

## **Assessing the Effectiveness of Trade Unions in Protecting Educators' Interests in the Workplace**

**Authors:**

Sipho Selatole Makgopa ([makgoss@unisa.ac.za](mailto:makgoss@unisa.ac.za))

University of South Africa, Pretoria, South Africa

**Abstract:**

Educators likewise as employees expect the trade unions to protect their interests on the workplace to ensure productivity. The objective of this paper was to assess the role of trade unions in protecting the interests of educators at the workplace during rationalisation and resource redeployment. A qualitative research approach was followed to achieve the objective of the paper and fifteen educators who are members of trade unions were interviewed. Content analysis method is used to analyse the primary data obtained during in-depth interviews. The findings of this study uncovered that trade unions attempt to protect the interests of their members during rationalisation and resources redeployment, however, the final decision during the process remains with school principals. This paper offers recommendations to key stakeholders in public schools and future research directions on the topic.

**Keywords:**

Content Analysis, Educators, Rationalisation and Redeployment, Trade Union.

*Submitted: 2025-03-03. Revised: 2025-03-10. Accepted: 2025-03-14.*

## **Introduction**

According to Mengale, Rajuskar and Bardarke (2024), trade unions serve as a mechanism to ensure that workers' aspirations, needs, and welfare are understood and addressed comprehensively by management. This collective representation becomes particularly crucial in safeguarding workers' rights and interests amidst changing industry dynamics and potential exploitation. Trade unions are influential partners in decision making, with the ability to provide continuous improvements in the work and life circumstances of their members (Balaneasa, 2013). The point is that the relationship between workers and employers is influenced by several factors, including the labour market, the organisation's functions or activities, and the organisational norms that determine the expectations of workers and employers (Bidwell, Briscoe, Fernandez-Mateo & Sterling, 2013). Trade union members expect trade unions to protect their rights and interests at the workplace. Similarly, educators in public schools expect to be protected by trade unions during decision-making sessions that affect the work environment. Nxumalo (2020) emphasised that trade unions in South Africa have been at the forefront of the struggle for workers' rights. They played a fundamental part in the development of labour law and the Constitution, and thus in transforming an exclusive labour relations system under apartheid to one which has as its goal equality, fairness and dignity for all workers. Mokofe (2021) added that the South African Constitution provides that everyone is equal before the law and has the right to equal protection and benefit of the law, and that 'everyone has inherent dignity and the right to have their dignity respected and protected. Based on this background, it is imperative to assess the role of trade unions in protecting the interests of workers, in this case, educators in public schools.

## **Theoretical Background and Literature Review**

This sections literature review of previous studies and the discussion of the relevant theory in this paper.

### **Literature Review and Previous Studies**

Nel, Kirsten, Swanepoel, Erasmus and Jordaan (2016) alluded that trade unions are autonomous of any employer. A trade union was governed by the belief that unity is power. In other words, a gathering of citizens working collectively was more powerful than single individuals. Organisations usually use workers, especially uneducated ones, to work for long hours while earning minimal salaries primarily because their employers keep most of the profits. Most of the time, this does not enable the employers to provide good working conditions and makes it difficult for the workers to get higher and better wages. The resulting effect of all the above makes the workers upset, and they, therefore, form trade unions. However, Adi and Sambe (2018) argue that trade unions are formed by workers with believe that collectively, they can protect themselves against exploitation and social injustices in workplaces.

According to Nxumalo (2020), trade unions in South Africa have been at the forefront of the struggle for workers' rights. They played a fundamental part in the development of labour law and the Constitution, and thus in transforming an exclusive labour relations system under apartheid to one which has as its goal equality, fairness and dignity for all workers. In performing duties, trade unions should, however, consider the detrimental effect that unprotected collective action can have on the unions as organisations. Previous studies established that measuring union strength, that is, the degree of representation of the workforce, depends on the following variables: union density; composition of the union; unity; organisational concentration; centralisation; extension of collective bargaining; and representation in the workplace (Crouch, 2017; Martínez Lucio, 2017; Vandaele, 2019).

Previous studies focused on wages and salary negotiations (Magruder, 2012; Card et al., 2020). In the study Magruder (2012) uncovered that working in a sector where a Bargaining Council wage agreement has been reached does increase the wages of workers who are not union members. The study by Card et al. (2020) discovered that the unionisation rate by wage bin for all workers, in the public and then the private sector, smoothed for clarity. The study of Montesano, Biermann, Kalfagianni and Vijge (2024) explored how do trade unions, as important socioeconomic actors, contribute to this agenda by aligning with environmental concerns. The study uncovered that trade unions are committed to promotion of green environments to avoid pollutions. In another study such as Uys and HoltzHauzen (2016) explored on the perceptions of South African trade union leaders on factors influencing the future of trade unions, and the findings uncovered that quality and type of service offered to members is main factor and impeccable knowledge of the relevant legislation to be able to assist members timeously and efficiently. Some of the studies started to explore on the use of technology in trade unions.

Fakude, Matsepe and Maluleke (2024) explored an effective and efficient way to use these integrated digital strategies for organising, mobilising, and retaining new coming educators. Trade unions were trying to use their previous experience with technological change to tackle AI, but at the same time there have been increasing calls for trade unions (and works councils) to fundamentally change the way they work as a prerequisite for successfully influencing the design. The study of Krzywdzinski, Gerst and Butollo (2023) showed that relevant AI applications in organisations consist of use cases in the field of human resources (personnel diagnostics in recruitment or career management) highlighted in public discussions. The impacts of digital media technologies on social movements are particularly concerning traditional movement organisations like trade unions, for which the adoption of a social media-driven strategy of engagement potentially constitutes a double-edged sword.

On the one hand, effective use of social media may support renewal efforts for unions, the membership and influence of which are in long-term decline (Schnabel, 2020). The study by Ford and Sinpeng (2025) found that connective movements using technology platforms such as Facebook promote self-

expressive and peer-to-peer style of communication that invites participation, initiation and personalisation. Other study focused on the role of trade unions on maintenance of safety and health conditions in the workplace such as McIvor (2024). Considering preceding studies, a gap exists to explore on the role of trade unions in protecting the interests of workers such as educators on pertinent matters such as rationalisation and resources redeployment. The purpose of this paper was to assess the role of trade unions in protecting the interests of educators at the workplace.

## **Stakeholder Theory**

To achieve long-term relationship between the trade unions and members, a stakeholder theory becomes relevant. The term “stakeholder” was originally coined by Freeman and Reed in 1983 as “any identifiable group or individual who can affect the achievement of an organisation’s objectives or who is affected by the achievement of the organisation’s objectives” (Freeman & Reed, 1983). Stakeholders are accordingly different parties, units and persons in the organisation as well as parties, units and persons from the environment around the organisation that have a relationship with the organisation. Stakeholders are groups who can potentially be affected by a activities of the organisation, or who can potentially be engaged in the activities of the organisation. In the context of this study, trade unions representatives (shop stewards) and affiliated workers are stakeholders as they affected by the activities of the respective labour unions. Stakeholder theory the emphasis is on building and maintenance of sustainable stakeholder relationships within the organisation (Freeman, Dmytriiev, & Phillips, 2021). The theory emphasises the importance of stakeholder relations and the creation of value for them. The stakeholder theory is relevant and applicable to the study to explore the role of trade unions in protecting the interests of workers at the workplaces such as public schools.

## **Methods and Data**

Exploratory qualitative search was used in this paper to achieve the research objective. Saunders et al. (2019) added that an exploratory study is pertinent if the researcher wants to clarify an understanding of an issue, problem or phenomenon. Qualitative data provided a detailed understanding of a research problem; therefore, this qualitative understanding was generated through studying a few individuals to discover perspectives in great depth (Leedy and Ormrod, 2014). Sample size comprised of fifteen educators affiliated to trade unions in education sector were interviewed until saturation point is reached. Purposive sampling requires that the researcher to use your judgement to select cases that will best enable you to answer your research question(s) and to meet your objectives. Sampling method used in this study is purposive sampling. The target population included educators and trade union representatives in public schools, and for the purpose of this study only the trade union affiliated educators were targeted. The interviews were conducted as a data collection method using Interview

guide containing questions and relevant topics regarding the role of trade unions. Data was analysed using the content analysis approach. Content analysis is described as a quantitative analysis of qualitative data (Saunders et al., 2019).

## **Results and Discussions**

The purpose of this paper was to assess the role of trade unions in protecting the interests of educators at the workplace. To achieve the purpose, the following question was asked: What is the role of trade union in protecting workers' interests during rationalisations and redeployment of educators? In answering the research question three, participants explained the concept rationalisation and redeployment as the process followed to in schools as there is no retrenchment. To justify these findings, participants 3 and 14 verbatims are cited:

*“Rationalisation and redeployment mean we have more teachers and in education we don't have retrenchment and that is why they use rationalisations and redeployment, they use teacher learner ratio in the school, trade union only comes in where there is a dispute, and they declare me in access”.*  
(Participant 3)

*“Trade Unions make sure that their members are placed correctly, rationalisation and redeployment have steps, and they must consider curriculum need and, in a case, where principal is not in good terms with you, and they misplace you unions assist in compiling the grievance form.”* (Participant 14)

According to participant 3, rationalisation and redeployment is carried out considering learner ratio in schools. Participant 14 added that rationalisation and redeployment to ensure educators affiliated to trade unions are placed appropriately in line with the curriculum needs of schools. Participants 4, 6, 7, 8, 10 and 13 expanded on the process of the involvement of the trade union during rationalisations and redeployment of educators. Participants verbatims are cited to justify the findings:

*“As far as rationalisations and redeployment is concerned, we are part of ...the process, which is rationalisations and redeployment, we as educators and as trade union members because rationalisations and redeployment is our responsibility, so that teachers must not be retrenched are rather be placed where there is a need. The trade union will start by helping teachers at school when doing identification of which teacher is supposed to leave because of curriculum need and then the trade union will also help in placing the teacher, finding the place where teacher is can be suitably placed. Few having, firstly they give us staff establishment to show us that we have this number of teachers that are supposed to leave, as far as the staff establishment our school is not affected by rationalisations and redeployment anywhere. If the school is affected by rationalisations and redeployment then the union will make sure the teacher submits the can teach subjects and the qualifying subjects, we have*

*subject that we qualify for teaching, sometimes we have subject we can teach based on the experience. So, after making profile of that teacher, they make sure that teacher is placed.” (Participant 4)*

*“In fact, the role of trade union is to make the teacher aware that the teacher is not owned by school and is employed by government and if there is a need for a teacher to move if the subject and moving conditions suit the teacher they can move. Rationalisation and resources redeployment is an open process and then being an open its got levels , the first level of rationalisations and redeployment is that they check where the space is at, they cannot place you where the leaner teacher ratio is 100% , they need to take you where there is a need, And then as far as rationalisations and redeployment is concerned, first we check circuit ,like we have Bochum east ,if I’m a teacher teaching Bochum east, they first check the space that suit my qualifications in the circuit. if there is no space for me in the circuit, then we check the cluster Bochum cluster includes all circuit in Bochum. If maybe you did not find space in cluster that is where the problem starts, then you will be placed in the certain district level, to provincial level or another province if you did not find space. No cases of teachers not finding placement so far.” (Participant 6)*

*“As unions we are party to the policies of rationalisations and redeployment so there is no way rationalisations and redeployment can take place without the unions, when we review posts establishment, its document from government that it explains as the school you qualify for this number of educators because of this number of learners, if we say we are 20, we receive one which says we must be 19 next year, in the policy its says it must be done by the principal and there are policies to be followed, we use something called seniority means who came first in this institution, we have last in first out (LIFO) but we don’t do it just like that we check subjects we have, but if we use LIFO meaning when we implement rationalisations and redeployment you are the first one to go. When we do presentation, they are all members of the union also have site executive committee they are part of us as educators they will make sure that when I say I have applied LIFO they will verify if this is not the case they will ask me why did I use LIFO and not remove the person that came last to the school, It’s not possible that these people go there to select schools while the union is not there, the union will be part of all the process which is the circuit, cluster combination of all circuits and district and in every level there must be a member of union to ensure all people who are on rationalisations and redeployment to come select schools.” (Participant 7)*

*“Annually we have the management plan is done by province is where they call Unions members to come sit down as province and see how many teachers qualify then work it out, we’l know our school has 700 leaners and qualifies 21 teachers, if teachers are more we will be affected, most of principals don’t understand criteria of selecting teachers. The criteria states that we must look at major subject.” (Participant 8)*

*“According to my understanding when coming to rationalisations and redeployment it doesn’t mean teachers are chased away from the school or work, it’s the reshuffling of educators, if ever they see that there is too many educators according to the roll. according to the department of education learners ratio or percentage should be 1 is to 35 in a class (1 teacher to 35 learners). We have staff establishment; they make use of ratio that learners are 700 and teachers 34. Rationalisations and redeployment mean there are many educators and learners are less or verse visa.” (Participant 10)*

*“If ever members are not satisfied when I was acting as principal and firstly, I asked them to fill the grievance forms, if ever they are not satisfied and I bring the grievance forms to the circuit, the grievance stated that I was doing the rationalisations and redeployment with the other teachers and not alone. The matter was taken to circuit office, unions are involved only if the grievance was positive so in this case the union was not part of it and the matter was dismissed at circuit.” (Participant 13)*

According to participants indicated that rationalisation and redeployment is carried out per districts, using Last in First Out (LIFO) formula and their unions are part of the process. Participant 10 emphasised that rationalisation and redeployment is applied to ensure that human resources are deployed where they are needed and will be productive. In addition, participant 10 highlighted that where educators are not satisfied with the process, the educators are allowed to complete trade union grievance form for circuit to handle the matter. However, participants 15 argued that in other instances lists are just presented to educators indicating educators that are to be transferred to other schools. Participant 15 said:

*“Unions just speak to us on the list of schools presented that you could go and if you can’t speak to them regarding the personal issues, you have that prevent you from going.” (Participant 15)*

The findings of this study uncovered that trade unions attempt to protect the interests of their members during rationalisation and resources redeployment, however, the final decision during the process remains with school principals. These findings support the view by Mokofe (2021) that trade unions protect the right of trade unions to negotiate on matters affecting labour relations and other conditions of employment. On the issue of rationalisation and resources redeployment, the participants explained that the process is done using the departmental norms and standards and rely on school principals’ discretions. These findings that departmental norms and standards add new insight to the literature. The findings of this study support stakeholder engagement theory of Freeman et al. (2021) by promoting the need to engage educators, trade unions and school principals in making decisions related to rationalisation and redeployment of resources. The findings that trade unions ensures that identify educators who should redeployed because of curriculum needs so that are properly and suitably placed in the interests of these employees and add significant contribution to literature and concur with that of Balaneasa (2013) and Nxumalo (2020).

## Conclusions

The study recommends that a transparent approach should be followed by the school principals and trade unions in making decisions related to rationalisation and redeployment process. In addition, this study recommends that prior to final decision on rationalisation and redeployment, affected educators should be allowed to make presentations in person to both the school principal and the trade unions as part of consultation. Lastly, once the final decision is made on rationalisation and redeployment, this study recommends that the school principal should explain appeal process to affected educators in case where they do not agree with redeployment.

The study was qualitative in nature and conduct in one public school in one province. Therefore, future research should be quantitative to cover large sample in other provinces and other sectors of the economy other countries. In addition, a comparison study is recommended so that the findings and results can be compared. Moreover, the study recommends that future research should explore more how promotional posts interviews are conducted in public schools to develop a monitory mechanism to ensure that dishonestly is eliminated.

## Author

**Prof. Sipho Selatole Makgopa** (PhD) has served as a senior lecturer in management within the Department of Business Management at the University of South Africa (UNISA), and as Curriculum and Learning Development Specialist and Acting Deputy Director (Responsible for College of Education) at the University of South Africa. Currently, serves as an Associate Professor in the Department of Marketing and Retail Management at the University of South Africa. He has authored journal articles and presented papers at national and international conferences in the following fields: Marketing, Consumer Behaviour, Labour Relations, Corporate Social Responsibility, and Finance. He also authored chapters for the Business Management textbooks prescribed at South African Higher learning institutions.

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