone from having "a strong emancipatory objective, emphasising the value of experience in the collective struggle to build new knowledge and in developing democratic participation and decision-making for a socialist society" (Cooper, 2005, p. 3) to one in which "a human capital approach to worker education, which emphasises individual access to vocational educational and training and upward educational and economic mobility" (Cooper, 2009, p. 1) has become dominant within trade unions. Unions now "outsource" the training of shop-stewards to accredited private providers in order to access training funds available through Sector Education and Training Authorities (SETAS) (Hamilton, in press).

At the level of terminology, this has led to a rise to dominance within policy discourses of terms like "adult education" and "lifelong learning." Of the latter term in particular, Mojab (2009) wrote that it "shifts the burden of increasing adaptability to the workers and at the same time, offers it as a ray of hope for a more democratic engaged citizenry" (p. 5). Stated another way, implicit in this shift in conception is the notion that unemployment can and should be attributed to "deficits" among the un- or under-employed – to a "skills gap."

Another key development affecting worker education in post-apartheid South Africa was the introduction of the "National Qualifications Framework" (NQF) in the mid-1990s, which imposed a standardized set of principles, guidelines and definitions for the creation of a national certification system for educational qualifications, overseen by the South African Qualifications Authority (SAQA). Hamilton (in press) cited Jones' (2013) observation that the NQF "looks both ways... [to] social upliftment through enabling access to educational opportunities for people to improve their lives, but at the same time commodifies education, training and experience and ascribes it with a market value; a credit currency":

While some unions continue their own shop-stewards training, whole departments within unions and federations have been established to engage with education and skills development structures, often, at the expense of trade



union education. In the skills terrain alone, trade unions are represented in 21 SETAs with representatives from government and business and many require more than one representative from each stakeholder to serve on their sub-structures. (Hamilton, in press)

Ngcwangu (in press) summarized Samson and Vally's (1996a) critique of the NQF's "outcomes-based" qualifications framework for education and training as follows: (1) the NQF system "would create an unwieldy bureaucracy with Standard Generation Bodies and similar structures resulting in an extensive 'paper chase'; (2) international experience indicates that outcomes-based systems focus on "what people can *do*, to the exclusion of other knowledge which they may *have*; (3) one of the underlying assumptions of "human capital theory" is that there is a direct link between education and economic growth [which obscures or underplays other, more important causes of unemployment]; and, (4) post-Fordist production methods would influence the logic of the development of the NQF: "For post-Fordists, investment in education and training must be justified by proof that they are an efficient means of ensuring increased productivity" (Ngcwangu, in press).

In a subsequent article, Samson and Vally (1996b) identified further challenges the NQF would pose to union education in South Africa: (1) the NQF's focus on clearly identifiable performance outcomes reinforced these trends and further marginalized more overtly political, class-based forms of mass worker education; (2) linking union education and training efforts to the NQF in order to satisfy training certification requirements would undermine the ability of unions to maintain control over their own education programs; (3) disparities between level of training achieved and level of employment opportunities available – an unavoidable disparity over which unions have little if any control – would tend to result in "educational inflation" (i.e., higher and higher credentials required for jobs that neither utilize nor remunerate workers according to the required skill level); (4) learning moments such as strikes and experiences of building and controlling organizations collectively, which are important elements of worker education that cannot be certified through the NQF system, could become devalued and marginalized; (5) limitations on the number of days off to pursue training would translate into pressure on workers to emphasize industrial and skills-based training over other forms of union training aimed at organizing and collective advancement of workers' struggles; and, (6) outcomes-based training and education models define outcomes in terms of individual displays of competence and hence learning understood as a social process would be undermined.

Continuing, Samson and Vally (1996b) wrote:

The issue of collective vs. individual learning and evaluation processes highlights larger issues regarding the NQF's focus on generic competencies that are applicable in all spheres of learning. One of the ten "essential outcomes" proposed by the Inter-Ministerial Working Group is "solving problems and

making decisions.” The ability to make decisions and solve problems is by no means a “natural,” neutral or singular thing across different contexts, however. For example, a manager may be very talented at quickly identifying what s/he sees as a problem, formulating a solution, and instructing others to carry it out, and at the same time completely incapable of participating in a joint identification and assessment of a problem, facilitating the collective development of a solution through a consensus-based decision-making process, and participating in a collective strategy to implement the group’s proposed solution. Two very different sets of competencies are involved in these two different scenarios, and the skills applicable to each are not transferable to the other. Canadian and Australian critics of outcomes-based education have drawn on the vast body of work on learning processes and have argued that in fact there is no such thing as a de-contextualised generic competency or essential outcomes. (pp. 22-23).

The discourse of “Adult Basic Education” (ABE) – and later “Adult Basic Education and Training” (ABET) – had replaced the previous, informal discourse in which the term “literacy” was dominant, understood to encompass more than the ability to read and write, but familiarity with the structures and forces that shape lived opportunities, and a sense of self-driven agency to engage with them. Soliar (2000) argued that this was more than a mere change in terminology, but rather an indicator of the rise to dominance of a conception of education for economic skills, with the discourse and practice of ABET focusing mainly on the “T” for training and leaving aside any suggestion of education that would encompass the full range of skills, values, capabilities and competencies that equip one to participate in the transformation of power and social relations.

Thus ABET, “lifelong learning” and the construction of “worker education” to focus on certification together promote a widespread “flexibilization” of the workforce through a state-led training regime to maximize economically exploitable skills for the production of value within the (private) formal economy, and to increase a “reserve army” of skilled labour in advance of market demand. Even as it adopted struggle language of empowerment, participation and a people-centred approach, ABET discourse and practice remain firmly within, and in service of, a political economy of vocationalism, market values and individualism. This is reflected in the fact that the “Recognition of Prior Learning” (RPL) in higher education institutions and in the private sector are focused on – if not restricted to – providing access to education and the market on the basis of established norms and standards in these institutions (Soliar, 2000).

Within trade union structures, these changes have decisive impacts on roles, responsibilities and self-conceptions. Perhaps most significantly, they promote the conversion of shop-stewards – arguably the single most important function within unions for sustaining political consciousness, and therefore a site of often fierce contestation – into “trainers” (or even “trainers of trainers”).

## CONCLUSION: LESSONS AND PROSPECTS

Roux (1992) presciently noted:

Trade unions all over the world have had, and still have, noble aims regarding their education programmes, but it is interesting to see how differently these aims are applied. Unions may have many wonderful sounding resolutions, but it is their concrete plans, strategies and programmes and how these are applied in practice that spell out what their resolutions really mean. (p. 4)

It is crucial to bear in mind that if worker education is to serve an emancipatory purpose, it must be grounded in the contexts and experiences of working people themselves. For this reason, it is important to resist the temptation to pursue the “right” or even the “best” conception of, and approach to, workers’ education, outside of an active and concrete engagement. Scholarly research and analysis can provide evidence and conceptual resources for use by working people who are engaged in struggle – not merely for improved working conditions but for deeper collective self-consciousness and greater self-determination – but in the absence of such grounding and accountability such scholarship can quickly become irrelevant or even distracting. Additionally, as Cooper et al. (2002) observed, “a tight definition of worker education is difficult because its boundaries are fluid and dynamic, moving within the full range of learning experiences of workers” (p.112).

COSATU’s position on worker education is currently under review in the wake of a rejection at its 2009 Education and Skills Conference of a proposal to adopt accreditation processes and standards for union education programs and activities, in favour of a more explicitly radical and collectivist conception of worker education. This renewal of interest in more politically responsive forms of worker education may indicate resistance among rank-and-file members of COSATU’s member unions to the increasingly de-politicized and individualistic conception of worker education that has been operative in recent years.

The effectiveness of worker education efforts in shaping political consciousness and in supporting workers’ struggles for fundamental social transformation depends to an important degree upon the opportunities those efforts provide for learning through and from concrete activities of resistance and struggle. For this reason, it remains vital that formal union structures actively resist tendencies towards formalization, technical functional division, and the rise of certification schemes and standards. In South Africa, this resistance has not been sufficient to prevent a profound de-politicization of trade union structures, and of political consciousness among workers. Nevertheless, there remains a significant legacy and influence of the traditions of worker education and militant trade unionism in South Africa among some trade unions, community-based organizations and social movements. Perhaps most noteworthy among these are the National Union of Metalworkers of South Africa (NUMSA), South Africa’s largest union, which is currently in conflict

with the ANC/SACP; independent trade unions whose members have left the COSATU/ANC/SACP alliance, such as the General Industrial Workers Union of South Africa (GIWUSA); associations of “shack dwellers” such as Abahlali base Mjondolo; and other social movements rooted in working class communities.

South Africa’s proud history of resistance in and through education continues. This resistance has generated popular epistemologies and pedagogies against racial capitalism. The “peoples’ education movement,” “worker education movement” and “popular adult and/or community education movement” are examples (see Cooper et al., 2002; Motala and Vally, 2003). This praxis, relative to the struggle against apartheid has diminished but still exists, and its centre of gravity today has shifted away from trade unions to new organizational forms, as workers and the unemployed resist the impact of neo-liberalism and increasing poverty and inequality two decades into post-apartheid South Africa. Tendencies towards de-politicization can be countered and even reversed through worker education that is critical, but this requires structures, activities and arguments that favour independent, democratic control, and that foster skills of critical thinking, building and maintaining solidarity, and cultivating collective self-awareness aimed at the self-emancipation of working, poor and oppressed people.

While the legacy of worker education in South Africa is a rich and proud one from which an enormous amount can be learned, new developments brought about by ongoing capital accumulation as well as the waxing and waning and changing forms of class struggle have brought forward new challenges. Only a few of the most notable among these are the widespread casualization of labour and the rise of “precarious work”; social, political and economic challenges arising from the movements of migrant workers, including xenophobia; and, the accelerating ecological crisis wrought by continuing, unfettered industrial expansion.

The workers’ movement and workers’ education must grapple with and respond to these challenges as a matter of urgency. As with the economic crises which the capitalist social order can be relied upon periodically to generate, the unfolding ecological crisis will inevitably produce opportunities for resistance – but only opportunities, not certainties. Unlike capitalism’s past economic crises, the climate crisis poses dangers of incalculably greater consequence. As Belamy Foster, Clark, and York, (2010), Harvey (2006) and others have argued persuasively, there is good reason to believe the capitalist system may be inherently incapable of addressing ecological catastrophe – certainly not without effectively committing genocide on an incalculable scale. For this reason, it is more vital than ever that worker education efforts remain clear, vigilant and resolute in their analytical, organizational and practical commitments.

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## NOTES

1. Workers developed the phenomena of “moving meetings,” turning buses and trains into literally vehicles of mass education to popularize various campaigns. Train carriages where these discussions and rallying speeches occurred were referred to as “Zabalaza” or “struggle” compartments.
2. This section draws heavily from Vally (1994; previously unpublished), with revisions.

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