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# The trade union as a ‘learning organisation’? A case study of informal learning in a collective, social-action organisational context

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## Abstract

The ‘learning organisation’ literature tends to take a narrow view of what constitutes an organisation, assuming that all organisations are guided by the logic of profit-maximization. Understandings of the learning organisation could be enriched by research into other kinds of organisation, particularly those that have primarily a social purpose. This paper critically examines processes of informal learning within a South African trade union. It draws on Situated Learning and Activity theories to illuminate these processes of learning in an organisational context which is collective and non-hierarchical in character, social-action oriented, and directed towards social change. It concludes that proponents of ‘the learning organisation’ may have something to learn by studying the processes of learning in organisations which are social-action oriented and social purpose in nature. At the same time, however, a ‘learning organisation’ is not simply the product of good design; its existence is subject to history and to shifting power relations both within and outside of organisations

## Introduction

An important aspect of any democratic union is that it should be a “learning organisation”. That a union as an organ of struggle and democratic expression should always be striving to empower its members. That its meetings and activities, and militant actions, are all an environment which teach lessons (South African Municipal Workers’ Union (SAMWU), 1996, p.14).

Over the past fifteen years there has been growing interest in the impact of changing social and production relations under globalisation, on workplace learning. The focus in the international literature has crystallised around the implications of post-industrial and post-Fordist forms of work organisation for emerging structures of knowledge and new approaches to learning. A body of literature has emerged debating the relationship between ‘working knowledge’ and other kinds of knowledge (Davenport and Prusack, 1998; Hopkins and

Maglen, 2000) and expounding notions of ‘the learning organisation’ and the ‘knowledge economy’ (Marsick and Watkins, 1999; Mulcahy, 2000).

The learning organisation literature (Senge, 1990; Davenport and Prusack, 1998; Nooteboom, 1999; Nonaka and Nishiguchi, 2001) is essentially concerned with how to transform the traditional workplace in order to survive and compete successfully in a globalised economy. Under globalisation, it is argued, the relationship between knowledge and production has become central: “(k)nowledge is the fundamental resource of contemporary production processes and knowledge competencies are the true source of competitive advantage” (Mulcahy, 2000, p.220). In order to gain a “full return on knowledge assets” (Marsick and Watkins, 1999, p.206), companies need to transform themselves into learning organisations.

The learning organisation is “an organisation which learns continually and has the capacity to transform itself” (Marsick and Watkins, 1999, p.206). Although all organisations ‘learn’, the learning organisation demands proactive interventions in order to create an organisational environment that supports a free flow of information, knowledge creation and management, and continuous learning. The learning organisation thus requires new technologies of knowledge for capturing and spreading ideas and know-how. This requires new approaches to education and training: more decentralised and innovative, and capitalising on informal and incidental learning. It also requires new ‘knowledge enablers’ (Davenport and Prusack, 1998): managers and supervisors need to assume educator roles by shifting their role ‘from cop to coach’, and building a collaborative culture which empowers workers and allows their knowledge and creativity to be harnessed (Garrick, 1999; Mulcahy, 2000).

Notions of the ‘knowledge society’ and the ‘learning organisation’ are particularly attractive to those concerned with workplace education and training in South Africa. They promise to provide the key to the international competitiveness sought by South African industry and to contribute to broader national economic development. Furthermore, the legacy of apartheid and the failure of government since 1994 to fund the provision of adult basic education and training (see Aitchison, 2003) has meant that the need for adult education and training far exceeds the capacity of the formal education sector.

Thus the notion of informal learning<sup>1</sup> in the learning organisation appears to offer ideal learning opportunities for those workers previously excluded from education and training opportunities (see Dovey, 1996).

The learning organisation literature has been the subject of widespread critique levelled from a number of different perspectives. Garrick (1999) argues that it tends to ignore political, social and ethical issues, while Fenwick (2003, p.48) believes that the literature is “. . . unapologetically rooted in the belief that learning should advance the organisational goals of competition”. While the learning organisation literature claims to meet the needs not only of employers but also those of workers, a number of authors have questioned these emancipatory promises. Jackson and Jordan (2000) and Mojab and Gorman (2001) argue that the learning organisation benefits only a small, elite part of the workforce; the majority of workers gain little benefit and are given little opportunity to contribute their knowledge. Perhaps the most serious critique is based on the literature's bias towards idealistic, normative outcomes. Garrick (1999, p.129) argues that “the glossy ‘empowerment’ promises that accompany many high-tech solutions for organisations to be learning enterprises tend to be like politicians’ promises – unlikely ever to be delivered in full, if at all”. Gee, Hull and Lankshear (1996, p.24) describe much of the literature on the learning organisation as ‘fast capitalist texts’, produced mainly by business managers and consultants seeking to “attend as textual midwives at the birth of the new work order” by creating a paper version of the new work order that they are trying hard to enact in the world.

While accepting most of the above critiques, this article argues that the learning organisation model may not be merely an aspirational ideal. However, in order to capture a glimpse of what a learning organisation might look like in practice, it would be worthwhile examining an organisational context very different to that of the traditional workplace. This article takes as a case study a trade union organisation: a site which is not usually regarded as a workplace, even though it is a place where people – in collaboration – labour not for profit maximisation, but for a social purpose. Unlike the traditional workplace, trade unions have sought to represent the collective need of workers to challenge capitalism's economic logic and power relations, rather than to compete successfully within the logic and rules of the global economy.

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<sup>1</sup> Definitions of informal, non-formal and formal education are not clear in the literature (Walters, 1998; Colley, Hodkinson and Malcom, 2003). Furthermore, the development of the National Qualifications Framework (NQF) and Recognition of Prior Learning (RPL) has further blurred the distinction between formal and non-formal education. In this article, I use ‘informal’ to refer to spontaneous or incidental learning in everyday life situations, as opposed to ‘non-formal’ (non-accredited but organised) education, and ‘formal’ education (accredited education in specialised education institutions).

The article critically explores some of the key factors that facilitate learning in this kind of organisation – contextual conditions that are not generally found in the hierarchical and competitive traditional workplace. In analysing this case, the article will also seek to demonstrate the heuristic value of socio-cultural theories of learning – in particular, Situated Learning and Activity theory – for illuminating the processes of learning and teaching in such organisational contexts.

### Socio-cultural theories of learning: situated learning and activity theory

Some writers on the learning organisation (see, for example Guile and Young, 1998 and Fox, 2000) draw fruitfully on the Situated Learning theories of Lave and Wenger (Lave and Wenger, 1991, Lave 1996 and 1998, Wenger, 1998), in particular, their notion of ‘learning in communities of practice’, their focus on organizations or institutional settings where teaching and learning are not the primary purpose of the organization, and their foregrounding of tacit knowledge.

Lave (1998) emphasises that we need to see ‘thought’ not only as a cognitive process, but also as embodied and enacted. She proposes the conception of ‘learning as social practice’, and argues that learning is ‘an aspect of changing participation in changing communities of practice’ (Lave, 1996). The notion of ‘learning in communities of practice’ captures both the collective/shared dimensions of learning and knowledge construction, as well as the central role of identity-construction in these processes.

We all participate in multiple communities of practice at once and for this reason, the concepts of boundaries (connections that create bridges across communities of practice), and boundary practices (where people introduce elements of one practice into another) become central elements of this conceptual framework. This theoretical perspective illuminates the fluidity and instability of the educator role, and points to the “richly diverse field of essential actors” (Lave and Wenger, 1991, p.93) who – by virtue of being knowledge brokers in some sense or another – may step into this role at different times.

Writers on the learning organisation have also drawn on post-Vygotskian Activity Theory and in particular, on the work of Engeström (see for example, Guile and Young, 1998; Garrick, 1999; Worthen, 2004). For Vygotsky, learning is a socially and culturally-based activity, with social interaction, social history, experience and culture all playing major roles (Vygotsky,

1978). One of Vygotsky's key conceptual tools is the notion of tools of mediation, used to describe the role of people, artefacts and symbolic forms such as language, that assist the learner to appropriate the cultural tools developed through social history (Daniels, 2001).

Some post-Vygotskian theorists have drawn on this conceptual legacy to write about learning at work. Scribner (1997), for example, puts forward the notion that organised, social knowledge is embodied in the physical and symbolic environment of the workplace; the organisational environment must therefore be seen as part of the activity system, rather than an external 'envelope'. Engeström (2002) has elaborated the key components of an activity system, arguing that it should be viewed as a complex interaction of 'rules' (including rituals), 'roles' (or division of labour), mediating tools, object (purpose) and the community of which it is a part. Engeström's interest is in 'transformative' learning rather than the transmission of existing knowledge: his studies on the social transformation of the organisation of work seek to identify how people – through critically interrogating their work contexts – collectively produce new understandings and hence new knowledge.

The analysis of the empirical data from my case study in the following sections draws on conceptual tools from both the Situated Learning and post-Vygotskian Activity theories. By so doing, it seeks to explore the forms of participation in the union that generate learning, describe the forms of (visible or invisible) pedagogy that support such learning, identify those who play key pedagogic roles, and identify the key features of this activity system (the nature of its rules, division of labour and mediating tools) that help to promote learning.

## Background to the case study

The trade union movement, with its several million members, can be seen as one of the most significant 'adult learning institutions' in South Africa, historically and currently. Over time, trade unions have invested considerable resources in organised education programmes for their members (see Seftel, 1983; Bird, 1984; Vally, 1994; Lowry, 1999; Andrews, 2003). However, arguably the most pervasive and significant processes of learning within the union movement are those associated with workers' broader involvement in their organization where – through their experiences of organizing, meeting, taking collective decisions and engaging in collective action – knowledge is shared and new understandings are sought and produced.

There has been a self-conscious awareness within the South African labour movement that trade unions do not only promote adult education but also

facilitate organisational learning. As early as 1986, soon after the Congress of South African Trade Unions (COSATU) was formed, its first Education Officer captured this view in a speech to a union education conference:

Firstly, education cannot and must not be separated from organisation. . . Secondly, education can take place anywhere, at any time and involves people of all ages. . . Any meeting, any strike, any wage negotiation, and any lunch break can be used as places where education takes place (quoted in Baskin, 1991, p.244).

Worker education has long been seen as taking place not only in trade union seminars, workshops and planned education programmes, but also in a variety of events such as meetings and rallies as well as through the day-to-day actions of workers.

Trade unions have been described as “laboratories for democracy” (Friedman, 1987, p.499), pointing to their role not only as sites of learning, but also as sites of knowledge production. In the early years of the labour movement, through workers’ day-to-day experiences of organising and running meetings, new understandings of and ways of practicing worker democracy and control emerged. In the process of running increasingly large and complex organisations, elected worker leaders – often with very little formal education – experimented with new forms of collective leadership. Over time, the labour movement’s principles and practices of workers’ control and participatory democracy became embodied in the physical and symbolic environment and day-to-day rituals of the trade union as an activity system. It is therefore possible to view the historical experience of black workers in South Africa as “intelligence sedimented in organisation” (Scribner, 1997, p.313). As workers participate in trade union organisational activities today, they learn from and appropriate the knowledge of previous generations of workers.

This article draws on case study research of the Cape Town branch of the South African Municipal Workers’ Union (SAMWU), a local government affiliate of the Congress of South African Trade Unions (COSATU). The union remains one of COSATU’s largest affiliates, despite a decline in its membership in recent years as a result of post-apartheid restructuring of local government and policies of privatisation. The continued militancy amongst its members has expressed itself in two national strikes, and a large number of more local protest actions in the period between 1993 and 2003 (ILRIG, 2000; SAMWU, n.d.).

The larger research project was aimed at documenting, analysing and theorising the ways in which knowledge is produced and disseminated within the trade union context. Data was gathered through over seventy hours of ethnographic observation of union activities and events spread over a two-year

period (February 2001 to February 2003), and these were complemented by data from seventeen, in-depth individual and focus group interviews. In the course of analysing the data, three discrete data sets emerged, each linked to a specific organisational setting, and bearing distinct pedagogic features: (a) the union's organised but non-certificated education programmes; (b) sites of everyday organisational involvement (including meetings, organising and negotiating with management); and (c) the context of workers' mass action (see Cooper, 2005).

SAMWU's organised education programmes – aimed at transferring skills as well as building collective identity and trade union consciousness – are relatively substantial in scale.<sup>2</sup> However, this article – concerned as it is with informal or incidental learning in organisations – will not focus on these programmes in any detail; it will restrict its focus to the pedagogic and learning dimensions of workers' routine forms of participation in the organisation (mainly in meetings), and their experiences of learning during the course of a major, national strike of their union.

## Learning through routine organisational participation

Situated Learning theory enables a range of activities within the union to be viewed through a 'learning lens' and allows the question to be posed: what forms of social activity engaged in by members of this activity system have learning as a significant outcome?

The most common form of social activity engaged in by union members are 'meetings'. There are a range of forums in SAMWU in which workers participate and take collective decisions. These range from general meetings of union members in their municipal work depots, to meetings of shop-stewards who represent workers of a particular sector (such as electricity, water or waste management), to meetings of shop-stewards who represent their constituencies at the branch or regional level of the union. Worker representatives also participate in meetings with management and in bargaining forums with employer groupings.

Meetings represent sites where learning "is not reified as an extraneous goal" (Wenger, 1998, p.76). The primary purpose of union meetings is to take

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<sup>2</sup> They include Foundation Shop-steward Training and a range of 'special issue' courses on areas such as health, safety and environment, political economy, collective bargaining, labour law, workplace education and training, gender studies, organisational management and union finances (SAMWU, 1996; SAMWU 2002).

collective decisions rather than to carry out education, while meetings with management usually have a strategic purpose. Nevertheless, meetings are educational in at least two ways: union meetings facilitate information-sharing between members and help to develop common perspectives, while meetings with management contribute to the renewal leadership capacity at a time when worker leaders are constantly being siphoned off into positions of greater responsibility within the union or, increasingly, into management or government.

In meetings with management, learning frequently happens through worker representatives simply being ‘thrown in at the deep end’ (sometimes deliberately). For example, one worker spoke of how one of the more experienced shop-stewards used to take her and her co-worker along with him to meetings with management:

. . . X was one of my mentors. What (he) used to do was . . . he used to take us along to meetings. We don’t know a thing about the issue that we’re going to discuss! . . . He would open the meeting, he would . . . put SAMWU’s position there, and then X would excuse himself (leave the meeting). And we were sitting there, like, we’re supposed to speak now! What are we supposed to say? And we were forced in that way . . . and to me, that was the biggest school. I mean . . . you were forced to do it, you see, you were left completely on your own. . . ja, that was the way that I learnt. Not through the formal . . . through the training workshops.

In the union’s own meetings, learning may be seen as taking place through ‘participation in a community of practice’. This participation may take the form of simply being present, listening and observing, with ‘old-timers’ modelling the roles and values that ‘newcomers’ are expected to acquire. For example, one shop-steward recalled in an interview how, when he first joined the union, he learnt from observing the General Secretary in meetings:

(he) never taught me . . . but I used to watch him very closely, you know . . . His style, and the manner in which he speaks, and the manner in which he treats people, and all of those things . . .

‘Participation’ also takes more active forms. One shop-steward who had been involved in the union’s Women’s Forum emphasised the value of what she learnt from participating in meetings of this structure:

We really learnt a lot there. And we did a lot of things. . . The women in the Women’s Forum developed to the extent that they could open up their mouths and challenge the men . . . For me, in terms of not getting formal training within the union, a lot of my training I got through the Forum.



When asked what she had learnt from her involvement in meetings of this structure, she described how it taught her not only practical skills, but also general, analytical skills as well as broader dispositions:

Public speaking . . . The ability to read and analyse documents . . . The ability to be able to develop policy . . . Debate, develop positions . . . Charing meetings. . . Also the practical skills, listening skills, learning to listen to others . . . It taught me that you've got to do your research, you've got to prepare, then you'll be able to speak to people at whatever level . . . or whatever qualification you have . . . And then the ability to guide others and give direction. So quite a lot of things . . .

While much learning takes place invisibly or unconsciously through observation or participation, there are also forms of pedagogy – more specifically, peer mentoring or 'guided participation' (Rogoff, 1984) – going on in the day-to-day life of the union. As noted above, some shop-stewards have union leaders acting as their mentors (deliberately or unconsciously), but often, it is ordinary workers and shop-stewards who play reciprocal peer-mentoring roles for one another. For example, one shop-steward (a qualified librarian) recalled:

I as a shop-steward . . . didn't go for formal training for a long time. But the minute I was elected I was told: alright, you're going to learn on the job. And I was taught by the cleaner – the shop-steward . . . I had to do cases, and he was there with me. He had to give me information and I would wonder: how does he know what I want? But he used to come with exactly what I wanted. Every time I picked up the phone . . . he'd come with exactly what I wanted.

My observations revealed that in many meetings, a process was enacted which involved a classical learning cycle or spiral: experiences were shared and compared, and participants collaborated to induce common understandings, broader principles and strategies for action. In contrast to the focus of Experiential Learning theorists however, this learning cycle is a thoroughly collective rather than individual process. One key dimension of this experiential learning cycle is the re-contextualisation of 'local' experiences within a broader context, enabling workers to gain a better understanding of how different elements of their experience might be connected to one another. The brief extract below, taken from a dialogue in one shop-steward council meeting, illustrates how more experienced shop-stewards assist newer, less experienced shop-stewards to interrogate, analyse and conceptualise their experiences. The meeting had been discussing a report from the branch's Health and Safety committee, and the issue of privatisation was mentioned. One shop-steward could not see the connection:

Ss1<sup>3</sup>: What is the link between privatisation and Health, Safety and Environment?

Ss2 (Health and Safety representative): They are using every excuse to get rid of our people – so where a shop-steward has an injury – suddenly documents disappear, next thing he's retrenched ...

Ss3 (Chairperson): Members who've been injured on duty are first to lose their jobs with privatisation ...

Some worker representatives play a key pedagogic role in this process of re-contextualisation on account of their role as 'boundary workers'.<sup>4</sup> Older workers bring valuable experiences from other periods in history, while other workers bring much-needed information from outside structures and forums in which they sit as union representatives. One shop-steward who played a leading role in the branch had an unusually rich set of involvements in multiple forums: he represented his branch in higher (provincial and national) structures of the union, had attended a course in adult education at a local university, and was involved in local community organisations and activist forums. He was a plumber, and the union's representative on a national, tripartite policy body engaged in developing new water policy for South Africa. He had attended local and international conferences where he had met environmental activists from around the world and engaged in international advocacy around water issues.

Often, those who promote understanding of wider and wider layers of context are fully aware of their re-contextualising role and the importance of helping others to 'grasp the full picture'. For example, a shop-steward in one meeting continually stressed "the need to put things into perspective", while in another meeting, the chairperson emphasised the importance of drawing inter-connections between workplace restructuring and workplace education and training issues, and asked: "How in SAMWU do we make workers understand and see the linkages?"

The trade union may therefore be seen as a community of practice (see Ball, 2003) where the process of participation in routine union activities, supported by forms of mentoring and modelling, induct workers into their trade unionist roles and identities. Collective spaces offered by the union provide workers

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<sup>3</sup> Successive speakers who were shop-stewards are labelled: Ss1, Ss2 and so on.

<sup>4</sup> As noted earlier, Wenger uses the term 'brokers' to refer to those who participate in multiple communities of practice, and who introduce elements of one practice into another (Wenger, 1998). I have misgivings about the entrepreneurial or commercial connotations of this term, and have therefore devised 'boundary workers' as an alternative term.

with opportunities to share and compare experiences and develop new understandings; in this context, boundary workers play a key re-contextualising role by helping fellow workers to locate their local experiences within a broader context.

## Learning through mass action

'Collective doing' also plays a key role in mediating learning in the context of mass action. In July 2002, SAMWU embarked on a three week, national strike that was to become the largest strike in the country since the democratic elections of 1994. Strikers' actions included marches, 'trashing' (emptying garbage bins on to the streets), burning tires in the city streets, occupations of municipal offices, and picketing.

In the union, it is a truism that members learn from strikes, as well as that strikes help to expose organisational weaknesses. For example, in the union's shop-steward training manual produced after the 2002 strike (SAMWU, 2003, p.26), one of the workshop activities asks shop-stewards to "reflect on, and learn lessons from the strike that will help you to build strong workers action in the future", and to "identify the strengths and weaknesses of the union that the strike has thrown up".

SAMWU's 2002 strike was experienced by workers as an intense and condensed learning experience. According to one full-time shop-steward, "Whatever else the strike was – it was a massive learning experience. . .". Learning was largely tacit and took place through participation in the special community of practice thrown up during the strike. Here, the Situated Learning theorists' notions of 'learning as doing' and 'knowing in action' are most clearly illustrated. For example, on my visits to the union office, I observed activity that was quite frenzied – apparently unconscious, unaware, unreflective. Union activists were grappling with a large number of multi-faceted, complex issues, and having to deal with them literally 'on the run'. Lessons were being learnt and skills acquired which might only be reflected upon or acknowledged later.

This tacit learning was complemented by moments of self-conscious, critical reflection on experience in the midst of the strike. For example, I observed a meeting at the union's offices on the third day of the strike where worker leaders and organisers engaged in a heated debate about how to account for the uneven support for the strike, and the 'lack of discipline' amongst some shop-stewards. There was a lengthy process of sharing experiences, drawing lessons and debating new courses of action. This was accompanied by an explicit awareness of the importance of learning from the experience of the strike, as

illustrated in comments like: “We need to learn from these things – we need to tighten up, spell out everyone’s role, say exactly what’s expected of each and everyone. That’s what this morning taught me. . .” and “We need to learn from what has taken place here, not just for tomorrow but for the future.”

Participants learnt not only practical and strategic lessons but also gained a deeper understanding of a more general kind. They learnt something about how economic power functions, as well as how political power operates to protect those with economic power. For example, in a group interview after the strike, two workers discussed the role of the police during the workers’ march on the first day of the strike:

W1<sup>5</sup>: . . .they try to protect them (management) and let us get hurt. . . they’ve got bullets, guns, batons. . . And our strikers go there with bare hands. . .

W2: . . .With bare hands. And empty stomach.

The strike also raised broader questions that awakened in workers a desire to understand more about politics, history, and how society functions; for example, in another focus group interview following the strike, one worker argued: “We need to start giving our members political education . . . [Yes!<sup>6</sup>] People don’t understand how the politics work . . .”

The strike played a pedagogic role in a further, less obvious way: it acted as a significant evaluative moment of the union’s organised education programmes. It functioned to indicate whether the building of collective identity and trade union consciousness – the core aims of the union’s planned education programme – had been successfully achieved or not. It became clear in SAMWU’s 2002 strike that these aims were unevenly achieved. In central Cape Town for example, many workers did not support the strike; these included many shop-stewards who failed to exercise the roles, skills and political leadership capacity they were expected to have acquired through their shop-steward training and mentoring on-the-job. The strike revealed different ideological and identity positions amongst the union’s members that did not seem to have been successfully resolved by the union’s planned education programmes, by the pedagogic processes happening in meetings, or by the solidarity of the strike itself.

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<sup>5</sup> Worker 1 and Worker 2

<sup>6</sup> A collective response by other workers taking part in the focus group interview.

## Factors facilitating learning in the trade union context

Engeström (2002) argues that an activity system has the potential for 'breakthrough into learning activity' if it allows multiple voices and contested viewpoints to be heard, and if it is prepared to tolerate instability, internal tensions, struggles and contradictions. The 'multi-voicedness' (Bakhtin, 1965/1994) of an activity system is therefore the source of productive tensions and contradictions which can, in turn, be a source of new learning and knowledge.

It has been shown above how the 'rules of practice' of the trade union as an activity system promote learning by prioritising social interaction and solidarity between social equals, thus creating the potential for widespread participation and multi-voiced interaction. In addition to this, there are two other significant features of the trade union's organisational culture which promote inclusion and participation, and thus possibilities for learning: firstly, the widely distributed nature of the educator role, and the part played by ordinary workers as educators; and secondly, the role of culturally-embedded, symbolic tools of mediation, and oral-performativity in particular.

### Shared and reciprocal educator roles

A key feature of union pedagogy is the weak division of labour between educators and learners. In the union's organised education programmes, the educator role is relatively specialised: the educator role is clearly identified, although a range of union staff, worker leaders or outside 'experts' may step into this role. In union meetings, however, the role of educator is far more widely distributed and fluid, richly illustrating Lave and Wenger's notion of the educator role being assumed by a "richly diverse field of essential actors" (1991, p.93) who engage in various and reciprocal forms of guided participation, modelling and peer mentoring. Boundary workers who traverse different communities of practice bring important information which helps workers to re-contextualise and understand the significance of their experiences, while ordinary workers also share experiences and work collaboratively to construct common understandings.

During the 2002 strike, the boundaries between educators and learners became even more diffuse as workers assumed the role of the 'collective educator', using mass action to communicate their experiences, their identity, their world view and their power to the world at large. This weak specialisation of the educator role and inter-changeability of educator and learner roles (weak division of labour) allows ordinary workers to add their 'voice' to the union's rules of practice and contribute to the shared 'knowledge pool' of the organisation.

## Culturally-embedded tools of mediation

In the South African trade union context, a range of symbolic tools of mediation play a key role in facilitating learning. Together, these assume the form of ‘oral performativity’ – a mode of communication embedded in the historical and cultural experiences of black people in South Africa (Gunner, 1999), and rooted in the history of the trade union movement more specifically (Sitas, 1990).

Despite the presence of large amounts of written text, oral communication dominates in union meetings, and often assumes the form of a distinctive speech genre involving code-switching between different languages. Union members frequently use English when dealing with more formal knowledge such as labour law, but switch to Afrikaans or isiXhosa (the two dominant languages in the Western Cape) when expressing their strong feelings on an issue. Code-switching is a widespread phenomenon in South Africa, and is regarded as originating in the attempts to circumvent or transcend the institutionalised, ethnic barriers of apartheid (Slabbert and Finlayson, 2002). It is seen as a form of accommodation, and as symbolising the values of democracy, equality, mutual understanding and respect (*ibid.*). In the union context, it signals the importance with which equality and respect amongst workers is regarded, and helps to build an inclusive, working-class identity.

Story-telling is also an integral part of information-sharing and comparing of experiences in meetings, and its pedagogic, mediating role is illustrated by the numerous occasions when control over ‘stories’ is exerted by the chair to stop shop-stewards from relating experiences which do not seem relevant to the item under discussion. Meetings are often lively and boisterous and have a distinct, ‘carnavalesque’ quality to them. The use of ‘folk humour’ (Bakhtin, 1965/1994) allows workers to celebrate their collective identity, functions to parody ‘the bosses’ (a subversive function), as well as having a sardonic, self-mockery (critical self-reflective) function.

Emotion and the dramatic use of the body are also key tools of mediation; debates and discussions in meetings are often highly emotional and accompanied by strong body language. For example in one meeting, a debate around privatisation was concluded with calls to “take to the streets”, “We must do something drastic”, “They’re trying to destroy the union”, and “this is a matter of life and death!” Participation in the union is not simply a responsibility or task but an act of ‘passion’ and commitment.

In the strike, there was an overall mode-switch (Kress, 2000) from the languaged discourse of union workshops and meetings to one of visual display; this was evident in workers’ public demonstrations in their symbolic

use of the body, in their toyi-toying,<sup>7</sup> marching and dancing, as well as their use of visual artefacts such as banners, placards, T-shirts, political symbols and the symbolic use of colour.

The forms of oral performativity which characterised many of SAMWU's meetings and strike activities are specific, local reinventions of a long-standing cultural tradition within the South African labour movement, and are deeply embedded in the history and culture of black South Africans more generally. The rich performative culture drawn upon in the union context is indicative of 'grassroots creativity' and 'grassroots energy' (Sitas, 1990), signalling a space for ordinary people to draw on familiar, historical, cultural resources to mediate knowledge and meaning, and give voice to their experience and knowledge. It allows for the 'dispersed educator role' referred to above, and enhances the multi-voicedness of this activity system

## Conclusion

The use of Situated Learning theory has allowed a range of 'everyday' activities within the trade union organisational context to be viewed through a learning lens, and the deployment of Activity Theory concepts has shown that a number of key features of this activity system – its participatory 'rules of practice', its weak division of labour, and its culturally-embedded tools of mediation – create affordances for learning. The research presented in this article shows that rich examples of 'innovative learning' and 'working knowledge' may be found in organisations which have primarily a social purpose, and which seek to challenge rather than reproduce dominant social relations. The material from my case study suggests that learning may best be promoted in organisations which value collectivity and social solidarity, where a 'thirst' for new knowledge is born out of the real experiences and needs of its members, where multiple 'voices' are able to meet and contest, where the educative role of ordinary, grassroots members of the organisation is valued and nurtured, and where the symbolic and communicative culture of the organisation is an expression 'from below' of the cultural history of its members.

The learning organisation literature seems generally to have based itself on a restricted definition of what 'counts' as an organisation. Those interested in exploring the contextual conditions that make possible the enactment of a learning organisation may therefore have something to learn from organisations which are social action- and social change-oriented.

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A form of chanting-marching-dancing performed in a militant mood.

A cautionary note is required however. Situated Learning theories have been criticised for their neglect of power relations, and in particular, for failing to account for how broader, historical and structural relations of power at a societal level might reverberate within the dynamics of any community of practice (see, for example, Hasan, 2002). My research on this union suggests that broader, unequal, power relations within the society are echoed and reproduced, even in a relatively democratic organisation such as SAMWU. There are constraints on participation in the organisation arising from inequalities between workers based on language, different levels of (formal) education, gender, the urban-rural divide, and the hierarchical division of labour in the workplace. All these factors promote greater participation by some, and the more limited participation or exclusion of others.

Furthermore, the conditions of collectivity which historically made possible a widely dispersed educator role within the union, have been undermined over the last few years by a new and increasingly aggressive ideology of competitive upward mobility (Grossman, 1999). There has been growing pressure for greater knowledge specialisation to enable unionists to deal with a complex range of policy issues; this has been accompanied by the increased foregrounding of those with specialised expertise, and pressure from union members for formally accredited courses. There has also been a shift in the nature of the dominant tools of mediation which facilitate learning with the organisation. Over the last fifteen years, there has been a move away from more dialogical, oral forms of communication to a greater reliance on forms of written text – particularly policy and legal texts – which are more ‘authoritative’ and therefore more ‘univocal’ in form (Bakhtin, 1965/1994, p.78).

The contextual conditions which have promoted organisational learning within the South African trade union movement are not a given but are subject to history and to shifting power relations both within and outside of these organisations. The ‘learning organisation’ does not simply emerge from rational and carefully-planned pedagogic and organisational interventions (as suggested by some of the management and organisational development literature). Its emergence is the result of contestation and struggle, embedded in particular social and historical contexts.



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