The application of integrative thinking to develop a stewardship-based broader collective bargaining framework for the South African automotive industry

Submitted in fulfilment of the requirements for the degree of Doctorate of Philosophy

FACULTY OF COMMERCE

RHODES UNIVERSITY

By

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FEBRUARY 2026

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ABSTRACT

The automotive industry is one of the largest industries in South Africa, making an important contribution to the country's economy. The industry is also the most visible sector of the South African economy, attracting significant foreign direct investment, a key driver of economic growth and job opportunities. Despite the positive progress, the industry faces recent challenges, including slow economic growth, unstable electricity supply, international competitiveness, the importation of cheaper vehicles from China and other Asian countries, and recent US trade tariff announcements. The country's heavy reliance on the export of cars and components makes it vulnerable to global protectionist trends, such as trade tariffs and the AGOA programme. The aim of the research was to explore the development of a stewardship-based, broader collective bargaining framework to address the viability and socio-economic challenges facing the South African automotive industry through the application of interactive dialogue and integrative thinking.

With respect to the methodological approach, the exploratory case study method was applied, as it best suited the exploration of stakeholders' interrelated activities and views. This method is multi-perspectival, in that the researcher considered not only the voices and perspectives of the parties involved in the challenge but also their interactions. The primary method of data collection involved conducting interviews with key stakeholder representatives from sector employer representative organisations, unions, industry business councils, and government, and applying thematic analysis to the data to generate codes and themes, ultimately yielding paradoxical statements.

Two procedures were applied sequentially, namely interactive dialogue and integrative thinking. Through interactive dialogue, participants representing parties involved in collective bargaining in the automotive industry debated the paradoxical statements arising from the challenges facing sector-wide collective bargaining and explored potential solutions to reduce these tensions. In the second step, through a process of integrative thinking, the researcher constructively reconciled the tensions between opposing solutions by generating a holistic model that incorporated elements of the respective solutions but went beyond their individual resolutions.

This research illustrated the potential application of a collaborative stewardship approach beyond traditional social-ecological sustainability issues to address the multiplicity of challenges in collective bargaining in the South African automotive industry. Considering the study's contributions to the body of knowledge, the following contributions were identified: (1) scholarly, depicting the application of a collaborative stewardship approach to a new context and the application of a highly centralised collective bargaining arrangement in the South African automotive industry; (2) methodological, covering the application of paradox theory and integrative thinking to interorganisational challenges with multiple stakeholders, and (3) practical, as to how collaborative stewardship approach was applied in addressing the multiplicity of challenges in collective bargaining in the South African automotive industry.

The South African automotive industry has long been the cornerstone of South Africa’s manufacturing economy. Considering the future, sustaining and growing this sector requires a concerted effort from all stakeholders – industry, government, labour and society. However, the automotive sector faces numerous challenges, but also has opportunities beyond the current global manufacturing strategy afforded by exploring the African automotive market. The research suggests a stewardship approach in which leadership from all sectors of the industry collaborate across industries and borders to create a sustainable and growing automotive ecosystem, not only in South Africa but throughout Africa.

KEY WORDS

Integrated collective bargaining; Stewardship; Societal corporatism; International competitiveness; Automotive industry viability

DECLARATION

I declare that the Thesis entitled, "**The application of integrative thinking to develop a stewardship-based broader collective bargaining framework for the South African automotive industry",** which I hereby submit for the degree, Doctor of Philosophy at Rhodes University, is my own work. I also declare that this thesis has not previously been submitted by me for a degree at this or any other tertiary institution and that all the sources that I have used or quoted have been indicated and acknowledged by means of complete references.

_____

Name Surname (*signed*)

ACKNOWLEDGEMENTS

Without a doubt, this research presented the toughest challenge I have ever faced, including a demanding work career. What was supposed to be the start of a well-deserved retirement after a career in the automotive industry spanning more than forty years was replaced by an academic undertaking, which did not come naturally to me.

For this reason, I would like to pay tribute to my wife, Leigh, and my children, Francois, Chantal, Randall, Simone, and Gabrielle, who supported me during this trying time with their encouragement. Leigh, thank you very much for patiently supporting me, sacrificing holiday commitments, visits to the children, and touring our beautiful country. Also, to my grandchildren, Jeremiah, Alexis, Lara and Zachary, who must have wondered during their visits why Pa often disappeared to his study.

Secondly, I would like to express sincere gratitude to my supervisors, Professors Noel Pearse and Rosaan Krüger, for their patient support and guidance in this research journey. I especially thank Noel for his encouragement and accessibility in guiding me through this process. Thank you, Rosaan, for the legal input to the research. I was very fortunate to have such a combination of supervisors.

I would also like to thank the following industry stakeholders, who have agreed to nominate a representative to participate in the research. These representatives, despite their busy schedules availed themselves for meetings, responding to e-mail enquiries and willingness to assist in the research: Automobile Manufacturers Employers' Organisation (AMEO); Department of Employment and Labour (DoE&L); Motor Industry Bargaining Council (MIBCO); Minerals Council South Africa; Molapo Industries; National Association of Automotive Component and Allied Manufacturers (NAACAM); National Association of Automotive Manufacturers of South Africa, The Automotive Business Council (NAAMSA); National Employers' Association of South Africa (NEASA); National Union of Metalworkers of South Africa (NUMSA); and Solidarity; and many others who showed an interest in the research.

Lastly, I am deeply grateful to God for blessing me with strength, wisdom, and provision during this journey. This achievement would not have been possible without His grace and guidance.

ABBREVIATIONS

AGOA	African Growth and Opportunity Act
AMEO	Automobile Manufacturers' Employers' Organisation
APDP	Automotive Production and Development Programme
BBBEE	Broad-based Black Economic Empowerment
BCNTM	Bargaining Council for the New Tyre Manufacturing
BMWSA	BMW South Africa (Pty) Ltd
BUSA	Business Unity South Africa
CCMA	Commission for Conciliation, Mediation and Arbitration
COSATU	Council of South African Trade Unions
COVID	Coronavirus Disease
dtic	Department of Trade Industry & Competition
Ford SA	Ford Motor Company of Southern Africa (Pty) Ltd
GDP	Gross Domestic Product
IPF	Industry Policy Forum
Isuzu	Isuzu Motors South Africa (Pty) Ltd
LRA	Labour Relations Act, 66 of 1995
M & E	Metal and Engineering (German)
MBSA	Mercedes-Benz South Africa (Pty) Ltd
MEIBC	Metal and Engineering Industries Bargaining Council
MIBCO	Motor Industry Bargaining Council
MITG	Motor Industry Task Group
NAACAM	National Association of Automotive Component and Allied Manufacturers
NAAMSA	National Association of Automobile Manufacturers of South Africa
NBF	National Bargaining Forum
NEDLAC	National Economic Development and Labour Council
Nissan	Nissan South Africa (Pty) Ltd
NUMSA	National Union of Metal Workers of South Africa
OEM	Original Equipment Manufacturers
SAACI	South African Automotive Component Industry
SAAM	South African Automotive Masterplan

SAFTU	South African Federation of Trade Unions
SEIFSA	Steel and Engineering Industries Federation of South Africa
Toyota	Toyota South Africa Motors (Pty) Ltd
USDA	United States Department of Agriculture
VWSA	Volkswagen South Africa (Pty) Ltd

KEY DEFINITIONS

Artefacts	An artefact is something observed during the investigation that is not naturally present but occurs or is produced as a result of the investigation process.
Artefacts framework	An artefacts framework is a structured approach to understanding, designing, or evaluating artefacts, which are constructed objects or processes.
Collective Bargaining Coverage	Collective bargaining coverage refers to the proportion of employees whose terms and conditions of employment are determined by collective agreements between employers and trade unions. It essentially indicates the extent to which collective bargaining influences the pay and working conditions of a workforce.
Collective Bargaining	The term "collective bargaining" is used in this research complies with the ILO definition, which extends to all negotiations which take place between an employer, a group of employers or one or more employers' organisations, on one hand, and one or more workers' organisations, on the other, for: (a) determining working conditions and terms of employment; (b) regulating relations between employers and workers; and/or (c) regulating relations between employers or their organisations and a workers' organization or workers' organisations
Concession Bargaining	Concession bargaining is a form of bargaining where the worker representative organisation (union) agrees to give up previously obtained benefits, in exchange for something else, such as job security, from the employer.
Distributive collective bargaining	Distributive collective bargaining is a form of negotiation in which parties with competing interests are involved in a process of distributing limited resources among themselves.

	Integrative bargaining is a form of collective bargaining where the parties are willing to explore objectives that are not in fundamental conflict. Integrative thinking is a problem-solving approach that views opposing ideas, often perceived as mutually exclusive, as opportunities to generate a creative and superior solution that incorporates elements from both. Interactive dialogue refers to a conversational exchange between participants, encouraging contributions and the exchange of views on a particular challenge, which influences the resolution of the issue.
Efficiency	The ability to consistently maximise productivity with minimum wasted effort, expenses, or resources. Whilst efficiency focuses on doing things right all the time, effectiveness focuses on doing the right things.
Interactive dialogue	Is a communicative approach designed to reconcile differing perspectives, fostering empathy, mutual understanding, and transformation by combining diverse viewpoints into a cohesive, holistic understanding
Integrative bargaining	Is a collaborative “win-win” strategy where parties work together to maximize joint gains and create value, rather than fighting over a fixed, limited resource (also referred to as interest-based negotiation).
Integrative thinking	The ability to resolve opposing, “either-or” choices generating a new, superior model that combines elements of both, rather than making trade-off.
Just transition	A just transition is a process for a sustainable future that ensures fairness and social inclusion by addressing the uneven impacts of climate change and the shift to a low-carbon economy. It aims to create decent jobs, protect workers' livelihoods and communities affected by environmental regulations, and promote social equity throughout the transition.

Paradox	A paradox arises out of alternative solutions which do not follow from one another, and both appear to be likely, but selecting one will negate the other.
Productivity	Generally referred to as the measure of efficiency in converting inputs such as time, labour, resources, into valuable outputs (goods, services results). Doing it consistently, effectively and with quality
Sectoral Bargaining	Sectoral bargaining is a form of collective bargaining where industry trade unions and employer organisations negotiate across an entire industry or sector of the economy, as opposed to individual company-level bargaining.
Shop steward	Is an elected employee who represents fellow union members in the workplace, in interactions between workers and management ensuring that their rights are protected, who negotiates on wages and substantive issues of employment.
Societal Corporatism	Societal corporatism, or social democratic corporatism, is based upon a social partnership between capital and labour to address their interests through collective bargaining involving capital and labour facilitated by government.
Stakeholder	An individual or representative structure, or organisation with an interest in or affected by a business, project or organisation, such as employees, customers, investors or community organisations.
Stakeholder theory	Stakeholder theory proposes that an organisation's success depends on the effective management of relationships with its identified stakeholders, and not just shareholders. Stakeholders are a broad category of organisations, individuals or interest bodies, who have an impact on the organisation or are impacted by its actions.
Steward	: An individual or representative structure entrusted with the judicious management of another's property, interests or financial affairs in such a way as to contribute to its long-term sustainability.

Stewardship	Stewardship in the context of this research is an inclusive, holistic approach to broader collective bargaining in the South African automotive industry that will ensure industrial relations stability through the engagement of different stakeholders within the legal and negotiated labour relations framework for the sustainable growth of the industry and the well-being of societies within which it operates.”
Workplace stability	The creation of a secure, predictable, and supportive environment that fosters employee engagement, reduces turnover, and enables productivity under all circumstances.

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CHAPTER 1: INTRODUCTION AND PROJECT OVERVIEW

1.1 INTRODUCTION

The objective of this research is to explore the development of a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry, through applying a process of integrative thinking. This research is motivated among other by the important contribution of the automotive industry to the South African economy, recent challenges facing the industry and the collapse of societal-corporatist structures in addressing these challenges.

The South African automotive industry comprises twenty-two companies involved in the production of cars and commercial vehicles, of which seven are major vehicle manufacturers/assemblers (producing passenger cars and light commercial vehicles), and several assemblers of medium and heavy commercial vehicles (Lamprecht, 2021). Additionally, twenty-one companies are involved in the importation and distribution of new motor vehicles in the country, and approximately 500 automotive component suppliers, including 180 first-tier suppliers (NAAMSA Website, 2022). About 497 000 workers are employed in the industry, including the value chain (NAAMSA, 2024).

As one of the largest industries in South Africa, the automotive industry makes an important contribution to the country's economy (NAAMSA, 2022; Lamprecht, 2020). With respect to the country's economy, as the country's largest manufacturing sector, the automotive industry contributed a substantial 18,1% of value addition within the domestic manufacturing output, which was derived from vehicle and automotive component manufacturing activity (Augustine, 2024). According to Augustine (2024), this continued to position the industry and its broader value chain as a key player within South Africa's industrialisation landscape. In addition, the automotive sector remained one of the most visible sectors receiving foreign direct investments, with the seven Original Equipment Manufacturers (OEMs) investing a record R9,2 billion in 2020, while the component sector invested R2,4 billion in 2020. Investment at this scale is significant and will promote local value-addition, while, importantly, technology is also embodied in the investment (NAAMSA; 2022). In 2024, the broader automotive industry's contribution to the gross domestic product (GDP) stood at 5,3% and 14,7% of total exports (NAAMSA, 2024).

As far as vehicle exports are concerned, they are crucial for the viability of the domestic automotive industry, as exporting remains key to generating sufficient economies of scale and achieving improved international competitiveness (Lamprecht, 2021). Reflecting on vehicle exports, Lamprecht (2021, p. 5) noted that "Record vehicle exports in 2019, accompanied by continued high levels of investment in the domestic automotive industry and large-scale employment of high-skilled jobs, were testimony to the largest manufacturing sector's contribution to the South African economy." However, automotive export prospects depend on the health of the global economy. This dependence was reflected in the first half of 2020 when the vehicle exports dropped by almost 40% compared to 2019, a contraction which could be ascribed to the Covid-19 pandemic, as most countries introduced lockdown restrictions, resulting in a fall in new-vehicle demand (Venter, 2020; Lamprecht, 2021).

Beyond its economic contribution, the industry has also contributed to the upliftment of communities within which it operates through corporate social investment initiatives. In 2018, the seven Original Equipment Manufacturers (OEMs) contributed 4% of the total corporate social investment expenditure in South Africa (Jordaan et al., 2018). As is the case in many other developing countries, the South African industry has developed over the years under high levels of protection (Black, 2001). The industry was subsidised by the government through the Automotive Production and Development Programme (APDP), which expired in 2020, and has been extended from 2021 through to 2035, under a new policy, the South African Automotive Masterplan (SAAM) (Lamprecht, 2021).

The South African automotive industry not only contributes to the development of the South African economy, but also makes a significant contribution to the industrial capacity of the African continent, accounting for 62,1% of the African aggregate production volumes (Modiba, et al., 2021

This chapter covers an overview of the South African automotive industry and its contribution to the South African economy, current collective bargaining arrangements, labour stability and the challenges facing the industry as a major contributor to the economy. In outlining the future of the industry, the context of the challenges facing the industry, especially current trade tariffs, and the development of a globally competitive and transformed industry are covered. With

respect to labour relations in the industry, within the legislative framework of the Labour Relations Act No. 66 of 1995, the transformation of shopfloor relations and development of a collective bargaining framework is discussed. The chapter also introduces the research problem, the main objectives of the study and how broadening the labour relations framework for the industry to include all sectors could contribute not only to enhancing labour stability, but also to addressing the current challenges facing the industry. In outlining the methods, procedures and techniques, the researcher highlights how the research will be conducted, making reference to the research analysis tools and the data analysis techniques. This is followed by an overview of the thesis chapter structure and conclusion.

1.2 BACKROUND TO THE RESEARCH PROBLEM

With respect to the background to the research problem two topics will be expounded upon. Firstly, the future of the automotive manufacturing industry, among other its contribution to the South African economy and challenges facing the industry and secondly, labour relations and workplace stability and the challenges on long-term viability of the industry.

With respect to the future of the automotive industry, Jordaan et. al. (2018) expressed the view that manufacturing is one of the sectors that can make the biggest contribution to the growth in the South African economy, and, therefore, it needs to be accelerated. In addition, manufacturing-driven growth has the greatest impact on job creation, and with its extensive linkages throughout the economy, the multiplier effects of manufacturing are higher than those in most other sectors (Barnes and Black, 2013; Jordaan et al., 2018). The automotive industry is not only the largest manufacturing sector in the South African economy, but it also invests billions of Rand every year, and represents about 497 000 highly skilled, direct jobs in its formal sector supply chain (Lamprecht, 2021). In terms of collaboration between industry and government, the domestic automotive sector has proven to be a reliable partner and dependable ally for the government, positioning manufacturing as a catalyst for development and inclusive growth in the country (Jordaan et al., 2018).

To address the challenges facing the industry, the National Association of Automobile Manufacturers of South Africa (NAAMSA), in consultation with industry stakeholders, developed a strategic document known as the South African Automotive Master Plan 2035 (SAAM). The plan seeks to create “A globally competitive and transformed industry that actively contributes

to the sustainable development of South Africa's production economy, creating prosperity for the industry stakeholders and broader society" (Deloitte, 2019, p. 7). Some of the key objectives of the plan are to achieve a local production target of 1% of global vehicle production and 60% local content (Deloitte, 2019).

In developing the strategic document, NAAMSA (2021) reflected on the consequences of losing the industry. As already indicated, some regional economies are heavily dependent on the automotive industry, and the impact of a decline in the industry on the economies in Buffalo City, Nelson Mandela metropolitan areas, and Rosslyn would be devastating (Jordaan et al., 2018). Any decline in the automotive sector would negatively affect the industry's transformation and corporate social investment. In a scenario of industry closure, billions of Rand in OEM investment in these activities will be lost.

In support of its long-term policy certainty strategy, the government approved the South African Automotive Masterplan (SAAM) 2021 - 2035, which, in addition to amendments to the APDP, was to take effect in 2021 but was postponed to 2022 (Deloitte, 2019). The SAAM 2035 vision is to pursue "a globally competitive and transformed industry that actively contributes to the sustainable development of South Africa's productive economy, creating prosperity for industry stakeholders and broader society." (Lamprecht, 2021, p. 116).

Despite the positive progress, recent challenges facing the South African automotive industry include unstable electricity supply and the USA trade tariff announcements. Commenting on the disappointing 2023 new vehicle sales and exports, NAAMSA spokesperson identified the unstable electricity supply as one of the major factors which negatively impacted on the automotive industry (Mabasa, 2024). NAAMSA CEO, Mabasa, (2024), cautioned that the electricity crisis is one of the biggest inhibitors for growth, productivity and quality in the industry (Anon., 2024a). Quoting Biene, VWSA Chairperson, Mahlaka (2023) reported on plant closures during higher stages of load shedding and their impact, not only on production but also on workers' income. Several CEOs of the OEMs commented on the negative long-term impact of unstable electricity supply on the future of the industry, as well as the production of electric vehicles (Mahlaka, 2023).

With respect to the trade tariff announcements, South Africa's high reliance on exports, particularly through the African Growth and Opportunity Act (AGOA), makes the country vulnerable to global protectionist trends (Droppa, 2025). The February 2025 announcement by the USA President of 25% levies on USA imports of steel and aluminium poses challenges and opportunities for the South African automotive industry (Droppa, 2025; Mothilal, 2025; Woosey, 2025). According to Mothilal (2025), CEO of the National Association of Automotive Component and Allied Manufacturers (NAACAM), this challenge emphasised the importance of proactive policy interventions from the government and ongoing collaboration between industry stakeholders, labour and government to navigate the challenges and exploit the opportunities critical for the long-term sustainability of the industry. According to Mabasa, NAAMSA CEO, these tariffs will undermine existing trade agreements, fair trade principles, and the South African automotive sector's contribution to economic development and job creation (Mabasa, 2025).

Concerning labour relations and workplace stability, institutions in the South African automotive industry, including collective bargaining, are enshrined in the Constitution of South Africa. Section 23 of the Constitution, 1996, regulates the rights to fair labour practices, the rights of workers, employees, trade unions, employer organisations, and employers who engage in collective bargaining. One of the key legislative instruments that gives effect to Section 23 is the Labour Relations Act, 66 of 1995 (LRA), which advances economic development, social justice, labour peace, and the democratisation of the workplace. The LRA (1995) governs the relationship among employers, employees, and trade unions, particularly with respect to collective bargaining and dispute resolution. With respect to collective bargaining, the LRA, Chapter III (1995), provides for organisational rights, including collective agreements, bargaining councils, trade unions, and employers' organisations, among others. The LRA (1995) also provides for Workplace Forums, aimed at minimising adversarialism and strengthening joint problem-solving in the workplace. Consisting of employer and representative structures, the focus is on joint decision-making, consultation, enhanced workplace efficiency, and the promotion of the interests of all employees, whether or not they are union members.

As already outlined, workplace stability is critical to the industry's current and future competitiveness. Although the industry has come a long way from a history of industrial relations conflict, characterised by hostile wage negotiations, sequential strikes as wage negotiations deadlock in the various value chain bargaining chambers, above inflation increases, it has been

able to reinvent itself from an industry characterised by inefficiency and poor quality, to one that is internationally competitive, particularly since 1995 (Dibben and Wood, 2015). As an indication of how critical workplace stability is, the comments of Molapo, former Chairperson of the Automotive Manufacturers Employers Association (AMEO) and van Zyl, former President of the National Association of the Automobile Manufacturers of South Africa (NAAMSA), during the 2013 strike action, which crippled the industry, are noted. (Williams, 2013). Williams (2013) referred to Molapo's comments that a lack of workplace stability can compromise the industry's future growth prospects, with consequences for the country's broader economy. Van Zyl was also of the view that the strike action had damaged the country's status as a reliable supplier to the international export markets and could negatively impact future exports (Willams, 2013).

The South African automotive industry has made significant progress. Dibben and Wood (2015, p. 3) pointed out that "… unlike Australia and New Zealand, where the motor industry has largely collapsed, the South African motor industry survived, and, albeit in a somewhat fragile manner, actually prospered". They argued that this survival can be attributed to the industry's ability to reinvent itself from an inefficient, low-quality one to an internationally competitive one. This reinvention is reflected in how industrial and work relations have been transformed, as well as in the industry's ability to innovate, often through improvisation, despite limited resources at play (Dibben and Wood, 2015).

A central feature of the industrial and workplace relations turnaround is the creation of collective bargaining structures, which have long been a feature of wage and substantive conditions-of-employment negotiations in the automotive industry. There are three bargaining councils representing the component suppliers and new tyre companies (Department of Labour, Registered Private Sector Bargaining Councils, 2017). The OEMs are represented in the National Bargaining Forum (NBF), which is a structure agreed upon by the Parties.

However, despite consensus comments from collective bargaining partners that current sector collective bargaining has served the industry well and contributed to labour stability (Research Participant interviews), this stability was threatened in July 2024, when, despite sector collective agreement (NBF), Ford Motor Company of Southern Africa (FMCSA) experienced work stoppages as workers went on strike demanding a share in Ford's global profit declaration

(Mawson, 2024). In terms of the OEM sector NBF Agreement's "No Further Claims Undertaking (NBF Agreement, 2022; A 8.3), "The parties undertake that they will make no further claims/demands, either at industry or at company/plant level, for the duration of this Agreement, in respect of substantive wage and/or benefit on-cost items covered by this Agreement." According to Vavi, General Secretary of the South African Federation of Trade Unions (SAFTU), "…bonuses, like basic remuneration and profit, come from the surplus value that is created by workers in production." (Mkentane, 2024, p. 1). Referring to Ford's global company profit, Vavi argued, "…such surpluses should not only contribute to the wealth growth of shareholders but must benefit the workers who create it." (Business Day, 2024, p. 1). Ford and NUMSA settled the strike by agreeing to pay every worker a one-off R 20 000,00 settlement and to take no disciplinary action against workers who participated in the illegal strike (Mawson, 2024; Mkentane, 2024).

In another threat to industry stability, Schaefer, VWAG CEO responsible for Global Passenger Car Operations, raised concerns regarding the sustainability of VWAG's ongoing presence in South Africa (BizNews, 2023; Reuters, 2023), due to operational challenges such as load-shedding, rising labour costs, and problems with Transnet. Schaefer argued that South Africa was a competitive player in global car manufacturing due to its low labour costs, but it is now losing this edge rapidly due to poor governance and sluggish regulatory reforms (Bavier, 2023, Reuters, 2023). It is crucial for the South African automotive industry to navigate these challenges, as its ability to adapt will significantly impact its future trajectory (Unterwegs, 2023). Without concerted effort, the industry risks losing its competitive edge and facing a downturn in the face of globalisation. The government, industry stakeholders, and international partners must collaborate to address issues related to port management and electricity supply.

These recent threats to the automotive industry's viability necessitate structured collaboration among industry stakeholders to address the challenges facing the industry. Workplace stability is critical to the current and future competitiveness of the industry. Although the industry has come a long way from a history of industrial relations conflict, characterised by hostile wage negotiations, sequential strikes, and wage negotiations deadlocked in the various value chain bargaining chambers, above-inflation increases, it has been able to reinvent itself from an industry characterised by inefficiency and poor quality, to one that is internationally competitive, particularly since 1995 (Dibben and Wood, 2015).

1.3 THE RESEARCH PROBLEM

There is no structured process in place for government, employers, organised labour, and society to consider and deliberate on strategic issues impacting the long-term viability and the socio-economic challenges facing the automotive manufacturing industry in South Africa.

It is proposed that broadening the labour relations framework for the industry to include all sectors could enhance labour stability and viability of the industry, given the interdependence of the sectors within the automotive industry. A central feature of the industrial and work relations turnaround is the creation of collective bargaining structures, which have been a feature of wage and substantive conditions of employment negotiations in the automotive industry for many years. Several authors argue that collective bargaining has contributed to labour stability in the automotive industry by providing a structured process for dialogue and negotiations between employers and employees, thereby reducing conflict and promoting mutual trust (Coleman, 2013; Botha, 2015; Godfrey, 2018). Finnemore and Koekemoer (2018) suggested that collective bargaining is the most common form of employee involvement in employer relations worldwide. Centralised bargaining is common in the automotive industry and is organised in specific sectors of the industry, generally taking place through national bargaining councils (Anstey, 2006; Finnemore and Koekemoer, 2018).

In exploring a stewardship-based approach, both trade unions NUMSA and Solidarity are strategic partners, having been involved in industry collective bargaining for many years. NUMSA has a more historical linkage in shaping the industry (Desai and Habib, 1997; Coleman, 2013a; Botha, 2015). NUMSA predominantly represents blue collar workers in the industry, whilst Solidarity represents white collar and technical workers.

Formed in 1987 through the merger of four different trade unions, with a current membership of 341 150, NUMSA is today the largest trade union in South Africa (Mayekiso, 2015, https://numsa.org.za/). The union adheres to a revolutionary, anti-capitalist ideology rooted in Marxism-Leninism, striving for a socialist society where workers control the means of production (https://numsa.org.za/). According to Sebake (2024), the trade union movements play a strategic role in influencing the consolidation of working-class power. Regarding NUMSA's involvement in shaping the South African socio-political landscape, General Secretary Irvin Jim argued that trade unions cannot keep out of politics because the dominant class in society

reproduces itself through the state, which is an organ of oppression (https://numsa.org.za/). Reflecting on the future relationship with the ANC, Mayekiso (2015) refers to NUMSA's 9th Congress resolution, which states that NUMSA will scale down its relationship with the ANC should the Government of National Unity be established. NUMSA has indeed called for a break with the Alliance with the ANC and SACP, an alliance it has been part of for many decades.

Concerning the South African automotive industry, NUMSA is heavily involved in the automotive sector, representing workers across the entire value chain—from component manufacturers to vehicle assembly plants (Anon., 2024b). They play a significant role in collective bargaining, shaping industrial policy, and protecting job security within the industry. NUMSA remains a powerful, often adversarial, partner in the automotive sector, focusing on securing, protecting, and advancing the rights and wages of its members (Barchiesi, F, 2000; Anstey, 2006).

Solidarity, on the other hand, is a trade union often categorized as a conservative, Christian-democratic organisation representing mainly Afrikaner workers. Its ideology is defined by a focus on community federalism, opposition to racial policies and civil rights challenges (Solidarity Website). It has a largely Afrikaner membership base and has moved beyond traditional labour bargaining to become a significant conservative civil society actor influencing the national political landscape through legal activism, alternative service delivery, and lobbying. The union's impact is defined by its opposition to state centralism, challenging Affirmative Action, Broad-Based Black Economic Empowerment (B-BBEE), and the National Health Insurance Act. Although not involved in OEM wage negotiation, they represent various employee groups in MIBCO and MEIBC labour negotiations (Libera, 2015).

There are three bargaining councils representing all the employees in the component suppliers and new tyre companies (Department of Labour, Registered Private Sector Bargaining Councils, 2017). The bargaining councils are:

- Automotive Components
    - Metal and Engineering Industries Bargaining Council (MEIBC): Metal and engineering industries such as production of iron, steel, alloys (e.g. ArcelorMittal); general engineering (e.g. Dorbyl), manufacturing industry (e.g. Defy); building and ship repairs; electrical engineering industry, etcetera.

- Motor Industry Bargaining Council (MIBCO): Vehicle body building; component manufacturing; automotive engineering; component reconditioning.

- Tyre manufacturers (New tyre manufacturers)
  - Bargaining Council for the New Tyre Manufacturing Industry (BCNTM)
- Automotive companies (OEMs)
  - National Bargaining Forum (NBF)

Table 1.1: Overview of automotive bargaining structures.

Bargaining structure	Statutory bargaining structure – Section 66 of LRA 66 of 1995	Number of Employer Forums (number of companies)	Unions	Employees (approximate)
NBF	No	1(7)	1	17 500
MIBCO	Yes	3(2 100)	2	300 000
MEIBC	Yes	3(60 624)	5	306 747
BCNTM	Yes	1(5)	2	4 500

(Source: MIBCO Strategic Plan 2017 – 2019; MEIBC Website, 2019; NBF Office and South African Tyre Manufacturers Council).

There are several challenges facing collective bargaining in the automotive industry:

Collective bargaining in the industry is complex in that a differentiated bargaining structure is in place. The Motor Industry Bargaining Council (MIBCO) for example, has 3 different employer forums representing three different industries, such as Retail, Fuel retailers, and two unions. The number of companies and employees represented in this bargaining structure is 2 100 and 300 000 respectively. NUMSA is the majority union in all the bargaining structures. Member companies range from large international corporations to small local component suppliers (MIBCO Strategic Plan 2017).

There is also no structured interface between employer bodies in the respective bargaining councils. The majority union, NUMSA, on the other hand, is a collective union for the entire automotive industry (Interviews with AMEO, MIBCO and Solidarity, 2023).

Although long-term agreements are in place in all the bargaining structures, the expiration dates are different, resulting in negotiations commencing at different times. An overview of strikes in the automotive industry reveals that since 1995 (following the end of Apartheid), there were 38 days of strikes during the OEMs' wage negotiations and 43 days in the component suppliers and tyre manufacturing industries over the same period (AMEO, 2019, NBF Negotiations Preparations). A feature of these strikes is that they are often sequential, meaning a longer period of disruption.

Two bargaining structures, NBF and MEIBC, have agreed to an Industry Policy Forum "to consider and deliberate on strategic issues which affect the future of the automobile manufacturing industry in South Africa (2016 NBF Agreement, A 10; Metal and Engineering Industries Bargaining Council Collective Main Agreement, Annexure 1). In addition, the OEMs and NUMSA have agreed "to pursue the establishment of a broader collective bargaining forum involving inter alia representatives from the automobile manufacturing industry, motor components sector, vehicle body building, bus building and tyre sectors" (NBF Agreement, 2016, A 6.2, p. 12).

A review of recent agreements showed that these structures primarily focus on wages and substantive employment conditions, rather than issues collectively affecting the industry's future viability (NBF Agreement, 2016; MEIBC Agreement, 2016).

The study will examine alternative labour relations arrangements to address broader socio-economic issues that impact the viability of the industry, which are not within the scope of the current negotiations framework. Given the rapidly changing environment, both internationally and domestically, it is imperative that the industry collectively responds to the challenges of technology, socio-economic demands that surfaced during recent negotiations, political change, and advocacy. In particular how the industry can give effect to clauses in the NBF (2022) and MEIBC (2016) agreements to establish a broader collective bargaining framework and industry policy forum that will institutionalise a collective approach to address the challenges facing the industry across the value-chain, notably labour instability, sequential strikes, above inflation increases, government advocacy, future bargaining structures, social demands such as affordable housing, transport and medical aid, etcetera. (Godfrey, 2018).

The societal corporatist philosophy underpinning the South African labour relations framework supports a collaborative stewardship approach to labour relations, particularly when dealing with socio-economic issues (Desai and Habib, 1997). The rise of collective bargaining in South Africa has its roots in the transformation of labour relations from conflict to collaboration within the framework of legislation, industry or plant agreements (Finnemore and Koekemoer, 2018). The development of this consensual approach in labour relations is informed by corporatism, which involves the participation of unions, employers, state institutions and other collective bodies (Habib, 1997). Desai and Habib (1997, p. 495) describe corporatism in South Africa "…as a system of interest representation whereby influential socio-economic organisations are given access to, and the possibility of helping to shape policies…". Cossin et al. (2015) and Davis et al. (1997) describe stewardship as an inclusive and holistic approach to conflict management, providing a strong focus on leadership to find equitable solutions that accommodate competing interests. Thus, the societal corporatist foundation of collective bargaining supports a collaborative stewardship approach in developing a broader collective bargaining for the automotive industry.

With respect to exploring a stewardship approach in addressing challenges through collaborative partnerships has been predominantly applied to social-ecological sustainability disciplines (Cockburn et al., 2019), but no evidence could be found of its use in addressing challenges in collective bargaining. Several articles refer to the use of a collaborative stewardship approach in addressing socio-ecological challenges such as conservation and sustainability goals, natural resource management in urban areas, policy development for natural forest systems, multi-stakeholder collaboration in policy formulation, shareholder interest in strategic management, and sustainability in agricultural systems (Donaldson and Davis, 1991; Butler and Koontz, 2005; Belaire et al., 2011; Barendse et al., 2016; Cockburn et al., 2019). These authors highlight some principles underscoring the application of stewardship in addressing multidisciplinary challenges, such as collective bargaining, engendering a sense of shared responsibility, intergenerational rather than short-term benefits, a need for multiple partnerships, collaborations, and linkages, etc. In the context of this research, where an institutionalised framework is in place to address challenges in the current collective bargaining agreement, stewardship can help leaders drive sustainable development and growth by balancing short-term and long-term objectives amidst competing interests (Cossin and Ong, 2016).

In a socio-ecological context, collaborative stewardship is generally defined as a collaborative process involving multiple, diverse resource users in a particular landscape who act together and share risks, resources, and responsibilities to take care of natural resources in a way that a full and balanced account of the interests of stakeholders and society at large is achieved (Barendse et al., 2016; Welchman, 2012; Cockburn et al., 2019). Examples of the implementation of stewardship programmes include sustainability in agri-environmental systems in the United Kingdom resulting in improved land and catchment management (Welchman, 2012); a decisional process model for stewardship enabling decision makers address rehabilitation of contaminated sites (Hocking et al., 2001); improve land and catchment management in Australia (Cockburn et al., 2019); several collaborative initiatives involving the United States Department of Agriculture (USDA) Forest Service to build agreement and manage conflict across diverse settings and resources. (Selin, Schuett and Carr, 2000). Selin, Schuett, and Carr (2000) argue that the findings from their study reinforce recent evidence that collaborative approaches can lead to important economic, quality of life, and biophysical outcomes.

In applying a collaborative stewardship approach to challenges in labour relations, many paradoxes will surface in relation to the socio-economic challenges that the parties seek to resolve**.** In explaining paradoxes and their impact on effective leadership, Peters (2012) points out that alternative solutions do not always follow from each other, and selecting one could negate the other, resulting in a suboptimal solution. Considering broader collective bargaining, each party in the negotiating structure has its own views and expectations on how such a framework could be structured. The diverse views of the parties will create paradoxical positions, which must be considered in finding solutions in the best interest of the industry.

Martin (2007) proposes integrative thinking as a mechanism for embracing complexity in understanding paradoxes in diverse relationships, challenges, and creating optimal solutions**.** Karakas and Kavas (2008, p. 8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." This concept explores the tensions between conflicting ideas in generating a best-fit idea that incorporates elements of the others while being superior to them.

1.4 THE RESEARCH AIM AND GOALS

The research proposed applying a process of integrative thinking to explore developing a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry

The following objectives will support the aim:

- Develop a framework to describe historic and current collective bargaining arrangements in the South African automotive industry
- Analyse the process of integrative thinking that will generate alternative solutions to the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant-level bargaining framework. This will inform a stewardship-based approach to structure proposed models for broader collective bargaining

The intention of the study is to apply integrative thinking as a mechanism to explore all the paradoxes emanating from the reviews of collective bargaining, societal corporatism and stewardship to structure a stewardship model that will underpin a structure to develop concepts of broader collective bargaining, giving effect to what is envisioned by the parties in the 2016 NBF and MEIBC Agreements. Although no research could be found that has applied integrative thinking in the collective bargaining context, the concept was applied to dealing with challenges such as responding to organisational issues, strategic managerial decision-making and change management (Cossin, Ong and Coughlan, 2019; Donaldson and Davis, 2015; Hocking et al, 2001).

When considering the structuring of a broader collective bargaining framework, it is essential to take into account the complexity of having four independent bargaining structures and the pluralistic elements of conflicting interests and goals. Stakeholders with radically different viewpoints perceive issues differently and struggle to explore solutions that serve the greater

multi-stakeholder interest. The challenge is to persuade stakeholders to accept a collective responsibility for securing the future viability of the automotive industry. That responsibility could be shared if a stewardship philosophy is agreed to.

1.5 METHODS, PROCEDURES, AND TECHNIQUES

Ponterotto (2005) and Taylor and Medina (2013) refer to the research paradigm as a comprehensive belief system of the social world, which provides a philosophical and conceptual framework that guides research. The interpretive paradigm is more applicable to this research as it aims to understand the cultural aspects of collective bargaining and stakeholder views through inter-subjective knowledge (Taylor & Medina, 2013).

The research method applied in this study was an exploratory case study. Referring to research being done by Yin (1994), Stake (1995) and Feagan, Orum & Sjoberg (1990), Tellis (1997) which highlights the following benefits of using an exploratory case study approach in research: it strives towards a comprehensive understanding of the interrelated activities and views of stakeholders and is multi-perspectival in that the researcher considers not just the voice and perspective of the parties involved in the challenge, but also the relevant groups of actors and the interaction between them.

The primary methods of data collection were interviews and interactive dialogues with mandated representatives of all structures involved in collective bargaining in the automotive industry. This includes, the employer bodies and unions from the four automotive bargaining structures, National Bargaining Forum (NBF), Motor Industry Bargaining Council (MIBCO), Metal and Engineering Industry Bargaining Council (MEIBC) and Bargaining Council for the New Tyre Manufacturing (BCNTM), as well as Department of Trade Industry and Competition (dtic) and Department of Employment and Labour. This represented about twenty organisations, including government departments. All the structures were approached in writing to participate in the research and to mandate a representative whom will be interviewed. (Annexure B). The mandated person completed a “Participant Informed Consent Declaration” (Annexure C). The intention was to implore the leadership structures of the employer and labour organisations to explore ways to give effect to their commitment to establish a proposed broader collective bargaining framework and to avoid engaging in negotiations. The focus was on facilitating interaction between them through group interviews.

Due to the sensitivity associated with this topic, face-to-face meetings would have been ideal; however, the representatives' busy schedules made it necessary to conduct most interviews on electronic meeting platforms. The interviews were analysed qualitatively to inform the interactive dialogue and integrative thinking processes. Interactive dialogue is a method of engaging leadership in driving change by guiding them to explore different interpretations of organisational attributes and arrive at a better understanding of what needs to be done (Maccoby, 1996).

In conducting this research, there was an appreciation of the sensitivity of the broader collective bargaining topic in the automotive industry, and as such, discussions were limited to stakeholder leadership. Data collected and analysed in this research included:

- Documents and interviews: Department of Employment & Labour and Trade & Industries; Labour Review website; NBF; MIBCO and MEIBC
- Interactive Dialogues: Leadership from labour and employer organisations, involved in sector collective bargaining, leadership of bargaining councils, Department of Labour, Department of Trade and Industry.
- Memoranda and notes taken by the researcher, noting observations, summarising key points, and reflecting on the findings and processes.

1.5.1 INTERVIEWS

A paradox arises from alternative solutions that do not follow from one another, and both appear likely, but selecting one will negate the other (Peters, 2012). Peters (2012) argues that this implies parties in a collective bargaining relationship may have different views on issues that appear to be a likely solution, but selecting one will inevitably bring about tensions. in the process. Thus, the interviews explored the views of the parties on what could constitute a broader collective bargaining framework covering, among other matters, what should be the bargaining issues, sector collective bargaining, the future of the South African automotive industry, societal corporatism, and the role of leadership in addressing the challenges of the industry.

In summary, the interviews explored the following aspects of collective bargaining in the automotive industry:

- Obtain views on current sector collective bargaining**:** Current sector collective bargaining focuses on wage increases and substantive conditions of employment. This section explored the participants' views on what should constitute collective bargaining topics and current sector collective bargaining.
- Obtain views on determining the future of the South African automotive industry: How does the industry consider and deliberate on strategic issues impacting the future of the automotive industry, government policies and social cohesion?
- Explore Societal Corporatism: The current labour relations framework has its roots in corporatism, which is a multifaceted concept, covering organised systems of wage bargaining, the role of state intermediation and the scope of agreements negotiated in national economies (Perraton, 2018). Corporatism underpins the maturing of negotiations and constructive interaction between labour and capital, which resulted in corporatist structures such as Motor Industry Task Group (MITG), NEDLAC, etcetera, but recent challenges during negotiations extended beyond bread-and-butter issues to social issues such as viability challenges, rise in general standard of living of workers, access to affordable houses, education, transport and medical aid. This section explored the role of societal corporatism in the current and future collective bargaining framework.
- Explore the role of leadership in the automotive industry: This research explored the idea that leaders of representative structures should take on the role of stewards. Stewards are not motivated by self-interest, but rather focus on achieving broader objectives in the long-term interests of society. Stewardship leadership is therefore characterised by leading with positive social impact, safeguarding the future and driving social good.

1.5.2 INTERACTIVE DIALOGUE

The challenge in this phase of the research is to get stakeholders to agree on how to respond to the challenges facing collective bargaining in the South African automotive industry. Interactive dialogue sessions were employed as a process to engage the leadership of the parties involved in collective bargaining within the automotive industry in finding solutions to the identified paradoxes.

The responses to the interview questions were coded to identify recurrent themes and classify them. The resulting codes were grouped into paradoxical pairs, which constituted the tensions in structuring the constructs of the stewardship-based collective bargaining concept/s. The

viewpoints of the various parties were outlined in the framework and categorised at the level at which they believed the matter should be addressed (i.e., National, Sectoral, Plant level, or None – meaning the party is of the view that the issue should not be part of collective bargaining).

These dialogues therefore explored the respective organisation's views on how to resolve identified paradoxical challenges derived from the analysis of the interview data and developed into an artefacts framework.

1.5.2.1 OVERVIEW OF INTERACTIVE DIALOGUES

The artefacts framework served as input into the integrated decision-making process of Martin (2007) to generate innovative proposals as to how the tensions within the stakeholders' views on broader collective bargaining can be resolved, thereby leading to ideas for the application of a stewardship approach to collective bargaining within South Africa's current societal corporatist legal framework.

Maccoby's (1996) interactive dialogue approach was used to explore the artefacts framework, which arose from the analysis of the interviews. Interactive dialogue is a method for engaging leadership to lead change by guiding them to identify and explore different interpretations of organisational attributes and arriving at better views of what needs to be done (Maccoby, 1996). The interactive dialogues took place through plenary sessions involving mandated representatives from industry stakeholder structures, employer bodies, unions, and other relevant organisations. Alternatively, separate caucus sessions with the mandated representatives will be considered to explore key paradoxes.

The outcomes of these dialogues were applied to the integrative thinking model to resolve the paradoxes. Karakas and Kavas (2008, p.8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." Alternatively, if integrative thinking does not produce a resolution of a paradoxical pair, the participants will be asked to (1) clarify the collective bargaining structures where further engagement should occur to address these paradoxes and (2) suggest the processes that will facilitate these engagements.

1.5.2.2 CONDUCTING AN INTERACTIVE DIALOGUE

The following process, as outlined by Martin (2007), was employed. Facilitated discussions with mandated representatives of the industry stakeholder structures were conducted by the researcher, supported by an independent facilitator with experience in collective bargaining.

The paradoxical pairs were presented to the mandated representatives in an exploratory manner to seek their views on how the paradoxical challenges could be resolved. As the researcher represented the employers over many years, to avoid any bias, the co-facilitator presented the paradoxical statement to the union representatives.

The outcomes of the deliberations were then classified as “consensus”, “disagreement with no solutions offered, “alternative solutions offered”. This was then built into a framework for a stewardship approach to collective bargaining.

1.5.3 DATA ANALYSIS

The researcher employed inductive thematic analysis to interpret the collected data (Boyatzis, 1998; Nowell et al., 2017). This method was chosen because it is suitable as a qualitative approach to generate general knowledge grounded in human experience (Sandelowski, 2004). It is a useful method for examining the perspectives of different research participants, highlighting similarities and differences, and generating unanticipated insights (Nowell et al., 2007). An essential feature of this approach was the generation of codes that allowed for the simplification of the data and focused on specific characteristics thereof (Nowell et al., 2007).

1.6 THESIS STRUCTURE

The thesis comprises nine chapters**:**

Chapter 1, “Introduction”, provided an overview of the South African automotive industry, its contribution to the South African economy, current collective bargaining arrangements, labour stability, and the challenges facing the industry as a major contributor to the economy. The chapter also introduced the research problem, the main objectives of the study, and how the researcher intended to conduct the research and analyse the data.

The literature review and theoretical aspects of the study are covered in Chapters 2, 3, and 4, dealing with "Collective Bargaining" and "Societal Corporatism and Stewardship", "Paradoxes and Integrative Thinking", respectively. Chapter 2 on Collective Bargaining reviewed international and local trends, structures and processes, as well as centralised versus decentralised bargaining, global trends and how these impacted the concept of broader collective bargaining. Chapter 3 on Societal Corporatism and Stewardship explored the current labour relations framework and its connection with corporatism, the development of corporatism in South Africa, the social partnership between the interests of capital and labour and the extent to which collective bargaining contributed to addressing the broader socio-economic challenges facing the working class. At an international level, the multi-faceted nature of corporatism was reviewed and its contribution to addressing the challenges of industrial relations. With respect to stewardship, its application as a collaborative approach to address complex problems by bringing together multiple and diverse stakeholders is explored.

In Chapter 4, Paradoxes and Integrative Thinking, paradox theory will be introduced to construct different views on what could constitute a likely solution, while minimising tensions. When considering the structuring of a broader collective bargaining framework, the complexity of dealing with four independent bargaining structures, multiple employers and employees' representative structures, and the government, with its pluralistic elements of conflicting interests and goals, must be taken into account. Integrative thinking, as a mechanism that will embrace this complexity and explore the paradoxes emanating from the stakeholder input, will be introduced.

Chapter 5 will focus on the "Research Methodology", covering aspects such as the research design, justification and the procedure. It discusses the data collection and analysis techniques employed as well as the procedure followed to obtain the data, such as data analysis, research quality and ethical considerations.

Chapters 6 and 7 will present the study's findings on the proposed broader collective bargaining in the South African automotive industry. Chapter 6, "Findings – Paradoxes", will cover the analysis of the development of paradoxical pairs which constitute the tensions in structuring the constructs of steward-based broader collective bargaining concept/s. This chapter will also cover the outcomes of the interactive dialogue process, outlining the respective stakeholder

views on resolving the paradoxical challenges. The outcomes of the integrative thinking process will be captured in Chapter 7, “Findings – Integrative Thinking”. In this chapter, all paradoxes arising from the reviews of various aspects of collective bargaining are introduced, outlining the tensions between opposing models to explore the best-fit solution for a broader collective bargaining framework that could encompass the entire automotive industry.

Chapter 8, “Discussion”, deals with the findings of the research on collective bargaining and explores proposed frameworks for broader collective bargaining in the automotive industry. The foremost theories on integrative thinking as a tool to explore a stewardship-based, broader collective bargaining framework, incorporating the paradoxical reviews of proposed solutions by stakeholders, aim to address the viability and socio-economic challenges facing the South African automotive industry. This chapter will also explore the scholarly, methodological, and practical contributions made to the body of knowledge on the collaborative stewardship approach beyond the traditional application of social-ecological sustainability challenges.

The final chapter, Chapter 9, “Conclusion”, highlights the main contributions of the research to the existing body of knowledge on collective bargaining and the expansion of concepts of stewardship and integrative thinking in this field. The chapter will cover the main findings, implications, research recommendations, and the researcher's reflection on the research journey.

1.7 CONCLUSION

Despite the fact that sector collective bargaining has been in place in the South African automotive industry for many years, the industry is yet to deliver on an agreement to pursue the possible establishment of a proposed broader collective bargaining framework for the entire automotive industry. This agreement, concluded in at least two bargaining structures, will set out appropriate levels of bargaining, bargaining subjects per level, provide a link with other important structures at national, regional and industry level (NBF, 2016; MEIBC, 2016). The Parties to these agreements view this as a step to institutionalise a collective approach in addressing the challenges facing the industry, across the value chain, notably labour stability, sequential strikes, long-term viability of the industry and other socio-economic issues.

Although the Labour Relations Act of 1995 and the respective Sector Agreements provide mechanisms to address conflict in implementing an agreement clause, the Parties have not been able to make any progress. This research proposes a collaborative stewardship approach to develop a broader collective bargaining framework concept that will contribute to addressing the socio-economic challenges facing the industry. The stewardship-based framework will be informed by collective bargaining, societal corporatism and integrative decision-making perspectives. Industry stakeholders, including the government, employers (OEMs and suppliers), trade unions, and society, all have viewpoints, expectations, and suggestions for developing this framework. The intention is to apply integrative thinking as a mechanism to explore all the paradoxes emanating from the respective viewpoints, expectations, and proposed solutions, thereby generating best-interest solutions to this complex change effort.

The importance of this research lies in developing a framework that addresses the challenges of labour stability, productivity, cost efficiency, international competitiveness, and skills within a collaborative industry framework. This framework aims to enhance the industry's export potential, as at least six of the seven OEMs are vehicle exporters.

In pursuing the stewardship-based collective bargaining framework, a literature review covering collective bargaining, societal corporatism, stewardship and paradox theory will be explored. The intention of this review is to explore the impact these disciplines can have on guiding the development of a broader, stewardship-based collective bargaining for the South African automotive industry.

CHAPTER 2: LITERATURE REVIEW – COLLECTIVE BARGAINING

2.1 INTRODUCTION

With its origins linked to the Industrial Revolution and the emergence of the trade union movement, collective bargaining became an important instrument for regulating labour relations in most industrialised nations (Doellgast and Chiara, 2014). Whilst traditional collective bargaining was generally considered as a mechanism to negotiate wages, working hours, etcetera, it has evolved into a labour relations framework within which employers, employers' representative structures, trade unions, and other recognised organisations, can bargain collectively to determine wages, conditions of employment and other matters of mutual interests (Heras, 2018; Anastakis and High, 2024; Ignacio Messina and Jon Las Heras, 2024). Heras (2018), Anastakis and High (2024) and Messina and Heras (2024) argue that current collective bargaining goes beyond the day-to-day challenges of the workplace to strategic challenges such as the viability of the industry and job security (Heras, 2018; Anastakis and High, 2024; Ignacio Messina and Jon Las Heras, 2024).

The term 'collective bargaining' generally refers to all negotiations between trade unions and employers to determine working conditions and terms of employment, including issues related to pay and working time, and to regulate relations between employers and workers, as outlined in International Labour Organisation (ILO) Convention No. 154. (Contreras and Molina, 2022).

In South Africa, collective bargaining has historically been facilitated by industry bargaining councils, which are either statutory, centralised, or involve enterprise or plant-level negotiations (Botha, 2015). However, bargaining councils remain the central pillar for collective bargaining (Godfrey, Theron and Visser, 2007; Godfrey, 2018). In the South African automotive industry, collective bargaining has traditionally been provided through a centralised system aimed at industrial peace and stability, with agreements binding both parties and non-parties (MIBCO, 2017; NBF Agreement, 2019). Collective bargaining in the automotive industry is sector based and comprises of National Bargaining Forum (NBF) for the seven Original Equipment Manufacturers (OEMs); Motor Industry Bargaining Council (MIBCO) covering compo-

nent suppliers, retail and diverse auto industries; Bargaining Council for the New Tyre Manufacturing Industry (BCNTM) covering new tyre manufacturers and the Metal and Engineering Industries Bargaining Council (MEIBC) for the metal and engineering sector.

Maree (2009) noted that collective bargaining trends in South Africa have evolved differently from those in the rest of the world over the past 30 years. Whilst in many countries in Europe and America, collective bargaining is being decentralised as trade union density decreases, it has become more centralised in South Africa, and trade union density has increased (Coleman, 2013b; Godfrey, 2018; Bosch and Kupets, 2021; Gall, 2025). One explanation for the trend in South Africa has been the growth of trade unionism during the Apartheid years and the emergence of democracy (Godfrey, 2018).

The focus of the research is on exploring a stewardship-based, broader approach to collective bargaining in the current sector of the automotive industry, which will not only embrace collective bargaining but also consider and deliberate on strategic issues impacting the future viability of the industry in South Africa. In considering this objective, this chapter will explore the theory that underpins labour relations and collective bargaining, reviewing trends in collective bargaining in countries historically linked to the South African automotive industry. It will then reflect on collective bargaining in the local industry and how global trends could impact the concept of broad-based collective bargaining.

2.2 INDUSTRIAL RELATIONS THEORY AND PERSPECTIVES

To understand the significance of the issues impacting industrial relations, it is perhaps relevant to examine the main influences that shaped the development of labour relations in South Africa. However, it is essential to note that there is no unified theory, and over the years, many disagreements have surfaced as theorists have emphasised different aspects of the topic (Finnemore and Koekemoer, 2018). Finnemore and Koekemoer (2018), Bendix (2010) and Godfrey (2018) document an overview of the “evolution” of industrial relations in South Africa from the time labour was regarded as just another commodity subject to the laws of supply and demand, to where it is today, where, in most instances the labour union is integrated in the overall operational strategies of the organisation.

2.2.1 SYSTEMS THEORY AND PERSPECTIVES

In an attempt to provide an integrated theory, Dunlop (1958) focused his attention on the system of rules which governs the workplace and work community (Finnemore and Koekemoer, 2018). He argued that industrial relations is a complex system comprising interested parties, contexts, ideologies, and rules, all interacting within a specific environment to shape workplace relations (Maree, 1993; Bendix, 2010; Joy, 2015; Godfrey, 2018). It is also a subsystem of the wider society, which comprises stakeholders such as managers, workers and government agencies, and an environmental context which impinges on the actors.

Furthermore, while each actor may have its own ideology, the industrial relations system requires a common framework that provides a shared set of ideas and an acceptable role for each actor. Anstey (2009) argued that any social system is functional to the extent to which stakeholders strive to best serve their own interests by accommodating each other's interests in the system. He further pointed out that the manner and phases of change in social systems are of particular interest to each stakeholder, as they protect their interests (Anstey, 2006). Although this approach provided some leading attempts to give context to the study of industrial relations, it was not without criticism (Anstey, 2006; Finnemore and Koekemoer, 2018). Anstey (2006) pointed out that labour relations assume many forms across nations, industries and enterprises, and are the product of strategic changes made by key social actors. This requires a continuous process of adaptation, which compels a change not only for each stakeholder but also for the larger system.

The Neo-Marxist approach's criticism of systems theory highlights that the rules and procedures used to control the stability and regularity of the system indicate a lack of binding commonality between employers and employees, due to the imbalance in the power relationship (Anstey, 2006; Finnemore and Koekemoer, 2018). Expounding on this perspective, Mzangwa (2015, p. 5) expressed a view that employers and workers are opposed to collaboration and, as such, hostility is prevalent – "us employees against those employers."

2.2.2 NEO-MARXIST THEORY

The Neo-Marxist approach is based on the writings of Karl Marx, reflecting the private sector as the primary driver of production and, consequently, as the owner of the economy, and posi-

tions the worker as a value-adding element within the capitalist system (Bendix, 2010). Finnemore and Koekemoer (2018) refer to the Marxist view that workers and employers do not share a common ideology regarding the maintenance of stability and regularity in the industry. In this approach, the employer is primarily concerned with the economic aspects of employment, while the worker surrenders their work capacity subject to certain conditions (Finnemore and Koekemoer, 2018). Bendix (2010) pointed out that in this system, capitalism is viewed as owning the political and legal structures, which favour the employer over the employee, resulting in an imbalance of power, which gives rise to exploitation. As such, conflict is inherent in the socio-economic system, not only in the employer-employee relationship (Maree, 1993; Bendix, 2010; Joy, 2015; Finnemore and Koekemoer, 2018).

This approach is supported by unionists, who have adopted a social dispensation approach through collective bargaining, challenging the employers on a political front whilst attempting to overthrow the capitalist system (Bendix, 2010). Despite the inherent conflict and power imbalance, parties have been able to overcome these challenges and establish constructive and productive relationships (Finnemore and Koekemoer, 2018).

2.2.3 UNITARIST AND PLURALIST APPROACHES

Fox (1971) argued that the structure and dynamics of the industrial enterprise are too complex and subtle; therefore, the Marxist theory, with its conflict-based approach, and systems theory, with its consensus-based approach, cannot adequately describe the system (Joy, 2015; Mzangwa, 2015). Fox (1971) proposed that a "unitarist" approach, based on the premise that in industry, there is no room for conflicting groups or factions and that loyalty to the leader or boss is entrenched, is favoured by management. As such, conflict is viewed as unnatural, as it can lead to a breakdown in communication between the parties. Given this view, the presence of a union in the workplace is viewed as an intrusion into what should be a private, unified structure of members focusing on the organisation's goals.

Bendix (2010) proposes that the origins of the unitarist approach lie in classical liberalism, which is, in essence, individualistic in nature and does not recognise the need for collectivism. In this concept, employees are viewed as individuals with an individual contract between the enterprise and the employee. Both Bendix (2010) and Finnemore and Koekemoer (2018) highlight certain characteristics of this approach, including that all partners share the same objective

and company values; employees respect authority and are loyal to the organisation; and the employer adopts a paternalistic approach towards employees. The approach does not recognise conflict in the workplace and considers collective bargaining as unnecessary.

Fox (1971) rejected this approach as "incongruent with reality" and suggested that the organisation be viewed as a "plural" society consisting of many but related interests and objectives. In such a system, workers are acknowledged as a separate and legitimate constituency, and the recognition of trade unions is implied, which caters for the interests of workers. The pluralist approach recognises the right of interest groups, such as unions, as an effective voice of the workers in the decision-making process. In the pluralist perspective, business and industry recognise that the capacity to respond creatively to changing business conditions depends on the degree to which their various interest groups are able to find each other (Anstey, 2006).

Reflecting on the right of interest groups and their ability to find each other, Bendix (2010) points out that with the rise in trade unionism and liberal democratic ideology, the pluralist perspective provided the best opportunity to accommodate the interests of the working class within the capitalist economic system. Hence, pluralism recognises the inherent conflict within stakeholders of the economic system as a means to prevent domination by powerful interest groups by ensuring a more equitable distribution of the power base (Bendix, 2010). The implication is that when applied to labour relations, inherent conflict between employer and employees can add value to the relationship through an equitable distribution of power between the parties (Anstey, 2006; Bendix, 2010). This is the value that collective bargaining brings to pluralist relationships, which, unlike the radical approach, does not seek to abolish capitalism but rather to reform or manage it. The pluralist approach is dominant in the South African labour relations framework (Finnemore and Koekemoer, 2018).

It follows that management must accept that there are additional forms of leadership impacting the workplace, which they must accommodate in their decision-making processes (Anstey, 2006; Bendix, 2010; Finnemore and Koekemoer, 2018). As a consequence, conflict is inherent in industrial relations, but it does not follow that conflict is endemic to trade unionism. In addition, in a pluralist system, collective bargaining is considered a decentralised method of resolving primary economic conflicts at work. The success of collective bargaining depends on the commitment of the parties to the process and their adherence to the rules.

In a South African context, the Labour Relations Act, 66 of 1995, has provided a specific framework to regulate labour relations based on pluralist assumptions (Maree, 2009; Bendix, 2010; Coleman, 2013b; Labour Relations Act, No 66 of 1995). It has codified to a large extent the equitable rights and duties of employees, employers, trade unions and employers' organisations. However, several aspects impact this pluralist base. In outlining the differentiated role of government in supporting unitarist employers and promoting pluralism, Finnemore et. al (2018) pointed out that the pursuance of macropolitical policies that promote capital investment, economic growth and competitiveness could serve the interests of unitarist employers' suppressive policies aimed at controlling labour unions. In contrast, in a pluralist approach, government must play an important role in regulating and constraining conflict between capital and labour by creating a collective bargaining framework (Finnemore and Koekemoer, 2018). On the other hand, much of the trade union ideology has its roots in the Marxist philosophy of radical challenge, but to a large extent remains within the legal framework provided (Bendix, 2010; Joy, 2015).

2.3 COLLECTIVE BARGAINING THEORY AND PERSPECTIVES

In understanding the interaction between labour relations and collective bargaining, it is essential to recognise that labour relations encompass the overall relationship between employers, employees, employers' organisations, and trade unions, including laws and policies that govern this relationship (Finnemore and Van der Merwe, 1988; Bendix, 2010).

Expanding on collective bargaining, Bendix (2010) argued that it is not just a friendly and simplistic solution to resolving conflict, as at times it offers no more than a process of temporary accommodation of the parties' respective views, whilst providing an opportunity to reflect on their respective positions – a form of power base testing. If the respective power base is not recognised, it could influence the negotiation process or create unrealistic expectations. The success of collective bargaining in a pluralist approach is often determined by a balance in the respective parties' power base, putting pressure on one another to accept each other's credentials, leading to negotiations as an acceptable alternative to destructive conflict (Finnemore and Koekemoer, 2018). Visser et al. (2017) argued that it is essential to strengthen the foundations for inclusive collective bargaining, as trade unions and employers' organisations should be strong and representative. Referring to the pressure on German employer organisations in the

post-1990s period to attract and retain employee representation, ensuring compliance with collective agreements, Bispinck and Dribbusch (2011) refer to a social consensus reached among government, labour, and employers on measures to reduce unemployment and improve competitiveness. In a compromise settlement, the national employment associations and trade unions agreed to pursue an 'employment-focused and long-term approach to collective bargaining' concept (Bispinck and Dribbusch, 2011).

Often in negotiations, the less powerful party plays a more dominant role, but the power balance is restored as the parties make concessions during the negotiations (Finnemore and Koekemoer, 2018). A less powerful negotiator may feign dominance or be bold to break free from a low-power mindset, feeling more empowered to fight for their position and claim value (Donohue and Taylor, 2007; Staff, 2025). This is necessary, as the weaker party might perceive there is no benefit in negotiating, provoking an exercise of its power base, which in the case of the union could mean embarking on strike action. In many industries, like the South African OEM National Bargaining Forum, collective bargaining is institutionalised in a Collective Bargaining Agreement (NBF Agreement, 2019).

In addition to the aforementioned preconditions, such as power balance between parties, accepting each other's credentials, and consensus-seeking, Walton and McKersie (1963) distinguish between two forms of collective bargaining: distributive and integrative (Finnemore and Koekemoer, 2018). Distributive bargaining is generally defined as a negotiation process in which parties with competing interests engage in a process of distributing limited resources among themselves (Thompson et al., 1996; Barry and Friedman, 1998). Fisher and Ury (1981) also refer to this form of bargaining as positional bargaining, which occurs when there is a direct conflict in the goals of the union and employer, and where the outcome represents a gain for one party and a loss for the other, the so-called "win-lose" outcome. The result is that the losing party will exercise either its legal right or embark on an unprocedural action. Distributive or positional bargaining is thus fraught with tension; yet, the outcome of negotiations generally leads to an outcome that is acceptable to both parties (Barry and Friedman, 1998). It was traditionally the prevailing negotiation process in South Africa involving wages and substantive conditions of employment between employer representatives and the union (Coleman, 2013; Godfrey, 2018).

On the other hand, integrative bargaining is a form of collective bargaining in which the parties are willing to explore objectives that are not in fundamental conflict. This allows them to pursue a "win-win" situation as they see a beneficial outcome to the negotiations (Lillie, 2004; Coleman, 2013b; Godfrey, 2018). As such, integrative bargaining requires open communication, the participation of parties close to the issues at hand, and the identification of common goals. This form is particularly useful where negotiations focus on general conditions of employment, such as health and safety, absenteeism, labour turnover, and the introduction of new technology. Nel et al. (2012) suggest that the parties involved in the negotiations must be motivated to seek a negotiated outcome which is supported by a trusting and supportive relationship between them. In contrast, distributive bargaining is typically characterised by parties employing a wide range of strategies and tactics to achieve their goals.

Several studies have examined various aspects of distributive and integrative bargaining. Thompson et al. (1996) explored the effectiveness of team and individual negotiations in integrative and distributive bargaining. They found that team involvement in the bargaining process increases the likelihood of reaching integrated agreements compared to a single negotiator. This is attributed to the skills a negotiation team brings to the bargaining table. They suggest that teams do better at implementing mutually beneficial trade-offs and identifying compatible issues, whereas a solitary negotiator often misses opportunities to recognise superficial ways to maximise joint gain (Thompson, Peterson, and Brodt, 1996).

Thompson et al. (1996) identified key factors that contribute to teams' success in developing integrated agreements. Teams are in a better position to exchange information, which can lead to more accurate judgments about the other party's interests and integrative agreements. This also contributes to reducing uncertainty regarding negotiating issues and processes, as well as task ambiguity, thereby improving consensus-seeking within the team. Another key aspect identified is the distributive component. They suggest that teams have higher combined performance expectations and are able to persuade or apply social pressure within the team to achieve results. They conclude that a team structure produces better results in distributive bargaining.

Barry et al. (1998) examined the bargaining characteristics in distributive and integrative negotiations, considering the roles of personality and cognitive ability in these negotiations. In

their study, they examined the relative effect of social interaction during negotiations, as determined by extraversion and agreeableness, as well as those factors impacting the bargainer's approach to the negotiation problem, including cognitive and conscientiousness. They found that extraversion, an indicator of one's interpersonal assertiveness, gregariousness and confidence (Costa and McCrae, 1992), and agreeableness, the tendency to be cooperative, considerate, generous and trusting of others (Barrick and Mount, 1991; McCrae and John, 1992), have an impact on distributive bargaining and not on integrative. This supports the concept of distributive bargaining, which is primarily governed by gamesmanship and aggressiveness, and thus impacted by personality factors that encourage social interaction but not problem-solving ability. In contrast, integrative bargaining, which to a large extent is governed by problem-solving, is supported by enhanced understanding, creativity and care (Donohue and Roberto, 1996; Park et al., 2019; Lasky, 2024). Lasky's (2024) view is that extraversion is a liability early in the negotiation, when establishing principles and background information is a priority, but it becomes useful later when commitment tactics are most influential.

Considering the parties' cognitive abilities, they find that integrative negotiations seem to benefit those with high cognitive abilities. Barry and Friedman (1998) conclude that a negotiator's ability to understand the true interest of the opponent, and being able to respond to it with minimal cost to the representative structure, which is the cornerstone of integrative bargaining, but in the process extract more from the opponent, is what distinguishes a smart negotiator. Reflecting on judgment accuracy and the cost of wrong interpretation and strategies in distributive bargaining, Bottom and Paese (1999) argue that negotiators must be able to judge their opponent's preferences and alternatives to finding a settlement. In their study, the researchers examined the relationship between perceptions of the bargaining zone and settlements in distributive bargaining, concluding that negotiators were generally optimistically biased, thinking that their opponent would concede more readily, which led to a more profitable settlement.

In summary, negotiations are not just a once-off process. Fischer and Brown (1998) note that it is important for the parties to develop a working relationship underpinned by a commitment to being unconditionally constructive in their approach to negotiations. Key contributors to effective negotiations are effective communication and rationality, building reliability and trust, pursuing persuasion rather than coercion, and accepting each other as legitimate partners (Thompson, Peterson and Brodt, 1996; Barry and Friedman, 1998; Bottom and Paese, 1999; Finnemore and Koekemoer, 2018). A win-win outcome is not always possible, but a problem-

solving approach which considers the interests of the parties could result in a negotiated outcome without disruptions.

The distributive form of bargaining, with its inherent shortcomings of power plays and an adversarial nature, remains the most prevalent form of negotiation in South Africa across all levels of the manufacturing, mining, and other industries (Anstey, 2013; Botha, 2015; Finnemore and Koekemoer, 2018). Supporters of distributive bargaining believe it is more realistic than problem-solving approaches. Factors such as the inherent adversarialism of intergroup relations, fears of co-option, differing ideologies and beliefs, and pressures from constituencies support a more competitive approach(Thompson, Peterson and Brodt, 1996; Barry and Friedman, 1998; Bottom and Paese, 1999). In reflecting on the competitive aspect of distributive bargaining, Anstey (2006) noted that, despite the potential for cooperation to produce gains, the parties still prefer the competitive approach out of concern for losing credibility as tough negotiators. By contrast, integrative bargaining is viewed as cooperative bargaining, and the relative ease of settlement may be seen as capitulation to the demands of opponents.

2.4 THE CHANGING NATURE OF COLLECTIVE BARGAINING

2.4.1 INTRODUCTION

Whilst centralised bargaining is the most common form of bargaining worldwide, there has been pressure to pursue alternative forms of bargaining, such as decentralised bargaining at the company or plant level, and concession bargaining at the plant level and social structures (Bispinck and Dribbusch, 2011; Bosch and Kupets, 2021). Bispinck et al. (2011) reflect on the pressure of sectoral collective bargaining in the German metal and electrical engineering industry, considering alternative forms of collective bargaining in response to several economic developments. They argue that economic and social challenges, such as new market developments, intensified international competition, steadily mounting overall unemployment, a shift in neo-liberal deregulation and liberalisation, cause sustained pressure on decentralisation as employer organisation, labour and government consider the impact on their respective organisation and the economy as a whole (Hauptmeier, 2009; Jaeger, Noy, and Schoefer, 2022). Bispinck et al. (2011) noted that employers and the union responded to these challenges by agreeing to introduce opening clauses in collective agreements, allowing for deviations from sectoral bargaining at the company or plant level. In return, there is an agreement to organise the decentralisation of the bargaining process. The union also responded to employer pressure

by agreeing to introduce concession bargaining, allowing management to implement cost-cutting measures in return for the exclusion of forced dismissals and limited job guarantees (Hauptmeier, 2009; Jaeger, Noy, and Schoefer, 2022).

Given the history of the South African automotive industry, several countries have influenced the development of labour relations in South Africa (Anstey, 2006). Of particular interest is the investment of American, British and German automotive companies in South Africa. Ford was the first to establish a production facility in Gqeberha (Port Elizabeth) in 1924, followed by General Motors in 1926, Volkswagen in 1951, Mercedes-Benz in 1958, and BMW in 1963 (Anstey, 2006). Through these investments, these countries also influenced the development of labour relations in South Africa, such as workplace forums, incorporated in the Labour Relations Act, 66 of 1995, which draws from the German works council systems (Finnemore and Van der Merwe, 1988; Anstey, 2006; Bendix, 2010).

In addition to the historical links, these countries are also the most important trading partners of the South African automotive industry. NAAMSA statistics (AIEC; SARS) indicate that the main domestic automotive trading regions and countries (exports and imports combined) in 2020 were Germany with a total trade between the two countries a significant R101,4 billion, despite the negative impact of COVID-19, followed by the USA with R25 529 million and China in 5th place with R18 498 million (Lamprecht, 2021). The imports of automotive components into South Africa generally reflect the global linkages between local companies and their parent companies' headquarters. With respect to Chinese imports, Kirby, CEO of Toyota South Africa Motors (TSAM), referred to the distorted trade conditions for the Chinese automotive industry and parts manufacturers over local producers, arguing for the protection of local manufacturing (Arnoldi, 2025).

Due to the historical and trading challenges, collective bargaining trends in Germany, the United States, and China will be explored and reflected upon in addressing the challenges faced by the South African labour relations landscape. Germany and the USA not only influenced the transformation of labour relations in this country, but also have strong historical economic ties, beyond the automotive industry. Development in economic policies and labour relations can impact not only the country's economy but also labour relations, as discussed in this chapter (Jäger, Naidu). China, on the other hand, has made significant inroads in new vehicle sales,

with limited employment opportunities in infrastructure development (Chan and Hui, 2014; Arnoldi, 2025).

2.4.2 CHANGING NATURE OF COLLECTIVE BARGAINING IN THE GERMAN AUTOMOTIVE INDUSTRY

Collective bargaining in the German automotive industry involves strong trade unions, particularly IG Metall, negotiating with employers' associations to set wages, working conditions, and other terms of employment (Keil, 2023). Although the industry is characterised by a robust system of co-determination, where employees have a say in company decisions through works councils and employee representatives, there are several challenges impacting collective bargaining (Schulten, 2025). These include the economic challenges facing Germany, the introduction of new technologies, cost reduction initiatives, concerns about job security, increased global competition, and so forth (Kädtler and Sperling, 2002; Benassi, 2015; Keil, 2023; Schulten, 2025). Despite these challenges, reflecting on the importance of collective bargaining, Schulten (2025) commented that it fosters a social partnership between employers and employees, promoting dialogue and cooperation; it safeguards employee rights; can contribute to economic stability by providing a framework for cost control measures; and provides a platform for workers to explore social justice allowing workers to negotiate their terms of employment.

Reflecting on the changing nature of collective bargaining in the German metal and electrical engineering industry, Bispinck et al. (2011) reported that the industry had undergone significant development since the 1990s, the period post-Cold War. This change was evident in changes in bargaining agendas at both sectoral and company levels, especially in the automotive industry. The German automotive industry is one of the country's main economic sectors and a key pillar of its export economy (Bispinck and Dribbusch, 2011). The core of the German automotive industry comprises seven large manufacturers, of which Daimler and Volkswagen have manufacturing operations in South Africa.

With respect to the war in Ukraine over the past few years, Schulten (2025) and Keil (2025) noted that it has led to high inflation rates, which in turn have resulted in increased prices for energy and food. Some industrial sectors, such as the automotive industry, have been particularly hit hard by the crisis and are facing significant job losses (Schulten, 2025). The tough

economic environment and job losses have given rise to trade unions demanding a social component in the wage agreements, responding to the impact of higher inflation rates on the disposable incomes of especially lower wage groups (Keil, 2023; Schnabel, 2025).

Schulten (2025) commented on a sharp fall in collective bargaining coverage in Germany since the mid-1990s. In 2023, only 50% of all employees in Germany worked in companies covered by collective agreements, 42% in companies with sectoral agreements and 8% with company agreements (Schulten, 2025). Keil (2025) reflected on IG Metall's strategy to address the challenges, including the transformation from internal combustion engines to electric vehicles, the strategies of works councils, and the ecological reorganisation of production.

The end of the Cold War heralded an era of new markets and other opportunities for employers as international competition intensified. According to Dribbusch and Schulten (2008), politically, the economy and social policy shifted toward neoliberal deregulation and liberalisation. With the short-lived unification boom ending in 1992, Germany experienced a severe recession, resulting in a steady increase in overall unemployment (Schulten, 2025). The resultant impact on the economy saw unprecedented levels of high unemployment, with workers and unions losing their bargaining power in the employment relationship (Hauptmeier, 2009; Jaeger, Noy, and Schoefer, 2022).

Collective bargaining in the metal and engineering industry has experienced a sustained tendency towards decentralisation, resulting in the so-called "open clause" in collective agreements, which allows for deviations from sectoral standards and company or plant-level arrangements (Bispinck and Dribbusch, 2011). Further challenges impacting collective bargaining included shifts in company-level bargaining, cost-cutting measures, threats of investment withdrawal, and relocations of production facilities. The unions, on the other hand, responded by seeking ways to avoid the economic breakdown and impact on union membership, by engaging stakeholders such as the government and employers. The parties explored changes in work organisation, such as "productivity conditions" (Windolf, 1989, p. 3), forging alliances for survival. This period was marked by what is known as "crisis corporatism" (Bosch and Kupets, 2021). At the company level, employees and their representatives entered into concessions, as employers were concerned about losing skilled workers. Workplace organisation mechanisms, such as extended worktime flexibility and work-time accounts, were implemented during this period, which later became mechanisms to avoid redundancies.

In the political environment, economic and social policy shifted to neo-liberal deregulation and liberalisation, resulting in additional challenges for the trade unions in their focus to ensure job security and living wages (Schnabel, 2025). Bispinck & Dribbusch (2011) outlined two distinctly different bargaining phases adopted by the trade unions in bargaining negotiations. During periods of strong economic growth, trade unions in West Germany negotiate substantial wage increases. However, the challenges brought about by the economic crisis in 1994 prompted employers to adopt a more aggressive approach to collective bargaining, heralding a new era of pay settlements that were often below inflation and introducing opening clauses that permitted company-level deviations from collectively agreed-upon industry standards. On the other hand, the unions scored some successes by retaining and securing employment, as well as by persuading companies not to implement compulsory redundancies.

With respect to the automotive industry, collective bargaining during the 1990s was dominated by two key issues: managing the consequences of the economic and employment crisis, and, secondly, the conflict among the parties over the future of industry-level bargaining. The conflict was further influenced by the transfer of West German bargaining arrangements to East Germany, particularly in aspects such as pay and benefits, work organisation arrangements, and shifting the focus of collective bargaining to the workplace. Notable about this period was the ongoing pressure on collective bargaining in response to societal corporatism elements, such as salary conversion, financing of company-based and other pension arrangements, training and development, and work organisation measures. During this period, IG Metall, the largest union in the metals and engineering industry, introduced a proposal for collective bargaining restructuring ("Tarif reform 2020") aimed at modernising collective agreements that regulated pay grades and remuneration arrangements (Dribbusch and Schulten, 2011). A new approach to collective bargaining emerged in the industry when employers, in response to the economic crisis, pursued several demands aimed at reducing manufacturing costs, including lower agreed-upon standards, the principle of industry agreements, changes in negotiation processes, and a greater degree of differentiation.

Concession bargaining in the German automotive industry involves unions and works councils negotiating agreements with companies that may include concessions from employees in exchange for job security or other benefits, particularly during times of economic pressure or industry restructuring (Krzywdzinski, 2014; Benassi, 2015). These negotiations often involve striking a balance between demands for increased flexibility and cost-cutting measures, on the

one hand, and the need to protect workers' rights and maintain social standards, on the other. Benassi (2015) contended that concession bargaining in Germany expanded as a consequence of the impact of increasing international competition and the weakening of sectoral bargaining, but also cautions that it could be a short-term response to the increasing pressure on workers' representation and collective bargaining to deal with the economic challenges. Concessions on wages and conditions of employment could contribute to avoiding plant relocations or closures in the short term, but in the long run, they could lead to deteriorating conditions for the workforce (Benassi, 2015).

With respect to concession bargaining, German automakers such as Audi, Mercedes-Benz and the Volkswagen Group, in recent years, engaged in negotiations with the unions, seeking concessions on a variety of profitability challenges such as labour costs, increasing flexibility, and restructuring of bonus systems (Bosch and Kupets, 2021; Keil, 2023). A case in point is the 2024 collective bargaining discussions between VWAG and IG Metall, during which the company advised the union that it couldn't meet its increased demand and instead proposed a 10% reduction in wages as a means to make future investments so as to remain competitive and hence safeguard jobs (Boesenberg, 2024).

As outlined above, collective bargaining in the German metals and engineering industry has undergone a steady transformation as the industry responded to economic crises, international competition and political-economic challenges. Unions, such as IG Metall, made concessions as the decentralisation of collective bargaining impacted employment, remuneration and benefits processes. Increasingly, company-level developments compelled works councils (a company-level union structure) to make concessions on pay, working conditions, and a wide range of benefits, in exchange for job preservation guarantees (Bispinck and Dribbusch, 2011).

Any discussion on the decentralisation of collective bargaining in the German automotive industry must reflect on the restructuring of the automotive industry in general. Over the years, global car manufacturers were subjected to several challenges, such as international competition, the influence and success of Asian car manufacturing, new technologies in manufacturing process such as lean production and just-in-time, production costs, labour stability, and the German automotive industry were forced to respond to these challenges by introducing various forms of restructuring (Jurgens and Krzywdzinski, 2008). The restructuring took on various forms, such as decentralisation into business units, setting up production facilities in lower

labour-cost countries, and exploring company-level bargaining arrangements. The suppliers, many of whom supply components to major automotive companies, were also forced to respond to pressures from manufacturers for lower component costs, flexibility in production, and reorganisation of production supply chain structures. Another important factor was the globalisation of production, which triggered management demands for worker concessions across a range of production inputs to achieve internal and external competition.

Confronted by these challenges, IG Metall and company-based works councils found themselves caught between the pressures of company competitiveness, job preservation, a living wage, and benefits. In principle, they shared the manufacturer's economic objectives of maintaining and improving competitiveness, but were also challenged by how to take their membership on this journey. Being placed in this difficult situation with restricted alternatives, unions and works councils conceded to employer pressure to adapt to a changing economic environment as an inherent necessity of capitalism and a prerequisite to maintaining competitiveness (Hauptmeier, 2009; Keil, 2025).

Expounding on the debate on the future of sectoral collective bargaining, Bispinck and Dribbusch (2011) explain that employers and unions in the metalworking industry had widely divergent conceptions of the future of the status and functioning of industry-level agreements: during the 1990s, these differences dominated the entire collective bargaining discussion, and also extended to other branches. They explain that the main concern of the national employers' association, Gesamtmetall, was both to lower agreed standards and achieve a fundamental configuration of the system of collective bargaining, concretised in its idea of a 'pyramid model' in which only a small number of basic parameters would be subject to mandatory regulation at industry level. Alongside this significantly reduced set of basic agreed-upon terms, they advocated for an increased number of provisions that would be fleshed out at the workplace level, and which, as a consequence, would not be fully specified at the industry level. A third level would consist of agreed, but non-binding, joint recommendations. IG Metall rejected these proposals and, in 1997, embarked on a debate on how to stabilise and develop the system of industry-level agreements at its collective bargaining conference.

In summary, significant changes to collective bargaining in the German metals and engineering industry have occurred since the 1900s, against the backdrop of a new global and national

political-economic environment. Bispinck and Dribbusch (2011) argue that the most significant development was the continuous decentralisation of collective bargaining, empowering works councils and employers to negotiate pragmatic responses to the challenges impacting on the company. With respect to the automotive industry, they argue that IG Metall was well aware that major changes were required when accepting the strategy of organised decentralisation of collective bargaining by engaging employers at the company level and agreeing to opening clauses, thus eroding sectoral collective bargaining. IG Metal can be credited in playing a stewardship role in the transformation of the German automotive industry by adopting a pragmatic approach in addressing the challenges facing the industry.

2.4.3 OVERVIEW OF COLLECTIVE BARGAINING IN THE UNITED STATES

American influence on South African labour relations has been a mix of ideological inspiration from radical USA labour movements like the Industrial Workers of the World (IWW), and practical engagement from institutions such as the American Federation of Labor and Congress of Industrial Organisations (AFL-CIO) and the American Institute for Free Labor Development (AIFLD) starting in the 1960s, though this was often intertwined with broader geopolitical and economic interests(Knight, 2024; Parrott, 2018.). The influence was demonstrated by supporting South African trade unions, advocating for worker rights in U.S. foreign policy, and promoting economic links that both enabled and complicated the fight against apartheid (Knight, 2024). It is within this context that the current USA industrial relations are included.

According to Compa (2014), the history of American industrial relations reflects a long-term decline in trade unionism and related structures. Several authors refer to the writings and statements of prominent USA labour historian and commentator, Yeselson (2013), who suggests that some analysts are of the view that the labour movement is not just in decline, but that it is in the process of being eradicated (Yeselson, 2013; Compa, 2014; Gall, 2025). Reflecting on this Gall (2025) cynically remarked that the difference between labour relations in the United Kingdom and the United States of America, is more than being separated by a common language, but that labour relations reforms in the USA never developed on par with the UK despite enabling labour relations reforms such as Employee Free Choice Act (EFCA) and Protecting the Right to Organise (PRO) Act.

Supporters of this view contend that the labour movement is in decline because, although trade unions were needed in the past, the modern-day shopfloor environment is dominated by enlightened management that not only understands shopfloor relations but also the need to ensure economic competitiveness (Compa, 2014). However, employers' exploitation of workers, whether perceived or real, has led American workers to find ways to deal with it over the cycles of trade union growth, decline, and regeneration by finding ways to balance power within the employment relationship. Compa (2014) suggests that the labour movement built by workers in the United States over the past century remains a strong base for the advancement of the working class and the strengthening of collective bargaining for years to come. Jäger et al. (2024) conclude that although collective bargaining continues to be an important labour relations institution, studies have shown that collective bargaining coverage and union membership have declined in company-based or industry collective bargaining systems, such as in the U.S., Canada and the U.K., it has stayed high in more centralised bargaining systems, such as in Scandinavia.

Reflecting on their survey of union and management leadership relations, Cutcher-Gershenfeld and Kochan (2005) expressed concern that only a minority of union and management negotiators believed their relationships had improved, either on the shop floor or in negotiations. Reasons put forward are changes in the nature of work, such as an increase in knowledge-driven job content and a declining economy. They argue that if collective bargaining were to reverse this trend, it would have to explore systemic transformation in labour-management relations at both the workplace and the strategic level (Cutcher-Gershenfeld and Kochan, 2005).

In the early 20th century, American society utilised federal legislation as a framework to address ongoing labour conflicts and develop a unified national policy regarding collective bargaining in the private sector. Currently, the United States has three distinct frameworks of collective bargaining: one for the railroad and airline industries, one for the rest of the private sector and one for public sector employees (Compa, 2014). With respect to collective bargaining in the US private sector, the coverage of collective agreements declined from approximately one-third of the labour force in the 1950s to about 7% in 2013 (Compa, 2014). Collective bargaining coverage is, in many ways, regionally focused and concentrated in sectors such as transportation, communications, manufacturing, retail, services, and many other industries. Unlike Europe, the US does not have sectoral bargaining in place between social partners; most collective bargaining in the private sector occurs at the company or plant level. For large national groups

such as the major automotive companies, bargaining takes place at the national level in the form of a "master agreement", which is followed by "supplemental" agreements at respective plants (Compa, 2014).

In the case of uncertified unions, employers can unilaterally introduce changes to the basic conditions of employment, as long as they comply with basic legislation, such as minimum wage, overtime pay, and non-discrimination (Hiatt, 2022). Such flexibility and control by employers are a major obstacle for unions to organise in these sectors or companies.

Katz (1993) indicated that there is sufficient evidence to suggest that bargaining structures have become decentralised worldwide, and that this is not just an American phenomenon. This decline in collective bargaining has reduced union bargaining power and worsened outcomes for unions and their members (Katz et al., 1987; Katz, 1993).

In exploring decentralisation in collective bargaining in the United States, Eaton and Kriesky (1998) developed two methods to gain a deeper understanding of the forces that determine bargaining structures. They first built a framework to analyse bargaining structures by integrating previous studies of the forces that determine bargaining structures, and applied this framework to four bargaining unit case studies in the US pulp and paper industries. They concluded that the following factors contributed to decentralisation of collective bargaining in the pulp industry (Eaton and Kriesky, 1998):

- Management's desire to preserve and increase its bargaining power was a driving motivation.
- Direct reaction to increased competition due to globalisation, de-unionisation or other changes in their product or labour.
- Work reorganisation.
- Political challenges within the unions' structure in creating or holding together centralised structures
- If de-unionisation is counted as a form of decline in collective bargaining, an argument of decentralisation of collective bargaining across the six countries is supported.

Eaton and Kriesky (1998) caution that although these factors contribute to the trend of decentralisation in the US paper industry, their experience in the research is not representative of all other manufacturing (or service) industries in the United States or other nations.

2.4.4 AN OVERVIEW OF COLLECTIVE BARGAINING IN CHINA

Since the late 1980s, China has faced social challenges resulting from its transition from a socialist-driven economy to a market-driven global economy (Finnemore and Koekemoer, 2018). Several scholars have reflected on the rapid expansion of labour relations institutes in China over the last few decades, including a rise in trade union membership, staff and workers' congresses, and collective bargaining (Lee et al., 2016; Liu and Kuruvilla, 2017). However, despite the institutional expansion, primary-level enterprise unions often lacked effective worker representation, and collective bargaining structures often lacked genuine negotiations between workers and employers (Clarke et al., 2004; Lee, 2009). Unions and their members lack the freedom to bargain collectively or to strike, and unions primarily serve as conduits for state policy (Chan and Hui, 2013; Lefeng Lin, 2022). However, due to a wave of labour unrest in the late 2000s, a National Tripartite Consultative Conference (NTCC) was established in 2002 (Finnemore and Koekemoer, 2018; Lefeng Lin, 2022), which consisted of the Ministry of Labour and Social Security, the Chinese Employers' Conference and the All-China Federation of Trade Unions (ACFTU). The Chinese Communist Party, whilst retaining firm control of economic and social transition, steered the NFCC as a form of consultative tripartism to defuse the social problems arising from rapid transition (Chan and Hui, 2013a; Liu and Kuruvilla, 2016; Lefeng Lin, 2022). Friedman and Kuruvilla (2015) argue that despite several multi-level legislative reforms, China has largely prevented the development of regular or national labour relations reforms, restricting it to the municipal or enterprise level. They conclude that experiments with labour relations frameworks in China will continue to proceed in a largely decentralised manner (Friedman and Kuruvilla, 2015).

In regions where foreign-invested manufacturing was located, local authorities began supporting trade unions in establishing workplace elections and bargaining (Meng and Lu, 2013). The introduction of this social dialogue initiated a shift in focus from solely economic goals to addressing social consequences. Zhu and Warner (2000) commented that this social dialogue contributed to trade unions becoming more assertive, especially in foreign-owned companies, particularly in the foreign-invested automobile industry.

Reflecting on the wave of strikes which followed the strike in Honda's Chinese factories in 2010, Chan et al. (2017) suggested that it served to highlight the need for union reform and workplace collective bargaining. Concerning the social structure, scholars view it as being dominated by parties that are not independent of the state, with their primary allegiance being to the Party and Government (Chan and Hui, 2013; Lefeng Lin, 2022). Chan et al. (2017) are of the view that although collective negotiation in China is undergoing a transition to a state-led form of collective bargaining, it is unlikely that worker-led bargaining will materialise in the near future. They are of the view that both collective bargaining forced by rioting and party-state-led bargaining will co-exist in China. Lin (2022, p. 24) supports the view and argues that the "uneven development of workplace collective bargaining is not a transient phenomenon but a semi-institutionalised middle ground" in China.

2.4.5 AN OVERVIEW OF COLLECTIVE BARGAINING IN DEVELOPING COUNTRIES

Collective bargaining and economic conditions vary across developing countries, influenced by democratic processes and socio-economic conditions (Lamarche, 2015; Contreras and Molina, 2022). Although the definition of developing countries is not universally agreed upon, these countries are generally referred to as sovereign states with a less-developed industrial base and often characterised by lower income levels and limited access to essential services such as healthcare and education (Sharma, Jain and Mogaji, 2020). Many developing countries rely heavily on agriculture or resource extraction rather than promoting a diversified and industrialised economy, which would result in greater economic efficiency (Duval and Loungani, 2019). A case in point is Argentina's experience with collective bargaining, which suggests that policies promoting the decentralisation of collective bargaining advance labour productivity and economic efficiency, as opposed to national or industry-wide structures (Lamarche, 2015). Lamarche (2015) also concluded that working conditions negotiated at the national or industry level appear to restrict economic efficiency because of binding conditions for agreements at lower levels.

Referring to the trade unions in the Caribbean, Morris (2002) pointed out that the unions resorted to a confrontational approach to settle bargaining demands other than wages and conditions of employment. As these countries became independent and the impact of adverse economic circumstances was felt, collective bargaining took on a new direction as trade unions

were forced to change their approach to negotiations relating to the preparation of proposals and presentation of arguments (Morris, 2002). To address the adversarial approach to collective bargaining, social dialogue has been developed by the ILO as one of the alternative approaches recommended to the social partners (governments, employers and trade unions) (Morris, 2002). Selwyn (2012) highlighted how globalisation is increasingly opening up new sources of collective power in developing countries, referring to how workers in the export grape sector in Northeast Brazil leveraged their structural and associational power to secure concessions from their employers. This demonstrates the significant role workers' collective actions and organisational capabilities play in shaping capitalist development. Under pressure from retailers in the European market to deliver high-quality grapes in a timely manner, large-scale farmers were under pressure to retain a permanent workforce that is trained and skilled. The workers were able to maintain high wages and permanent employment by taking advantage of the pressures, exploiting structural and associational power. This structural power base, emanating from both workplace and marketplace bargaining power, empowered workers to negotiate better working conditions, wages, and other terms with their employers (Selwyn, 2012; Webster, 2015).

Pencavel (2007) examined policy lessons from the experiences of developed economies, which developing economies can apply in the shaping of their public policy on unionisation and collective bargaining. It is proposed that three general principles should underpin an enabling public policy on unionisation and collective bargaining: collective bargaining should be decentralised; the state should disengage from unionisation and collective bargaining; and active promotion of competitive markets pursued throughout the economic environment (Pencavel, 2006). These enabling policy guidelines appear to be supported by the examples referred to above, which illustrate collective bargaining responses in developing countries to democratic and socio-economic pressures.

In summary, throughout the world, collective bargaining has evolved in various formats and structural arrangements, reflecting the historical development and choices of the parties, as well as political and cultural influences, as well as legislative changes. Sector collective bargaining in the German automotive industry, for instance, although well established in the German co-determination framework, has come under sustained pressure from intensified international competition, new market opportunities, globalisation, and internal social pressures (Bispinck and Dribbusch, 2011; Jaeger, Noy, and Schoefer, 2022).

In considering the challenges of collective bargaining in the South African automotive industry, it will be useful to reflect on the changing nature of collective bargaining in developed countries that have historical and important trade links with South Africa. Germany and the USA have strong historical ties with the South African automotive industry, as well as being major trading partners. Meanwhile, China, although fifth in terms of export and import trade, is a significant investor in the African economy (Lamprecht, 2021).

The threat to sector collective bargaining in Germany brought about mostly by globalisation which put pressure on employers and union to respond, has seen the parties agreeing on alternatives with the objective of preserving collective bargaining. Parties agreed to introduce so-called opening clauses in collective agreements allowing for deviations from sector bargaining agreements at company or plant level bargaining, enabling agile responses to the threats to company or plant viability (Hauptmeier, 2009; Bispinck and Dribbusch, 2011; Jaeger et al., 2022). In addition, the parties agreed to concession bargaining at the company level, allowing management to introduce cost-cutting measures. In return, the union received protection from forced dismissals and limited job guarantees. This illustrates how management and the union were compelled to collaborate strategically in response to threats not only to sector viability but also to the economy as a whole. The parties have been able to respond to the ongoing pressures on collective bargaining through negotiations and reached an equitable settlement on matters of mutual concern.

On the other hand, to a large extent, collective bargaining has declined dramatically in the USA over a long period (Katz, Harry, 1997; Eaton and Kriesky, 1998). Reflecting on the decline of collective bargaining in the US, several scholars highlighted the following contributing factors (Katz, Harry, 1997; Compa, 2014; Bondy, 2018):

- The structure of bargaining and the roles of management sometimes affect bargaining outcomes in the sense that unions prefer to centralise bargaining to strengthen the leverage at the bargaining table, whilst employers prefer a decentralised structure to better respond to company or plant conditions.
- Shifts in party bargaining power brought about by globalisation pressures, decline in union membership, changes in legislation, etcetera.

- Spread of new work organisation pressures resulting in demands for flexibility and employee participation.

Considering the potential impact of the decline of collective bargaining on the South African automotive industry, it is worthwhile to examine the industry's complexity. The entire industry is represented by bargaining councils (BCNTM, MIBCO, and MEIBC), which cover component suppliers, manufacturers, and new tyre suppliers. In contrast, OEMs are covered by a bargaining agreement between employers and the union (NBF). However, there is no formal collaboration process in place. Furthermore, the number of unionised employees has increased, although bargaining councils declined mostly as a result of an amalgamation of unions (Anstey, 2006; Maree, 2009; Coleman, 2013). This amalgamation of trade unions is legally provided for under Section 102 of the Labour Relations Act (LRA) (Labour Relations Act, No 66 of 1995). This process allows registered trade unions to merge and apply for registration as a single, amalgamated entity, while the registrar cancels the registration of the individual, merging unions.

Despite the fact that collective bargaining is firmly entrenched, there is ongoing pressure from NUMSA on the current collective bargaining framework to consider changes, such as broader collective bargaining and industry policy forums (NBF Agreement, 2019). The parties have agreed to pursue these commitments within existing structures, which will lend credibility to collective bargaining as a mechanism for resolving issues of mutual interest.

Considering global collective bargaining, industrial relations in China are unique, as current collective bargaining structures are dominated by government involvement. What is of interest is how international pressure on existing structures to review government-dominated collective bargaining. Although union density is high due to virtually compulsory membership, the unions have not been able to serve the best interests of their members (Finnemore and Koekemoer, 2018). Addressing this dilemma, the traditional collective bargaining establishment will be almost impossible (Chan and Hui, 2013b; Lefeng Lin, 2022), but social dialogue could bring about a semi-institutionalised middle ground in China.

Collective bargaining has the potential to make a significant contribution to labour relations, fostering modernisation and innovation, as well as strengthening competition and addressing important challenges such as globalisation, technological change, and shifts in our social fabric

and labour markets (Voss, Schoeneberg, and Contreras, 2015). Reflecting on how modern-day unions respond to global challenges, such as outsourcing and modular manufacturing, Holmes (2004) referred to collective bargaining strategies by North American autoworkers' unions as they respond to the extensive restructuring of the industry. These strategies included innovative approaches to the structure and content of collective bargaining, redefining the framework under which collective bargaining takes place. The Canadian Auto Workers (CAW), for example, developed new collective bargaining strategies such as "work ownership" and satellite bargaining, which in essence redefined the traditional geographical extent of the collective bargaining unit (Holmes, 2004).

There are also other dimensions of collective bargaining that are equally important, particularly from the perspective of workers: it contributes to social cohesion and equality, creates better employment prospects, and improves living and working conditions. In examining the impact of collective bargaining on social protection, (Plá, 2025) found that although collective bargaining is a vital mechanism for enhancing overall social welfare, it can also lead to disparities in accessing it and the quality of benefits among different groups, resulting in the segmentation of social protection processes. This study provides a compelling example of how collective bargaining mechanisms can strengthen labour relations, playing a key role in social structures beyond wages and labour relations (Plá, 2025).

The debate on centralisation and decentralisation in collective bargaining primarily revolves around whether bargaining should take place at the industry or national level (centralisation) or at the enterprise or local level (decentralisation). Centralisation can lead to consistent wages and stronger worker power, while decentralisation offers flexibility for companies to meet their specific needs, but risks creating an uneven playing field (Artiles and Moner, 2003; OECD, 2019; Aglio and Di Mauro, 2020). The most appropriate approach depends on economic conditions and desired labour relations outcomes.

Over the past decades, there has been a continuous decentralisation of collective bargaining in most European countries. Aglio and Di Mauro (2020) argue that decentralisation of wage bargaining has the support of authorities and governments in the European Union, as it contributes to sound industrial relations and company performance promoted by a good match between company expectations and workers' skills. However, legal labour reforms in collective bargaining within the Spanish industrial relations system led to a dual process of decentralisation

and centralisation in the structure of collective bargaining (Artiles and Moner, 2003). To clarify this, Artiles and Moner (2003) explained that, on the one hand, the legal reforms reinforce the tendency towards decentralisation; but at the same time, they foster a centralising process, which is evident in the reduction of local and regional bargaining units. This is reinforced by Ibsen and Kuene (2018), who pointed out that the structured decentralisation in collective bargaining in Germany, the Netherlands, and Denmark requires a framework that preserves the regulatory function of multi-employer agreements. This implied that a framework of sector agreements is in place, allowing the determination of terms and conditions of company-level agreements (Ibsen and Keune, 2018).

Considering collective bargaining in the South African automotive sector, centralised bargaining is taking place at the sector level, including OEMs, component suppliers, and the tyre sector, focusing on the specific sector's interests rather than the broader interests of the South African automotive industry. This research proposes an additional level of centralisation, enabling strategic engagement between representatives of various sectors to consider and deliberate on the strategic challenges impacting the future of the South African automotive industry, while maintaining a restructured bargaining chamber for each industry sector.

2.5 COLLECTIVE BARGAINING IN SOUTH AFRICA

Any discussion on collective bargaining in South Africa would be incomplete without reference to the development of labour relations in the transformation of the South African political and economic landscape. Collective bargaining is central to the process of managing relations between the employer and employee, and it is the mechanism through which ‘regulated flexibility’ will be achieved. In other words, the ability of collective bargaining to set wages and conditions that balance employees’ needs with those of employers is crucial for the new labour relations system to strike a balance between the imperatives of equity and economic development (Godfrey, Theron, and Visser, 2007).

Collective bargaining structures not only provide a platform for parties to negotiate wages and substantive conditions of employment, but also a framework for handling disputes and resolving conflicts. It is a mechanism of conflict resolution before parties exercise their right to withhold labour, strike, or activate legal processes. As such, the mere existence of collective bargaining agreements does not guarantee industrial peace and stability, but it institutionalises

mechanisms to regulate the relationships. All too often, and especially in earlier years, bargaining was a hard and bitter confrontation, with political agendas, prejudices, and entrenched prerogatives also being significant issues. Yet, labour relations have come a long way from the early years of aggression and conflict to a period characterised by a relationship of mutual respect between employers and trade unions, an increasing display of maturity leading to constructive engagement during and post negotiations (Godfrey, Theron and Visser, 2007a; Coleman, 2013b).

2.5.1 OVERVIEW OF COLLECTIVE BARGAINING IN SOUTH AFRICA

Historically, collective bargaining has its roots in the Industrial Conciliation Act of 1924 (Bendix, 2010). The Act made provision for the establishment of Industrial Councils, which were permanent structures whose purpose was "…to endeavour, by negotiation of agreements or otherwise, to prevent disputes from arising, to settle disputes and to take such steps as necessary to bring about regulation or settlement of matters of mutual interest" (Labour Relations Act, Section 18). The exclusion of Blacks from the definition of employees prior to 1979 did not preclude the formation of Black trade unions, but such unions could not be registered. However, the 1973 'Natal' strikes proved that Black workers could, by sheer numbers, illegally withhold their labour without suffering any repercussions (Bendix, 2010).

In the aftermath of the Durban strikes of 1973 and the Soweto uprisings of 1976, the government set up the Wiehahn Commission (Anonymous, 2011). The Commission's stated goals were the stabilisation of labour relations and the facilitation of economic growth. The Wiehahn Commission report, issued in 1979, constituted a watershed for the labour relations system in South Africa (Godfrey, Theron, and Visser, 2007). It recommended, inter alia, that African workers be included in the definition of 'employee'. This amendment would permit African workers to form or join registered trade unions and participate directly in industrial council negotiations. Over the next three years, the government accepted many of the recommendations of the Wiehahn Commission, making amendments to legislation that included changing the definition of an 'employee' to encompass African workers. Although trade unions representing mainly African workers initially rejected participation in industrial councils, by the mid-1980s they had grown to such an extent that they had to reconsider their opposition. Over the next ten years, several of these unions joined industrial councils, but many continued to attempt bargaining at the enterprise level while doing so.

To address the ongoing labour relations conflict, the Industrial Conciliation Amendment Act of 1979, specifically Act No. 94, was promulgated, significantly altering South Africa's labour laws, particularly concerning the inclusion of Black workers in trade unions and the establishment of an Industrial Court. It permitted certain Black workers, who had previously been excluded, to join unions, although migrant and commuter workers remained excluded until later. The Act also prohibited mixed trade unions (unions with members of different racial groups) and repealed provisions related to job reservation. Furthermore, it introduced the concept of "unfair labour practices" (Finnemore and Van der Merwe, 1988; Anstey, 2006; Bendix, 2010). The Industrial Conciliation Amendment Act of 1979 was also considered the forerunner of the subsequent Labour Relations Acts, with subsequent amendments, dramatically changed the South African labour relations landscape and, with it, the collective bargaining framework in South Africa. The constitutional framework, given effect to by the provisions of the Labour Relations Act, Section 23(5) of the Constitution of the Republic of South Africa, provides that every trade union, employers' organisation and employer have the right to engage in collective bargaining (Labour Relations Act, No 66 of 1995). Central to the collective bargaining framework is the recognition of the right to strike, as well as the granting to representative trade unions of certain organisational rights.

The greatest net benefit from collective bargaining can be obtained when a system is in place that promotes good faith bargaining and the efficient enforcement of collective agreements. One of the purposes of the LRA is to promote collective bargaining and to provide a framework within which employers, employers' organisations, trade unions and employees can bargain collectively to determine conditions of employment, formulate industrial policy and provide for other matters of mutual interest (Godfrey, Theron and Visser, 2007a; Bendix, 2010; Coleman, 2013b).

Some of the key pillars of the Act were the review of collective labour relations, which entails, among other elements, such as freedom of association, registration of trade unions and employers' organisations, promotion of sectoral bargaining, dispute resolution and the right to strike (Godfrey, Theron and Visser, 2007). In line with the new social corporatist framework, the Act was subjected to unprecedented tripartite negotiations involving representatives from business, government and organised labour, in the newly established National Economic Development and Labour Council (NEDLAC). NEDLAC was established through Act 35 of 1994, resulting

from the merger of the National Manpower Commission and the National Economic Forum (Habib, 1997). Despite very difficult negotiations, particularly regarding the nature of the collective bargaining system, the parties ultimately reached a consensus. Among other things, the new Act guided the approval of workplace forums, the implementation of a new dispute resolution process, the establishment of the Commission for Conciliation, Mediation and Arbitration (CCMA), and other innovations (Godfrey, 2018).

Since the introduction of the LRA of 1995, the bargaining council system has undergone significant changes (Anstey, 2006; Maree, 2009). In a sense, there has been some rationalisation of bargaining councils, which has seen a reduction in the number of bargaining councils, while the total number of workers covered has increased. According to Godfrey et al. (2007), the main reason for the increase in workers covered by collective agreements was the inclusion of several thousand employees in the public sector under the Act.

Not all multi-employer bargaining forums are covered by bargaining councils. An example is the automobile assembly sector, where collective bargaining is based on a collaboration framework agreement between the Automobile Manufacturers Employers Organisation (AMEO), representing the seven OEMs, and the National Union of Metalworkers South Africa (NUMSA). This three-year agreement covers the wages and conditions of employment applicable to all hourly-paid employees in the automobile manufacturing industry (NBF Agreement). It covers more than 13 000 direct workers (NBF Office, December 2021).

Godfrey (2018) holds the view that, although the bargaining system has proven to be resilient over the years, it has faced several challenges. One of the challenges identified is the definition of "sufficient representivity" of the parties to the council for the purpose of extending collective agreements to non-parties. In this regard, there have been several legal challenges, notably in the Metal and Engineering Bargaining Council (MEIBC). In a press statement, Papenfus, CEO of the National Employers' Association of South Africa (NEASA), refers to the ongoing dispute between MEIBC and NEASA regarding issues such as levy administration, MEIBC's failure to comply with legal requirements, and collusion between big business represented by SEIFSA and the union (NUMSA) (Papenfus, 2016). In 2022, the Labour Court dismissed an application by NEASA and the South African Engineers' and Founders Association (SEAFA) to declare Section 32(1) of the LRA unconstitutional and to halt the MEIBC's Main Agreement

to apply to non-parties (Arnoldi, 2022). Section 32(1) of the LRA allows the Minister of Labour, subject to certain conditions, to extend a bargaining council collective agreement to any of the non-parties within the registered scope of the bargaining council (Labour Relations Act, No 66 of 1995). The conflict was essentially about representativity in that MEIBC argued that non-parties in the metal and engineering industry, being the industry over which it presides, are bound by what has been negotiated and agreed to at the national level (Engineering News, 2022). NEASA's petition to the Constitutional Court for leave to appeal the Labour Court's decision was dismissed, essentially bringing an end to this issue (Burger, 2023).

2.5.2 CHALLENGES FACING COLLECTIVE BARGAINING IN SOUTH AFRICA

The bargaining council system remains the pillar of collective bargaining in South Africa. It is not about to collapse. On the contrary, it has displayed considerable resilience. Godfrey et al. (2007, p. 97) argue that "Collective bargaining everywhere is a function of trade union strength, and trade union strength is a function of there being significant numbers of workers in standard employment, massed together in the same workplace. Where these conditions prevail, as in the automobile manufacturing industry, it is possible to maintain a relatively sophisticated collective agreement without the necessity to establish a bargaining council."

However, bargaining councils and collective bargaining face significant challenges on their own. As already mentioned, key challenges for bargaining councils centre around the representivity of the parties, the extension of agreements to non-parties, and the constitutionality of certain sections of the LRA. These challenges have been tested legally with mixed outcomes. With respect to collective bargaining, despite being rooted in societal corporatism, good progress has been made in institutionalising a framework and contributing to labour stability; there are still views that collective bargaining is problematic and should be reviewed. Botha (2015) argues that collective bargaining, by its nature, is adversarial in the sense that it's a play-off between the power of the union and the managerial prerogative of employers. He suggests that a dual system of collective bargaining and workplace forums is subject to buy-in from the social partners.

Concerning workplace forums, Chapter V of the LRA provides for the establishment of workplace forums, serving as a consultative structure that seeks to promote the interests of all employees in the workplace, regardless of whether the employee is a member of a trade union.

Among other things, the workplace forum aims to promote workplace efficiency, consensus-seeking consultation, and participation in joint decision-making on matters of general workplace policies and procedures (LRA, Section 84). Concerning the efficiency of this structure, it is argued that the dual nature of having an inherently adversarial bargaining structure and a consultative structure in the workplace is problematic for workplace stability, particularly as a result of conflict between consultation and negotiation outcomes (Finnemore and Van der Merwe, 1988; Anstey, 2006; Botha, 2015). This proposal mirrors the participatory workplace governance of the German works council system, which operates in addition to or alongside collective bargaining.

Coleman (2013) argues that the current collective bargaining framework has failed to meet its objectives, and therefore, there is a need to substantially restructure collective bargaining. His criticism centres essentially on the poor progress made in reconfiguring the Apartheid wage gap, the insufficient response to challenges of job security, the lack of alignment with industrial and economic development strategies, the violation of the voluntarism principle, the undermining of trade unions, and the systematic chipping away by employers of the gains made by the unions. As a way forward, he suggests various approaches or a combination of the following:

- Concessional bargaining in which unions trade basic conditions of employment, such as wages, for job security.
- A long-term collective bargaining concept, in which the union develops long-term strategies for a sector promoting greater equity, worker empowerment, employment security and job creation.

Reflecting on multi-party bargaining at the sector level, Godfrey (2018) is of the view that it has been successful, both as a framework for managing labour relations and as a system for exploring labour market regulations. However, parties must be cognizant of several threats, which he refers to as structural pressures, that put pressure on the multi-party bargaining framework, such as slow economic growth, persistent high levels of unemployment and a spate of litigation challenging the extension of bargaining agreements to non-parties in the industry. Webster (2015) argues that the Marikana tragedy was a watershed moment in contemporary labour relations, including multi-party collective bargaining. The impact on the multi-party collective bargaining framework and institutions will need to be adapted if it is to survive.

Mabasa et al. (2022) identified the following lessons learned, which they view will have a lasting impact on multi-party collective bargaining in the mining industry (Mabasa and Chinguno, 2022):

- Changing nature of work and social reproduction strategies in contemporary mining communities.
- Workplace labour market struggles cannot be separated from livelihood social reproduction challenges in mining communities.
- Marikana has highlighted that the current model of mining thrives on creating or amplifying social differences and hierarchies.

Despite criticism, collective bargaining in the South African automotive industry has been resilient and has made a significant contribution to labour stability (Anstey, 2006). The last strikes the automotive industry experienced were during the 2013 negotiations, when OEMs and component suppliers shut down production for 15 and 20 days, respectively, due to strike action. (AMEO, 2019). Since then, the domestic automotive sector has proven to be a reliable partner and dependable ally for the government and employers, positioning manufacturing as a catalyst for development and inclusive growth in the country (Lamprecht, 2021). "South Africa has an excellent track record as a reliable manufacturer and supplier of high-quality vehicles and automotive components to world markets. Vehicle exports are important to the viability of the domestic automotive industry, as exporting remains key to generating sufficient economies of scale and to achieving improved international competitiveness" (Automotive Export Manual, 2021, p. 21-22).

However, the stability of collective bargaining structures is largely confined to those sectors of the economy where well-established traditions of trade union organisation and collective bargaining prevail (mainly in the secondary sector) and where the standard employment relationship predominates. Collective bargaining in the automotive industry is facilitated by three well-established bargaining chambers and a negotiating forum (NBF), which enables the parties to focus not only on wages and substantive employment conditions relevant to their sector, but also on the viability of automotive manufacturing in South Africa. However, there are no formal structures in place which serve as a platform for the stakeholders to address the broader viability challenges facing the industry. The major union, NUMSA, has for some time signalled

its intention to realign sectors and bargaining processes, which force involvement of employer organisations and trade unions (Godfrey, 2016). The parties have agreed to pursue the establishment of an Industry Broader Collective Bargaining and Industry Policy Forums in their 1997 and 2007 negotiations (NBF Agreement, 1997 and 2007), a clause that has been retained in all subsequent agreements. Despite these agreements and the industry's progress as a global player, there is no documented evidence of a collaborative approach among government, labour, and employers to address the challenges facing the industry.

With respect to the Industry Policy Forum clause in the MEIBC Main Agreement (2021 to 2024, Part 1, p. 42), it reflects the following, "The union and employer parties, having noted the significant challenges facing the Metal and Engineering Industry in the context of the imperative of creating and sustaining decent jobs and competitive manufacturing capability in the domestic and global market, have agreed to establish an Industry Policy Forum (hereinafter referred to as the IPF) under the auspices of the MEIBC as per the special provisions applicable in Annexure I." The IPF clause in the NBF Agreement states (A10, p.22), "The Parties agree to establish an AMEO/NUMSA Industry Policy Forum (IPF) to consider and deliberate on strategic issues which affect the future of the automobile manufacturing industry in South Africa…"

With respect to a proposed broader collective bargaining, the parties agreed that "…the desired structure of this collective bargaining forum should be in the form of separate bargaining chambers/chapters for each Industry sector, i.e. Automobile Manufacturing, Tyre, Components etcetera. There should furthermore be clear delineation between the substantive bargaining and consultative topics and bargaining modes" (NBF Agreement 2013 – 2016; A6.2, p. 12). This outline seems to provide clear guidelines to the parties to enter into discussions to give effect to the clause. These two bargaining chambers represent 51,6% of all employees in the automotive industry (MIBCO, 2017).

Another facet of collective bargaining that must be considered in the context of this research is the debate of decentralisation and centralisation. Collective bargaining in the South African automotive industry is centralised along four major sectors: vehicle manufacturing, component suppliers, metal and engineering and new tyre manufacturing. The LRA (1995) promotes centralised bargaining through the establishment of bargaining councils (Labour Relations Act, No 66 of 1995). The above centralisation has gone along with a perceived serious decline in plant-level bargaining within the jurisdiction of councils (Godfrey, Theron and Visser, 2007).

Most of the bargaining council agreements contain a clause prohibiting company-level bargaining on benefits already agreed to at the central level (MIBCO, 2017; NBF Agreement, 2019), the so-called peace or no-further-claims clauses. This suggests that little or no productivity bargaining is taking place at the plant level. Even where a framework agreement was negotiated at the central level for productivity bargaining, it did not stimulate much interest at the plant level.

However, centralised bargaining has served the automotive industry well. The parties fashioned sophisticated collective agreements with joint commitments with regard to the long-term growth and viability of the industry; the establishment of an industry training board; multi-skilling, career pathing, "portable" skills development; adult literacy; affirmative action; a retirement scheme; a medical fund; and the elimination of "apartheid" wage discrepancies(Anstey, 2006; Godfrey, Theron and Visser, 2007b; Maree, 2009)

The NBF is currently relatively stable and continues to produce what are generally seen as cutting-edge collective agreements. However, tensions remain about the level of bargaining (Godfrey, 2018). Some employers appear to favour a return to plant-level bargaining, whereas NUMSA has advocated the creation of a mega-bargaining council that would incorporate the metal and engineering bargaining council, the tyre manufacturing bargaining council, the motor sector bargaining council, and the automobile sector (i.e. NBF) (Cloete, 2013; Coleman, 2013b; Botha, 2015). Each sector would be accommodated in a chamber within the mega-council.

As already mentioned, the global trend in collective bargaining is a decentralised framework for negotiating wages and conditions of employment. Within the context of the current centralised bargaining in the automotive industry, the researcher proposes a strengthening of the current arrangement. In essence, this is influenced by clauses in the NBF and MEIBC agreements to pursue a broader bargaining framework, admission by the parties interviewed for a more structured collaboration between collective bargaining stakeholders to focus on strategic issues impacting the industry, which is not possible in the current sector's centralised bargaining framework. Lastly, South Africa's auto sector has experienced several challenges resulting in job losses and company closures: 12 company closures, 4,000 job losses in the past two years, the Industry faces challenges from U.S. tariffs, low localisation, and domestic sales are much lower than the 2035 master plan (Dludla, 2025). These challenges impact the entire automotive

industry and cannot be addressed at the sector level. The proposal is to introduce a stewardship-based, broader collective bargaining framework, comprising a centralised forum that includes relevant government stakeholders, where strategic challenges impacting the industry can be discussed and resolved, and decentralised sector collective bargaining, focusing on the sector. Ibsen and Keune (2018) refer to a structured decentralisation approach in collective bargaining in Germany, the Netherlands, and Denmark, consisting of a framework that preserves the regulatory function of sector agreements but allows for centralised engagement with challenges impacting the industry. Reporting on the impact of labour reforms on Spanish labour relations, Artelis and Moner (2003) concluded that the legal changes brought about a dual approach of decentralisation and centralisation in the structure of collective bargaining, in that they reinforce the tendency towards decentralisation while fostering centralisation at local and regional bargaining units.

2.6 CONCLUSION

Collective bargaining is well-established in the automotive industry and is backed by an institutionalised legal framework, regulated under the Labour Relations Act of 1995, which includes registered bargaining councils and industry and plant-level agreements. There is a general consensus that it has served the industry well and is able to address strategic issues that impact the industry's viability. The question is how the industry can implement these agreements to pursue a broader collective bargaining framework and establish an industry policy forum that will consider and deliberate on strategic issues impacting the industry.

There is a general recognition that relationships between business and organised labour need to transition more rapidly to constructive, mutually beneficial collaborations. Workers and organised labour are crucial in the success and sustainability of the automotive manufacturing industry and should not be seen as a nuisance factor. The viability of the industry requires ongoing engagement and consensus-seeking collective bargaining. These engagements should not only focus on the sustainability of the industry but also on creating an environment that fosters the creation of decent jobs and improves standards of living for workers.

Negotiations are not just a once-off process. Fischer and Brown (1998) note that it is important for the parties to develop a working relationship underpinned by a commitment to being un-

conditionally constructive in their approach to negotiations. Key contributors to effective negotiations are effective communication and rationality, building reliability and trust, pursuing persuasion rather than coercion, and accepting each other as legitimate partners (Thompson, Peterson and Brodt, 1996; Barry and Friedman, 1998; Bottom and Paese, 1999; Finnemore and Koekemoer, 2018). A win-win outcome is not always possible, but a problem-solving approach which considers the interests of the parties could result in a negotiated outcome without disruptions.

CHAPTER 3: LITERATURE REVIEW – SOCIETAL CORPORATISM AND COLLABORATIVE STEWARDSHIP

3.1 INTRODUCTION

In developing a comprehensive collective bargaining framework, this chapter will examine the collaborative efforts of industry stakeholders in addressing the challenges facing the automotive industry. It will explore the collaborative link between societal corporatism and stewardship in establishing a structural context that makes a shared, long-term vision for collective well-being more feasible. The chapter will focus on how societal corporatism as a structure for dialogue and collaboration between state, organised labour, employers and society, can foster a stewardship approach, to promote a shared sense of responsibility and long-term vision for societal well-being, enabling leaders to operate as stewards for present and future generations, rather than focusing solely on shareholder interests. This context encourages leaders to act as stewards, balancing economic objectives with their responsibilities to a wide range of stakeholders, thereby aligning business practices with broader societal values.

The chapter will first focus on societal corporatism, which provides a structural context that makes a shared, long-term vision for collective well-being more feasible. This context encourages leaders to act as stewards, balancing economic objectives with their responsibilities to a wide range of stakeholders, thereby aligning business practices with broader societal values. It will then focus on stewardship, exploring the responsibility of corporate leaders to act in the best interest of various stakeholders, including employees, customers, local communities, and the environment.

3.2. SOCIETAL CORPORATISM

3.2.1 INTRODUCTION

This section provides an overview of societal corporatism as a form of structured collaboration between interested parties, focusing on a common goal, guided by a social partnership among employers, organised labour, government, and society, in engaging in collective bargaining. The focus will be on providing an overview of societal corporatism, including its existence, characteristics, key contributions and challenges, and the research that has been conducted on it. This will be achieved, firstly, by a literature review of societal corporatism definitions to

craft a definition particular to this research. This will be followed by an overview of contemporary societal corporatism, illustrating how it manifests in various countries and what underpins this manifestation. In discussing societal corporatism in collective bargaining, the link between the two is explored, followed by a focus on the development of societal corporatism in South Africa, culminating in an examination of the rise of corporatism and its impact on status in the South African automotive industry.

3.2.2 DEFINING SOCIETAL CORPORATISM

With reference to the Nordic countries, Sweden, Norway, and Finland, Perraton (2018) defines corporatism as a multifaceted concept, balanced by collaboration between organised systems of wage bargaining, the role of state intermediation, and the scope of agreements negotiated in national economies. Maree (1993) argues that societal corporatism is a form of interest intermediation where interest groups representing various societal groups, such as unions, business organisations, and professional groups, are officially recognised by the state and participate in policy-making.

Siaroff (1999), in his study to develop a comparative ranking of corporatism in long-term industrial democracies, suggested that corporatism tends to encompass two different perspectives. Firstly, it is a system of interest representation (Schmitter, 1979) and secondly, it is "an institutionalised pattern of policy-formulation in the shaping of economic policy" (Lehmbruch, 1979, p. 150). Calmfors and Driffill (1988) also reviewed several definitions of corporatism and concluded that corporatism appears to encompass two aspects: incorporating government into labour relations and bargaining through a legal framework, and the integration of trade unions and employers into a shared collaboration in the development of the economy.

In considering a core definition for corporatism, Siaroff (1999, p. 177) listed the main features of the concept of corporatism as reflecting "… within an advanced industrial society and democratic policy, the coordinated, co-operative and systematic management of the natural economy by the state, centralised unions, employers, presumably to the relative benefit of all three actors." Siaroff's (1999) view is that this reflection is a general description of pluralism.

Although there are extensive definitions of societal corporatism in the literature, there is generally a convergence on the key elements comprising societal corporatism (European Commission, 2013; Ngok, 2016; Perraton, 2018; Contreras and Molina, 2022; Castro, 2025). In considering the contestations reflected in the above definitions, a commonality emerges regarding a collaborative approach among the interested parties in wage bargaining and economic policy formulation. It reflects an institutionalised political and economic system where stakeholders representing various segments of society, such as labour, organised business, government, and societal structures, are integrated into a policymaking process to address viability challenges (Maree, 1993; Habib, 1997; Dickson, 2000; Castro, 2025). Some characteristics of such an institutionalised framework are (Kim and van der Westhuizen, 2015; Webster, 2015; Castro, 2025):

- It is structured around organised representative structures.
- It is recognised by the government as an interest group and given a formal role in policymaking.
- The interests covered are varied, such as policymaking, labour laws and other economic and social policies and fostering a sense of social cohesion and consensus.

Reflecting on the above, the following elements must be included in developing a definition: it must be an institutionalised process; engagement between representative structures of employers and workers; governed by a collaborative framework; and joint accountability for the outcomes. Considering the above, the following definition of societal corporatism is considered appropriate for the study: Societal corporatism in collective bargaining is an institutionalised process involving mandated representatives of employers and workers, engaging on workplace issues guided by a structured collaboration framework, pursuing outcomes for which the parties are jointly accountable.

3.2.3 CONTEMPORARY SOCIETAL CORPORATISM

This form of collaboration between labour and capital pursues a general common good through centralised bargaining, which enables the promotion of a full employment policy, wage moderation, social and economic equality, and a reduction of labour market competition. However, in the face of growing challenges – including economic pressures, migration trends, and the

liberalisation of markets - scholars suggest that corporatist structures are experiencing a declining capacity to reproduce universal goals (Visser, 2005). Political-economic changes throughout Europe, including the increasing power of European Union institutions, are causing an erosion of local institutions' (e.g., trade unions, employers' associations) capacity to concentrate on political-economic power and pursue centralised bargaining (Bryson et al., 2011; Traxler, 2004). Noticeable within the process of institutional weakening is the increasing prevalence of precarious forms of employment, mainly affecting vulnerable groups of workers (e.g., women, migrants, the old and the young) (Baccaro et al., 2003; Briskin, 2014a). Precarious employment leads to a further increase in income inequality, a differentiated decline in employment security, and growing segmentation in labour markets, all of which affect social-economic solidarity and cohesion. In turn, through a gradual decrease in the influence of national institutions and traditions, precarious employment also reinforces the segmentation of the industrial relations system itself, disrupts centralised resistance to labour market fragmentation and reduces unions' ability to enforce collective employment norms.

In analysing the segmentation of the industrial relations system and its consequential effects upon social-economic measures in the labour market, scholars have demonstrated the importance of sectoral features and their contributions to the declining political-economic power of institutions (Bechter et al., 2012; Wagner and Hassel, 2016). This form of analysis enables the identification of sectoral industrial relations features and institutional contexts associated with the spread of precarious employment in various forms, such as mini-jobs, zero-hour contracts, fixed-term employment, and outsourcing, as well as increased labour market vulnerability. Offering a closer look at trends of change in the labour market and the processes underlying the development of precarious employment, the analysis of the segmentation of industrial relations system, focuses on industrial sectors rather than the national industrial relations system as a whole, thus making it possible to discover earlier and more complex forms of segmentation in both the labour market and the industrial relations system (Bondy, 2018).

Baccaro (2003) pointed out that the traditional corporatist system, underpinned by a mutually beneficial relationship between the industrial relations processes and the political processes, has been threatened by the emergence of the so-called "social compact". These social compacts, broadly defined as an implicit agreement between the state and citizens regarding their respective roles and responsibilities, so that together they can charter the future (Editors, 2025), appear to lack the institutional and organisational preconditions once regarded as essential for

these policies to proceed (Baccaro, 2003). This has raised doubts about the relevance of societal corporatism in the modern-day economic environment. Driffell (2006) refers to Ireland as an example of a country that has implemented a succession of tripartite social pacts to limit inflation and promote high employment, sometimes involving the government in offering lower tax rates. The Netherlands' success in returning to lower unemployment has been characterised as partly a success of a corporatist model (Nickell and van Ours, 2000).

Key preconditions for a strong and functioning social dialogue between social partner organisations include a sufficient membership base, organisational capacity to negotiate, legal recognition, and the confidence of workers and companies in these organisations. For effective social dialogue, several key preconditions are essential, including strong, independent, and representative employer and worker structures, respect for fundamental rights such as freedom of association and collective bargaining, and a commitment from all parties to engage in dialogue (Hicks, 1988; Grunig, 2000). However, studies have shown a general pattern of decreasing organisational density in Europe, particularly in relation to trade unions (Eurofound, 2010; 2013; Schnabel, 2013; Voss, Schoeneberg and Contreras, 2015). Nations where there is general agreement on the presence of corporatism are typically integrated nations, such as Sweden, Austria, and Norway, and pluralist nations, like Canada, Greece, and the USA, in the sense of being non-integrated (Siaroff, 1999). Integrated nations are generally defined as nations cooperating to reduce or eliminate trade barriers and coordinate economic policies to foster growth and trade (World Bank, 2025), whilst pluralist nations are generally regarded as nations where a diverse range of cultural, ethnic, religious, or political groups coexist within a single state, ideally with mutual tolerance and acceptance, and actively participate in the governing process (Siaroff, 1999).

Reflecting on the widespread historical evidence of societal corporatism, Noto (2014) argued that there is a renewed interest in applying social dialogue to address labour relations and economic challenges. This renewed interest in corporatism shows that it cannot be limited to a particular time frame or ideology of authoritarian nations (Siaroff, 1999; Hicks and Love, 2003). The adaptability of corporatism in Germany is of particular interest, not only for the extent of corporatism but also for the extraordinary economic interest. Streeck (1983) highlighted the significance of the relationship between government and designated stakeholder structures in addressing socio-economic challenges. Not only did this process safeguard the

interests of stakeholder members, but it also played a crucial role in shaping the country's economic policies (Noto, 2014).

Nearly all developed countries have implemented varying degrees of corporatist polices (Siaroff, 1999; Noto, 2014; Perraton, 2018). Quoting from Hicks-Kenworthy, 2003 and Streeck, 2010, Noto (2014, p.11) concluded that, "Corporatism was and still is vital. Since the beginning of the 21st century, it seems to have paradoxically become not so much a third option, but rather has come to represent the most developed and adopted form of Western capitalism."

3.2.4 SOCIETAL CORPORATIST COLLECTIVE BARGAINING

Unlike unitarism and pluralism, societal corporatism promotes social dialogue, broadly defined as bargaining, consulting, or exchanging views between representatives of government, employers, and labour on issues of mutual interest relating to economic and social policy, as a means of managing conflict in stakeholder relations (Finnemore and Koekemoer, 2018). Through consensus-seeking dialogue and bargaining, based on an institutionalised framework, employers and unions exercise their respective power in addressing challenges of mutual concern.

Union bargaining in Nordic countries is also characterised by solidaristic objectives in terms of compressing wage differentials among enterprises and sectors exposed to international competition and productivity growth (Perraton, 2018; Scott, 2021). Such bargaining is typically designed to ensure that wage settlements throughout the economy are set at rates validated by the sector's capacity to maintain international competitiveness (Pekkarinen, Pohjola and Rowthorn, 1994). These countries appear to be good examples of societal corporatism, in the sense that they show a combination of centralised bargaining, heavy government involvement, and a high degree of solidarity (Perraton, 2018; Scott, 2021).

From labour's view, these corporatist arrangements are not just focusing on high levels of employment through wage restraint, but an expectation that the resultant profits be re-invested, leading to further growth in income and employment sustainability over the medium and long term (Pekkarinen, Pohjola and Rowthorn, 1994; Scott, 2021). Therefore, organised labour's participation in corporate bargaining strategies is to achieve full-time employment through high productivity and wage improvement.

Perraton (2018) suggests that the most systematic attempt to formalise social corporatist arrangements was through the Rehn-Merdner model proposed by trade unions in post-war Sweden. In terms of the model, fiscal policy was used to restrain inflation, which in turn led to higher profit margins, which tend to undermine the solidaristic wage bargaining. Under the Rehn-Merdner macroeconomic policy, full employment was ensured through active market policies, which led to wage pressure on less efficient firms whilst benefiting more productive ones. Thus, the Rehn-Merdner model simultaneously maintained relatively low profit margins and encouraged investments.

Perraton (2018) concludes that the Nordic economies developed social corporatist-coordinated wage bargaining systems that underpinned their economic performance, combining low unemployment with low levels of inequality. Although the Swedish model has received considerable attention in the economic literature, there has been increasing pressure on the system, eroding key aspects of the economic system, while the Nordic economies have experienced ongoing continuity. In this sense, corporatist systems remain viable. This aligns with research indicating that social corporatist economies appear to outperform other economies in terms of profit share and investment levels (Siaroff, 1999).

3.2.5 SOCIETAL CORPORATISM IN SOUTH AFRICA

Given that the current South African labour relations framework has its roots in corporatism and the struggle for worker rights, the extent to which collective bargaining contributed to addressing the broader socio-economic challenges of the working class is being debated (Maree, 1993; Desai, Habib, 1997; Habib, 1997; Finnemore and Koekemoer, 2018). Any discussion on the concept of broader collective bargaining must include a review of the challenges of collective bargaining from a multifaceted perspective, such as international competitiveness, the standard of living of workers, employment levels, the need to be agile and flexible from a labour relations perspective, while remaining competitive. Also, there are debates about the extent to which policy and investment choices of corporatist institutions impact existing power relations in serving the working class (Kim and van der Westhuizen, 2015).

The development of corporatism in South Africa is rooted in the apartheid government's attempts to control the predominantly black trade union movement (Habib, 1997; Finnemore and Koekemoer, 2018). Globally, corporatism is defined as a multifaceted concept, covering or-

ganised systems of wage bargaining, the role of state intermediation and the scope of agreements negotiated in national economies (Siaroff, 1999). In a South African context, it is considered an interest-representing system, whereby the labour movement has access to the development of government policies and processes, provided they comply with certain conditions governing their participation and support the development of national unity (Maree, 1993; Finnemore and Koekemoer, 2018). Corporatism underpins the maturation of negotiations and constructive interaction between labour and capital, involving unions, employers, state institutions, and other collective bodies (Desai & Habib, 1997). It is also compatible with local and centralised levels of bargaining. Societal corporatism, also known as social democratic corporatism, is based on a social partnership between the interests of capital and labour, involving collective bargaining between representatives of labour and employers, facilitated by government (Coleman, 2013). There is a debate about whether corporatism in South Africa has been as successful as it has been in Europe. There could be two schools of thought. One might reflect on the remarkable progress made over the last couple of years in institutionalising conflict on the shop floor, maturity in negotiations, and a focus beyond bread-and-butter issues to viability challenges, long-term agreements, and so forth. But secondly, there is a debate whether it has really contributed to the rise in the general standard of living of workers, in particular, the social challenges of affordable housing, education, world-class transport, etcetera. (Coleman, 2013).

Several authors have concluded that social dialogue played a major role in the relatively smooth political and economic transformation of the South African democracy since 1994 (Maree, 1993; Anstey, 2013; Finnemore and Koekemoer, 2018; Godfrey, 2018). Anstey (1991) referred to several social pacts that were concluded between the government, employers, and unions, during which the parties exercised sufficient power and commitment to address stability challenges. The overview of the history of labour relations and collective bargaining in South Africa, outlined earlier, referred to numerous social pacts that contributed towards the socio-political stability. A key structure that contributed to the social dialogue was NEDLAC, which provided a centralised forum for deliberating the interests of the state, employers, and unions on crucial matters of policy formulation.

It is argued that conditions in South Africa are not yet fully conducive to stronger forms of societal corporatism typical of Western European countries (Finnemore and Koekemoer, 2018), as outlined in Siaroff's (1999) study. In particular, the following pre-conditions for good corporatist economies are a concern (Siaroff, 1999):

- A high degree of unionisation, especially among blue-collar workers
- Relatively few unions, which are grouped into highly institutionalised representative structures and play a key role in wage bargaining.

Considering the developments in the social partners, there have been developments which negatively impact societal corporatist stability in South Africa:

- There is often conflict in trade union federations. In 2014, NUMSA was expelled from the Congress of South African Trade Unions (COSATU), citing compliance challenges (Friedman, Business Day; 2014). This split led to the formation of the South African Federation of Trade Unions with NUMSA as the key union (SAFTU website, 2023).
- There are several trade union federations of which COSATU is the biggest with 1,8 million members, followed by SAFTU with 800 000 members and Federation of Unions of South Africa (FEDUSA) with 560 000 members (Websites of COSATU, SAFTU and FEDUSA). Apart from the conflict in trade union federations, there is also a diversity in political alliances.
- A large portion of the economically active population is unemployed or employed in the informal sector. The current official unemployment rate in South Africa for the second quarter of 2025 is 33.2%, an increase from 32.9% in the first quarter of 2025 (Stats SA, 2025).
- The inclusion of broader community interest groups in the NEDLAC structure, although broadening the social dialogue platform, cluttered the NEDLAC agenda, which was primarily designed to focus on labour matters and the economic policy framework. In addition, the social partners lack the appropriate skills to contribute to the delivering of NEDLAC's mandate (NEDLAC, 2021). A process to capacitate the social partners to improve and build capacity to participate in the NEDLAC processes is in place.

Finnemore and Koekemoer (2018) argued that despite these challenges, the culture of social dialogue has been robust. The authors refer to NEDLAC's swift response to the global economic crisis of 2008, in which the parties agreed on principles and action plans to address the country's challenges (Finnemore and Koekemoer, 2018). However, there is a general view that the social dialogue and societal corporatism remain under considerable strain as it appears there is little consensus on the way forward to reduce unemployment, poverty and inequality in the country (Maree, 2009; Anstey, 2013; Coleman, 2013; Finnemore and Koekemoer, 2018)

The societal corporatist philosophy underpinning the South African labour relations framework supports a collaborative stewardship approach to labour relations, particularly when dealing with socio-economic issues**.** The development of this consensual approach in labour relations is informed by corporatism, which involves the participation of unions, employers, state institutions and other collective bodies (Habib, 1997). Desai and Habib (1997, p. 495) describe corporatism in South Africa "…as a system of interest representation whereby influential socio-economic organisations are given access to, and the possibility of helping to shape policies…" Cossins et al. (2015) and Davis et al. (1997) describe stewardship as an inclusive and holistic approach to conflict management that emphasises a strong focus on leadership to find equitable solutions that accommodate competing interests. Thus, the societal corporatist foundation of collective bargaining supports a collaborative stewardship approach in developing broader collective bargaining.

Maree (1993) contends that societal corporatism is not new in South Africa, and a remarkably strong corporatist current flows through the labour relations environment, involving all the major stakeholders of labour, capital, and the state. Supporting this view, several writers refer to pre-1994 societal corporatism structures, such as Economic Advisory Council (EAC) established in 1960 to articulate the views of white labour and organised business; National Manpower Commission (NPC), commissioned in 1979 to consider labour related challenges involving the state, business and labour, excluding black labour; National Economic Forum (1993); etcetera. (Maree, 1993; Schreiner, 1994). In addressing his view that the economic conditions and pressing social and political grounds point to a need for corporatism in South Africa, Maree (1993) pointed out that the ongoing stagnation of the South African economy is an alarming trend which could create an economic and political crisis of major proportions for the new dispensation, which could cause major instability regardless of who is in power. Years later, such economic and political conditions are among the many factors which contributed to the unrest in Kwazulu-Natal in July 2021 (Africa News, 2021; Harding, 2021; Kana, 2022). The findings of the report by panellists tasked to investigate the unrest point to "poorly rolled out programmes of service delivery and unacceptable living conditions, the state of the economy and persistent levels of poverty", which led to poor and desperate people looting, alongside those more calculating in their objectives and motivation." (Kana, 2022; p. 1).

Reflecting on the progress of the National "Development Plan – 2030; Our future – make it work", the NPC commented that: the stagnant economy has given rise to a loss of jobs in the

mining, manufacturing and construction industries; the net effect of these job losses fuels the already high levels of unemployment; and, there is a need for faster and more inclusive growth. Another factor contributing to growing corporatism is the increased awareness across the world of competitive productivity levels, which contributes to viable and sustainable economies (Castro, 2025).

3.2.6 THE RISE OF CORPORATISM IN THE SOUTH AFRICAN AUTOMOTIVE INDUSTRY

Commenting on the rise of corporatism in the automotive industry, Desai and Habib (1997) noted that NUMSA's adversarial attitude shifted to consensus building as it was co-opted into the country's political developments, leading to the rise of corporatism in the industry. Their view is supported by five incidents in the automotive industry (Desai and Habib, 1997):

- The 1990 strike at Mercedes-Benz South Africa, then called Car Distributors Association (CDA), during which the hourly paid employees demanded that the company withdraw from the National Bargaining Forum (NBF), in essence demanding the company renege on an agreement with NUMSA to establish the NBF. This strike was eventually resolved with the intervention of newly unbanned political organisations, the ANC and SACP. In a sense, the parties agreed to call upon the government in waiting. In resolving the strike, the key stakeholders, employers, the union, society and the government, represented by an unbanned organisation, worked together to resolve the strike (Von Holdt, 1990; Desai, Habib, 1997).
- NUMSA's participation in the Motor Industry Task Group (MITG), which was set up in October 1990 by the Minister of Finance and Trade and Industry, to advise the government on the future of the industry (Barnes and Black, 2013). The MITG consisted of key industry stakeholders from the public sector, unions and government. Following a fact-finding mission to the automotive sectors in Australia, Germany and England, a policy document was formulated to grow and preserve the domestic car market. Thus, the MITG represented a corporatist structure, comprising unions, employers, and, ultimately, the state, set up to reach consensus on automotive industry policies (Desai, Habib, 1997).
- The 1994 automotive industry strike, when workers of the seven OEMs downed tools for a period of five weeks, is perhaps the most significant development in the rise of corporatism in the industry (Desai, Habib, 1997; Godfrey, Theron and Visser, 2007a). Godfrey et

al. (2007) noted that although the strike was eventually resolved through the involvement of government, labour, employers, and, perhaps for the first time, public opinion, some cracks emerged in the collective bargaining framework. Employers called for the collapse of centralised collective bargaining and the introduction of decentralised plant-level bargaining, where relationships are collaborative and a shared view of company viability among shop stewards and employers (Desai, Habib, 1997). NUMSA responded with a discussion document in May 1994, which, to a large extent, laid the foundation of their broader collective bargaining strategy. They called for a three-tier bargaining strategy: national, focusing on the entire automotive industry; sectoral, based on industry such as OEMs, tyres and components and company or plant level(Desai, Habib, 1997; Habib, 1997).

- The agreement reached between VWSA and NUMSA in 1994 also presented a significant shift in the union's position on plant-level bargaining (Desai, Habib, 1997). The agreement outlined eight strategic objectives, committing the parties to the long-term viability of the company.
- Another shift towards corporatist practices in the industry is the 1995 agreement reached between the OEMs, NUMSA, and Yster & Staal en Verwante Nywerhede, designed "to change the shape of labour relations in an industry emerging from episodes of serious conflict in recent years" (Desai, Habib, 1997, p 511) This agreement also called for a 'motor industry authority.'

The establishment of corporatism in the industry is not without debate. Some scholars (Maree, 1993; Desai and Habib, 1997; Habib, 1997; Anstey, 2006) argued in favour of a corporatist approach by NUMSA, in that the union adopted a strategic perspective in participating in the corporatist structures such as the MITG, focusing on structural or radical reform. Others view that the power balance in the relationship could be disturbed, as changes are forced upon them by corporatist bodies such as international financial institutions, multinational corporations, and domestic corporate capital. The authors argued that there is an alternative to corporatism. The interests of the union will be better protected in a pluralist relationship with capital and the state, where the state's engagement is not governed by formal political rules negotiated in corporate institutions. Commenting on the criticism of NEDLAC as a consensus-seeking structure between government, organised business, and organised labour to address socio-economic challenges, Kim and van der Westhuizen (2015) argued that power imbalance contributed to

the inefficiency of NEDLAC. Desai and Habib (1997), Kim and van der Westhuizen (2015) argued that several factors contributed to NEDLAC's inefficiency as a post-Apartheid corporatist structure, such as: the inability of labour to represent a broader constituency beyond organised labour, including the unemployed, the lack of technical capacity within the labour movement, as well as NEDLAC's organisational inefficiency.

Coleman (2013) argued that centralised bargaining has come under increasing pressure in many countries driven by changes in the labour market influenced by neoliberalism and, lately, the pressure on worker rights during company competitive challenges, a decline in trade union density, as well as pressure on unions to trade wages and working conditions for employment security.

In South Africa, the future of societal corporatism, characterised by tripartite partnerships between government, business, and labour, is uncertain, with some arguing for its decline and others suggesting a need for its revitalisation to address economic and social challenges (Godfrey, Theron and Visser, 2007a; Coleman, 2013b). NEDLAC, a key corporatist institution, has faced criticism for its inability to effectively address pressing issues like unemployment and inequality, leading to calls for its reform or even dismantling (Kim and van der Westhuizen, 2015). Some researchers argue that South Africa has moved away from social regulation towards market regulation, with the ANC government shifting from social-democratic policies to neoliberal policies, potentially weakening the role of unions and corporatist institutions, such as NEDLAC (Maree, 2009; Anstey, 2013).

In summary, despite the challenges, it is widely acknowledged that social dialogue and tripartite partnerships remain crucial for addressing complex economic and social issues, promoting stability, and fostering sustainable development. Another view is that societal corporatism, as practised in some developed countries, can be a model for achieving social and economic progress. The state of corporatism in the auto industry creates complex implications for expanding collective bargaining; a strong, centralized model can foster worker voice and industry-wide standards, but growing corporate power, complex global value chains, and the shift to a just transition necessitate new strategies to incorporate non-standard workers, address automation and globalization, and bridge environmental goals with worker interests through adaptive, inclusive governance models (OECD, 2019).

3.3 STEWARDSHIP

3.3.1 INTRODUCTION

In this section, the application of stewardship as a collaborative approach to address complex problems by bringing together multiple and diverse stakeholders is explored. Research in stewardship is being dominated by social-ecological sustainability challenges, and is of interest in this study, given the possibility of inclusive processes in which stakeholders could exercise a clear sense of purpose and engagement in a collaborative manner to address complex sustainability challenges.

In the previous section, in exploring societal corporatism as a pillar for developing a broader collective bargaining framework, reference was made to the role of stakeholders as key participants in addressing the challenges facing the South African automotive industry. This section aims to explore how stakeholders can collaborate by combining their knowledge, skills and resources to collectively address challenges that cannot be resolved individually (Belaire et al., 2011). Stakeholders are generally classified as employees, customers, suppliers, government bodies, communities, trade unions and industry bodies (Cossin, Ong and Coughlan, 2015). In terms of the stakeholder theory, the company's purpose is to facilitate interaction between stakeholders and to serve the interests of a broad group of stakeholders (Boyd, Haynes and Zona, 2011; Brower and Mahajan, 2013).

This research proposes a collaborative stewardship approach to the leadership structures of government, employer, and labour organisations, as a framework to explore mechanisms that will give effect to a commitment to pursue the establishment of an industry-wide collective bargaining structure and an industry policy forum (NBF Agreement, 2022; MEIBC Main Agreement, 2021). As a leadership tool, stewardship has been instrumental in bringing together various stakeholders to address socio-economic challenges (Cockburn et al., 2019b). It has a strong focus on leadership, drawing on inspired insight and vision to find equitable solutions that accommodate competing interests (Davis, Schoorman, and Donaldson, 1997; Cossin, Ong, and Coughlan, 2015).

In developing an understanding of a stewardship approach for developing a broader collective bargaining forum, the application of stewardship in socio-ecological applications was explored.

With respect to the successful implementation of ecosystem stewardship, it is vital that stakeholders understand their respective roles, the complex relationships between stakeholder profiles and processes, the need to compromise and the acceptance to pursue a mutually acceptable resolution of the challenges (Chapin et al., 2010; Belaire et al., 2011; Cossin, Ong and Coughlan, 2015).

Despite the ongoing debate on the definition of ecosystem management, it is being applied in many disciplines. In the USA, the concept of ecosystem stewardship was integrated into forestry management practices, which are impacted by complexities such as radically different decision-making processes, institutionalised structures, and management boundaries (Butler and Koontz, 2005). Cockburn et al (2019) offer a view that stewardship presents a platform for addressing the challenges of social-ecological sustainability, seeking to balance economic, social and environmental interests. It is pointed out that stewardship has various interpretations which developed over time; however, the interaction between theory and practice are not well understood (Cossin, Ong and Coughlan, 2015). Cossin et al. (2015) pointed out that in a social-ecological context, the understanding of practitioners' centres around two main points: stewardship as a 'responsible use and care' and stewardship as a mechanism to balance the use of natural resources and responsibility to protect and manage the wider ecosystem.

3.3.2 DEVELOPING A DEFINITION FOR COLLABORATIVE STEWARDSHIP FOR THE SCOPE OF THE RESEARCH

The Western perspective of stewardship has its roots in the Christian religion, in which people are viewed as stewards of creation (Chen, 1975; Saltman and Ferroussier-Davis, 2000). Saltman et al. (2000, p. 733) drew several perspectives from the biblical concept of stewardship: "A steward is a selfless servant who manages resources without owning them and anticipates future trends." This implies that human ownership is contingent upon the fulfilment of an individual's responsibility to use and administer, not exclusively for their own benefit, but to serve the needs of the entire society (Chen, 1975).

With reference to a definition of stewardship in a corporate and socio-economic context, various ecosystem stewardship definitions capture the collaborative endeavour and bring together diverse stakeholders. The following definitions have been proposed:

- Welchman (2012, p303) captures the classical moral-ethical root of stewardship in this definition of environmental stewardship as "the responsible management of human activity affecting the natural environment to ensure the conservation and preservation of natural resources and values for the sake of future generations of human and other life on the planet, together with the acceptance of significant answerability for one's conduct to society."
- In defining ecosystem stewardship, Chapin et al. (2010) incorporate a specific management-oriented focus of the recent understanding of stewardship. It is defined as "a strategy to respond to and shape social-ecological systems under conditions of uncertainty and change to sustain the supply and opportunities for use of ecosystem services to support human well-being." (Chapin et al., 2010; p. 25).
- In developing their definition, Cossin et al. (2015) argue that it is critical to understand the interrelationship between the roles of the key players and how they relate to each other, in the context of stewardship. They define stewardship as "… the process by which a firm can best create value over time, through its relationships with both internal and external key agents. To successfully do this over the long term, a firm needs to consider how these relationships may affect its performance in the future" (Cossin, Ong and Coughlan, 2015, p. 4).

Based on a review of several ecosystem stewardship definitions, Cockburn et al. (2019) identified the following key principles captured by these definitions: Focus on management approach; provision of diverse services; recognition of an integrated approach in that stewards are integrated in a system; a collaborative integration of stakeholders, and the need for stewards to anticipate and respond to change and shape it for future sustainability.

In considering the question of how business can thrive and sustain growth whilst creating wealth for the shareholders and contributing to the well-being of the societies within which it operates, Cossin et al. (2015) suggest that in the ever-evolving landscape, stewardship provides a platform to deal with the complex challenges of global socio-economic and viability pressures (Cossin, Ong and Coughlan, 2015). They argue that as business structures and relationships become more complex and interdependent, the business perspective extends beyond merely complying with corporate governance requirements. They define stewardship as "an inclusive and holistic approach combining dimensions of a clear sense of purpose, an intertemporal horizon, and the engagement of different stakeholders." (Cossin, Ong and Coughlan, 2015, p.10).

Davis et al. (1997) and Cossin et al. (2015) describe stewardship as an inclusive and holistic approach to conflict management, providing a strong focus on leadership to find equitable solutions that accommodate competing interests. Belaire et al. (2011) emphasised the importance of collaboration between stakeholders as a key strategy for identifying strengths and weaknesses in addressing resource management challenges. In reviewing key success factors for collaborative stewardship, Belaire et al. (2011) summarised the following stakeholder characteristics:

- Knowledge-sharing capacity
- Focus on the development of trust
- Openness to facilitation of collaboration (Borgatti and Foster, 2003; Pretty, 2003)
- Creative problem-solving (Newig et al. 2010)
- Promoting shared ownership of challenging problems

Stewardship is a broad concept that encompasses the responsible management of shared resources or interests. Collaborative stewardship, on the other hand, specifically emphasises the act of multiple, diverse groups (e.g., communities, Indigenous peoples, organisations) actively working together to achieve that stewardship. Collaborative stewardship adds the dimension of partnership, shared decision-making, and the mutual sharing of expertise to the fundamental principles of responsible management (Mattor et al., 2020).

Considering the above definitions, the following definition for stewardship for broader collective bargaining in automotive industry is proposed: “Stewardship is an inclusive holistic approach to broader collective bargaining in the South African automotive industry that will ensure industrial relations stability through the engagement of different stakeholders within the legal and negotiated labour relations framework for the sustainable growth of the industry and the well-being of societies within which it operates.”

3.3.3 OVERVIEW OF STEWARDSHIP PERSPECTIVES

To comprehend the role of stewards, it is essential to explore stewardship theory, which helps understand how stewards are driven by psychological and sociological characteristics and how

this impacts the organisation's values. In exploring a stewardship-based, broader collective bargaining approach, its success will depend on how the current representative organisations collaborate in focusing on the viability of the industry within the complex and challenging global automotive industry environment.

3.3.3.1 AGENCY VERSUS STEWARDSHIP THEORY: IMPACT ON ORGANISATION CHALLENGES

Stewardship theory originated from several diverse thoughts, including the view that humans have a duty and are obligated to preserve humanity and the earth (Chen, 1975; Saltman and Ferroussier-Davis, 2000). This notion implies accountability and a long-term orientation in the preservation of the resource over time. However, in a corporate and business sense, the notion extends beyond the preservation of resources over time to maximising organisational excellence in a socially ethical way (Saltman and Ferroussier-Davis, 2000; Cossin and Ong, 2016). Several researchers have highlighted how organisational theory and business policy have been influenced by agency theory, which identifies leadership in large modern corporations as agents whose interests may not be aligned with those of their principals, the shareholders (Jensen and Meckling, 1976). Davis et al. (1997) in their research attempted to explore economic approaches to governance, such as agency and stewardship theories. They associate agency theory with subordinates who are individualistic, opportunistic and self-serving. Stewardship theory, on the other hand, identifies leadership as collectivist, pro-organisation and trustworthy (Chen, 1975; Davis, Schoorman and Donaldson, 1997; Belaire et al., 2011). In considering a stewardship approach as a mechanism to conceptualise a broader collective bargaining framework, it is essential to reflect on the type of stakeholder leadership required to address the challenges of overcoming individual stakeholder positions and expectations, and to focus on the industry as a whole.

Saltman and Ferroussier-Davis (2000) argued that more discerning definitions of stewardship focus not only on the relationship between agency and stewardship theories, but also on the impact on the balance between efficient and ethical forms of decision-making and behaviour. The perspective of an ethical and efficiency-oriented view of stewardship is supported by Armstrong (1997) and Davis et al. (1997).

The challenge for shareholders is to guide managers in pursuing organisational interests above self-interest. The self-interested nature of agency theory necessitates that shareholders be conscious of the risks associated with it and strategize how to limit these risks to the organisation as a whole. There are various approaches in addressing these challenges, among others, putting in place control measures to monitor such managers or the use of incentive schemes aimed at focusing the managers on the organisation (Donaldson and Davis, 1991). Important to note that stewards are not driven by self-interest, but identify themselves with the organisation and are motivated by maximising organisational performance (Davis, Schoorman and Donaldson, 1997; Cossin, Ong and Coughlan, 2015). As such, stewards' actions and behaviours are aligned with the interests of the organisation. Individuals who identify strongly with the organisation, who internalise the organisation's success or failures as their own, are also most likely to be stewards (Davis, Schoorman, and Donaldson, 1997; Belaire et al., 2011; Cossin, Ong, and Coughlan, 2015). In summary, the diagram below describes an overview of agency and stewardship theory (Saltman and Ferroussier-Davis, 2000).

Table 3.1: Comparison of Agency theory and Stewardship theory

Characteristic	Agency theory	Stewardship theory
1. Model of man	Economic man	Self-actualizing man
Behaviour	Self-serving	Collective serving
2. Psychological mechanisms		
Motivation	Lower order/economic needs (physiological, security, economic)	Higher order needs (growth, achievement, self-actualization)
Social comparison	Extrinsic	Intrinsic
Identification	Other managers	Stakeholders
Power	Low value commitment	High value commitment
	Institutional (legitimate, coercive, reward)	Personal (expert, referent)
3. Situation mechanisms	Control-oriented	Involvement-oriented
4. Management philosophy	Control mechanisms	Trust
Risk orientation	Short-term	Long-term
Time frame	Cost control	Performance enhancement
Objective	Individualism	Collectivism
5. Cultural differences	High-power distance	Low-power distance

Source: Armstrong (*13*), adapted from Davis, Donaldson and Schoorman (*17*).

The relevance of these notions of stewardship as a framework for developing a broader collective bargaining concept for the collective industry is complex. Firstly, the stakeholders in the automotive industry bargaining councils are a mix of employers' representative structures and individual trade unions. Secondly, conflict is inherent in collective bargaining both within the employers' representative structures and between the respective bargaining council structures.

One of the challenges in structuring a broader collective bargaining forum will be not only the structure but also the relationships between bargaining councils, the establishment of collaboration and communication principles, and the creation of shared ownership among stakeholders, among other factors. This in itself will be a process of negotiation. The diverse views of the parties will create paradoxical circumstances that must be considered when finding solutions in the best interest of the industry. Martin (2007) proposes integrative thinking as a mechanism for embracing complexity in understanding paradoxes in diverse relationships, challenges, and creating optimal solutions. Karakas and Kavas (2008, p. 8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." This concept examines the tensions between conflicting ideas to generate a best-fit solution that incorporates elements of the others while being superior to them.

3.3.3.2 CHALLENGES OF STEWARDSHIP

In considering the application of a stewardship approach in the development of health policy in the US, Saltman and Ferroussier-Davis (2000) refer to various structural and organisational challenges that must be resolved before stewardship can be considered a suitable model. In this particular application of transitioning from an economically oriented agency theory to an ethically oriented stewardship approach among civil servants across states, the following observations were made (Saltman and Ferroussier-Davis, 2000):

- Introducing a stewardship approach in an administrative infrastructure is complex as the commitment of all stakeholders to the change is required (Davis, Schoorman and Donaldson, 1997).
- Stewardship might be challenged by disgruntled employees with an agency theory mindset, resulting in tension in the organisation (Armstrong, 1997).
- If the key focus of introducing a stewardship concept is economic efficiency, such as cost-cutting, it could become a major conflict situation for public servants who have not made the transition.
- The ability of different states to implement a stewardship approach is often influenced by broader historical and cultural influences, such as political, social, economic or religious influences, which might impact the introduction of stewardship.

Another challenge to stewardship is human nature. Leaders are also vulnerable to trends, volatility and overconfidence. Cossins et al. (2015) noted that leaders must periodically reflect on their flexibility and adaptability in response to a changing environment. Failing to identify threats will not only impact them but also the survival of the organisation and the future of all those involved. Leaders may also fall victim to their success and become arrogant. Leaders must accept that they are vulnerable to risks, such as reputation, feuding, and politics. Great leaders have the ability to cultivate self-awareness and manage their weaknesses by adopting a lifelong learning philosophy and building diverse teams that serve as sounding boards.

Davis et al. (1997) identified several psychological factors that influence stewardship behaviour in organisations, including motivation, identification, power, risk, and culture. Considering culture, they point out that collectivist cultures tend to promote stewardship relationships more than individualistic cultures, because individuals have been socialised to put society's interests above their own interests. Hofstede (1991) refers to another cultural factor, namely power distance, which is the extent to which less powerful members of the stakeholder structure expect and accept that power is distributed unequally. In cultures where low power distance prevails, it is more likely that a steward's orientation would prevail (Cossin, Ong and Coughlan, 2015).

At an individual level, stakeholder representatives motivated by their own needs may impact the steward's commitment to collaboration. Referring to Maslow's theory on self-actualisation, Davis et al. (1997) argue that intrinsically motivated individuals, those who are motivated from within the organisation rather than external pressures, are more likely to have a stewardship orientation. These individuals seem to identify strongly with the organisation.

In summary, social, organisational and individual factors influence the implementation and ongoing success of stewardship. These variables are often not discrete but dynamic and not mutually independent (Cossin, Ong and Coughlan, 2015).

3.3.4 STEWARDSHIP AS A FRAMEWORK FOR EXPLORING BROADER COLLECTIVE BARGAINING

When considering the application of a collaborative stewardship approach to structuring a framework for a proposed broader collective bargaining concept, it is helpful to examine

whether existing agreements between the bargaining parties provide a platform for this exploration. Two of the four bargaining councils, AMEO and MEIBC, contain clauses in their respective agreements which provide such a platform. In these two bargaining councils, NUMSA represents 52% of the workforce in the automotive industry (MIBCO, 2015). In the NBF Agreement, covering the seven OEMs and NUMSA, the parties agreed to the formation of a "Proposed Broader Collective Bargaining Forum (NBF Agreement 2022 – 2025, A6.2) and an "Industry Policy Forum (IPF)" (NBF Agreement 2022 – 2025, A10). The proposed Broader Collective Bargaining Forum clause outlines the objectives and functions of such a forum as well as the proposed participating sectors (automobile manufacturing industry, motor components, vehicle body building, bus and tyre sectors), whilst the Industry Policy Forum records AMEO and NUMSA's commitment to consider and deliberate on the strategic issues impacting on the future of the automotive manufacturing industry in South Africa. The Industry Policy Forum met in 2014 and 2016 (AMEO presentation, 2018).

For a company in the South African automotive industry to continue contributing to the economy, the focus must not only be on maximising its profitability but also on contributing to the global footprint of the organisation. However, as a local company, a sustained focus on wealth creation must also address broader societal challenges, such as labour stability and employment creation (Cossin and Ong, 2016). Therefore, it is essential that companies adopt a longer-term perspective on their investments in foreign countries. Stewardship, with its focus on collaboration and exploring solutions to collective challenges, enables businesses to address societal issues and have a meaningful impact. Additionally, stewardship is described as multiple stakeholders pooling their knowledge, experience, resources and mandates to solve collective challenges which neither can solve individually (Belaire et al., 2011). Stewardship enables stakeholders to broaden their views of their respective roles beyond the contextual lens of individual stakeholder strategies and objectives, to include societal and economic considerations (Cossin, Ong, and Coughlan, 2015). This implies that stakeholders must be aware of the various views and perspectives, as well as the broader expectations of the industry and the organisation.

It requires current stakeholders to think beyond their own interests by considering the interplay between different stakeholder interests and what is necessary for the industry's viability. This mind shift change is reflected in Block's (1997) definition of stewardship, cited by Saltman and Ferroussier-Davis (2000, p. 733) as, "…the willingness to be accountable for the well-being of the larger organisation by operating in service rather than in control of those around

us." Despite the complexity of collective bargaining in the automotive industry, all sectors are covered by bargaining council structures and bargaining agreements. As such, all stakeholder relations in the industry are structured and represented in the bargaining council. This complexity is not only evident between the respective bargaining councils but also within each of them. MIBCO, for instance, represents 14 000 employers and 182 000 employees (MIBCO website), in diverse industries such as component manufacturers, fuel retailers, retail motor, etcetera, spread over five bargaining chapters in the main agreement.

Several articles in the above literature review identified principles that underscore the application of stewardship in addressing multidisciplinary challenges, such as collective bargaining, fostering a sense of shared responsibility, and promoting intergenerational rather than short-term benefits, among others, including the need for multiple partnerships, collaborations, and linkages. In the context of this research, where an institutionalised framework is in place to address challenges in the current collective bargaining agreement, stewardship can help leaders drive sustainable development and growth by balancing short-term and long-term objectives amidst competing interests.

Stewardship is the process by which a firm can create the most value over time through its relationships with both internal and external key stakeholders. To achieve this over the long term, a firm must consider how these relationships may impact its future performance. Critical to the structuring of a broader collective bargaining framework is understanding the roles and responsibilities of key players and how they relate to one another in the context of stewardship.

In summary, Belaire et al. (2011) argue that for the successful implementation of ecosystem stewardship, it is vital that stakeholders understand their respective roles, the complex relationships between stakeholder profiles and processes, and the need to compromise and accept a mutually acceptable resolution of the challenges. Stewardship could provide the framework for implementing the NBF Agreement by offering an approach to help the parties adopt a more holistic view of industrial relations stability, thereby creating economic and societal value over time.

In finding the right balance in the collaboration continuum between government, business, unions, and social partners is essential to construct a stewardship framework. This can be set up through bargaining processes or a government-led legal framework. The government's role is

to set fair rules to create a consistent and predictable framework, promoting collaboration in the best interest of the industry and economy.

In South Africa, bargaining councils exist in various industries, regulating the conditions of employment in specific industries. A bargaining council is formed and established by one or more employment organisations and one or more trade unions, and must comply with the Labour Relations Act 66 of 1995. It must also be registered for a specific industry (Sections 29 and 30, LRA). The powers and functions are regulated in terms of section 28 and include, among others establish, conclude and enforce collective agreements; prevent and resolve labour disputes and ensure compliance with the LRA.

3.4 CONCLUSION

In exploring a collaborative stewardship-based approach in developing a broader collective bargaining framework for the South African automotive industry, the key focus of this chapter was to establish an integrative link between societal corporatism and collaborative stewardship. In doing so, it was essential to demonstrate that societal corporatism and a collaborative stewardship framework for this research are underpinned by a collective responsibility of industry stakeholders to exercise ownership for the long-term viability of the industry, thereby giving effect to collective bargaining agreements. In driving this integrated link, societal corporatism must provide the framework for the execution of stewardship by establishing a collaborative governance structure among industry stakeholders, government, employers, organised labour, and society. This framework commits the stakeholders to exercise a stewardship role driven by their long-term interest in the automotive industry within a cooperative, policy-driven process. Key focus elements of this integrated link are shared responsibility, fostering a shared commitment to industry stability; institutionalised collaboration responding to shared ownership and goals; and a focus on long-term sustainability, accountability, and collective decision-making.

CHAPTER 4: LITERATURE REVIEW – PARADOX THEORY AND INTEGRATIVE THINKING

4.1 PARADOX THEORY

4.1.1 INTRODUCTION

In applying a collaborative stewardship approach in developing a broader collective bargaining framework, many paradoxes will surface in relation to the socio-economic challenges the parties seek to resolve**.** In explaining paradoxes and their impact on effective leadership, Peters (2012) pointed out that alternative solutions do not always follow from each other, and selecting one could negate the other, resulting in a suboptimal solution. Referring to the work of Smith and Lewis (2011), Zhang et al. (2015, p. 540) suggested that a paradox entails "contradictory yet interrelated elements that exist simultaneously and persist over time. Such elements seem logical when considered in isolation, but irrational, inconsistent, and even absurd when juxtaposed". In this context, each party in the negotiating structure has its own views on whether such a structure is sensible and, if so, how it could be structured. The parties' diverse views will create paradoxical circumstances that must be considered when seeking solutions in the industry's best interest. Clarke-Hill et al. (2003) suggest that paradox theory can offer a powerful framework for exploring the impact of plurality and change, thereby contributing to a better understanding of parties' divergent perspectives.

The application of paradox theory in addressing challenges is quite diverse. From exploring mechanisms to manage the increasing threat of natural disasters and potential paradoxes that could emanate from inter-country disaster management organisations' collaborations (Jarzabkowski et al., 2022), addressing the complexity and global interconnectedness of COVID-19 pandemic in the academic environment and how it contributed to a rethinking of the paradox theory (Keller et al., 2021), to exploring the overconfidence of leadership in their ability to embrace paradoxes, successfully avoiding dysfunctional behaviours (Gaim, Clegg and Cunha, 2021). The latter application referred to the Volkswagen emissions scandal, which highlighted how the illusion of embracing paradox can trigger dysfunctional behaviours.

The intention of this study is to explore the paradoxes arising from stakeholder views on collective bargaining, societal corporatism, and stewardship, which will underpin a stewardship model that facilitates the development of broader collective bargaining concepts. This research

encompasses a range of stakeholder perspectives on collective bargaining in the automotive industry, including its challenges and views on how these challenges can be addressed. It is considered that the paradox theory provides a framework to manage conflicts that can arise in these processes.

4.1.2 UNDERSTANDING PARADOX THEORY

Several authors referred to the ever-changing business environment characterised by globalisation, speed of business, mobility, advances in electronic communication and competitiveness, resulting in pressures on organisations to respond, resulting in contradictory demands on internal systems (Clarke-Hill, Li and Davies, 2003; Smith and Lewis, 2011; Zhang et al., 2015; Sundaramurthy and Lewis, 2021). Expanding on the ever-changing business environment, Ozanne et al. (2016) explored paradoxical theory as a guiding framework for collaboration between organisations and policymakers, facilitating organisational responses that enhance their ability to achieve long-term sustainability across people, the environment, and profits.

Paradox studies adopt an alternative approach to environmental tensions, exploring how organisations can simultaneously cope with competing demands. The inevitability of paradoxes is evident in organisational and management studies, as it is inherent in effective organisational function (Clarke-Hill, Li, and Davies, 2003). Smith and Lewis (2011, p. 382) argue for "a dynamic equilibrium model of organising, which suggests that tensions are inherent and persistent and depicts how purposeful and cyclical responses to paradox over time enable sustainability—peak performance in the present that enables success in the future."

Smith and Lewis (2011) defined paradox as contradictory yet interrelated elements that exist simultaneously and persist over time. This definition highlights two components of paradox: first, underlying tensions, that is, elements that seem logical individually but are inconsistent and even absurd when juxtaposed; and second, responses that embrace tensions simultaneously. Clarke-Hill and Davies (2003), referring to the inevitability of paradoxes in organisational systems, define paradox as an apparent contradiction in which contradictory elements operate simultaneously. According to this definition, a key characteristic of a paradox is the simultaneous presence of contradictory or mutually exclusive elements. Dameron and Torset (2014), referring to the definition by Smith and Lewis (2011), observe that there is some confusion between a dilemma and a paradox. In a dilemma situation, there are competing choices that involve weighing the pros and cons of the situation before choosing one option. In contrast,

a paradox is composed of contradictory, yet interrelated elements that exist simultaneously and persist over time (Smith and Lewis, 2011; Dameron and Torset, 2014).

Paradox studies adopt an alternative approach to addressing tensions, exploring how organisations can simultaneously attend to competing demands. Although choosing among competing tensions might aid short-term performance, a paradox perspective argues that long-term sustainability requires continuous efforts to meet multiple, divergent demands (Cameron, 1986; Lewis, 2000). In reflecting how paradox theory can inform practice, increasingly leaders respond to challenges from "either-or to both" thinking, valuing the underlying paradoxes (Lewis and Smith, 2022). Expounding on their reflection, Lewis and Smith (2022) cite the following examples: Barclays advertising campaign in exploring both main street banks and online banking; Yale University marketing the school's approach as both local and global curricular and co-curricular learning; PricewaterhouseCoopers recognising effective leaders as those who can engage in paradoxical leadership applications whilst Deloitte identified navigating paradoxes as a core feature of organisations.

In summary, paradox theory suggests that seemingly contradictory elements, such as innovation and tradition, can coexist and are often interdependent, leading to a more dynamic and resilient outcome than choosing one over the other. Instead of a simple choice, it focuses on navigating these tensions through a "both/and" approach, as these opposing forces can be complementary and essential for long-term success. A key principle is that these contradictory forces are not just temporary problems but are persistent and can be beneficial when managed effectively.

4.1.3 PARADOX THEORY PERSPECTIVES

Changes in the world economy, driven by trends such as globalisation, international manufacturing and distribution, demand for services, complexity in international trade, and competition, have resulted in the organisational environment becoming increasingly dynamic, competitive and complex (Zhang et al., 2015). This has brought about complexity in organisations, exposing leaders to face intensified, contradictory, or seemingly paradoxical challenges. With respect to how leadership respond to these paradoxical challenges, Zhang et al. (2015, p. 538) refer to "paradoxical leadership behaviours" in the way people are being managed, "…which

refers to seemingly competing, yet interrelated, behaviours to meet structural and follower demands simultaneously and over time." Clegg et al. (2002) refer to the inherent paradox in organisations. Organisations encourage free, creative, independent human capital, but on the other hand, the individuals belong to the organisation and are subject to its policies and procedures.

With respect to the structuring of a broader collective bargaining framework, the challenge for stakeholder organisation leaders is how to choose between competing demands of the organisation, which may be short-term, with those of the industry, which will be long-term.

Typically, stakeholder leadership approaches at the bargaining table are driven by mandated demands, which are the product of internal demand-setting processes, a paradox in itself. Often, the negotiation parties' demand lists reflect specific worker or employer challenges, with very little focus on industry challenges (Anstey, 2006; Botha, 2015; Finnemore and Koekemoer, 2018). As such, the focus is on short-term challenges, including wages and substantive working conditions, with little regard for the industry's long-term viability. The challenge for leadership is to accept and harmonise paradoxes simultaneously. This can be achieved in pre-bargaining conferences, where the parties can discuss and explore the strategic challenges of the industry, thereby developing an understanding of how their respective demands might impact these challenges.

Exploring the tensions between control and collaboration in a corporate governance framework, Sundaramurthy and Lewis (2021) argue that the paradoxical tensions stem from conflicts between opposing and interwoven elements. Referring to Lewis' (2003) framework, Sundaramurthy and Lewis (2021) explored the following underlying tensions:

- Understanding the underlying tensions between control and collaborative approaches by analysing differences and similarities using agency and stewardship theories.
- Integrate insights from organisation behaviour, strategy and governance and elaborate on cognitive behaviour and collaboration, which inhibit change when one approach is overemphasised.

Regarding the application of agency and stewardship theories to understand the underlying tensions between control and collaborative approaches, several authors have commented on

this perspective. Chen (1975) expounded on the conceptual relationship between competition and cooperation. This issue is particularly relevant to collective bargaining in the automotive industry. The employers' representative structure comprises global companies that are competitors in the industry, but must overcome individual company positions to develop a consensus position during negotiations. This perspective is referred to as a trans paradox, in which opposites may be independent in nature but, when combined, form a unified approach. Davis et al. (1997) examined the potential conflict in organisations between managers and principals who report directly to the board. In large organisations, senior managers, depending on their psychological motivation, may act as agents, which could bring about tensions in their reporting relationships with their principals, who are driving shareholder interests.

In the best interest of the organisation, the different leadership levels should choose a stewardship relationship. Saltman et al. (2000) expanded on the application of stewardship as a tool to reconfigure state authority in the US health sector, in the interest of achieving the World Health Report 2000's proposal for policy alignment. They emphasised that the ultimate objective of the reconfiguration is crucial. If the focus is on a cost-cutting exercise, then an agency approach is the most appropriate; however, if the desired outcome of the reconfiguration is good governance in the interest of serving the public, then stewardship offers the more suitable approach. They argued that the concept of stewardship holds substantial promise if adequately developed and effectively implemented. Belaire et al. (2011) commented on the contemporary debate that environmentally sustainable societies is often a confrontational struggle between “save it so we can use it” and all species are of equal worth and must be preserved” perspectives. They argue “that fuller consideration of the complex relationships within humankind and between humans and other species leads to a more holistic ecological ethic than one typically witnesses in the environmentalism of the contemporary industrial world” (Belaire et al., 2011, p. 26).

Important characteristics of agency leaders are that they are self-serving, risk-averse and intrinsically motivated, which might negatively impact the wealth creation of the organisation (Cossin, Ong and Coughlan, 2015). Controls put in place will focus on regulating the behaviour and minimising the impact on the organisation. To minimise their risk, shareholders might respond with compensation based on the company's profitability. Stewards, on the other hand, align with the organisation's strategy, adopt a collaborative leadership approach, and strive to enhance the organisation's wealth. They identify with the firm and the empowerment of subordinates.

Summarising the underlying tensions, the control approach focuses on discipline, and the collaborative approach stresses service, fosters trust and promotes equity. The contrasting approaches summarise the tensions between control and collaboration.

Conflict is inherent in organisations, and the challenge is how leadership responds to it. Peters and Waterman's (1995) analysis of corporate America also suggests that today's excellent firms possess a variety of paradoxical characteristics. Moreover, some authors argue that paradox can provide a powerful framework for examining the impacts of plurality and change, thereby aiding understanding of divergent perspectives (Lewis, 2000; Stacey, 2000). Lewis (2000) also advocates using paradox as a thought-provoking tool or perspective.

In summary, paradox theory views contradictory elements not as problems to be solved, but as persistent, interdependent dualities that must be managed. In business, this means organisations must navigate tensions like innovation versus tradition or efficiency versus flexibility to foster resilience and adaptability.

4.1.4 APPLICATIONS OF PARADOX THEORY

Reflecting on the wide scope of the application of paradox theory, Smith and Lewis (2011, p. 308) conclude, "Today, as globalization, innovation, hyper-competition, and social demands create more dynamic and intricate environments, paradox becomes a critical theoretical lens to understand and to lead contemporary organisations."

In applying paradox theory to a culture change effort, paradoxical circumstances are both common and have predictable impacts, which could either stall or stop change efforts (Peters, 2012). Change efforts are often complex, giving rise to interesting challenges which create pressure on leading the change effort. Peters (2012) describes how paradoxes impact an organisation's change effort. Peters (2012) describes an organisation that is eager to implement a corporate culture change in the face of business pressure challenges. With the business motivation for the culture change project signed off and the leadership committed to the process, the company faced some serious business challenges which would not only impact the culture change program but also the viability of the organisation. The business challenge represents both an opportunity and a risk. As a high-tech government contractor, an opportunity arose to participate in a major government competition. Losing the competition might result in a scaling

down of the company's activities, with a possible retrenchment of the technical and skilled workforce, reducing their ability to compete in other high-tech competitions.

Regarding the application of paradox theory in developing a stewardship-based, broader collective bargaining approach, it is essential to note that paradox is inherent in any change effort. The more complex the stakeholder structure, the more challenging it becomes to identify and resolve paradoxes. It is also important to note that paradoxes emanate not only from within the organisation but also within individuals and departments. Therefore, paradoxical challenges are likely to arise within each of the representative structures, including bargaining councils, as well as in the change process of convincing parties to explore a broader collective bargaining framework.

Harris (1980) describes the application of paradox theory in an analysis of communications patterns among normally functioning married couples. With reference to the assertion by Watzlawick and Weakland (1977) who concluded that "…social reality is created through processes of communication", Harris (1980, p. 1) argues that "…communication processes are inherently problematic, it is filled with inaccuracies, disagreements, knots, paradoxes, and so forth." These imperfections are shared in our communication engagements. Healthy families and good communication are supported by certain skills that are necessary for managing successful, self-regulating environments (Harris, 1980). Harris' study (1980, p. 1) seeks to "…describe the logic by which the family moved through their social reality and to observe the communication patterns by which they created and maintained this logic". The research procedure adopted consisted of three stages: (1) selection of subjects, (2) individual and joint interviews, and (3) written self-reports, role playing and self-critique.

Contextualising the study within the broader collective bargaining exploration, the input could be helpful in strategizing the structure and content of the interactive dialogue sessions – a process to engage the leadership of the representative structures in reviewing the paradoxical pairs. During this process, parties will collectively reflect on the paradoxes screened from individual interviews. The following summary reflects recommendations and observations (Harris, 1980):

- Undesirable behaviours are inherent in people and manifest themselves in unchangeable personality flaws. Paradoxes produced by these beliefs could be addressed through dissociation, withdrawal, antagonism, or a willingness to collaborate.

- Confrontation may produce other outcomes other than having to manage the conflict, such as re-commitment to the process, identification of contentious or consent issues, etcetera.
- When tension becomes intolerable, it is obligatory to confront the conflict in order to relieve tensions, eliminate undesirable behaviours and reinforce commitments to the relationship.

In summary, paradox theory has applications in organisational management, particularly in navigating contradictions like innovation versus tradition and competing versus collaborating. It is used in fields such as human resource management to balance tensions, in team creativity to encourage integration of conflicting ideas, and in sustainability to better understand complex environmental and social goals. This context supports the application of this framework in developing a stewardship-based, broader collective bargaining framework for the automotive industry.

4.1.5 SUMMARY OF PARADOX THEORY AND APPLICATIONS

Several authors have commented that, as globalisation, innovation, hyper-competition, and social demands create more dynamic and intricate environments, paradox becomes a critical theoretical lens to understand and to lead contemporary organisations (Harris, 1980; Smith and Lewis, 2011b; Zhang et al., 2015; Cornelius and Lewis, 2021; Sundaramurthy and Lewis, 2021).

Paradox studies adopt an alternative approach to tensions, exploring how organisations can attend to competing demands simultaneously (Smith and Lewis, 2011b). Although choosing among competing tensions might aid short-term performance, a paradox perspective argues that long-term sustainability requires continuous efforts to meet multiple, divergent demands (Cameron, 1986; Lewis, 2000). Tensions are inherent and persistent, depicting how purposeful and cyclical responses to paradox over time enable sustainability—achieving peak performance in the present that enables success in the future.

According to Demb and Neubauer (1992), the increasing environmental ambiguity and turbulence require a more paradoxical approach to governance—one that balances the simultaneous needs for control and collaboration (Cornelius and Lewis, 2021).

Paradoxical tensions spark defences that may inhibit change and fuel counterproductive reinforcing cycles (Lewis, 2000). Defences denote cognitive, behavioural, and organisational responses that protect the ego, preventing actors or groups from confronting the limits of current understandings and practices.

The context in which social relations and economic exchange are embedded can induce self-aggrandisement or trust, individualism or collectivism, competition or cooperation among participants (Sundaramurthy and Lewis, 2021). Economic progress requires both kinds of behaviours in each set of alternatives, not just one or the other (Ghoshal & Moran, 1980).

In the context of developing a stewardship-based, broader collective bargaining framework for the South African automotive industry, the researcher adopted a qualitative research paradigm, as it was viewed as the best method for developing paradoxical pairs that will serve as input to the interactive dialogues and integrative analysis methodology. It is considered the best practical and effective procedure for conducting inductive thematic analysis that meets the trustworthiness criteria (Denzin and Lincoln, 2011; Nowell et al., 2017). The thematic analysis is presented as a linear, multi-phased model that is an interactive and reflective process, which allows for a constant review of the data and analysis(Braun and Clarke, 2006).

In deciding to use this approach, several articles covering the resolution of paradoxes were considered (Boyatzis, 1998; Jamal, 2004a; Buckley, 2012; Fallon, Swiss and Veteran, 2012; Nowell et al., 2017; Sugiyama et al., 2018). The methods applied in resolving paradoxes varied from field studies applying statistical analyses(Sugiyama et al., 2018), qualitative research applying coding(Jamal, 2004a), cross-sectional time series applying a random-effects model(Fallon, Swiss and Veteran, 2012) and immersion(Buckley, 2012). In resolving the paradox of an "interest-based, multi-stakeholder approach to manage conflict" in determining environmentally sensitive tourism destinations, based on direct observation of stakeholder meetings, Jamal (2004) used codes to develop themes and categories, seeking common ground among stakeholders. This approach facilitated the application of inductive thematic analysis to develop codes and themes, as well as paradoxical statements. Applying the methodologies of Boyatzis (1998), Braun and Clarke (2006) and Nowell et al. (2017) to devise a model to develop codes and themes inductively, which ultimately informed the development of paradoxical statements.

In considering the contribution of paradox theory to management studies, its application to collective bargaining and interorganisational problem solving, the following summary is provided:

Considering the contribution to management studies, paradox theory in management suggests that organisations can thrive by embracing and navigating, rather than resolving, seemingly contradictory demands. It proposes that tensions, such as innovation versus efficiency or competition versus collaboration, are persistent and interdependent. Instead of choosing one side, managers can find creative novelty and resilience by learning to manage these opposing forces simultaneously.

With respect to its application to collective bargaining, paradox theory views opposing forces, like the need for stability and the need for change, as contradictory yet interrelated elements that are a normal part of the process. It suggests that these tensions aren't problems to be solved, but dynamic dualities that must be managed to achieve sustainability, such as a union and management trying to find a balance between a firm's need for productivity and workers' demands for better wages.

Paradox theory views interorganisational problem-solving as a process of managing contradictory yet interdependent demands, rather than a dilemma to be resolved by choosing one option. It suggests that instead of eliminating tensions, organisations should acknowledge them and find ways to sustain both sides, such as embracing complexity to create new opportunities while maintaining efficiency. Effective management can involve strategic separation of tensions or finding a synthesis that accommodates both sides simultaneously.

4.2 INTEGRATIVE THINKING

4.2.1 INTRODUCTION

Concerning broader collective bargaining, each of the parties in the negotiating structures has its views and expectations on how such a framework could be structured. The challenge will be how to harness this diversity and complexity in empowering the bargaining representative organisations to think beyond short-term interests and focus more collaboratively on the long-term viability of the industry. Reflecting on the demise of the Australian automotive industry, Clibborn et al., (2016) pointed out that the reasons for the demise are complex and intertwined.

It appears that the need for better collaboration between stakeholders is advocated, as recommended in an interim investigation report on the demise, which urges the government to work with stakeholders to develop policies that sustain an internationally competitive automotive industry in Australia (The Senate of Australia, 2015).

Martin (2007) proposes integrative thinking as a mechanism to embrace the complexity of understanding paradoxes in diverse relationship challenges, thereby creating optimum solutions**.** Karakas and Kavas (2008, p. 8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." This concept explores the tensions between conflicting ideas to generate a best-fit idea that incorporates elements of the others but is superior to them.

Benson and Dresdow (2009) reflected that the modern-day socio-political environment presents complex challenges for organisations, affecting their decision-making processes. These complexities require organisations to investigate diverse facts, ideas, developments, connections, etcetera., to solve problems and take advantage of new opportunities. As the world economy shifts away from manufacturing to the service and creative industries, organisations with the ability to identify and solve complex challenges, think creatively about the information, work effectively in teams, and communicate clearly across all aspects of the challenges will have an advantage (Schwartz, 2016). Martin (2007) refers to this process as integrative thinking, reflecting how great leaders resist quick, certain solutions and instead look beyond obvious considerations to generate wealth and profitable solutions for the business.

This research will explore how integrative thinking, supported by stewardship and paradox theory, can be applied to the development of a stewardship-based broader collective bargaining concept for the South African automotive industry.

4.2.2 OVERVIEW OF INTEGRATIVE THINKING

4.2.2.1 CONTEXT AND DEFINITION OF INTEGRATIVE THINKING

Reflecting on today's ever-changing, challenging, and complex global economy's pressures on organisations, their leaders, and their employees, Brand et al. (2019) argued that an organisation's ability to master change is critical for its long-term economic welfare, health, and sustainable work environment. To remain viable in this complex environment, many industries today must rethink how they operate and organise (Lee et al., 2012). External factors, such as technological development, government regulations, changing customer demands, and increased competition, are often cited as antecedents to transformational change (Lant et al., 1992; Lee et al., 2012; Pettigrew, 1987). Reflecting on this, Martin and Austen (1999) argue that in this climate of constant change and relentless competition, the key job of a leader is to make robust choices.

Schwartz (2016) argues that the ability to identify and solve complex problems lies not only with corporate leaders and employees, but also that these skills be developed among graduates. Frustrated by his students having to repeat assignments six or seven times, Jason Watt, a teacher at Norseman Junior Middle School, Canada, developed tools to impart problem-solving and critical thinking skills to learners, which were based on training received on integrative thinking from the University of Toronto's Rotman School of Management (Schwartz, 2016). A spin-off of the training program is that teachers in the Toronto area are being trained on how integrative thinking can build critical thinking in students from a young age.

Integrative thinking is broadly defined as a process of looking for solutions through the tensions inherent in different viewpoints (Schwartz, 2016). Martin (2020, p. 1) defines integrative thinking as "the ability to face constructively the tension of opposing ideas and, instead of choosing one at the expense of the other, generate a creative resolution of the tension in the form of a new idea that contains elements of the opposing ideas but is superior to each." In outlining how integrative thinking works, Martin (2020) encourages openness to learning from others' ideas, even ones that conflict with our own. With a clearer perspective, problem solvers explore possibilities and iterate on prototype solutions. Unexpected outcomes can be uncomfortable; new ideas can seem like they could "never work."

Supporting the narrative that integrative thinking is not just for organisational effectiveness and efficiency, Ortega et al. (2017) argue that engineering graduates are expected to address complex global challenges, which require an ability to assimilate insights and ideas from multiple perspectives and disciplines. This view is captured in Ortega et al.'s (2017) definition of

integrative thinking as the ability to assimilate insights and ideas from multiple perspectives and disciplines. Encouraging the inclusion of integrated thinking in engineering graduates' programmes in preparation for the world of work, Ortega et al. (2017) reflect on the finding of Rogers and Freuler (2015) that a majority of engineering graduates are ill-equipped for the type of jobs society demands. As a result, employers have to retrain graduates in communication, problem-solving, and adaptability skills, which graduates should have acquired during their engineering studies. Ortega et al. (2017) conclude that integrative thinking skills enable students to adapt to various environments and add value to the viability of their employers.

4.2.2.2 PERSPECTIVES AND APPLICATION

Karakas and Kavas (2009) share the views of several authors on integrative thinking, noting that the world is becoming increasingly knowledge-intensive, fast-paced, diverse, chaotic, interconnected, and multicultural. In such a world, we need new ways of thinking, learning, and development in organisations. Furthermore, there is a demand for a new skill set that includes interdisciplinary thinking, engagement, flexibility, individual customisation, collaboration, and inspiration, which are critical factors for the development of creative and integrative thinking skills in managers (Martin and Austen, 1999; Martin, 2007; Karakas and Kavas, 2008).

Successful business leaders build their integrative skills to achieve organisational success by developing a unique ability to transform messy outcomes to understand and act in an increasingly turbulent environment (Martin and Austen, 1999; Karakas and Kavas, 2008; Ortega, Lagoudas and Froyd, 2017). These business leaders are able to think beyond the boundaries of a single discipline or event to see the bigger picture. Typically, such leaders are able to integrate knowledge from seemingly desperate situations to make sense of the challenging environment (Martin, 2007).

Karakas and Kavas (2009) simplified the definition of integrative thinking, suggesting that it necessitates a high tolerance for change, innovation, openness, flexibility, and chaos, as well as creative brainstorming. Cameron et al. (2003) refer to a new paradigm for managerial practice, known as positive organisational scholarship. Management's excellence is principally connected to enabling/creating an organisational context that empowers human capability and unlocks the positive and collaborative strength of communities. Benson and Dresdow (2009) suggest that successful decision-making in complex situations requires the individual to explore the integrative aspects by examining opportunities that facilitate successful integration

across knowledge and interactional domains, as well as in decision-making. Martin (2007) defines complex situations as situations where there are no right or wrong answers and where the choices are not either-or, but require a thinking that integrates two or more conflicting ideas into constructive tension. Integrative thinking provides a valuable tool to facilitate this process.

Referring to the challenging modern-day environment of constant change and competition, leaders are required to make robust decisions, often under time pressure. Such an environment is loaded with tensions, which by its nature requires leaders to make decisions (Martin and Austen, 1999). These situations typically have a vast array of interrelated elements and consequences. Addressing one facet of the puzzle means others will be impacted. This interrelatedness makes it very difficult to break down the puzzle into small, easily manageable parts and solve it sequentially.

Hosting renowned CEOs and thought leaders over many years, Martin (2007) identified patterns in their thought processes and the actions they took. After studying the input of these leaders, Martin (2007) developed a four-stage model that reflects the process of thinking, making decisions, and how the steps are interrelated. The four stages are salience, causality, architecture and resolution. The dynamics of the stages are summarised below (Martin and Austen, 1999, p. 5; Benson and Dresdow, 2009):

- Salience: Arriving at a choice by considering a set of features deemed salient, most notable. It deals with what we choose to consider and what not, guided by what features are relevant to the decision.
- Causality: Creating a mental model of the causal relationships among those features. Making sense of what is observed and identifying relations believed to be evident between the various elements of the identified relationships.
- Architecture: All the causal relationships are arranged into an architecture intended to produce a specific outcome. This step reflects on the findings of the first two steps.
- Resolution: It is about reaching a resolution of the problem being investigated. Is our decision based on sound reasoning?

The stages of Martin's (2005, 2007) model reflect the decision-making process and do not depend on the thought processes of the people involved. However, Benson and Dresdow (2009)

noted that an integrative thinker's approach to each of these steps is highly specific. They made the following observations (Benson and Dresdow, 2009):

- In considering the salient factors, there is no limit to the number of factors, but the applicability and interrelatedness of the factors must be considered.
- Integrative thinkers welcome the complexity of looking for relevance in multiple, less obvious factors.
- Causality is multi-directional, and the decision-maker must question the validity of the factors being used.
- In the architecture stage, the decision-maker must look at the systemic level to visualise the entire scope and avoid assigning subsections of the issue to different people
- Central to this process is that the decision-maker must understand how the factors fit together and influence one another.

Concerning the complexity of bringing together diverse stakeholders to structure a broader collective bargaining concept, Martin and Austen (1999) caution that it is also critical to consider the impact of "life journeys" of the respective representative organisations and the individuals representing them. Martin (2007) refers to mental models that each of us possesses, which impact our thinking and how we make sense of situations. These mental models, reflecting our "journey in life", inform our personal knowledge system, which influences our approach to problem-solving (Martin, 2007a). The personal knowledge system comprises three elements: your stance, a response to who you are and what you are trying to achieve; tools and models that organise the individual's perception of the environment; and lastly, what experiences the individual builds in his repertoire of sensitivities and skills (Martin and Austen, 1999). They point out that these three aspects are interdependent in the sense that our stance influences and guides the tools we use, which in turn influence and guide the experiences we build up, which in turn build our repertoire of skills. In applying this model, the researcher must carefully consider the "journey in life" each participant and organisation brings to the collaborative process and must consider each response to the particular participant's "journey in life" lens.

In summary, brilliant leaders excel at integrative thinking. They can hold two opposing ideas in their minds at once. Then, rather than settling for choice A or B, they forge an innovative "third way" that contains elements of both but improves on each.

4.2.3 INTERACTIVE DIALOGUES

The section on integrative thinking emphasised that the responsibility for identifying and solving complex problems lies with corporate leaders. It provided a framework for systematically steering culture change processes to achieve the desired outcomes. However, the process still requires a tool to engage stakeholders in a structured, collaborative manner. Maccoby (1996) proposed interactive dialogue as a process to guide interaction between stakeholders, exploring an interchange and discussion of ideas, especially when open and frank discussions are required, in order to seek mutual understanding or harmony (Maccoby, 1996). Interactive dialogue is a way of engaging leadership in leading change by guiding them to expose different interpretations of organisational attributes and arrive at a better understanding of what needs to be done (Maccoby, 1996). It has as its goal discovering the different meanings people give to organisational attributes, arriving at a better understanding of what needs to be done. Maccoby (1996) points out that the approach is consensus-seeking, aiming to generate a common understanding or organisational strategy and priorities, communicate reasons for change, and engage people to make it happen. However, this requires mutuality, reciprocity, and equality in terms of knowledge.

4.2.4 CONCLUSION

Martin and Austen (1999) defined integrative thinking as a process of creatively resolving the tension between two ideas by generating a new one that contains elements of both but is superior to either. The literature review of integrative thinking not only outlines various similar definitions but also explains how integrative thinking can be applied to the development of a broader collective concept. Integrative thinking has inherent tensions that are addressed through various instruments. However, there is a strong link between stewardship, paradox theory and integrative thinking. Peters (2012) argues that there is a need to examine the thinking process surrounding paradox to understand how people move from either/or to both/and thinking (Peters, 2012). Paradox is defined as alternatives that do not follow from each other,

where both alternatives appear necessary, but choosing one acts to negate the other (Peters, 2012). Davis et al. (1997) and Cossin (2015) expound on the notion that the origins of stewardship imply accountability, long-term orientation, and assuming responsibility for the preservation of resources over time. They describe stewardship as an inclusive and holistic approach to conflict management, providing a strong focus on leadership to find equitable solutions that accommodate competing interests.

The relevance of the concepts of stewardship, paradox theory and integrative thinking to the development of a framework for developing a broader bargaining concept has been outlined in this chapter. The earlier comparative research presented on the automotive industry internationally, combined with current global disruptions and economic uncertainties, exposes the vulnerabilities of the South African industry. To understand the challenges facing the local automotive industry, leaders across the political spectrum, organised business and labour, and societal corporatist structures will need to find ways to minimise the impact on the local economy and potential job losses. Against this background, this study examines the potential of a broader collective bargaining arrangement as a contributor to the industry's viability.

CHAPTER 5: RESEARCH METHODOLOGY

5.1 INTRODUCTION

This chapter outlines the methodology, presentation, and justification of the design, and describes the research procedure followed, which underpins the quest to answer the research question and address the research objectives.

The study aimed to address the following research problem statement: "Through applying a process of integrative thinking that seeks to consider the paradoxes emanating from stakeholder reviews of current collective mechanisms, explore a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry and what arrangements will support it".

The following objectives will support the aim:

- Develop a framework to describe historic and current collective bargaining arrangements in the South African automotive industry
- Analyse the process of integrative thinking that will generate alternative solutions to the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant-level bargaining framework. This will inform a stewardship-based approach to structure proposed models for broader collective bargaining

The intention of the study was to apply sequentially paradox theory, interactive dialogues and integrative thinking as a mechanism to explore all the paradoxes emanating from the stakeholder reviews of collective bargaining, social corporatism and stewardship. This will form the platform to structure a stewardship model that will underpin the development of a broader collective bargaining, giving effect to what is envisioned by the parties in the 2016 NBF and MEIBC Agreements. Although no research could be found that has applied integrative thinking in the collective bargaining context, the concept was applied to dealing with challenges emanating from disciplines such as organisational development, strategic managerial decision-

making and change management (Cossin, Ong and Coughlan, 2019; Donaldson and Davis, 2015; Hocking et al, 2001).

In this context, the aim of this chapter is to identify, describe, and discuss the methodology and procedures followed in this research, in response to the research question and objectives. The chapter addressed the following objectives:

- Identify and present the research design that was applied, aimed at developing an understanding of the various research methodologies.
- Describe the nature of the research paradigm that informed and guided the research.
- Although included in the research paradigm, provide an overview of the ontological, epistemological and methodological approaches and relevance to the research.
- Describe the qualitative research method applied, as well as quality considerations to ensure the rigour of the research.
- Provide an overview of the various types of interviews and how they will promote the sharing of experiences by the interviewees, allowing for a structured interpretation and analysis by the researcher.
- Present an overview of the data analysis, including the selection and application of thematic analysis.

5.2 OVERVIEW OF THE RESEARCH DESIGN

Several researchers commented that inexperienced researchers are often overwhelmed by a host of research methodologies, making it difficult to select an appropriate research design for a particular study (Groenewald, 2004; Cresswell, 2007; Maxwell, 2013; Kivunja and Kuyini, 2017). Some of the complexities of research methodology selection include understanding the vast range of methodologies described and explored in a thorough study of methodologies.

Pursuing research begins with the selection of a topic, identifying the problem or area of interest, and constructing the paradigm (Creswell, 2007; Mason, 2010). Groenewald (2004, p.44) defined a paradigm as the "patterning of the thinking of a person; it is a principal example among examples, an exemplar or model to follow according to which design actions are taken." (Groenewald, 2004). Kivunja and Kuyini (2017, p. 26) commented that paradigms "provide beliefs and dictates, which influenced what should be studied, how it should be studied, and

how the results of the study should be interpreted." Ponterotto (2005) and Taylor and Medina (2013) referred to the research paradigm as a comprehensive belief system about the social world, providing a philosophical and conceptual framework that guides research. The interpretive paradigm is applicable to this research as it aims to understand the cultural aspects of collective bargaining and stakeholder views.

The research method adopted is an exploratory case study. Referring to the description of this research method by others, such as Yin (1994), Stake (1995) and Feagan, Orum & Sjoberg (1990); Tellis (1997) highlighted that an exploratory case study approach in research strives towards a comprehensive understanding of the interrelated activities and views of stakeholders and is multi-perspectival in that the researcher considers not just the voice and perspective of the parties involved in the challenge, but also the relevant groups of actors and the interaction between them.

Qualitative research is a valued research paradigm and is increasingly recognised; however, it is imperative that it be conducted rigorously and methodically to yield meaningful and useful results (Nowell et al., 2017). The complexity surrounding qualitative research requires methodological procedures. Thematic analysis is a relevant qualitative research method. Sandelowski (2000) pointed out that qualitative research, aimed at generating knowledge grounded in human experience, has established a distinctive place in research literature and therefore must be supported by a rigorous and methodical analysis (Sandelowski, 2000).

Citing Thorne (2008), Nowell et al. (2017) argued that data analysis is the most complex phase of quality research and, therefore, must be conducted in a systematic manner in order for it to be understood by others. Many researchers argue that it is essential to be clear in the data analysis about what is being done and why, and to include a clear description of the analysis and methods. It is critical for researchers to realise that, when conducting data analysis, they become the instruments of the analysis, facilitating decisions about coding, theming, decontextualising, and recontextualising the data (Nowell et al., 2017). Thus, the individual researcher is responsible for ensuring the rigour and trustworthiness of the data analysis processes by recording, systematising, and disclosing the methods of analysis (Attride-Stirling, 2001). This step mapped the links between the concepts considered salient to identify critical relationships and choices under consideration. The causality must demonstrate the link between interactive dialogue themes, processes, people, environmental factors, events, and other factors that might

impact the development of a restructured collective bargaining framework, either positively or negatively. In essence, trying to make sense of what is presented.

5.3 RESEARCH PARADIGMS

In introducing the research paradigm, it is worth noting Taylor and Medina's (2013) reference to the "paradigm wars" in research, which emanate from a debate among researchers over which paradigm is superior, thereby detracting from the focus on promoting research quality. Over time, this has given way to a "paradigm dialogue" whereby individual proponents came to accept the respective differences and resolved that every research paradigm is of equal importance (Taylor and Medina, 2013). It seemed as if researchers agreed that no research paradigm is superior, but each has a specific purpose in providing a distinct means of making a unique contribution to knowledge.

In defining a paradigm, Ponterotto (2005, p.127) quoted Filstead (1979), who referred to a paradigm as a "set of interrelated assumptions about the social world which provides a philosophical and conceptual framework for the organised study of that world." Taylor and Medina (2013, p. 1) cited Willis (2007), who explained that "A paradigm is thus a comprehensive belief system, world view, or framework that guides research and practice in a field."

Taylor and Medina (2013) suggested a paradigm comprises a view of the nature of reality (i.e., ontology) whether, it is external or internal to the knower; a related view of the type of knowledge that can be generated and standards for justifying it (i.e., epistemology); and a disciplined approach to generating that knowledge (i.e., methodology). Denzin & Lincoln (2000) advanced that the paradigm selected guides the researcher in philosophical assumptions about the research and in the selection of tools, instruments, participants, and methods used in the study. Research paradigms define for researchers what research is all about and what falls within and outside the limits of legitimate research (Guba and Lincoln, 1994).

Guba and Lincoln (1994) suggested that there were four paradigms competing as a paradigm of choice in informing and guiding research, especially qualitative research. The paradigms include positivism, post-positivism, critical theory, and related ideological positions, as well as constructivism. From their perspective, both qualitative and quantitative methods may be used

appropriately with any research paradigm. However, there has been a growing interest in alternative paradigms, stimulated by a growing dissatisfaction with the overemphasis on quantitative methods (Guba, 1981; Guba and Lincoln, 1994; Anney, 2015). This dissatisfaction has led to a renewed interest in qualitative approaches, prompting a review of the metaphysical assumptions undergirding conventional paradigms. Taylor & Medina (2013) referred to positivist and post-positivist paradigms as traditional paradigms, and interpretive, critical, post-modern, and multi-paradigmatic paradigms as relatively new paradigms.

Table 5.1: Overview of Frequently used Paradigms (Guba and Lincoln, 1994; Ponterotto, 2005; Taylor and Medina, 2013):

Positivist	Post-Positivist	Constructivist-Interpretivist	Critical
Strives to investigate, confirm and predict patterns of behaviour (Taylor and Medina, 2013). This paradigm primarily involves quantitative methodology, where the researcher is positioned externally to the research site, serving as the controller of the research process.	A milder form of positivism that follows the same principles but allows more interaction between the researcher and his/her research participants (Willis, 2007). It aims to produce objective and generalizable knowledge about social patterns. Both positivism and post-positivism serve as the primary foundation and anchor for quantitative research	The focus is primarily on understanding and accounting for the meaning and interpretation of human experiences and actions (Guba and Lincoln, 1994; Bitsch, 2005). It describes how a group's meaning is generated and sustained, resulting in detailed contextual information and limited abstraction (Fossey et al., 2002)	Its primary purpose is to identify, contest and help resolve 'gross power imbalances' in society which fuel ethically questionable profit-making activities that contribute to systemic inequalities and injustices (Taylor and Medina, 2013).

There are numerous paradigms used to guide research, and authors incorporate different paradigmatic schemas to conceptualise and classify their research (Guba and Lincoln, 1994; Ponterotto, 2005). In identifying the most appropriate paradigm for this research, the following overview of paradigms was considered, followed by an unpacking of the selected paradigm.

For researchers, it is essential to understand what their research is about and what falls within and outside the limits of legitimate research (Guba and Lincoln, 1994). The fundamental questions about a paradigm are interconnected in such a way that the response given to any one of them, taken in any order, constrains how the other may be answered. These responses define research paradigms. Reflecting on the article of Guba and Lincoln (1994), Guba (1981, p. 108) documented the following questions:

- The ontological question: What is the form and nature of reality, and therefore, what is there that can be known from it? Only questions relating to the nature of reality and action are to be considered.
- The epistemological question: What is the nature of the relationship between knower and would-be knower, and what can be known? Due to the interconnectedness of the questions, the answer to this question is constrained by the answer already given to the ontological question.
- The methodological question: How can the researcher go about investigating whatever he or she believes can be known? The researcher is constrained by answers already given to the first two questions; that is, not just any methodology is appropriate.

5.3.1 THE RESEARCH PARADIGM OF THIS STUDY

The research investigation adopted the constructivist-interpretivist paradigm. This approach enabled the researcher to study the ordinary "life world" of the participants, examining how they experienced their collective bargaining world, what it was like for them, and how they best understood their experiences. Fossey et al. (2002) referred to this approach as acknowledging that a person's "life world" is a social, cultural and historical product, as well as a pole of individual subjectivity. In addition, this approach to data analysis addressed unique themes of meaning across the data (Tesch, 1990). Taylor and Medina (2013) argued that the epistemology of this paradigm is intersubjective knowledge construction. Interpretive knowledge on

the topic is ascertained through a process of interaction with the participants who are experienced in the topic domain.

A distinguishing feature of constructivism-interpretivism is the pivotal role the researcher-participant interaction plays in the investigation, as the researcher and the participants jointly create findings from their respective interactive dialogue and interpretation. Supporters of constructivism-interpretivism emphasise the goal of understanding the "lived experiences" from the point of view of those who live them day-to-day. The participants selected in this research were all involved in collective bargaining in the respective sectors of the automotive industry. Their involvement in collective bargaining was not restricted to their respective sector, but extended to other sectors as they represent their constituencies in multiple bargaining structures. Considering the "lived experiences", Ponterotto (2005) referred to Schwendt (1994, 2000), who expressed a view that these experiences may be outside the immediate awareness of the individual, but of value to the object of the investigation.

Mackenzie and Knipe (2005) noted that the constructivist-interpretivist researcher tended to rely on the participants' view of the situation being studied, recognising the impact of their own background and experiences on the study. In this study, the researcher not only relied on the participants' experiences and views on collective bargaining but also recognised that their own background and experiences in collective bargaining, gained over many years, would have shaped their interactions with the research participants.

Regarding the quality standards that regulate the constructivist-interpretivist paradigm, Taylor and Medina (2013) advise that research knowledge is quite diverse. Standards for trustworthiness and authenticity proposed credibility (an indication of prolonged immersion in the field), dependability (assessment of researcher engagement), transferability (comparison of the researcher's own social context with that of the research), and confirmability (tracing the research data to the source) (Guba and Lincoln, 1994). With respect to authenticity, the focus is on the ethics of the researcher-participant relationship, with a particular emphasis on fairness. That is, are the participants represented fairly?

Regarding the philosophical foundations of research paradigms, this overview highlights the anchors relevant to the constructivist-interpretivist approach.

Firstly, with respect to ontology, Crabtree and Muller (2022) and Ponterotto (2005) noted that it concerns the nature of reality and being, and addresses questions such as: What is the form and nature of reality, and what can be known about it? Constructivists-interpretivists are of the view that there exist multiple constructed realities, rather than a single true reality (Ponterotto, 2005). This reality is subjective and is influenced by the nature of the participants' situation, notably the participants' experience and perceptions, social environment, and the interaction between the participant and the researcher. Considering this research, each participant had their own reality of collective bargaining in their respective sector, shaped by their representative experiences and views on what is best for the industry, concerns about broader collective bargaining, and perceptions about the future of collective bargaining and the automotive industry. Although eight participants were interviewed, they represented multiple stakeholders in the industry and contributed diverse views on the phenomenon, resulting in multiple realities.

Secondly, epistemology covered the relationship between the research participants ("knower") and the researcher ("would-be knower") (Ponterotto, 2005). Crabtree and Miller (2022) referred to this as the knowledge of that reality. Constructivists-interpretivists adopt a transactional and subjectivist approach that suggests that reality is socially constructed and, therefore, the interaction between researcher and participant is central to capturing and describing the "lived experience" of the participant. Considering this research, the researcher engaged the participants on average twice after the formal interview, ensuring that the "lived experience" is captured correctly. As a result, a deeper interaction and dialogue between participant and researcher occurred, developing deeper insights into the participants' "lived experience".

Thirdly, concerning methodology, Crabtree and Miller (2022) explained that it refers to the particular ways of investigating reality, whereas Ponterotto (2005) simply refers to it as the process and procedures of research. Referring to Lincoln and Guba (1985), Ponterotto (2005) argued that for the constructivist-interpretivist methodology, the central positioning is driven by the researcher-participant interaction and the longer periods spent in the participants' world. The constructivist-interpretivist is often immersed in the community and day-to-day experiences of the research participants (Guba and Lincoln, 1994b). This form of naturalistic inquiry supported qualitative research methods, including interviewing and participant observation.

With respect to the ongoing debates between quantitative and qualitative research paradigms, Johnson and Onwuegbuzie (2004) noted that a paradigm approach suggests that there are commonalities between the two research paradigms, which add value to the research. Those who are strong proponents of quantitative research articulated assumptions that are aligned with the positivist philosophy (Johnson and Onwuegbuzie, 2004). Qualitative purists held the view that social observations should be treated as entities, similar to how physical scientists treat physical phenomena (Lincoln and Guba, 1985). Quantitative purists believed that social science should be the focus. Therefore, researchers should discard their biases, remain emotionally detached and uninvolved in the objects of study, and instead test empirically to justify their stated hypotheses (Johnson and Onwuegbuzie, 2004).

Both sets of purists viewed their paradigms as the ideal for research and, implicitly if not explicitly, advocated a compatibility thesis. How (1998) suggested that qualitative and quantitative research paradigms, inclusive of their respective associated methods, cannot and should not be mixed (Johnson and Onwuegbuzie, 2004). Johnson and Onwuegbuzie (2004) concluded that a disturbing feature of the paradigm wars was the relentless focus on the differences between the two views, rather than exploring their respective advantages in the interest of advancing research.

Applying the above overview, the interpretive paradigm was employed in this research, as it aimed to understand the cultural aspects of collective bargaining and stakeholder views through intersubjective knowledge (Taylor & Medina, 2013). An exploratory interpretative methodology was particularly applicable in this research, as it contributed to developing an understanding of collective bargaining from the respective participants' perspectives, exploring interactions among them, and examining the historical and cultural contexts in which the participants lived (Cresswell, 2007). In exploring this aspect within the context of this research, the interaction within MIBCO served as a useful example. MIBCO comprises six representative structures consisting of employer organisations and hourly paid employees, representing over 300 000 employees and over 21 000 employers (MIBCO Strategic Plan, 2017 – 2019). Each of the groups had a particular context and perspective of current sector bargaining emanating from their historical background. The union’s views might be influenced by their involvement in anti-Apartheid struggles. Therefore, each has a particular context and perspective on current sector collective bargaining and views on the concept of future broader collective bargaining. Interpretative methods provided insight and understanding of behaviour, explaining actions

from the participant's perspective, but do not dominate the participant (Scotland, 2012). The methodology applied used open-ended interviews with nominated representatives of the participants, which were fairly broad questions, allowing participants to express the organisation's views on a variety of topics.

The research method employed in this study was an exploratory case study. The stewardship approach to addressing challenges through collaborative partnerships has been predominantly applied to social-ecological sustainability disciplines (Cockburn et al., 2019), but no evidence could be found of its use in addressing challenges in collective bargaining. Several studies referred to the use of a collaborative stewardship approach in addressing socio-ecological challenges, such as conservation and sustainability goals, natural resource management in urban areas, policy development for natural forest systems, multi-stakeholder collaboration in policy formulation, shareholder interest in strategic management, and sustainability in agricultural systems, were reviewed (Chapin et al., 2010; Belaire et al., 2011; Barendse et al., 2016; Cockburn et al., 2019). These studies highlighted several principles that underscore the application of stewardship in addressing multidisciplinary challenges, such as fostering a sense of shared responsibility, promoting intergenerational benefits over short-term ones, and the need for multiple partnerships, collaborations, and linkages. (Chapin et al., 2010; Belaire et al., 2011; Barendse et al., 2016; Cockburn et al., 2019a). In the context of this research, where an institutionalised framework is in place to address challenges in the current collective bargaining agreement, stewardship can help leaders drive sustainable development and growth by balancing short-term and long-term objectives amidst competing interests (Cossin and Ong, 2016).

Regarding ontological considerations, multiple realities exist, reflecting the diverse experiences and perceptions of participants, as well as the social environment in which they operate. Each participant has their own reality of collective bargaining, shaped by their experiences of representation. Their views of reality are shaped by their perceptions of what is best for the industry, as well as their outlook on the future of collective bargaining and the automotive industry. The epistemology covered the relationship between the participant and the researcher. A transactional and subjectivist approach was adopted to ensure that the participant's "lived experience" was captured. As such, the researcher engaged with the participants on average twice after the formal interview, ensuring their "lived experience" was accurately captured. The methodology was driven by the central positioning of the researcher-participant interaction, allowing the researcher to spend longer periods in the participant's world.

5.4 AN OVERVIEW OF QUALITATIVE RESEARCH

According to Bitsch (2005), the number of research approaches under the qualitative umbrella has increased substantially over the past two decades, and it is still increasing. Each research adopting the qualitative technique brought about a new approach to its application, added ideas, and expanded new application techniques (Denzin and Lincoln, 2000). Qualitative research can be applied to a variety of applications, either as a stand-alone or in conjunction with other research methods. Areas of application are multiple and include approaches such as: (i) describing and interpreting new or not well-researched applications, (ii) theory generation, development, qualification or corrections, and (iii) evaluation, policy advice, research directed at future issues (Bitsch, 2005).

The application of qualitative research in this investigation of a stewardship-based broader collective bargaining arrangement that addressed the socio-economic challenges facing the South African automotive industry is underpinned by the following approaches:

- Describing and interpreting existing sector bargaining in addressing the socio-economic challenges facing as well as the viability of the industry.
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking approach in formulating a broader collective bargaining framework as envisaged in the collective bargaining agreements of the MIBCO and NBF.

In attempting to formulate a definition of qualitative research, Yilmaz (2013) argued that it is multifaceted and therefore difficult to define, as it is underpinned by different paradigms. Referring to various definitions of qualitative research, such as those proposed by Strauss and Corbin (1998) and Gay and Airasian (2000), Yilmaz (2013, p. 311) raised the following concerns about definitions:

- Some are simplistic in that they focus on procedures and techniques used to collect and analyse data, ignoring other aspects of research design.
- Some suffered from an identity problem as it used quantitative concepts to define a qualitative term, and

- Qualitative research is underpinned by the "epistemological assumption that social phenomena are so complex and interwoven that they cannot be reduced to isolated variables" (Yilmaz, 2013).

Concluding that a comprehensive justification of qualitative research must do justice to its key characteristics, Yilmaz (2013, p. 312) referenced Creswell (2007) and Denzin and Lincoln (1998, 2015) to define qualitative research as "an emergent, inductive, interpretative and naturalistic approach to the study of people, cases, phenomena, social interactions and processed in their natural settings in order to reveal descriptive terms the meanings that people attach to their experiences in the world".

Ponterotto (2005) commented on the application of qualitative research in psychology and other social sciences, noting a growing call for increased attention to and incorporation of qualitative research into these fields. Gergen (2001) asserted that qualitative research contributes to intellectual and philosophical perspectives and research methodologies, thereby enhancing the profession's growth in both professional knowledge and social impact (Ponterotto, 2005). Although qualitative and quantitative applications are empirical methods in that they involve the collection, analysis and interpretation of observations or data (Ponterotto, 2005), the difference is in the treatment of the data. Referring to the research literature of Ponterotto and Grieger (1999), Denzin and Lincoln (2000) and Taylor and Bogdon (1998), Ponterotto (2005, p. 128) presented the following overview of quantitative and qualitative methods:

- Quantitative methods: In general, the focus of quantitative methods is on the strict qualification of data and on careful control of empirical variables. Quantitative research often involves working with large-scale sampling and the use of statistical analysis to determine group means and variances. It focused on the measurement and analysis of causal or correlational relationships between variables.
- Qualitative methods: Qualitative methods are generally applied to a broad class of empirical procedures designed to describe and interpret the experiences of research participants in a context-specific setting. Typically, the findings were presented in everyday language and often included quotations from participants, describing psychological events, experiences, or phenomena.

Regarding criticisms of qualitative research, Ponterotto (2005) described several challenges in applying qualitative approaches and in situating them within research paradigms. One such challenge was the great variety of current research approaches. Drawing on Denzin and Lincoln (2000) and Patten (1990), Ponterotto (2005) concluded that, since qualitative research has its roots in disciplines such as anthropology, sociology, education, and history, numerous qualitative approaches have emerged in the literature over the last decade. Another challenge is that robust qualitative research can emanate from multiple paradigms, each valid in its own right, and each with its own arguments for conducting and evaluating research (Ponterotto, 2005). Therefore, it is essential that researchers clearly define and outline their operating paradigm.

In reviewing the criticisms of qualitative research, Pearse (2021) argued that much of the criticism is based on the assertion that qualitative research does not systematically build a body of knowledge. However, Pearse (2021, p. 95) expressed the view that some qualitative research approaches can contribute "to developing a distinctive and cumulative body of knowledge". However, the following challenges must be considered (Pearse, 2021). Firstly, there is a low level of theoretical consensus, as evidenced by several qualitative researchers rejecting the view that there is a single research approach or paradigm for a given phenomenon or concept. Referring to the work done by Glynn and De Jordy (2010) on leadership studies, Pearse (2021) suggested that leadership is a "multi-paradigmatic phenomenon with no dominant research approach" (Pearse, 2021, p. 95). Secondly, qualitative research often presents results in ways that are not easily replicable, thereby hindering the development of a distinctive body of knowledge.

Responding to these challenges, Ponterotto (2005) referred to the often-cited guidelines for qualitative research by Elliott, Fischer and Rennies (1999), of which the first recommended guideline identified "owning one's perspective" a priority, which suggests clearly explicating the operating paradigm, methodology, and personal orientation, the researcher's own experience with and expectations of the phenomenon under study. Ponterotto (2005) stressed that understanding a research purpose, goals, methods, and procedures require paradigmatic understanding. Furthermore, effectively evaluating the quality of a research study is to a great extent dependent on anchoring the paradigm.

In concluding the critique of the qualitative approach, it is noted that this form of research is not without criticism; however, research indicates that it is suitable for tackling a wide range of problems (Bitsch, 2005). Qualitative methods can be used to gain a deeper understanding of

the phenomenon's details, which are often difficult to address with quantitative methods (Ponterotto, 2005). It also provided a complex and detailed understanding of the research problem, which can be established through direct interaction with the participants. This conversation takes place in an environment that allows participants to share their experiences and views freely. This also allows the researcher to explore their views, minimising the impact of power dynamics that often develop between the researcher and the participant.

In addressing the challenges facing qualitative research, Pearse (2021) noted that researchers must focus on important, relevant, and stable phenomena, while also being mindful of striking a balance between parsimony and contextual detail. To establish that the research will contribute to theory development, it must confirm the relevance and justify the value of the theory. A thorough literature review is essential for researchers to have a good understanding of the nature and phenomenon being researched. Pearse (2021) concluded that qualitative research underpinned a systematic (Snyder, 2019) and chronological (Boyne, 2009) review of the literature, which can contribute to demonstrating the accumulation of a distinctive body of knowledge.

Reflecting on the debate on whether qualitative research adds value to building a distinctive body of knowledge, this research intended to make a contribution by investigating and developing a stewardship-based, broader collective bargaining framework for the automotive industry, as envisioned in several sector collective bargaining agreements. This study aims to illustrate the potential application of a collaborative stewardship approach beyond social-ecological sustainability challenges, addressing the multiplicity of challenges in collective bargaining within the South African automotive industry. The research approach and techniques employed in the study demonstrated how complex challenges can be addressed through the systematic application of a collaborative stewardship framework, which involves the sequential application of various research methodologies. This framework guided the development of an artefacts framework as input to a broader collective bargaining framework. The sequential application consisted of inductive thematic analysis, interactive dialogue and integrative thinking.

In summary, qualitative research methodologies focus on developing an understanding of the significance and experience facets of human lives and their social environment. It involves collecting and analysing non-numerical data, such as text, audio, or video, to understand concepts,

opinions, or experiences. It differs from quantitative research, which is underpinned by numerical data and statistical analysis, in that it focuses on "why" and "how" questions, providing rich, contextual insights into complex issues. Common qualitative research methods include interviews (structured, semi-structured, or unstructured), focus groups, observations, and case studies. The data is often textual, such as interview transcripts or observation notes. The ways in which qualitative research questions are posed, the methods chosen to address these questions, and the way qualitative research is conducted are each visibly informed by their underlying research paradigm. Good qualitative research is characterised by congruence between the perspective (or paradigm) that informs the research questions and the research methods used. The quality of qualitative research and standards for ethics in qualitative research are also interconnected, so that central to both issues is whether the subjective meaning, actions and social context of those being researched are illuminated and represented faithfully. The principles of good practice in the conduct of qualitative research and the trustworthiness of the interpretation of information gathered are both essential to judgments about its quality.

5.5 DATA COLLECTION TECHNIQUES AND SAMPLING: QUALITATIVE INTERVIEWS

5.5.1 INTRODUCTION

Whilst interviews generally provided the researcher with an opportunity to build a relationship with the interviewee, thereby improving the rigour of the findings, their purpose depended on the research question and the researcher's disciplinary perspective (DiCicco-Bloom and Crabtree, 2006). Warren and Karner (2005) argued that qualitative interviewing promotes the sharing of experiences and generates informative descriptions of the matter being investigated, allowing the researcher to interpret and analyse the data. Guba (1981) argues that the purpose of qualitative research interviews is to make a contribution to the body of knowledge that is both conceptual and theoretical, supported by perspectives and life experiences of the interviewees (Guba, 1981).

In the qualitative interview process, the researcher identified several knowledgeable participants who will add value to the research. That is, respondents should be knowledgeable of the issues under investigation. This supported the qualitative trustworthiness criteria of transferability. With the participant's permission, the interview sessions were recorded, and it was useful to take cryptic notes, which were subsequently summarised and validated by the participant

(Anney, 2015). The participants were selected based on their knowledge, experience, role/position in the organisation, willingness to participate in the interview, and their strategic insight into the topic (Bitsch, 2005; Onwuegbuzie & Leech, 2007). The intention was to enable the researcher to extract information about participants' perspectives, thoughts, mandated positions, and historical background, while also contributing to the rigour of the research process.

Overview of the Methods, Procedures and Techniques process applied in this research:

- Data collection: Semi-structured interviews and interactive dialogues with designated representatives of stakeholders involved in collective bargaining.
- Data analysis: Applying inductive thematic analysis to the data to develop the paradoxical pairs. This was followed by two sequential analysis techniques, Interactive Dialogues and Integrative thinking.
- Collective bargaining Artefacts framework: Identification of the key elements of a broader collective bargaining structure.
- Stewardship-based broader collective bargaining framework: Concept document of a proposed collective bargaining structure.

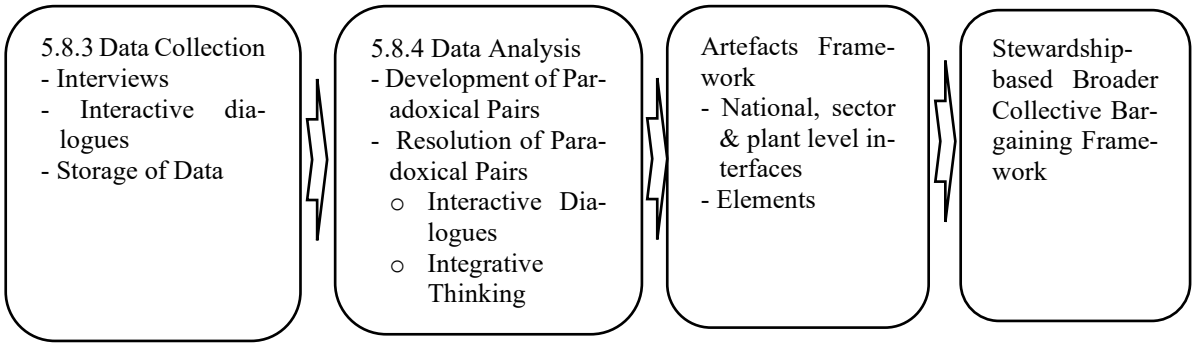


Figure 5.1: Overview of Methods, Procedures and Techniques process to be followed (Source: Author's construction)

5.5.2 QUALITATIVE INTERVIEWS

Qualitative interviews were categorised in several ways, with some authors loosely differentiating them as unstructured, semi-structured, and structured (Crabtree and Miller, 2022). The focus was on unstructured, semi-structured formats with some reference to structured interviews, which often produced quantitative data (DiCicco-Bloom and Crabtree, 2006).

5.5.2.1 STRUCTURED INTERVIEWS

Roulin and Bangerter (2000) explained a perceived academic-practitioner gap in the adoption of structured interviews, concluding that structured interview techniques are often considered infrequently adopted by practitioners.

Chapman and Zweig (2005) argued that the interview structure is multi-dimensional and, as such, there was no unique definition of the structured interview. Referring to Campion, Palmer, and Campion (1997) and Hoffcut and Arthur (1994), Roulin and Bangerter (2000) noted two main ways of structuring interviews, which researchers have explored: standardising the interview process and applying patterned behaviour or situational questions. As a general rule of interviews, structured interviews follow a standardized procedure (questions, rating scales, etcetera.) (Campion, Campion and Hudson, 1994; Hoffcut and Arthur, 1994). Behavioural interviews take on a descriptive format, asking applicants to describe how they would behave in hypothetical job situations (Lathan and Sue-Chan, 1999; Maurer, 1982). Through standardisation and the use of behavioural questions, psychometric properties are increased beyond those of traditional interviews.

5.5.2.2 UNSTRUCTURED INTERVIEWS

DiCicco-Bloom and Crabtree (2006) argued that, while no interview can be considered entirely unstructured, some can be considered relatively unstructured, in that they are more or less equally responsive to unguided questions. Historically, the most widely used application of unstructured interviews dates back to the ethnographic tradition of anthropology (Malinoki, 1932; Mead, 1930; Becker, 1999).

5.5.2.3 SEMI-STRUCTURED INTERVIEWS

In comparison with unstructured interviews, where the focus of data collection is observing, semi-structured interviews are often the only source of data collection in qualitative research (Adams et al., 2002). There are various forms of semi-structured interviews, such as group interviews, which often employ a focus group approach, where multiple participants share their experiences or knowledge on a particular subject (Kitzinger and Barbour, 1999). In this format, each focus group outcome is considered to be a single entity within the sample group and cannot be viewed as a shortcut to collecting data from multiple participants simultaneously (Duggleby, 2003).

Some key elements of semi-structured interviews include sessions scheduled as appointments at designated times, in a specific location, or with a predetermined meeting format. Generally, they involve open-ended questions, and additional questions may emerge during the interview process (DiCicco-Bloom and Crabtree, 2006). Semi-structured interviews are considered to be the most commonly used interviewing format in qualitative research, which can be conducted in individual or group sessions. A benefit of individual in-depth interviews is that they allow the researcher to pursue an inquisitive approach to social and personal matters, depending on the research phenomenon. Other forms of semi-structured interviews include “life history” research, which provides insight into an individual's personal biography, useful in building an understanding of their life story (Atkinson, 1998).

DiCicco-Bloom and Crabtree (2006) advised that individual in-depth interviews were more widely used in the healthcare sector for reconstructing views of events and experiences encountered in healthcare and healthcare delivery. It is essential to note that, regardless of the study's focus, the basic research question must be sufficiently focused to enable a relatively homogeneous group to share a common experience of the research (Crabtree and Miller, 2022). The interviewer should adopt a flexible approach during the interview, allowing departures from the planned schedule to pursue digressions that emanate from the interviewee’s interests and knowledge.

The researcher applied a semi-structured interview approach, with the interview questionnaire covering five specific areas of the research topic. This approach enabled the researcher to explore clarifications on issues that arose during the interview. This inquisitorial approach allowed both the researcher and the respondent to address aspects not specifically covered by the questions and to improve rapport between the parties.

5.5.3 DEVELOPING RAPPORT

Guba and Lincoln (1994), Bitsch (2005), and Anney (2015) commented that establishing a trust relationship between the researcher and participant enabled the exploration of the interviewee’s insight, experience and knowledge on the research topic (Guba and Lincoln, 1994; Bitsch, 2005; Anney, 2015). It is essential for the researcher to establish a positive relationship with

the interviewee fairly quickly (DiCicco-Bloom and Crabtree, 2006). Rapport with the interviewee involved trust, respect and interest in the interviewee, showing appreciation for the information being shared. Warrant and Karner (2005) emphasised the value of this approach, as it facilitated the connection of multiple truths, thus adding to the understanding of the meaning of human experience through interview research. Therefore, it was crucial to create a safe and comfortable environment for the interviewee to share their experiences and attitudes as they actually occurred.

DiCicco-Bloom and Crabtree (2006) pointed out that there are several levels of rapport between the interviewee and the interviewer, including apprehension, exploration, cooperation, and participation. The following overview of these factors (DiCicco-Bloom and Crabtree, 2006).
Firstly, during the opening phase, apprehension is often manifested as an uncomfortable feeling of uncertainty towards the interviewer and the topic. As such, the interviewer's focus is to build trust and encourage the interviewee to disclose information through open discussion. Therefore, it is best to start the interview with a general, exploratory question that reflects on the nature of the research in a “non-threatening” manner. As the interviewee settles down, the interviewer can commence prompting the interviewee to respond to further questions. A caution during this phase is to avoid asking leading questions or prompting the interviewee with personal reflections, as this could result in misleading responses (Warren and Karner, 2005). Throughout the interview, it is essential for the researcher to be reminded that the primary goal is to encourage the interviewee to share their experiences as fully and accurately as possible in their own words (Crabtree and Miller, 2022).

Secondly, during the exploration phase, the interviewer becomes engaged in an in-depth mode, characterised by learning, listening, testing, and developing a sense of bonding and sharing. This is followed by the cooperative phase, during which participants develop a comfort level, enabling them to become more confident in engaging, less afraid of challenging one another, and finding satisfaction in the interview. This gives the interviewer an opportunity to clarify certain points, allowing the interviewer to correct any inconsistencies in the responses. There is also an opportunity for the interviewer to pose questions which were too sensitive during the initial stages of the interview.

Finally, as the interview progresses over time or depending on the rapport between the interviewer and interviewee, the participation stage may occur during the in-depth interview. This

stage reflects a greater degree of rapport, during which the interviewee may take on the role of guiding and leading the interviewer.

5.5.4 SELECTING INTERVIEWEES

The researcher explored the purposive sampling technique to select the participants. Purposive sampling is defined as selecting participants (individuals, institutions, etcetera.) based on their specific knowledge and position, enabling them to respond to the research's aims and objectives (Bitsch, 2005). The participants were selected from automotive employer organisations, trade unions, bargaining councils and the government. All participant organisations involved in the current sector collective bargaining were approached to nominate an experienced representative in collective bargaining to represent the organisation in the research.

Interviewees were selected based on their knowledge, role/position in the organisation, personal status, experience in the field of research, and insights into the context of the challenge, enabling the interviewer to gain a meaningful understanding and insight into the interviewees' views on the particular topic. The interviewer should also strive to achieve a fairly homogeneous response from the interviewees, as they share critical similarities on the research question (Crabtree and Miller, 2022).

For this research, the primary method of data collection consisted of interviews and interactive dialogues with participants from the automotive industry's collective bargaining representative structures, including bargaining councils, employer bodies, unions, and government departments. The following representative structures were interviewed:

- Motor Industry Bargaining Council (MIBCO) is the statutory bargaining structure for the automotive supplier industry, comprising three employer forums, representing about 2 100 companies, and two unions, representing the interests of approximately 300 000 hourly paid employees (MIBCO Strategic Plan 2017 – 2019; NBF Office – 2022).
- National Bargaining Forum (NBF) is not a statutory bargaining council, but a negotiating forum by agreement between the parties, AMEO (Automobile Manufacturers Employers' Organisation), representing the seven OEMs, and NUMSA, representing approximately 17 500 hourly paid employees (MIBCO Strategic Plan 2017 – 2019; NBF Office - 2022).

- Department of Employment and Labour and NAAMSA (National Association of Automobile Manufacturers of South Africa), also referred to as The Automotive Business Council.
- Unions comprising of NUMSA and Solidarity.

The intention was to engage the leadership structures of the employer and labour organisations, as well as industry governing structures, to explore ways to give effect to their commitment to establish a proposed broader collective bargaining framework and to avoid engaging in negotiations (NBF and MEIBC Collective Agreements). To facilitate interaction between the parties and explore their views on the interview outcomes, group sessions were held. Interactive dialogue is a method of engaging leadership in driving change by guiding them to explore different interpretations of organisational attributes and achieve a deeper understanding of what needs to be done (Maccoby, 1996). Due to the sensitivity of this topic, most interviews were conducted via online meeting platforms. Throughout this research, there was awareness of the parties' sensitivity to the concept of broader collective bargaining in the automotive industry, which may have influenced their openness to sharing views on the topic.

Additionally, field notes comprising comments made during the interviews and follow-up emails with participants were compiled. Although all interviews were recorded with the participants' prior permission, notes were taken during the interviews to document aspects requiring further exploration, which were subsequently discussed in follow-up sessions. These notes were integrated into the recording summary and presented to the participants to confirm that it accurately reflected the discussions.

5.5.5 THE INTERVIEW PROCESS

DiCicco-Bloom and Crabtree (2006) stated that in-depth interviews should create a personal and intimate atmosphere, where open, direct, and verbal questions are posed to elicit detailed responses, narratives, and views. In this regard, the process/structure should facilitate this atmosphere. Hence, the interviewer should maintain control over the interaction with the interviewee's collaboration (Briggs, 1986). Role clarity is crucial in ensuring a clear distinction between the interview process and the social realm of the parties involved. Ribbens and Edwards (1998) caution against ignoring the role or impact of social differences on the shape of the interview process and perception of interview invasiveness.

Sensitivity to gender and racial biases should be considered, and in this regard, reflexivity on the part of the interviewer is essential. Anney (2015) reflected on reflexive journaling as a process by which researchers keep documents to consider, tentatively explore, and plan data collection. This allows the researcher to consider his/her own cultural focus and those of the interviewee, by recognising differences between them and integrating reciprocity into the creation of knowledge (Atkinson and Coffey, 2003). The danger is that the interviewer's ability to remain objective might be compromised. It could be argued that the objective of exploring people and building trust is best achieved by reducing the hierarchy between the interviewees and researchers, which could include sharing information in response to the informant's requests or recognising cultural differences (DiCicco-Bloom and Crabtree, 2006).

Regarding power relations and positionality in the research, in addition to the impact researcher's own social, institutional and personal identity, might have on the research, his years of experience in collective bargaining were also considered. Yip (2024) cited three reflection narratives impacting on the relationships and interaction between researcher and participant. The first narrative reflects on the researcher's positionality on accessing participants, secondly, how own experiences, assumptions and attitudes might impact on the engagement with participants, and lastly, how relationships were impacted by own personality (Yip, 2024). There was an additional challenge – participants' awareness that NUMSA raised this issue in several sectoral negotiations' sessions. These challenges were minimised, firstly, by the stakeholders nominating their representatives, secondly, by a structured involvement of the participants in the summaries of interviews. In the final step, participants had an opportunity to raise any issue in the interactive dialogue session.

Organisations involved in sector collective negotiations were identified and approached to participate in the research. Once a contact was identified, a letter titled "Request for Permission to Conduct Research" (Appendix 4.1) was forwarded to the organisation. This letter included a brief overview of the research, requested permission to conduct the research, and identified a contact to engage in setting up the interview. Once the contact was established a letter; "Participant Informed Consent" (Appendix 4.2) detailing an overview of the research and process.

In preparation for the data-gathering phase, the Interview Guide (Appendix 4.3) was e-mailed to all the participants, and arrangements were made to conduct the interviews. The interviews were conducted through electronic media, with face-to-face meetings lasting approximately

one hour. The Interview Guide outlined the aims and objectives of the research, as well as the participants' rights. The following aims and objectives were outlined in the Interview Guide:

The research seeks to investigate a stewardship-based approach in exploring a broader collective bargaining framework that will seek to address the socio-economic challenges facing the South African automotive industry through a process of integrative thinking. The first step in this process was to develop paradoxical pairs emanating from the views and perceptions of collective bargaining issues. The questions covered the following perspectives:

- *Views and perceptions of bargaining issues: This step seeks to identify the views of parties as to what constitutes a bargaining issue, what their position is, how it should be addressed, in what structure and at what level.*
- *Views on current sector collective bargaining: Currently, wage increases and substantive conditions of employment for hourly paid workers in the automotive industry are negotiated in sector collective bargaining forums, such as OEMs (Original Equipment Manufacturers), Components and Tyre.*
- *Future of the South African automotive industry: How does the industry consider and deliberate strategic issues impacting on the future of the automotive industry, government policies and social cohesion?*
- *Societal corporatism: The current labour relations framework has its roots in corporatism, which is a multifaceted concept, covering organised systems of wage bargaining, the role of state intermediation and scope of agreements negotiated in the national economic framework. Historically, corporatism underpinned the maturing of negotiations and constructive interaction between labour and capital, giving rise to corporatist structures such as MITG (Motor Industry Task Group), NEDLAC (National Economic Development and Labour Council), etcetera, but recent challenges during collective bargaining negotiations extended beyond wages and bread-and-butter issues, to include social demands such as affordable housing, medical aid, education and transport. This question seeks the participants' views on the efficacy of these structures and corrective action, if any.*
- *Role of leadership in the automotive industry. This research explores the idea that leaders of representative structures should take on the role of stewards. Stewards are not motivated*

by self-interest, but focus on the achievement of broader objectives in the long-term interests of society. Stewardship leadership is therefore characterised by leading with positive social impact, safeguarding the future and driving social good.

The interviews were "directed to the participant's experiences, feelings, beliefs and convictions about the theme in question" (Welman and Kruger, 1999; p. 196). All interviews were recorded with the participants' consent, and brief notes were taken. Permission to record the interviews was obtained from all participants prior to the interviews. The researcher updated the Interview Guide with the participants' responses for verification or additions. The updated responses were returned to the participant for validation or additional comments. Once a consensus was reached on the comprehensiveness of the document was filed for analysis.

Schurink, Schurink and Poggenpoel (1998) emphasised the truth-value of qualitative research and how it can be achieved. Guba (1998) suggested several major concerns that should be addressed relating to the trustworthiness criteria. With respect to the truth value, Guba (1998) explored the challenge how a researcher can establish confidence in the "truth" of the findings, or how the findings presented are genuine. From the participants' perspectives, the research employed an insider approach. In this regard, all responses were viewed sceptically and scrutinised through the researcher's experience in collective bargaining. Where necessary and if agreed by the participant, concerns were clarified telephonically with the participant. Once this process was completed, all participants received a copy of their responses and were invited to verify that it accurately reflected their perspectives on the issues under investigation.

In summary, whilst the term "interview" has many different implications, there is a general consensus that the basic purpose of an interview is to serve as an effective, structured information-gathering instrument on a predefined research topic (Agarwal and Tanniru, 1990). There is a widespread consensus that it remains the most commonly used technique for extracting knowledge, insights, and views from experts or interest groups (Buchanan and Shortliffe, 1984). Benefits of the interview technique include its ability to clarify issues through repeated probing by the interviewer and to provide immediate feedback. The technique has proven to be an invaluable information-gathering tool, particularly in situations where beliefs, feelings, and attitudes are undetectable through writing or cannot be elicited.

5.6 DATA ANALYSIS

5.6.1 INTRODUCTION

DiCicco-Bloom (2006) expressed the view that qualitative data analysis should occur concurrently with data collection, enabling researchers to explore a developing understanding of the research questions, which in turn impacts both the sampling and the questions being asked. According to Kuzel (1999), this iterative process of data collection and analysis eventually leads to a point in the data collection where new themes emerge, commonly referred to as saturation. As various forms of qualitative interviews arise from diverse disciplines, so too have data analysis strategies evolved in response to the interviews. Some of these approaches have been widely used for the interpretation of in-depth interviews, such as those applied in the grounded theory and hermeneutics approaches. According to Miller and Crabtree (1999, 2005), during these approaches, researchers review and identify test segments, similar to what an editor does, while developing interpretive statements during the process of identifying patterns for writing texts. A commonly used approach involves using codes and then sorting text segments with similar content into separate categories for final distillation into major themes (Boyatzis, 1998b; Nowell et al., 2017).

Fossey et al. (2002, p. 728) defined qualitative analysis as "a process of reviewing, synthesising and interpreting data to describe and explain the phenomena or social worlds being studied". Just as is the case with data collection methods, regardless of the approach used, the rigour of the analytical processes depends on their adequacy and transparency. In this regard, two analytical techniques are generally applied, namely, meaning-focused and discovery-focused (Fossey et al., 2002). Davidson et al. (1998) explained how meaning-focused analytical techniques, as a concept, emphasise comprehension of the subjective matter of experiences and situations for the participants themselves, as opposed to how these meanings might fit with the researchers' conceptions.

Tesch (1990) highlighted that two other techniques supporting this approach are phenomenological, referring to unique themes of meaning within the data, as well as common themes of meaning across the data. Discovery-focused techniques explore the formation of patterns and connections among data elements. Analysis is typically underpinned by segments of text that portray a particular meaning, rather than individual words or phrases (Tesch, 1990). These are

then coded, sorted and organised, looking for patterns or connections between them. This process may be viewed as theory building or, more typically, as thematic analysis. Thematic analysis involves a "constant comparative method, a progressive process of classifying, comparing, grouping and refining groupings of text segments to create and clarify the definition of categories, or themes within the data" (Fossey et al., 2002, p. 729).

Fossey et al. (2002) suggested that an effective system of data capture is essential, as qualitative data analysis involves progressively exploring the data to develop a more comprehensive understanding as more data is gathered and reviewed iteratively. According to Rice and Ezzy (1999), coding (i.e. the labelling of segments of the data to identify themes) is central to effective data retrieval in two ways. It enables the researcher to locate and collate similarly labelled data for examination and to retrieve data related to more than one topic when considering patterns, connections, or distinctions between them.

Qualitative analysis involves more than simply coding data. It involved exploring an understanding of qualitative data which requires conceptual-level processes of exploring the meanings, patterns, or connections among data that involve the researcher's own thought, reflection, and interpretation (Fossey et al., 2002). Davidson et al. (2001) noted that an adequate description of data analysis should include evidence of how these conceptual-level processes were applied and the manner in which data were explored to evaluate the information gathered from different sources.

5.6.2 THEMATIC ANALYSIS

According to Braun and Clarke (2006), thematic analysis has been poorly branded, yet it is widely used in qualitative research and should be a foundational method for qualitative analysis, as it provides core skills for conducting many other forms of qualitative analysis. There are two schools of thought on thematic analysis. Some researchers argue that, since it is a process employed in many qualitative methods, it is not a separate method, but rather a process used to assist researchers in analysing data (Boyatzis, 1998). Others claim thematic analysis should be considered as a method of analysis in its own right (Nowell et al., 2017).
Thematic analysis is a qualitative research method for identifying, analysing, organising, describing, and reporting themes found within a dataset (Nowell et al., 2017). Boyatzis (1998) describes thematic analysis as a translator between the languages of qualitative and quantitative

analysis, enabling researchers using different methods to communicate with one another. Braun and Clarke (2006) argued that a rigorous thematic analysis can produce trustworthy and insightful findings. However, there is no consensus among researchers on how to apply it to achieve consistent, rigorous outcomes.

5.6.2.1 ADVANTAGES AND DISADVANTAGES OF THEMATIC ANALYSIS

Braun and Clarke (2006) argued that thematic analysis provides a highly flexible approach to qualitative data analysis, which can be adapted to the requirements of many studies, offering a rich, detailed, yet complex account of the data. It does not require detailed theoretical and technological knowledge, unlike other qualitative approaches, and offers a more accessible form of analysis (Nowell et al., 2017). Thematic analysis is also useful for summarising key features of a large dataset, as it prompts the researcher to adopt a well-structured approach to data handling, contributing to a clear, organised final report.

Nowell et al. (2017) argued that the disadvantages of thematic analysis become more apparent when it is compared with other qualitative research methods. When compared with grounded theory, ethnography, and phenomenology, for example, there is a substantial lack of literature on thematic analysis, which may lead novice researchers to draw flawed conclusions about the language used. Holloway and Todres (2003) also note that flexibility can lead to inconsistency and a lack of coherence when developing or reviewing themes derived from the research data.

5.6.2.2 OVERVIEW OF CONDUCTING A TRUSTWORTHY THEMATIC ANALYSIS

Creswell (2014) noted that in qualitative research, data analysis processes are interrelated and can occur simultaneously throughout the research process. This implies that the processes of data collection, data analysis and report writing are not distinct steps, but are interrelated. Some occur concurrently, such as data collection and data analysis. Nowell et al. (2017) argued that although thematic analysis is an iterative and reflective process that unfolds over time, it involves constant moving back and forth between phases. Table 4.2 highlights how researchers view Lincoln and Guba's (1985) criteria for trustworthiness during each phase of the thematic analysis.

Table 5.2: Establishing Trustworthiness During Each Phase of Thematic Analysis (Summary - Nowell et al., 2017, pp. 4 - 11)

Phases of Thematic Analysis	Means of Establishing Trustworthiness
Phase 1: Familiarising with your data	• Prolong engagement with data • Triangulate different data collection modes • Document theoretical and reflective thoughts • Document thoughts about potential codes/themes • Store raw data in well-organised archives • Keep records of all data field notes, transcripts, and reflexive journals
Phase 2: Generating initial codes	• Peer debriefing • Researcher triangulation • Reflexive journaling • Use of a coding framework • Audit trail of code generation • Documentation of all team meetings and peer debriefings
Phase 3: Searching for themes	• Researcher triangulation • Diagramming to make sense of theme connections • Keep detailed notes about development and hierarchies of concepts and themes
Phase 4: Reviewing themes	• Researcher triangulation • Themes and subthemes vetted by team members • Test for referential adequacy by returning to raw data
Phase 5: Defining and naming themes	• Researcher triangulation • Peer debriefing • Team consensus on themes • Documentation of team meetings regarding themes • Documentation of theme naming
Phase 6: Producing the report	• Member checking

	• Peer debriefing • Describing process of coding and analysis in sufficient details • Thick descriptions of context • Description of audit trail • Report on reasons for theoretical, methodological, and analytical choices throughout the entire study.

5.6.2.3 DESCRIPTION OF THE PHASES

Phase 1 of the research requires the researcher to become familiar with the data. Thorne (2000) advised that qualitative data appear in various formats, including observations, focus groups, texts, documents, etcetera. To increase the likelihood that the research findings will be deemed credible, qualitative researchers may triangulate across different data collection methods (Guba and Lincoln, 1994). Regardless of the data collection format, archiving of all records provides an audit trail and a benchmark against which later data analysis and interpretations can be tested for adequacy. Tuckett (2005) and Nowell et al. (2017) cautioned that when data are collected through interactive means, the analysis may be compromised by prior knowledge, initial thoughts, and interpretations. It is vital that researchers immerse themselves in the data to familiarise themselves with the depth and breadth of the data. This process involves repeatedly reviewing the data actively, searching for meaning and patterns.

Starks and Trinidad (2007) encouraged researchers to engage with the analysis as faithful witnesses by reviewing the data, being both truthful and vigilant of their own perspectives, pre-existing thoughts, and beliefs, and developing theories. Lincoln and Guba (1985) and Sandelowski (1995) encouraged researchers to document their theoretical and reflexive thoughts as they immerse in the data, including their values, interests, and growing insights about the research topic.

Phase 2 involved generating the initial codes. Braun and Clarke (2006) advised that once researchers have developed an in-depth understanding of the data, having considered what the data contains, the stage of generating initial codes could commence. This phase involved the initial development of codes from the data, a theorising activity, and the researcher reflecting on the data by interacting with and thinking about the data. Coding allowed the researcher to

simplify and focus on specific characteristics of the data. During this process, researchers identified important sections of text and attached labels relating to themes or issues in the data (Nowell et al., 2017). A "good" code captures the qualitative richness of the phenomenon (Boyatzis, 1998a). Braun and Clarke (2006) encouraged researchers to work systematically through each data item, identifying interesting aspects that could develop into themes across the dataset. Codes should have explicit boundaries to ensure they are not interchangeable or redundant. King (2004) advised that hierarchical coding enables the researcher to analyse at varying levels of specificity, with broad, higher-order codes providing an overview and detailed, lower-order codes allowing distinctions to be made within and between cases. A consistent approach must be applied in coding the data, a process Creswell (2014) described as a systematic approach for coding data in which specific statements are analysed and categorised into themes that represent the phenomenon of interest.

Phase 3 involved searching for themes. This phase began when all data had been coded initially and collated, and a list of different codes identified across the dataset had been developed. The phase involved sorting and collating all potentially relevant coded data extracts into themes (Braun and Clarke, 2006). DeSantis and Ugarriza (2000) described themes as "an abstract entity that brings meaning and identity to a recurrent experience into a meaningful whole" (Nowell et al., 2017). Various authors document the following characteristics of themes:

- It brings together components or fragments of ideas or experiences, which often are meaningless when viewed in isolation (Aronson, 1994)
- It is not necessary to be dependent on quantifiable measures but rather on whether it captures something important in relation to the overall research question (Braun and Clarke, 2006)
- Once themes have been identified, they represent significant concepts that link substantial portions of data together (DeSantis and Ugarriza, 2000)

Themes may initially be generated inductively from raw data or deductively from theory or prior research. With the inductive approach, themes identified are strongly linked to the data and may bear little resemblance to the questions. Inductive analysis is a process of coding data, disregarding any pre-existing coding framework or the researcher's analytic preconceptions (Braun and Clarke, 2006). It can also be referred to as a data-driven form of thematic analysis.

On the other hand, deductive analysis is driven by the researcher's theoretical or analytic interest and may provide a more detailed analysis of some aspects of the data, but tends to produce a less rich description of the overall data (Braun and Clarke, 2006). It is important for researchers to distinguish between the two, as this will inform how the themes are theorised and developed (Braun and Clarke, 2006).

The fourth phase commenced once a set of themes had been devised, which now required review and refinement (Braun and Clarke, 2006). This phase was characterised by reviewing the coded data extracts for each theme to consider whether they appear to form a coherent pattern (Nowell et al., 2017). The validity of individual themes will be reviewed to determine whether they accurately reflect the meanings evident in the data set as a whole (Braun and Clarke, 2006). King (2004) advised that this process will also expose any inadequacies in the initial coding and reveal themes, potentially requiring various changes. It may also become apparent that some themes lack sufficient data to support them, or the data are too diverse, resulting in the possible merging of some themes into others, while other themes may need to be broken down into separate ones (Braun and Clarke, 2006).

Some themes may need to be refined into themes that are specific enough to be discrete and broad enough to capture the essence of the numerous text segments. Affride-Stirling (2001) described this process as the reduction of themes into a more manageable set of significant themes that succinctly summarise the text. At the conclusion of this phase, researchers have a comprehensive understanding of the different themes, their interrelationships, and the overall narrative they convey about the data (Braun and Clarke, 2006). Reviewing the referential adequacy of the analysis can be achieved by returning to the raw data, ensuring all conclusions are firmly grounded in the data (Lincoln and Guba, 1985).

Phase 5 involved defining and naming the themes. This phase was characterised by researchers determining what aspect of the data each theme captured and identifying what was of interest about them and why (Braun and Clarke, 2006). For each individual theme, researchers needed to conduct and write a detailed analysis, identifying the story that each theme tells. Braun and Clarke (2006) further suggested that theme names be catchy, which should immediately capture the reader's interest and convey the essence of the theme. Other factors, such as overlapping themes and how each theme fits into the overall story, must also be explored. With a perpetual process of modifying and refining definitions of themes, the dilemma was which and

when to stop the refinement. King (2004) suggested consulting with external experts to determine whether the themes are sufficiently clear and comprehensive to warrant halting modifications. This process of peer debriefing will help expose the researcher to aspects of the research that might otherwise not have been exposed (Lincoln and Guba, 1985). It is important that this process be documented to ensure an audit trail, which will serve as a reference for methodological decisions and rationales (Lincoln and Guba, 1985). If the researcher can clearly and succinctly describe the scope of each one, they might be ready to move on to the next phase. If not, further refinement might be required (Braun and Clarke, 2006).

Phase 6 involved producing the report. The final phase begins once the researcher has fully established the themes and is ready to conduct the final analysis and write up the report, which should provide a concise, coherent, logical, non-repetitive, and interesting account of the data within and across all themes (Braun and Clarke, 2006). In compiling the report, researchers are encouraged to consider the following (Nowell et al., 2017):

- Create a credible and believable overview of the data analysis through clear communication of the logical process by which they were developed (Thorne, 2000).
- Researchers keep methodological notes to establish trustworthiness, audit trail, etcetera.
- Include direct quotes from the participants to aid in the understanding of specific points of interpretation and demonstrate the prevalence of the themes.

Interweave literature with the findings, building up the merit of the report (Aronson, 1994). Regarding the rigour of the research, the analytic credibility will depend on the coherence of the argument (Nowell et al., 2017). Starks & Trinidad (2007) pointed out that the trustworthiness of the process will be determined by how the researcher interprets the data to support the main points, building towards a convincing argument. In addressing the issue of credibility, Côte and Turgen (2005) pointed out that the researcher should discuss all relevant information, including unexpected findings or findings which did not relate to the main explanations of the phenomenon being studied. Member checking, the process of submitting analyses to participants for their feedback, will allow the researcher to establish the fit between the respondents' views and the researcher's representation (Nowell et al., 2017; 2017).

In qualitative research, thematic analysis is a valued tool for data analysis. However, it is essential that the process be conducted in a rigorous and methodical manner to yield meaningful

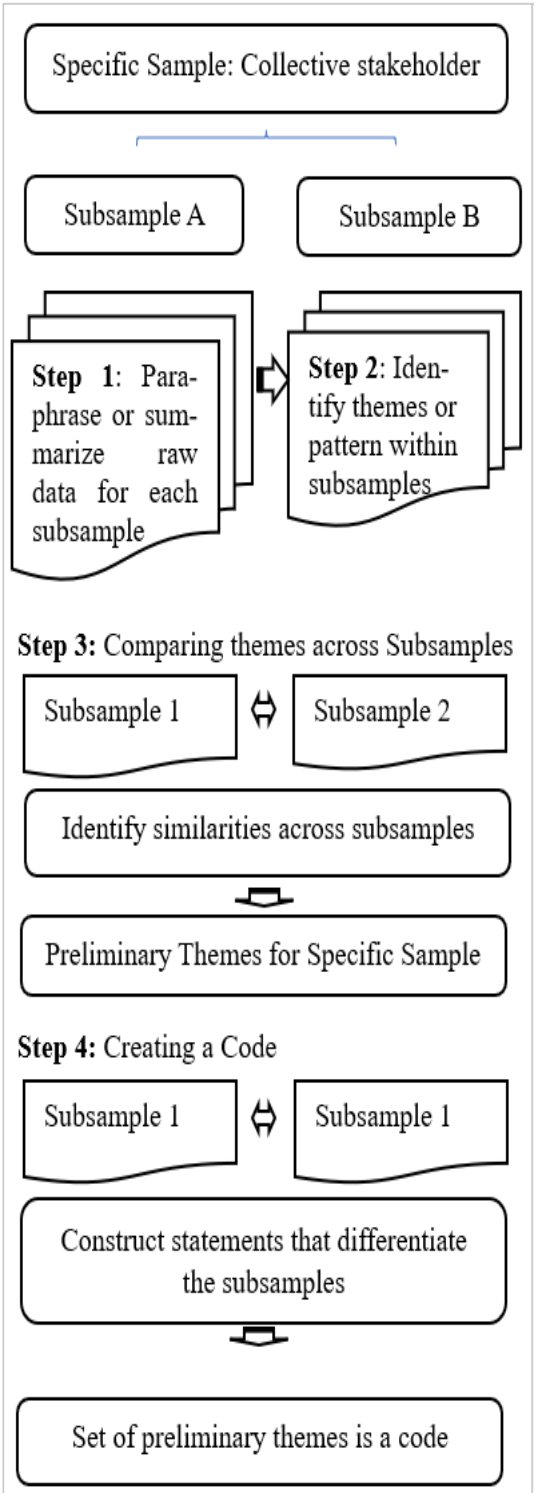
and useful results. To establish the rigour of the research, qualitative researchers must demonstrate that data analysis was conducted in a precise, consistent, and exhaustive manner. Tools such as recording, systematising and disclosing the methods of analysis contribute to the credibility of the research. Thematic analysis, when applied in a purposeful approach, systematises and increases traceability and verification of qualitative analysis. Thematic analysis is a trustworthy qualitative method that can make a positive contribution to qualitative research.

5.6.3 DEVELOPMENT OF PARADOXICAL PAIRS

The data analysis was based on a qualitative research paradigm, as it was viewed as the best method for contributing to the development of paradoxical pairs, which would serve as input to the interactive dialogues and integrative analysis methodology. It is considered the best practical and effective procedure for conducting inductive thematic analysis that meets the trustworthiness criteria (Denzin and Lincoln, 2011; Nowell et al., 2017). The thematic analysis was presented as a linear, multi-phased model, an interactive and reflective process that allowed for a constant review of the data and analysis (Braun and Clarke, 2006).

In deciding to use this approach, several articles covering the resolution of paradoxes were considered (Boyatzis, 1998; Jamal, 2004a; Buckley, 2012; Fallon, Swiss and Veteran, 2012; Nowell et al., 2017; Sugiyama et al., 2018). The methods applied in resolving paradoxes varied from field studies applying statistical analyses (Sugiyama et al., 2018), qualitative research applying coding (Jamal, 2004a), cross-sectional time series applying a random-effects model (Fallon, Swiss and Veteran, 2012) and immersion (Buckley, 2012). In resolving the paradox of "interest-based, multi-stakeholder approach to manage conflict"(Jamal, 2004b) in the determination of environmentally sensitive tourism destinations, Jamal (2004) used codes to develop themes and categories in seeking common grounds among the stakeholders. This study offered useful lessons on the challenges emanating from an interest-based multi-stakeholder approach in managing conflict resulting from the dynamic and paradoxical nature of participatory processes in multi-sectoral initiatives (Jamal, 2004). This approach facilitated the application of inductive thematic analysis in developing codes and themes to address paradoxical tensions in the development of a stakeholder-based, broader collective bargaining framework in the automotive industry.

Based on the methodologies of Boyatzis (1998), Braun and Clarke (2006) and Nowell et al. (2017), a model was developed to formulate codes and themes inductively, which ultimately informed the development of paradoxical statements. The model is reflected in Figure 5.2 below:



Identified Specific Samples representing a category of stakeholders: Bargaining Councils; Employers' Representative Forums; Government/Industry Forum and Unions, and selected one Specific Sample to develop codes and themes. Selected Subsamples for each Specific Sample e.g. NUMSA and Solidarity are sub-samples for Specific sample, Unions.

In-depth review of interview data: Reduced the raw information obtained from the interviews and other relevant information for each participant, through summarising. At the same time identified themes, similarities or dissimilarities in the samples.

Compared the themes developed in each sample analysis, identify similarities, differentiation between subsamples. This will further reduce the raw information making it more manageable for further analysis steps.

Constructed a set of statements that differentiated the two samples. This set of preliminary themes constituted a code.

To determine the validity of the code or themes, the code was applied to another subsample from the specific samples. Compared the subsample differentiated theme to each of the other specific samples independently. Those showing differentiation constitute the validated code or theme.

Figure 5.2: Model applied to develop codes and themes inductively (Source: Author's construction)

- Step 5: Identifying Codes and Preliminary Theme across the Specific Samples (Figure 5.3)

  Developing codes from the data by capturing important trends followed by extracting themes that relate to recurrent experiences of observations.

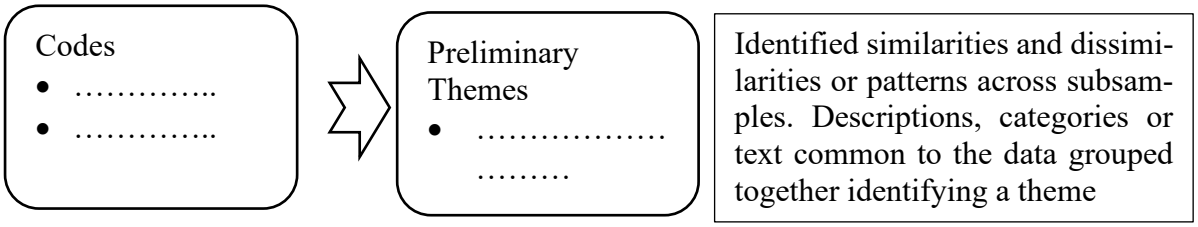


Figure 5.3: Identifying codes and preliminary themes (Source: Author's construction)

- Step 6: Validating Codes/Themes Qualitatively

This step involved validating the themes developed for the selected specific sample by comparing it qualitatively with the theme-specific responses from the other specific samples. The intention was to assess congruency with the themes developed through the application of the thematic analysis. This step is outlined below (Figure 5.4) and summarised in Table 5.3.

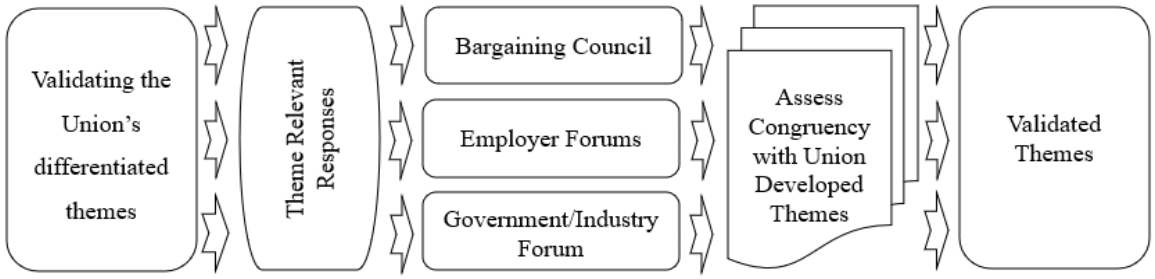


Figure 5.4 Validating Codes (Source: Author's construction)

Table 5.3: Validating Codes across Specific Samples

EMERGING THEME	SELECTED SPECIFIC SAMPLE' STATEMENT OF DIFFER-ENTIATION	RELEVANT SUMMARY OF SPECIFIC SAMPLES INTERVIEWS			
		BARGAINING COUNCIL	EMPLOYERS REPRESENT-ATIVES	GOVERN-MENT	INDUSTRY ORGANISA-TIONS

- Step 7: Summarising the Responses across all the specific Samples, highlighting the tensions

  This step involves reviewing the above table, identifying similarities and dissimilarities (tensions) across all the specific samples. This summary will be reflected in the table below (Table 5.4).

Table 5.4: Summary of responses across all specific samples

THEME	SUMMARY	TENSIONS

- Step 8: The findings of the above step will be summarised in Table 5.5, which reflects a summary of the tensions as paradoxical pairs reflecting tensions between stakeholder responses, as described below:

Table 5.5: Findings reflecting Themes and Paradoxical Statements

THEMES	PARADOXICAL STATEMENTS	

5.6.3.1 EXPLORING THE RESOLUTION OF PARADOXICAL PAIRS

In exploring the resolution of the paradoxical pairs, which will eventually lead to the development of a collective bargaining artefacts framework, two analysis techniques were applied sequentially. Through interactive dialogues, participants representing parties involved in collective bargaining in the automotive industry debated the paradoxical statements arising from the challenges facing sector collective bargaining and explored potential solutions for reducing these tensions. In the second step, through a process of integrative thinking, constructively reconciled the tensions of opposing solutions, thereby generating a holistic model containing elements of respective solutions, but going beyond the individual resolutions (Martin and Austen, 1999; Martin, 2007). Attempts were made to convene a second interactive dialogue or consult with participants individually to explore the resolution of the paradoxical statements.

Ultimately, by applying these techniques, the researcher explored the following objectives:

- Develop an artefacts framework that reflected the outcomes of the stewardship-based integrative process and explored how it could be built into a national, sector and plant-level

bargaining framework. This informed a stewardship-based approach to develop proposed models for broader collective bargaining.

- Applied integrative thinking to generate solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives.

The schematic below provides an overview of the sequential application of the interactive dialogue and integrative thinking models to develop the artefacts framework:

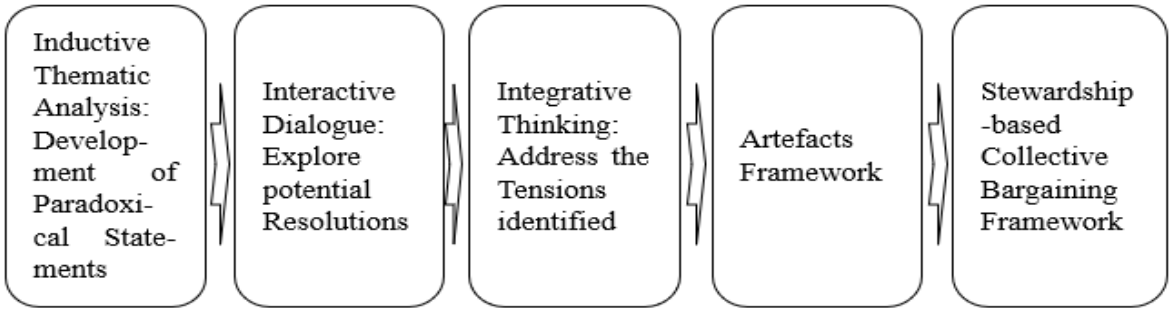


Figure 5.5 Application of Interactive Dialogue and Integrative Thinking to develop the Artefacts Framework (Source: Author's construction)

5.6.4 INTERACTIVE DIALOGUE

According to Maccoby (1996), an interactive dialogue is a method for engaging leadership in leading change by guiding them to identify and explore different interpretations of organisational attributes and arrive at a better understanding of what needs to be done. Sørenson and Torfing (2019, p. 18) reflected on how interactive dialogues have been applied in addressing the challenge of "stronger democratic political leadership in the face of the complex problems confronting European societies and the rather unfavourable conditions for exercising political leadership". This involved the application of interactive forms of governance, in which citizens and policy stakeholders collaborated in formulating innovative policy solutions. This approach institutionalised an interactive political leadership framework by merging traditional political leadership theory with theories of collaboration and participatory governance.

Christakis and Harris (2004) described the use of interactive dialogue in addressing the enhancement of liberating, transnational interactions among emerging indigenous leaders in the context of globalisation, in creating a shared understanding among the leaders of the barriers that will need to be addressed. This process enabled the stakeholders to identify and create a

shared understanding of the barriers that will need to be addressed in finding answers to the challenges of globalisation.

Like any process, interactive dialogues have their shortfalls. Littleton and Howe (2010) cautioned against the restrictive nature of interactive dialogues, as it is an inclusive concept that encompasses exchanges between a select set of individuals. Referring to the restrictive perspective of dialogues, the following quote should be noted: "The importance of struggling with another's discourse, its influence in the history of an individual's coming to ideological consciousness, is enormous." (Littleton and Howe, 2010; p 251). Maccoby (1998) emphasised the importance of shared values among participants in establishing a trust relationship, which contributes to positive engagement between them.

Maccoby's (1996) interactive dialogue approach was applied to explore the artefacts framework, which arose from the analysis of interviews. The interactive dialogues took place through plenary sessions involving mandated representatives from industry stakeholder structures, employer bodies, unions, and other relevant organisations. The dialogues will explore the respective organisation's views on how to resolve the identified paradoxical challenges that were derived from the analysis of the interview data and developed into an artefact's framework.

5.6.4.1 CONDUCTING AN INTERACTIVE DIALOGUE

The interactive dialogues were facilitated interviews with mandated representatives of the industry stakeholder structures, conducted by the researcher and supported by an independent facilitator with experience in collective bargaining.

The paradoxical pairs were presented in a plenary session and explored the participants' views as to how the paradoxical challenges could be resolved. As the researcher represented the employers' organisation in collective bargaining over many years, to avoid any bias, the co-facilitator presented the paradoxical statement to the representatives. The outcomes of the deliberations were classified as "consensus", "competing solutions offered", "consensus may be possible with further discussion", and "disagreement".

The following steps were applied in the interactive dialogue:

- Opening: Introductions and explanation of the process, including the introduction of a co-facilitator.
- Presentation of paradoxical pairs of statements: A selection of statements developed from the interview process, which appear to be in conflict in terms of participants' perspectives, was presented to mandated representatives of the stakeholders.
- Exploring organisation's views: Through an exploratory approach, the facilitators explored the views of the participants as to how to resolve the paradoxical challenges. The outcomes of the session were classified either as "consensus", "competing solutions offered", "consensus may be possible with further discussion", or "disagreement".
- Deliberation stimulants: Although the parties agreed to their participation in the interactive dialogue, the researcher envisaged a reluctance to express their views on some of the paradoxical pairs, most notably the concept of a proposed broader collective bargaining framework for the automotive industry. To stimulate the discussion, the writer reviewed the interview responses and identified some "thought-provoking" statements relevant to the respective paradoxical pair, which were posed to the participants as an extension of the paradoxical pair. As an example, a statement from one of the participants reflecting on the stakeholders' commitment to the viability of the industry, "There is at times reference to the stability of the industry, but this is glibly used in an attempt to affirm parties' commitment to the success of the industry." At least one statement from each participant was selected, and the source was not disclosed during the interactive dialogue.

5.6.4.2 DOCUMENTING THE OUTCOMES

The exploratory outcomes reflected the summarised views of the participants as to how the tensions could be resolved. This served as input into the Integrative Thinking model, which will contribute to building an artefacts framework, ultimately forming the basis for a stewardship approach to collective bargaining. The outcomes of the interactive dialogue were summarised in the format below and forwarded to the participants for their input. Only once there was consensus that the summary was a fair reflection of the dialogue discussion, was the input processed as an outcome of the integrative thinking process. The outcomes were documented in the following format:

Table 5.6: Outcomes of the Interactive Dialogue

THEMES	INTERACTIVE DIALOGUE SUMMARY	EXPLORATORY REVIEW	
		CONCLUSION	OUTCOMES Consensus; Competing solutions offered; Consensus may be possible with further exploration; Disagreement)

5.6.5 INTEGRATIVE THINKING

Martin (2007) proposed integrative thinking as a mechanism to embrace the complexity of understanding paradoxes in diverse relationship challenges, thereby creating optimal solutions**.** Karakas and Kavas (2008, p. 8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." This concept explored tensions among conflicting ideas to generate a best-fit idea which contains elements of the others but is superior to them.

In the interactive dialogue session, the participants discussed the paradoxical pairs by reflecting on the challenges of current collective bargaining, industry viability, societal corporatism, the role of stewards and industry structures, and explored possible views on how to address the tensions. Applying these outcomes to the integrative thinking model (Martin and Austen, 1999; Martin, 2007c; Karakas and Kavas, 2008; Benson and Dresdow, 2009), the researcher explored a stewardship-based broader collective framework that aimed to address the viability and socio-economic challenges facing the South African automotive industry by addressing two objectives:

- Generate alternative solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives, and
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant level bargaining framework, that will inform a stewardship-based approach to structure proposed models for broader collective bargaining.

To understand how the development of paradoxical statements, interactive dialogue, and integrative thinking concepts was applied in addressing the two objectives, the schematic below (Figure 5.7) shows how these three concepts are integrated to explore a stewardship-based, broader collective framework for the automotive industry. The framework illustrates schematically how the outcomes of Interactive Dialogues (Maccoby, 1996; Bolchini and Paolini, 2006) will be integrated into Martin's (2007) Integrative Thinking model, thereby giving rise to the Artefacts Framework. This presented an overview of the process for generating a proposed stewardship-based, broader collective bargaining framework.

- The first step in this process was the development of the paradoxical statements through inductive thematic analysis (Chapter 6), which served as input in the Interactive Dialogue session.
- The outcomes of the Interactive Dialogue served as input into the Integrative Thinking model (Martin and Austen, 1999; Martin, 2007; Karakas and Kavas, 2008). In finding a solution to the tensions existing in the current sector, collective bargaining requires embracing the multifaceted nature of the automotive industry to develop an understanding of its complexity and causal relationships. Martin's (2007) model demonstrates how, through integrative thinking, the complexity of opposing tensions can be embraced and explored to address the challenges associated with the complexity of opposing solutions, rather than avoiding them.
- The Integrative Thinking model consisted of four distinct elements (Martin and Austen, 1999, p 2 - 8)

  The first step, referred to as "Salience," involved identifying all features relevant to the identified challenges. These factors may include processes, people, environmental factors, and events that could impact the development of a restructured collective bargaining framework, either positively or negatively. Typical questions were, "What do we choose to give attention to and what not?". This was followed by "Causality", which mapped the links between the variables considered salient to identify critical relationships and choices under consideration. The causality must demonstrate the link between interactive dialogue themes, processes, people, environmental factors, events, and other factors that might impact the development of a restructured collective bargaining framework, either positively or negatively. In essence, trying to make sense of what was presented. The third step, "Architecture", explored the identification of a delivery framework that outlines which

tasks are important, how they should be tackled, and when. The final step, "resolution", involved developing creative solutions to the tensions.

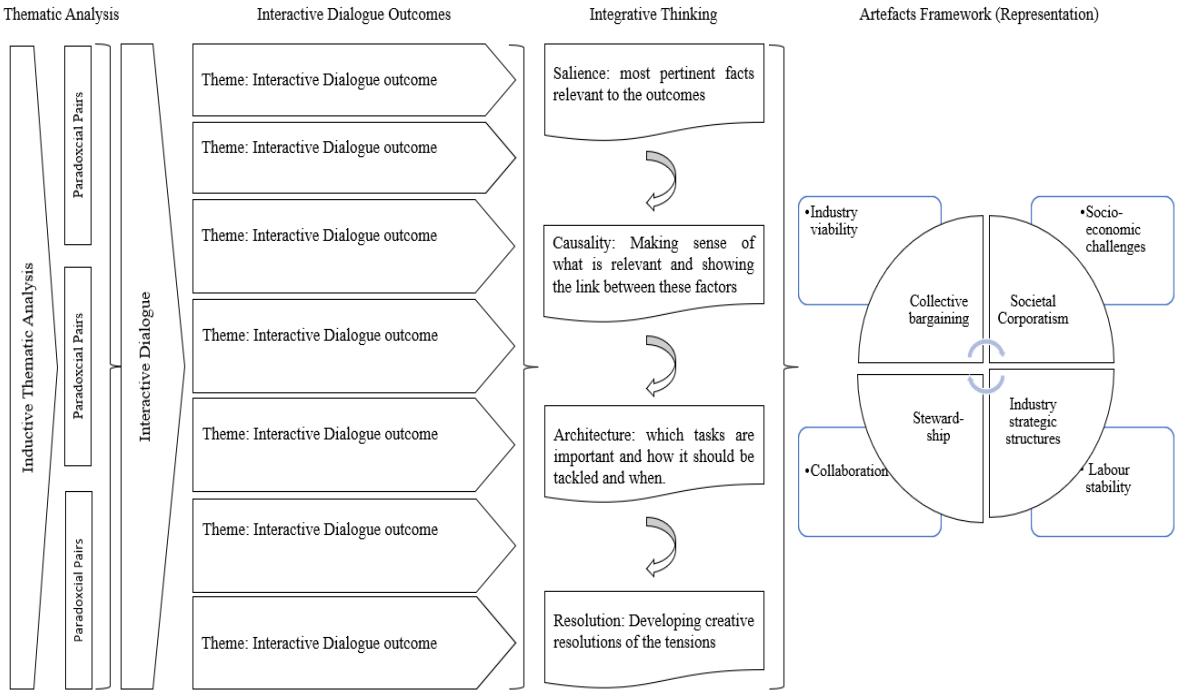


Figure 5.6 Schematic showing the sequential application of Thematic Analysis, Interactive Dialogue and Integrative Thinking processes

(Source: Author's construction)

5.7 QUALITY CONSIDERATIONS: TRUSTWORTHINESS OF CRITERIA

5.7.1 INTRODUCTION

When examining the trustworthiness criteria to ensure the rigour of the findings, it is essential to use the correct criteria in both qualitative and quantitative analyses. Anney (2015) points out that each research approach, whether qualitative, quantitative, or mixed methods, employs different evaluation criteria to ensure the rigour of the findings. Referring to Guba (1981) and Krefting (1991), Anney (2015, p.272) summarised the rigour distinctive features of qualitative and quantitative research below:

T**able 5.7 Distinctive Features of Qualitative and Quantitative Research**

Assumptions	Quantitative (positivist)	Qualitative (naturalistic)
The nature of reality	There is one reality, and the inquiry process can be converged; reality can be manipulated and separated into common parts, such as variables.	There is no one reality, as reality consists of interrelated parts that do not necessarily influence other parts of the inquiry. In other words, reality is divergent.
The nature of the inquirer-object relationship	There is an independent relationship between the inquirer and objects.	The researcher and the participants depend on each other or there is a relationship between the inquirer and participants and they influence each other.
The nature of truth statements	They believe that there is absolute ruth in the inquiry, and an inquiry that is not generalizable is unworthy. This the aims of quantitative inquiry are to develop nomothetic knowledge.	There is no absolute truth, and qualitative inquiries are not generalizable. They assume that the purpose of inquiry is to develop idiographic knowledge.

Source: Summary - Guba (1981), Krefting (1991) and Anney (2015)

Quantitative researchers consider reliability, objectivity, and validity (both internal and external) to ensure the trustworthiness of the research findings. In contrast, qualitative researchers consider dependability, credibility, transferability, and conformability as trustworthiness criteria to ensure the rigour of the qualitative findings. Although the criteria for assessing quantitative research are well established in the research literature, the erroneous use of them in assessing the rigour of qualitative analysis is still being observed (Anney, 2015).

Anney (2015) suggested that qualitative research approaches are diverse, comprising a variety of philosophical paradigms, such as interpretivism, phenomenology, semiotics, ethnography, feminism, constructivism, and others (Guba and Lincoln, 1994; Bryman, 2008; Blaintrie, 2010). It is pointed out that inexperienced researchers were often confused by the diverse nature

of qualitative research and often applied quantitative research trustworthiness criteria to establish the rigour of qualitative analysis. Gelo, Braakman, and Benetka (2008) and Ponterotto (2005) noted that the trend in most research methodology instructions originated from an education/psychology background, with a preference for quantitative research methodologies.
In assessing the application of qualitative trustworthiness criteria, Anney (2015, p. 275 - 279) considered established literature, of Cutcliffe and McKenna, 1999; Guba, 1981; Guba and Lincoln, 1994; for assessing the findings of qualitative research. The qualitative trustworthiness criteria will be applied to ensure the trustworthiness of the qualitative analysis.

5.7.2 ROOT OF QUALITATIVE TRUSTWORTHINESS CRITERIA

Responding to the question, "What are the relevant qualitative criteria that will ensure the rigour and validity of qualitative research?", what follows is a reference to the origins of qualitative trustworthiness criteria and a brief discussion of some of those used to ensure the trustworthiness of qualitative research. Guba (1991, p. 79) suggested four major concerns that should be addressed relating to trustworthiness criteria:

- Truth value: How can the researcher establish confidence in the "truth" of the findings of particular research? Or how do we know whether the findings presented are genuine?
- Applicability: How applicable are the findings of particular research to other contexts or to other subjects?
- Consistency: How can it be determined whether the findings would be repeated consistently with a similar participant in the same context?
- Neutrality: How can it be established whether the findings come solely from participants and the investigation was not influenced by the bias, motivations or interests of the researchers?

Expanding on Guba's concerns, Wallendorf and Belk (1989) added a fifth concern (Anney, 2015):

- Integrity: How do we establish whether the findings are not influenced by false information given by the study participants?

Anney (2015) argued that the concerns raised by Guba (1981) and Wallendorf and Belk (1989) were relevant to the researcher's investigation, as each research approach develops its own

criteria of responding to the five concerns raised. Lincoln and Guba (1985) claimed that positivist researchers have developed a set of criteria for addressing the four concerns, and the responses align with the ontological and epistemological assumptions of the positivist perspective. The positivist criteria included internal and external validity, reliability, and objectivity; however, Lincoln and Guba (1985) and Wallendorf and Belk (1989) argued that these criteria were not relevant for assessing the rigour of naturalistic inquiry because they make different ontological and epistemological assumptions. Anney (2015) argued that these ontological and epistemological differences suggest that assessing the rigour of qualitative research requires different criteria for addressing the four concerns proposed by Guba (2015) and the additional question posed by Wallendorf and Belk (1989). As a result, Guba and Lincoln (1982) proposed that internal validity be replaced by credibility, external validity by transferability, reliability by dependability, and objectivity by conformability (Anney, 2015, p. 276). Each of the qualitative research trustworthiness criteria and their application is briefly discussed below.

5.7.2.1 CREDIBILITY

Holloway and Wheeler (2002) and Macree and McCabe (2008) defined credibility as the confidence that can be placed in the truth of the research findings (Anney, 2015). Reflecting on the views of Grancheim and Lundiman (2004) and Lincoln and Guba (1985), Anney (2015) concluded that credibility establishes whether or not the research findings represent plausible information drawn from the participants' original data and are a correct interpretation of the participants' original views. A qualitative researcher established rigour of the research by adopting the following credibility strategies: prolonged and varied field experience; time sampling; reflexivity (field journal); triangulation; member checking; peer examination; interview techniques; establishing authority of researcher and structural coherence (Anney, 2015).

Firstly, quality research data collection requires the researcher to immerse himself or herself in the participants' world (Bitsch, 2005). This will benefit the researcher in gaining an understanding of the study's context, which will contribute to minimising distortions of data that might arise due to the researcher being in the field (Anney, 2015). Extended time in the field improved the trust in the participants' culture and context, according to Onwuegbuzie and Leech (2007). Krefting (1991) observed that an "extended time period is important because as rapport increases, participants may volunteer additional or different and often more sensitive information than previously disclosed (Anney, 2015).

Secondly, peer debriefing provides inquirers with the opportunity to test their growing insights and to expose themselves to searching questions (Guba, 1981). A qualitative researcher was required to seek support from other professionals willing to provide scholarly guidance, such as academicians and postgraduate support structures, which help the researcher improve the quality of the inquiry findings.

Thirdly, triangulation "involved the use of multiple and different methods, investigators, sources and theories to obtain corroborating evidence" (Onwuegbuzie and Leech, 2007, p. 239). Triangulation guided researchers in minimising bias and cross-examining the integrity of participants' responses (Anney, 2015). Anney (2015) identified three major triangulation techniques. Firstly, triangulation involves using multiple researchers to investigate the same problem, which introduces different perceptions of the investigation and helps strengthen the integrity of the findings. The second technique, identified as data triangulation, involves using different sources of data or research instruments, such as interviews, focus group discussions, or participant observation, utilising different informants to enhance the quality of the data. The third technique was called methodological triangulation, which utilised different research methods (Denzin and Lincoln, 2005; Lincoln and Guba, 1985). Anney (2015) recommended that qualitative research should include at least one or two of these triangulation techniques.

Fourthly, member checks imply that the data and interpretations are continually tested as they are derived from members of various audiences and groups from whom data are solicited (Guba, 1981). Lincoln and Guba (1985) viewed these checks as a crucial process that any qualitative researcher should undergo, as they are central to the credibility of the research. Member checks served to eliminate researcher bias during data analysis and interpretation of results. This allowed data to be returned to participants for evaluation of the researcher's interpretation and to suggest changes.

Fifthly, Bitsch (2005) defined negative case analysis as a situation in which data emerging from the research contradict the researcher's expectations. Negative case analysis enhanced the credibility of the research, as the researcher addressed the contradictions that emerged from the data, thereby providing a plausible alternative explanation. It could also help to reformulate the research questions, thus improving the rigour of the study.

Finally, according to Bitsch (2005, p. 83), persistent observation "poses the question as to whether the researcher or the research team has done an in-depth study to gain detail of all known cases" (Anney, 2015). This in-depth study assists the researcher in gaining an understanding of the participants' qualities and characteristics, which helps to better understand the essential characteristics of the research setting (Guba, 1981).

5.7.2.2 TRANSFERABILITY

Transferability is the degree or extent to which the qualitative research results were transferable to other contexts with other respondents – the interpretative equivalent of generalisation (Bitsch, 2005; Anney, 2015). Bitsch (2005, p. 85) concluded that the "researcher facilitates the transferability judgment by a potential user through 'thick absorption' and purposeful sampling" which implied that a detailed description of the research and purposeful selection of participants facilitate transferability of the inquiry. The following elements reflected a description of and purposeful sampling of transferability (Guba, 1981; Bitsch, 2005; Anney, 2015):

- By providing a thick description, the researcher enables judgments about how well the research context fits other contexts, and as such, a detailed methodology and context should be included in the research report. This includes the research process, data collection, study context, and documentation of the final report.
- The purposive sampling technique is mainly used in naturalistic research studies, and is defined as selecting participants based on the specific purpose of responding to the aims and objectives of the research. When considering purposive sampling, the researcher should determine which category of respondents to select. However, the respondents should be knowledgeable about the issues under investigation.

5.7.2.3 DEPENDABILITY

Bitsch (2005, p. 86) referred to dependability as "the stability of findings over time." Cohen et al. (2011) and Tobin and Begley (2004) advised that dependability involved evaluating the study's findings, interpretation, and recommendations by third parties to determine whether they were supported by the data (Anney, 2015). Factors influencing dependability were: audit trail, code-recode strategy, stepwise replication, triangulation, and peer examination of iterator comparisons (Anney, 2015). The following brief overview of these factors:

- An audit trail involved examining the research process and outcomes to validate the data by which the researcher accounted for the research decisions and activities, showing how the data were collected, recorded and analysed (Bowen, 2009; Li, 2004). To conduct a thorough audit trail, it was essential to retain the following supporting documents for cross-checking the research process: raw data, interview and observation rates, field documents and records, test scores, and other relevant materials (Guba and Lincoln, 1982). The audit trail also established the confirmability of the study, evaluating the dependability of the research, which requires thorough observation of the informants.
- Stepwise replication was a qualitative research data evaluation procedure where two or more researchers analyse the same data independently and compare the results (Chilisa and Preece, 2005). If the independent analyses were similar, then dependability of the research was achieved (Ary et al., 2010). Inconsistencies must be addressed to improve the dependability of the research.
- A code-recode strategy involved coding the same data twice, allowing for a gestation period between each coding. The outcomes of the two codes were compared to see whether the results were the same or different (Chilisa and Preece, 2005). If the coding results were the same, it enhanced the dependability of the qualitative research.
- In principle, peer examination was no different from the member checks strategy employed to enhance the credibility of the research (Bitsch, 2005). Peer examination involved the researcher presenting the research process and findings to neutral colleagues, who were experienced qualitative researchers. It also led to honesty and contributed to a more in-depth reflexive analysis.

5.7.2.4 CONFIRMABILITY

According to Baxter and Eyles (1997), confirmability refers to the degree to which research results can be confirmed or corroborated by other researchers (Anney, 2015). Tobin and Bagley (2004, p. 392) advised that confirmability is "concerned with establishing that data and interpretations of the findings are not figments of the inquirer's imagination, but were clearly derived from the data". Bowen (2009), Koch (2006), and Lincoln and Guba (1985) noted that researchers suggested that the confirmability of qualitative research was achieved through an audit trail, reflexive journaling, and triangulation. Anney (2015) reflected on reflexive journaling as a process by which researchers keep documents to reflect on, tentatively interpret, and plan data collection (Wallendorf and Belk, 1989). The reflexive journal should include

everything that happened during data collection, as well as personal reflections related to the research.

5.7.3 ASSESSING INTEGRITY OF RESEARCH FINDINGS

Wallendorf and Belk (1985) argued that the challenges faced by qualitative researchers were how to ensure that the data provided by the participants was not fabricated. There are various reasons that could cause participants to provide false information, such as reluctance to participate in the research or a dislike for the researcher. The best strategy for dealing with false information, evasion, and lies was to adopt a sceptical approach towards the information, embark on prolonged engagement with the participants, build trust, employ triangulation, use good interview techniques, ensure the participants' integrity is safeguarded, and conduct self-analysis by the researcher (Wallendorf and Belk, 1989).

5.8 ENSURING QUALITATIVE TRUSTWORTHINESS IN THE RESEARCH

In order to ensure that the credibility of the research was established (Guba, 1981; Guba and Lincoln, 1994; Anney, 2015) in that plausible information was drawn from the original data and a correct interpretation of participants' views, the researcher endeavoured to pursue the following processes:

- With respect to ensuring immersion in collective bargaining beyond the South African automotive industry, bargaining systems in other industries and countries were explored. This contributed to a better understanding of the context of the data, minimising misinterpretations and also improving the trust relationship between participants and researcher (Anney, 2015).
- Ensuring a trust relationship between participants and researcher was critical due to the sensitivity of the research on this topic had been a union demand in several negotiations (NBF Agreement, 2019; MEIBC, 2022). Strengthening this relationship will involve pre-interview engagement aimed at ensuring a thorough understanding of the research, extent of involvement, expectations and confidentiality commitments. Wherever possible, prolonged engagement with the participants was pursued, which included the timely submission of interview materials, summaries of interview materials, clarification of information, and occasional updates on the research status.

- Wherever appropriate, the advice and testing of concepts involved engaging experienced individuals in collective bargaining and other professionals. This also included approaching an experienced academic, especially to review the process of code development through the application of thematic analysis.
- Above all, there were regular consultations with a supervisor for guidance and review of the research script and processes, ensuring compliance with the ethical requirements of the university.
- All data were stored electronically on at least two storage formats for review whenever necessary.

5.9 ETHICAL CONSIDERATIONS

Due to the sensitivity of this study, the researcher adhered to ethical principles of research. The research proposal was reviewed and approved by the Rhodes University Human Ethics Committee (RU-HEC). The Approval number is: 2021-5008-6366 (Appendix D). The related documents attached to the Ethical Approval Application were: Permission to Conduct Research (Appendix A) and Participant Informed Consent (Appendix B)

Interviews were conducted with the participants' informed consent, and their privacy was respected. Once the stakeholders were identified, the researcher identified gatekeepers in the organisations, focusing on decision-makers, who approved the request to conduct the research (Permission to Conduct Research – Appendix A). The gatekeeper was requested to approve the request and identified a suitably qualified person, who completed the Participant Informed Consent form (Appendix B*)*, ensuring compliance with the research's ethical requirements (Holloway, 1997; Kvale, 1996).

The researcher was aware that his years of experience in collective bargaining in the automotive industry might impact an impartial approach to exploring the development of a concept for broader collective bargaining, thus impacting the trustworthiness of this qualitative research. Above all, there were regular consultations with the supervisor for guidance and review of the research script and processes, ensuring compliance with the university's ethical requirements. All data were stored electronically on at least two storage formats for review whenever necessary.

5.10 CONCLUSION

Qualitative approaches to research were not without challenges. Ponterotto (2005, p. 130) expounded on these challenges by reference to an "overwhelming variety of extant approaches to inquiry." Commenting on this challenge, Denzin and Lincoln (2000) pointed out that qualitative research was rooted in many disciplines, such as anthropology, sociology, education, psychology, history, literature, etcetera, and as such, these roots had a marked impact on research, resulting in differing qualitative approaches, which were evident in the literature.

The intention of the study was to sequentially apply interactive dialogues and integrative thinking as a mechanism to explore all the paradoxes emanating from the reviews of collective bargaining, social corporatism and stewardship, to structure a stewardship model that will underpin the development of a broader collective bargaining, giving effect to what is envisioned by the parties in the 2016 NBF and MEIBC Agreements.

When considering the structuring of a broader collective bargaining framework, it is essential to take into account the complexity of having four independent bargaining structures and the pluralistic elements of conflicting interests and goals. Stakeholders with radically different viewpoints experienced issues differently and found it difficult to explore solutions that served the greater multi-stakeholder interest. The challenge was to persuade stakeholders to accept a collective responsibility for securing the future viability of the automotive industry. That responsibility was structured in a stewardship philosophy.

The interpretive paradigm was applied to this research as it aimed to understand the cultural aspects of collective bargaining and stakeholder views through inter-subjective knowledge (Taylor & Medina, 2013). An exploratory interpretative methodology was particularly applicable in this research, as it contributed to developing an understanding of collective bargaining from the respective participants' perspectives, exploring interactions among them, and examining the historical and cultural contexts in which the participants lived (Cresswell, 2007).

The primary method of data collection consisted of interviews and interactive dialogues with participants from the automotive industry's collective bargaining representative structures, including bargaining councils, employer bodies, unions, and government departments.

The data analysis consisted of the sequential application of thematic analysis, considered the best method to develop paradoxical pairs reflecting the tensions in participants' views, interactive dialogues, allowing the participants to engage each other and the paradoxical statements, with the intention to explore potential solutions, and lastly, applied a process of integrative thinking to generate solutions addressing the paradoxes. Ultimately, the outcomes structured the artefacts framework, underpinning proposals for a stewardship-based, broader collective bargaining approach for the automotive industry.

It is considered that the Methods, Procedures, and Techniques process adopted in the research was grounded in relevant literature research, and the outcomes should conform to the qualitative trustworthiness criteria.

CHAPTER 6: FINDINGS – APPLYING PARADOX THEORY

6.1 INTRODUCTION

The research aimed to broaden the application of stewardship theory beyond sustainability and resilience challenges in social-ecological systems and apply it to the viability challenges in the South African automotive industry. The South African automotive industry landscape comprises key role players, such as the government, employers, and unions, whose actions and interactions impact the long-term viability of the industry for the benefit of the greater society. The intention of the study was to apply integrative thinking as a mechanism to explore the paradoxes arising from stakeholder views on collective bargaining, societal corporatism, and stewardship, which will underpin a stewardship model that facilitates the development of broader collective bargaining concepts.

6.2 OVERVIEW – DEVELOPMENT OF PARADOXICAL STATEMENTS

The researcher applied an inductive thematic analysis methodology based on the work of Nowell et al. (2017), Boyatzis (1998), and Braun and Clarke (2006) to develop themes and codes, which ultimately led to the development of paradoxical statements. The paradoxical statements constituted an important input in the application of interactive dialogue and integrative thinking processes to develop a proposed stewardship-based broader collective bargaining framework for the automotive industry.

6.3 STAKEHOLDER ORGANISATIONS AND STAKEHOLDERS

The first step in developing codes and themes inductively using thematic analysis was to identify the stakeholder organisations and stakeholders which were the source of the raw data. These stakeholders were selected based on their involvement in all structures of collective bargaining in the South African automotive industry. The data to be coded was obtained from interviews with identified representatives from stakeholders within selected stakeholder organisation structures. The following stakeholder organisations and stakeholders were identified and adopted:

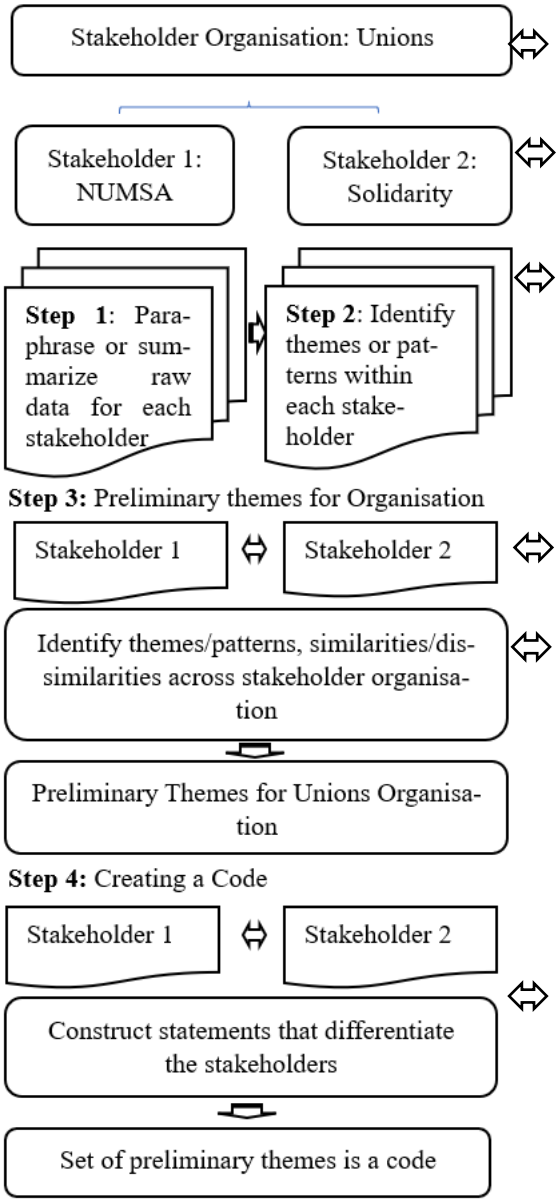
Table 6.1 Stakeholder Organisations and Stakeholders

STAKEHOLDER ORGANISATIONS	STAKEHOLDERS
• Bargaining Council	• MIBCO (Motor Industry Bargaining Council): Component suppliers
• Employers' Representatives	• AMEO (Automobile Manufacturers Employers' Organisation): OEMs • NAACAM (National Association of Automotive Component and Allied Manufacturers): Components • NEASA (National Employers Association of South Africa): Components
• Government/Industry Forum	• DoE & L (Department of Employment and Labour) • NAAMSA (National Association of Automobile Manufacturers of South Africa): Automotive
• Unions	• NUMSA (National Union of Metal Workers of South Africa) • Solidarity

6.4 DEVELOPING CODES AND THEMES INDUCTIVELY APPLYING THEMATIC ANALYSIS

The researcher adapted the methodologies of Boyatzis (1998), Braun and Clarke (2006) and Nowell et al. (2017) to develop codes and themes inductively (Figure 6.1). The methodology was first applied to a stakeholder organisation, namely the Unions. The Unions organisation was selected as they represent all the hourly paid and technical workers in the automotive industry in all the current collective bargaining structures. NUMSA represents all hourly paid workers, whilst Solidarity represents technically qualified staff in a number of bargaining structures. In contrast, the other stakeholder organisations are either automotive sector specific or governance.

The final step of the process was to apply the code, or themes, developed for the Unions independently to each of the other specific samples, identifying similarities and differences.



Bargaining Councils; Employers' Representative Forums; Government/Industry Forum and Unions (stakeholder organisations)

Subsamples (stakeholders)

Reducing the raw information obtained from the interviews and other relevant information for each participant, through summarising. At the same time identify themes, similarities or dissimilarities in the samples.

Compare the themes developed in each sample analysis, identify similarities between subsamples.
This will further reduce the raw information making it more manageable for further analysis steps.

Construct a set of statements that differentiate the two samples. This set of preliminary themes constitute a code
To determine the validity of the code or themes, the code is applied to another subsample from the specific samples. Compare the subsample differentiated theme to each of the other specific samples independently. Those showing differentiation constitute the validated code or theme.

- **Step 5:** Assessing validity

Applying the themes to the relevant "Similarities/dissimilarities, or Patterns within the Raw Data" across Other Stakeholder Organisations

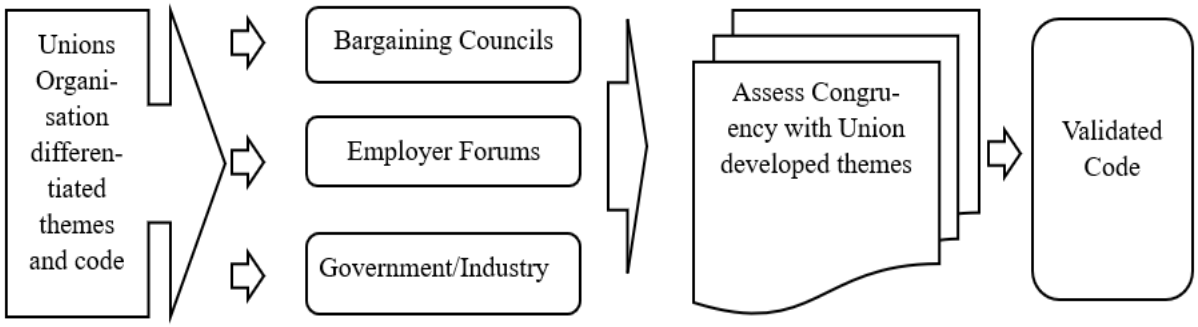


Figure 6.1: Adaptation of the Methodologies of Boyatzis (1998), Braun and Clarke (2006) and Nowell et al. (2017) to develop Codes and Themes inductively

6.4.1 IDENTIFYING PRELIMINARY THEMES WITHIN STAKEHOLDERS OF THE UNION: STEPS 1 AND 2

In essence, this process involved selecting one of the stakeholder organisations, applying the analysis and then validating the outcomes across the other stakeholder organisations. The Union stakeholder organisations were selected as the two stakeholders (unions) together represent all hourly-paid and technical staff in the automotive bargaining structures.

To identify themes within the union organisations, the raw data from each stakeholder (NUMSA and Solidarity) were summarised, and preliminary themes or patterns were identified. The raw data for each stakeholder were then summarised under each identified preliminary theme. Although the two stakeholders represent different categories of employees, there are many areas of similarity in their responses. In reviewing the data, common topics or preliminary themes were identified. The following summary reflects the key findings grouped under common topics or preliminary themes (reflected in Table 6.2):

- Bargaining issues: NUMSA's view was that it should consist of prevailing challenges facing the industry at the time, versus Solidarity's view that the traditional bargaining demands of wages and substantive conditions of employment and in addition, the viability and social challenges of the industry, should constitute the bargaining issues. This represented a difference in view between the subsamples of what constitutes bargaining issues.

- Bargaining structures: Both stakeholders identified a two-tier bargaining format consisting of plant and sector-level negotiations as an appropriate bargaining framework. Neither elaborated on which issues could be dealt with at the plant level or sector level, nor on a process for how these issues should be raised at the plant or sector level.
- Current sector collective bargaining: The responses were quite diverse. NUMSA strongly felt that the current sector collective bargaining was not a sustainable form of bargaining in the medium to long term. However, despite this view, they indicated that it contributed to improvements in working conditions for workers, as well as an enhanced understanding between workers and employers regarding the industry. Solidarity was of the view that the current collective bargaining structure was the most appropriate, as it effectively responded to the industry's diversity, allowing for plant-level agreements that focused on specific enterprise needs. This represented a disagreement between the two subsamples on current sector collective bargaining.
- Collective bargaining expectations: The views of the two stakeholders differed. NUMSA was of the view that the outcomes should be pro-worker centred, with decent wages ensuring a standard of living not negatively impacted by social and economic challenges. Solidarity, in turn, focused on the structure of collective bargaining, negotiating guidelines, and upgrading negotiation skills, as opposed to an overemphasis on wages and benefits.
- Collaboration between bargaining structures: There was unanimous support for a structured collaboration between bargaining councils, although neither party gave a view on what such a collaboration could look like.
- Challenges in collective bargaining: NUMSA's view was that it might not be easy to address these challenges, as negotiating structures were fluid and, as such, issues were fluid. An additional challenge was to secure a decent wage to ensure the standard of living of workers was not compromised. Solidarity identified systemic challenges, including poor alignment between the interests and focus areas of members of the bargaining council, a lack of commitment to bargaining council sustainability and shareholder interaction, and an overemphasis on wages and benefits. The stakeholders differed in their responses, with NUMSA focusing on direct worker compensation, while Solidarity identified systemic challenges.
- Role of stakeholders: According to NUMSA, the government should focus on contributing to a stable and predictable industry by supporting the implementation of the automotive

masterplan. Solidarity supported this view, but also reflected on the roles of corporate structures and stewards. With respect to corporate structures, Solidarity identified the need for a structured interaction among the various stakeholders contributing to the development of a policy conducive to driving the industry's viability. Solidarity argued that stewards should think beyond their own representative interests and accept mutual responsibility for the future of the industry.

- Challenges facing the South African automotive industry: Both NUMSA and Solidarity raised several challenges ranging from transition to electric vehicles; production of locally developed vehicles; appropriate skills, globalisation, the role of government and beneficiation of local strategic minerals. There was no differentiation between the two, and they complemented each other.
- Expectations of strategic structures: NUMSA's response covered worker interests, whilst Solidarity focused on stakeholder collaboration aimed at addressing the challenges facing the industry. The two views were opposing in the sense that NUMSA focused on worker issues, whilst Solidarity raised issues of long-term interests.

This process, which involved comparing the summaries of the stakeholders' raw data, identified similarities and dissimilarities, as well as common topics. These common topics represented the first step in developing themes. The analysis is summarised below:

Table 6.2: Condensed Summary of Raw Data of Stakeholders under each Preliminary Theme or Common Topic Description.

SIMILARITIES, OR PATTERNS WITHIN THE SUMMARISED RAW DATA		COMMON TOPICS/PRELIMINARY THEMES IDENTIFIED
NUMSA	SOLIDARITY	
Prevailing conditions in the industry.	Bread and butter issues, as well as industry viability and social challenges.	Bargaining issues
A combination of plant-level and sector collective bargaining.	Combination of plant level and sector collective bargaining. Viability and social challenges to	Bargaining structures

	be addressed in a "non-negotiation" structure.	
Not a sustainable form of bargaining in the medium to long-term, however contributed to the improvement of working conditions for workers.	The most appropriate bargaining structure responds to the diversity in the industry. Flexibility for plant-based agreements, focusing on specific enterprise challenges.	Current sector collective bargaining
Outcomes should be pro-worker-centred.	Instead of over-emphasis on wages and benefits, the long-term viability of the industry must also be considered.	Collective bargaining expectations
It is imperative as it promotes achieving bargaining consensus.	Where it is beneficial to collective bargaining and mandated by members.	Collaboration between bargaining structures.
Ensure the standard of living of workers is not negatively impacted by social and economic pressures.	Not always alignment in interest and focus areas among members of the bargaining council.	Challenges in collective bargaining.
Must contribute to a stable and predictable industry.	Must focus on viability challenges as well as focussing beyond representative interests; promote unity and commitment.	Role of stakeholders.
Manage transition to electric vehicles; exploit local strategic minerals; establish relevant infrastructure to support local production.	Globalisation, inability to provide basic infrastructure benefits, and the beneficiation of local strategic minerals to support local production.	Challenges facing the South African automotive industry.
Pro-worker automotive industry.	Focus on strategic issues impacting the industry; building strategic relationships, focusing on the challenges.	Expectations of strategic structures

6.4.2 IDENTIFYING SIMILARITIES/DISSIMILARITIES ACROSS STAKEHOLDERS UNDER EACH PRELIMINARY THEME (STEP 3)

In this step, the above summarised data were analysed, identifying similarities and dissimilarities across the two stakeholders for each preliminary theme. This analysis is captured in Table 6.3 and summarised below:

Upon reviewing the overview of similarities and dissimilarities across the two stakeholders, it appeared that the preliminary themes were more likely to cover consensus on strategic issues, while dissimilarities were more common in operational issues. This trend is summarised below:

- Preliminary themes with similar outcomes
  - Collective bargaining structures: The stakeholder responses were interesting. Whilst there was consensus among the subsamples for a two-tier bargaining structure at the plant and sector levels, Solidarity's view was that additional issues of viability and social challenges must be addressed in a "non-negotiation" structure.
  - Collaboration between bargaining structures: There was general consensus among the stakeholders that collaboration was imperative, as it would promote optimising existing negotiations. Solidarity's view was that collaboration is acceptable where it is beneficial, but collective bargaining was not viewed as a form of conditional approval.
  - Role of stakeholders: Although NUMSA only commented on the role of the government, Solidarity raised several other stakeholders. However, there was consensus on the role of government.
  - Challenges facing the South African automotive industry: Both stakeholders raised complementary challenges ranging from transition to electric vehicles, infrastructure, globalisation challenges, etcetera.
- Preliminary themes with dissimilar outcomes
  - Collective bargaining issues: NUMSA's response that bargaining issues be informed by prevailing conditions in the industry, such as job grading, did not necessarily imply that wages and benefits could not be considered as bargaining issues; however, their response was not further clarified. However, taken at face value, it differed from Solidarity's response, which focused on wages and substantive conditions of employment, as well as the viability and social challenges of the industry.

- Current sector collective bargaining: NUMSA expressed a strong view that the current sector collective bargaining was not sustainable in the medium to long-term and must be reviewed, despite acknowledging that it contributed to the improvement of worker conditions. On the other hand, Solidarity was of the view that current sector collective bargaining was the most appropriate bargaining structure for the industry, as it effectively responded to the industry's diversity, fostered labour and strategic relations within the bargaining council, and was flexible for in-house agreements.
- Collective bargaining expectations: NUMSA indicated that negotiation outcomes should be pro-worker centred, but also expressed a view that parties should strive to find common grounds in negotiations. Solidarity's view was that instead of focusing on wages and benefits, the parties should explore a total increase concept, which included wages and benefits, allowing flexibility in "cutting the cake".
- Challenges in collective bargaining: NUMSA proposed negotiating a decent wage for workers, ensuring they maintained a standard of living not negatively impacted by social and economic challenges. Solidarity's response was more systemic in that it sought to address the need for improved alignment among collective bargaining stakeholders, the lack of commitment to bargaining stakeholders, and the understanding of vastly different ideologies among stakeholders.
- Expectations of strategic structures: NUMSA's expectations in their engagement in strategic structures were to create a pro-worker automotive industry, ensuring workers remained relevant in the face of the introduction of new technologies, as well as ensuring the standard of living of workers is not negatively impacted by social and economic challenges. On the other hand, Solidarity's expectations were that these structures must focus on the strategic issues impacting the industry, and how the sector structures can collaborate in addressing these challenges

Table 6.3: Preliminary Themes and Condensed Summary of Similarities and Dissimilarities across Union Stakeholders

PRELIMINARY THEMES – UNIONS ORGANISATION	SIMILARITIES & DISSIMILARITIES ACROSS STAKEHOLDERS	
	SIMILARITIES	DISSIMILARITIES
1. Collective bargaining issues		Prevailing conditions in the industry VERSUS wages and benefits, and in addition, industry viability and social challenges.
2. Current sector collective bargaining		Not a sustainable form of bargaining in the medium to long-term VERSUS the most appropriate bargaining structure.
3. Collective bargaining expectations		Pro-worker centred VERSUS the conce of total cost to the company and negoti tion guidelines.
4. Collaboration between bargaining structures	In-principle support for collaboration between bargaining councils.	Where it will be beneficial to collective bargaining and mandated.
5. Challenges in collective bargaining		Focus on decent wages for workers VERSUS systemic challenges of collective bargaining.
6. Role of stakeholders	Collaborative engagement between stakeholders, focusing on viability and stability challenges	
7. Challenges facing the South African automotive industry	General consensus on challenges: transition to electric vehicles; exploiting raw materials; globalisation, etcetera.	

8. Expectations of strategic structures		Creating a pro-worker industry VER-SUS focusing on the strategic issues impacting the viability of the industry.

6.4.3 CREATING A THEME FOR UNION STAKEHOLDER ORGANISATIONS

This step involved reviewing the statements that differentiated the two stakeholders, creating preliminary themes. It also involved reviewing the raw data to determine the presence or absence of each of the preliminary themes.

6.4.3.1 CODES AND PRELIMINARY THEMES FOR THE UNION ORGANISATIONS

The similarities and dissimilarities or patterns in each subsample were reviewed, focusing on identifying key descriptions or categories or texts that underpin a particular context in the data (Gibbs, 2007; Stuckey, 2015). These descriptions, which included codes common to the three sets of data, were grouped together to identify a theme for application in the thematic analysis process, as schematically depicted in Figure 6.2.

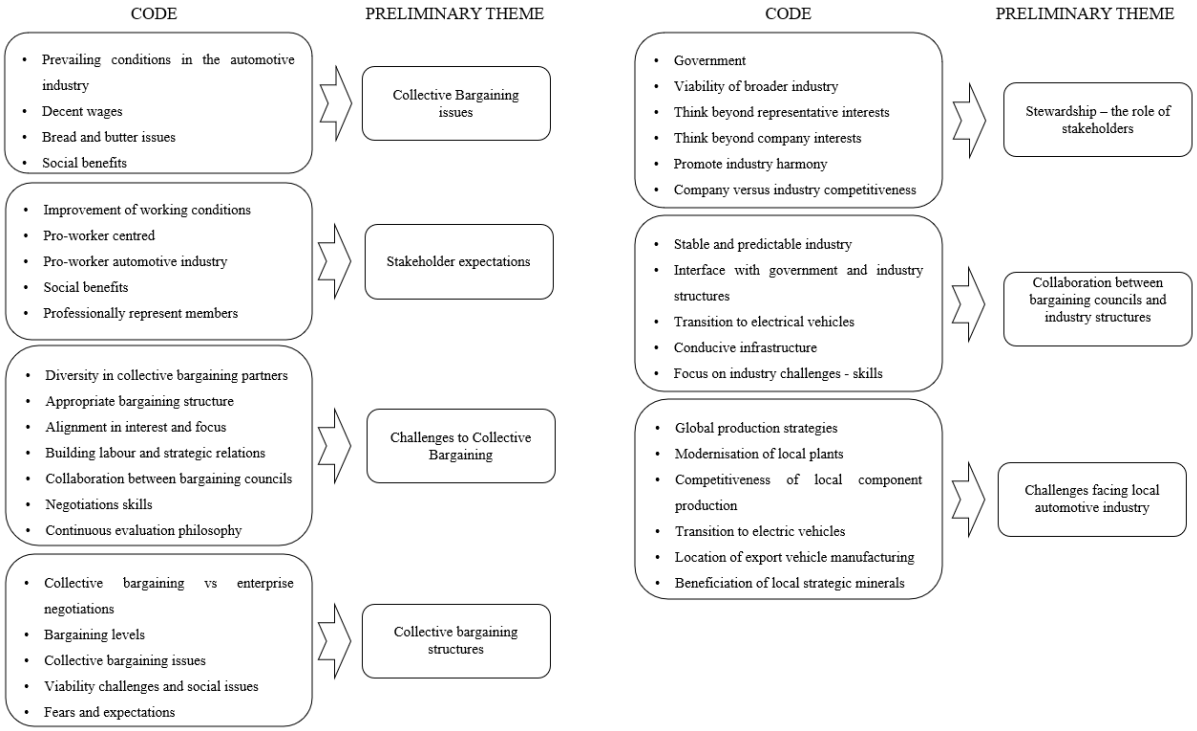


Figure 6.2: Identifying key descriptions, categories, or texts that underpin a particular context in the data. (Source: Author's construction)

6.4.3.2 PRELIMINARY THEMES FOR UNIONS ORGANISATION

This step involved reviewing the summary of similarities/dissimilarities across the two union stakeholders, identifying areas of differentiation. These statements were rewritten to create a statement that seeks maximum differentiation between the two stakeholders and are captured in Table 6.4. The following summary of themes and statements of maximum differentiation between the two subsamples:

- Industry collective bargaining topics: A collective bargaining framework between representative structures of the automotive industry should extend beyond wages and substantive conditions of employment, additionally focusing on the sustainability and socio-economic challenges of the industry in a non-negotiation platform.
- Current collective bargaining: Although current sector collective bargaining has served the industry well, it must be reviewed to bring about greater efficiency in the collective bargaining process by addressing the opposing views of appropriateness of the structure, sustainability and one-size-fits-all concerns.
- Challenges facing sector collective bargaining: Pursue establishing a broader collective bargaining framework involving all industry stakeholders, responding to the diversity in stakeholder interests, such as pro-worker centred outcomes and better alignment of interest and focus areas among members of the bargaining councils.
- Collaboration between bargaining councils: Pursue a structured collaboration framework between bargaining councils that will promote bargaining efficiency, build relationships between bargaining partners and labour stability, while preserving sector collective bargaining.
- Viability of the South African automotive industry: Pursue a structured collaboration framework between bargaining councils that will promote focus on strategic challenges facing the industry, bargaining efficiency, building relationships between bargaining partners and labour stability, but preserving sector collective bargaining.
- Efficacy of current societal corporatist structures: Although historically, societal corporatist structures served the industry well, currently, their involvement in addressing strategic challenges is limited. Participants argued that these structures no longer fulfil their role as a vehicle of problem-solving between government, labour, business and community to ad-

dress socio-economic challenges. There was no structured interface between these structures and the automotive stakeholder representative structures, resulting in a disjointed focus on the industry's viability.

- Expectations of strategic structures: Strategic structures should focus on building strategic relationships going beyond individual stakeholder interests in order to address the strategic challenges impacting the industry and, in particular, how the different sectors can collaborate in problem-solving initiatives.
- Role of leadership in the automotive industry: Automotive industry leaders must take ownership for the future viability of the industry by adopting a stewardship philosophy extending beyond representative interests and focusing on labour stability. Leaders must be able to influence industry processes and decisions within their representative structures as well as drive industry positions and decisions in these structures.

Table 6.4: Condensed Summary of Statements of Maximum Differentiation between Union stakeholders

PRELIMINARY THEMES	STATEMENT TO CREATE MAXIMUM DIFFERENTIATION BETWEEN UNION STAKEHOLDERS	REWRITE THE STATEMENT SEEKING MAXIMUM DIFFERENTIATION BETWEEN STAKEHOLDERS	THEMES
1. What constitutes bargaining issues?	Bargaining issues must be determined by prevailing conditions of the automotive industry, including bread-and-butter issues, versus a focus beyond wages and substantive conditions of employment to include deliberating on the viability of the industry as well as social challenges.	A collective bargaining framework between representative structures should extend beyond wages and substantive conditions of employment, additionally focusing on the sustainability and socio-economic challenges of the industry in a non-negotiation platform.	Industry collective bargaining topics.

2. Views on current sector collective bargaining.	Current sector collective bargaining served the industry well and is the most appropriate bargaining structure against the opposing view that it is outdated and not a sustainable form of bargaining in the medium to long-term; consequently, the one-size-fits-all approach results in inflexible negotiations and the digression of substantive issues.	Although current sector collective bargaining has served the industry well, it must be reviewed to bring about greater efficiency in the collective bargaining process by addressing the opposing views of appropriateness of the structure, sustainability and one-size-fits-all concerns.	Outdated current collective bargaining.
3. Challenges facing sector collective bargaining.	NUMSA's view is that the outcomes of collective bargaining should be pro-worker centred, whilst Solidarity's view is that there should be better alignment of interests and focus areas among members of the bargaining councils.	Pursue establishing a broader collective bargaining framework involving all industry stakeholders, responding to the diversity in stakeholder interests, such as pro-worker centred outcomes, and better alignment of interests and focus areas among members of the bargaining councils.	Stewardship-based broader collective bargaining framework for the industry.
4. Collaboration between bargaining councils.	Bargaining councils should be able to collaborate on common issues, whilst preserving sector collective bargaining, as	Pursue a structured collaboration framework between bargaining councils that will pro-	Structured collaboration between bargaining councils.

	opposed to a lack of commitment to bargaining council sustainability.	mote bargaining efficiency, build relationships between bargaining partners and labour stability, while preserving sector collective bargaining.	
5. Viability of the South African automotive industry.	Should focus beyond stakeholder and sector interests on the beneficiation of local strategic minerals, competitive local component production, and better collaboration between stakeholders, especially between OEMs and component suppliers.	Pursuance of the future of the industry should go beyond current manufacturing processes, additionally focusing on the beneficiation of local strategic minerals, competitive local component production, better collaboration between stakeholders, etcetera.	Viability of the South African automotive industry integrated into a collective bargaining framework.
6. Societal corporatism's impact on the automotive industry.	There is currently a limited interface between social corporatist structures and industry representative structures as opposed to the role corporatist structures played in the transformation of the automotive industry during the Apartheid years.	Although historically, societal corporatist structures have served the industry well, currently, there is no structured interface between these structures and automotive stakeholder representative structures, resulting in a disjointed focus on the viability of the industry.	Efficacy of current societal corporatist structures
7. Expectations of strategic structures.	These structures must focus on the strategic is-	Strategic structures should focus on building strategic relationships	Collaboration between industry structures.

	sues impacting the industry; how the different sector structures can collaborate in addressing the challenges facing the industry, and in building strategic relationships instead of focusing on sector or enterprise challenges.	going beyond individual stakeholder interests in order to address the strategic challenges impacting the industry and how the different sectors can collaborate.	
8. Role of leadership in the automotive industry.	Leaders must adopt a stewardship philosophy to find long-term solutions to the challenges facing the industry, extending beyond labour stability, sector, or enterprise interests.	Automotive industry leaders must take ownership of the future viability of the industry and must understand the challenges facing the industry. They must be able to think beyond representative interests; be able to influence processes within representative structures; and accept joint responsibility for the future of the industry.	Stewardship approach in addressing the challenges facing the industry.

6.4.4 VALIDATING THE THEMES QUALITATIVELY

The themes developed for the stakeholder organisation, Unions, were validated by comparing them qualitatively with relevant summarised interview responses from the other stakeholder organisations, namely Bargaining Council, Employers representatives, Government and Industry organisation, assessing congruency. The responses were lifted from the "Summary of Raw data of Stakeholder Organisation Responses" (Appendix H), reflecting responses to the themes.

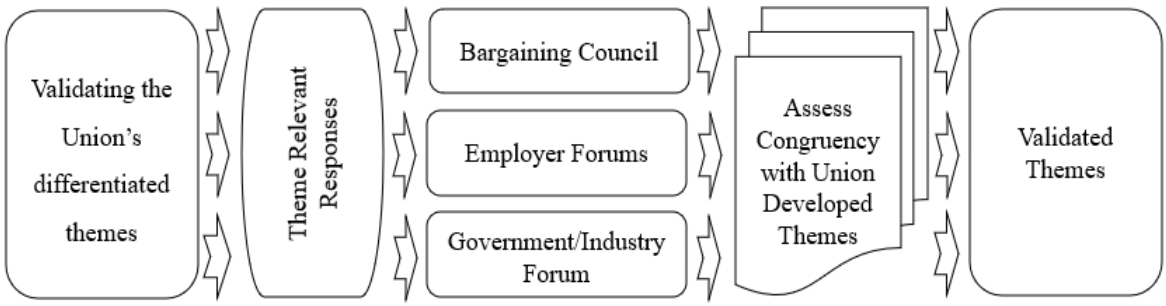


Figure 6.3 Comparison of the Unions' emerging themes with relevant summarised interview responses of the other stakeholder organisations (Source: Author's construction)

The following is an overview of the comparison between the Themes and Statement of Differentiation developed for the unions, with the relevant interview summaries of raw data of the other stakeholder organisations (i.e., Bargaining Council, Employers Representative forum, Government and Industry Forum). Appendix H reflects the raw data for the other stakeholder organisations, and Appendix G reflects the comparison of the emerging themes and statements for the union stakeholder with the summarised raw data for the other stakeholder organisations. The overview of the comparison is captured in Table 6.5 and summarised below:

- Industry Collective bargaining topics: There was general consensus among the other specific samples with that of the Union in that the main bargaining issues were wages and substantive conditions of employment, but must additionally focus on issues impacting the viability of the industry. These issues should be addressed in a collaborative manner.
- Current Sector collective bargaining arrangements: Comparing the views of each of the other specific samples to that of the Union, there were opposing views on the merits of current sector collective bargaining. Two of the stakeholder organisations concurred with the Union that current sector collective bargaining served the industry well in the sense of contributing to labour stability, but there was a need to focus on the strategic challenges impacting the long-term viability of the industry. Two of the specific samples held the view that current sector collective bargaining was outdated and that the "one-size-fits-all" approach was problematic when addressing industry challenges. There was consensus that the current sector collective bargaining system needed to be reviewed to achieve greater efficiency in collective bargaining.

- Stewardship-based broader collective bargaining forum: The Unions' view to pursue a broader bargaining structure was supported by three of the four specific samples. This position was summarised in one of the specific samples' views, which stated that current challenges fell outside the scope of the current sector collective bargaining and must be pursued in a broader structure.
- Structured collaboration between bargaining councils: The Union's motivation for a structured collaboration between bargaining councils was supported by all the other stakeholder organisations. The focus of the collaboration varied from common issues to those impacting the sustainability of the industry, including improved flexibility and preserving sector collective bargaining.
- Viability of the South African automotive industry: The Union's view was that the future of the South African automotive industry should go beyond current manufacturing processes, and should focus on beneficiation of the local strategic minerals and better collaboration between stakeholders. This must be integrated into a collective bargaining framework. This view was supported by the other three stakeholders, who also proposed additional measures for transforming the current collective bargaining framework and establishing social dialogue as vehicles to drive this process.
- Societal corporatist structures: The Unions suggested that, historically, the societal corporatist structures contributed to the transformation of the automotive industry, but currently, there is no structured interface between these structures and the automotive industry, resulting in a disjointed focus on the viability of the industry. Comparing this view to the other four specific samples, what was clear was that there is consensus that the societal corporatist structures provide a structure where socio-economic issues can be debated in a non-negotiation environment, nurturing a partnership between government and organised business. An additional comment was that societal corporatist structures have the potential to be the glue to address socio-economic challenges.
- Building strategic relationships: The Union's view was that stakeholders should focus on building strategic relationships, going beyond individual stakeholder interests, in order to address the broader challenges impacting the industry. Whilst the Employers' Forum lamented a lack of meaningful cohesion among stakeholders, all three stakeholders support the Unions' view of a strategic collaboration among stakeholders.
- Automotive industry leadership: The Unions' position was that the leaders should adopt a stewardship philosophy to explore long-term solutions to the challenges facing the industry,

going beyond labour stability. The other stakeholders raised specific ways in which leaders could address the future viability challenges, such as thinking beyond company and sector interests, and accepting joint responsibility to address the industry's challenges. There was a general consensus that a stewardship approach should be adopted by industry leaders to address the challenges facing the long-term viability of the industry.

Table 6.5. Condensed Validity Assessment of the Unions' Themes – Comparison with the other Stakeholder Organisations

STAKEHOLDER ORGANISATION: UNIONS		THEME SUMMARY OF OTHER STAKEHOLDER ORGANISATION INTERVIEWS (Appendix G and H)			
EMERGING THEMES	STATEMENT OF DIFFERENTIATION	BARGAINING COUNCIL	EMPLOYERS' FORUM	GOVERNMENT	INDUSTRY FORUM
1. Collective bargaining topics	Should extend beyond wages and substantive conditions of employment, additionally focusing on the sustainability and socio-economic challenges.	Wages and substantive conditions of employment, but could include issues impacting the viability of the industry beyond the employment relationship.	Wages and substantive conditions of employment, but there is a need for strategic engagement on issues impacting the viability of the industry.	Mutual interest issues between the stakeholders, with a scope covering topics such as the changing nature of work, viability and future skills, could be considered.	No comment
Validity comparison		Similarity. A need for a strategic engagement on issues impacting the viability of the	Similarity	Similarity, but reference to mutual interest issues.	Not able to assess – no comment

		industry beyond employment relationships.			
2. Current sector collective bargaining	Although current sector collective bargaining has served the industry well, it must be reviewed to bring about greater efficiency in the collective bargaining process	Challenges to sector collective bargaining are more fundamental. However, it provides a legal framework that governs negotiations and has contributed to labour stability.	A "One-size-fits-all" approach is problematic when dealing with industry viability challenges. There is a need for a broader industry platform that will support collective efforts to ensure the success of the industry.	Contributed to long-term agreements, which contributed to labour stability. However, there are challenges which frustrate current sector collective bargaining.	The current structure is outdated; consequently, the "one-size-fits-all" approach could result in inflexible negotiations and a digression from substantive issues.
Validity comparison		Similarity. Principled support for a review of sector collective bargaining, although recognising that it provides a legal framework	Similarity	Similarity. Although acknowledging that sector collective bargaining has served the industry well, a number of challenges were listed,	Similarity

		which has contributed to labour stability.		frustrating collective bargaining.	
3. Stewardship-based broader collective bargaining framework for the industry	Pursue establishing a broader collective bargaining framework involving all industry stakeholders	Some of the challenges fall outside the scope of current sector collective bargaining and can be addressed in a mega or broader collective bargaining platform.	There is a need for a broader industry platform that will support collective efforts to ensure the success of the industry.	No reference to broader collective bargaining	It must be reviewed to bring greater efficiency into the bargaining process.
Validity comparison		Similarity. Identified a need for a collaborative structure to deal with threats.	Similarity	Similarity could not be established	Similarity
4. Structured collaboration between bargaining councils.	Encourage a collaborative framework between bargaining councils, promoting bargaining efficiency and relationship	Collaborate on common issues, whilst preserving sector integrity.	Formalised and linked to strategic issues impacting the sustainability of the industry.	It allows for flexibility and takes into consideration the dynamics within the system.	Collaborate on common issues whilst preserving sector bargaining integrity.

	building between bargaining partners.				
Validity comparison		Similarity. With a focus on common issues, whilst preserving sector bargaining.	Similarity. With a focus on strategic issues.	Similarity. Focus on flexibility.	Similarity. With a focus on common issues, whilst preserving sector bargaining.
5. Viability of the South African automotive industry.	Should go beyond current manufacturing processes, export opportunities, and additionally focus on the beneficiation of local strategic minerals.	Beneficiation of local strategic minerals, competitive local component production, and better collaboration between stakeholders.	Must contribute towards international competitiveness, productivity, and the changing nature of the workforce.	Social dialogue at the industry level is critical in dealing with the challenges.	No comment.
Validity comparison		Similarity. Structured approach in addressing viability challenges.	Similarity. Structured approach in addressing viability challenges.	Similarity. Proposed social dialogue as a mechanism to address challenges.	No comment.

6. Societal corporatist structures	Historically, corporatist structures contributed to the transformation of the automotive industry; currently, there is no structured interface between these structures and the automotive industry.	Potential to be the glue to address socio-economic challenges, but currently little interface with bargaining structures.	Provide a platform where socio-economic challenges can be debated in a non-negotiating environment, focusing on the viability challenges	Central to building structures that can shape the industry through social dialogue.	No comment.
Validity comparison		<u>Similarity</u>. Agree that structure can play a role in addressing challenges; however, the current structure is failing in this regard.	<u>Similarity</u>. Agree that structure can play a role in addressing challenges; however, the current structure is failing in this regard.	<u>Similarity</u>. Agree that structure can play a role in addressing challenges.	

7. Building strategic relationships	Should focus on building strategic relationships extending beyond individual stakeholder interests, addressing the broader industry challenges.	Focus on the interaction between the various constituents of the industry, ensuring inclusivity instead of individual, company or sector interests	General lack of meaningful stewardship due to a lack of cohesion beyond company interest.	Vital for the consistent implementation and monitoring of the outcomes of strategic engagements.	No comment.
Validity comparison		Similarity. Focus on interaction and inclusivity.	Similarity. Identified a lack of meaningful stewardship in the industry.	Similarity. Vital for strategic engagements.	
Validity comparison		Similarity. Leaders are to accept joint responsibility to drive the sustainability of the industry.	Similarity. Leaders are to accept joint responsibility to drive the sustainability of the industry, and think beyond representative interests.	Similarity. Competent leaders who will engage in industry viability dialogues	Similarity. Driven leadership to focus on viability and not on short-term interests.

6.5 DEVELOPING THE PARADOXICAL STATEMENTS

Smith and Lewis (2011, p 382) defined a paradox as “contradictory, yet interrelated elements that exist simultaneously”. In identifying the paradoxes, the outcomes of the inductive thematic

analysis, as summarised in the above themes' validity assessment overview (6.4.4), were reviewed, identifying the "contradictory, yet interrelated elements" for each theme. The following steps were applied to document the paradoxical statements. The first step involved summarising the views of all the stakeholder organisations for each validated theme, highlighting the dissimilarities or tensions. This information was extracted from Table 6.5. The focus was on grouping the dissimilarities or tensions within each theme. Secondly, the tension statements were redrafted to create maximum differentiation between the tensions identified in each theme. This differentiation is reflected as a paradoxical pair. These steps are reflected in the tables below:

Table 6.6: Summary of the stakeholder organisations' responses to the themes, highlighting the tensions for each theme.

THEME	SUMMARY	TENSIONS
1. Industry collective bargaining topics should extend beyond "bread-and-butter" issues.	Bargaining issues constitute wages and substantive conditions of employment (bread-and-butter issues); however, there is a view that issues impacting the viability of the industry and socio-economic conditions should be considered.	Employers support the view that bargaining issues should include industry viability and socio-economic challenges; however, NUMSA contends that bargaining issues should generally be determined by prevailing conditions in the automotive industry, such as job grading.
2. Current sector collective bargaining is outdated and must be reviewed.	Current sector collective bargaining has served the industry well, contributing to labour and industry stability; however, there are limitations, such as addressing the long-term sustainability challenges. The view is that it must be reviewed to bring	Conflicting views in that current sector collective bargaining is outdated and should be reviewed and that it has served the industry well. In addition, the "one-size-fits-all approach will result in inflexible negotiations and digression of substantive

	greater efficiency into the bargaining process.	issues. Sector collective bargaining must be reviewed to bring about greater efficiency in the bargaining process, in itself, it is a challenge as the focus is on a respective sector without considering implications for the rest of the sector.
3. Pursue establishment of a stewardship-based broader collective bargaining framework for the industry.	There is a need to transform collective bargaining for it to remain relevant, not only to contribute to industrial peace and stability, but also to contribute to international competitiveness and benchmark productivity. However, there should be checks and balances to address non-wage-related issues and socio-economic challenges. A mega or broader collective bargaining platform can address the fundamental challenges within to sector collective bargaining.	Opposing view in that challenges to sector collective bargaining are more fundamental, which can be addressed in a mega or broader collective bargaining forum, whilst others argue that it has served the industry well, contributing to labour peace and stability. Internationally, collective bargaining is moving towards enterprise bargaining.
4. Structured collaboration between collective bargaining councils/structures.	There is consensus that collaboration between bargaining councils is important and that it should be structured; however, there are different views as to what the focus of the collaboration should be.	Different views held by participants as to what the collaboration should be based on – common issues, preservation of sector collective bargaining, linked to strategic issues impacting on the

		viability of the industry or harmonising benefits across the industry, etcetera.
5. Comprehensive focus on the viability of the South African automotive industry integrated into a collective bargaining framework.	There is a consensus that the sustainability of the industry must be addressed as a collective responsibility by all stakeholders. Various challenges were raised, such as a lack of common vision and interaction between industry stakeholders; an inability to exploit local resources for component and vehicle production; an enabling regulatory framework; and failing infrastructure.	The threat to the industry is that, by and large, the challenges facing the industry fall outside the scope of current sector collective bargaining, and there is no collaborative structure to deal with them.
6. Efficacy of current societal corporatist structures to address criticism of auto industry stakeholders, ensuring socio-economic challenges can be raised and debated in a non-negotiation environment.	Consensus that societal corporatist structures must play a role in addressing the socio-economic and viability challenges facing the industry, providing for a partnership between government, organised business and labour, governed by a policy framework.	There is criticism that NEDLAC (National Economic Development and Labour Council) is far removed from the industry and that there is little interface with bargaining structures (Bargaining Councils, Employers).
7. Build strategic relationships focusing on how different sector structures can collaborate in addressing the industry challenges.	The focus of industry leaders should be in building inclusivity and strategic relationships by creating structures and identifying champions, who are passionate drivers of	There is a perceived lack of meaningful stewardship due to lack of cohesion focus beyond sectoral or company levels. Parties do not respect

	objectives and targets set out for the industry. instead of focusing on self-interest, bureaucracy, inflexibility and lack of proactivity.	the outcomes of their engagements by failing to implement or enforce agreed-upon outcomes (government).
8. Automotive industry leadership must adopt a stewardship approach in addressing the challenges facing the industry, focusing on inclusivity and thinking beyond its own interests.	General consensus that leaders from all the representative structures of the auto industry must accept joint responsibility for the sustainability of the industry; they must think beyond the representative interests, promote unity, and be leaders with foresight.	A serious leadership challenge arises when parties disrespect the outcome of their engagements by failing to implement or enforce agreements (in the industry).

The next step in the development of paradoxical statements entailed rewriting or constructing a set of statements that differentiate the tensions identified in each theme. The set of differentiating statements represents the paradoxical statements and is reflected in Table 6.7 below.

Table 6.7: Paradoxical Statements

THEMES	PARADOXICAL STATEMENTS	
1. Industry collective bargaining topics should extend beyond "bread-and-butter" issues.	Sector bargaining should be restricted to wages and substantive conditions (bread-and-butter) of employment.	Should extend beyond bread-and-butter issues to address industry viability, exploring agreed broader or interactive structures, and should generally be determined by prevailing conditions in the automotive industry.
2. Current sector collective bargaining is outdated and must be reviewed.	Current sector collective bargaining has served the industry well,	Current sector collective bargaining is outdated; consequently, the one-size-fits-all approach results

	contributing to labour and industry stability and long-term agreements.	in inflexible negotiations, inefficiency in the bargaining process, and the digression of substantive issues, own agendas, repetitive demands.
3. Pursue the establishment of a stewardship-based broader collective bargaining framework for the industry.	Current sector collective bargaining is fit for purpose, and it is possible to develop a framework of negotiations between enterprise level, sector and industry level, with necessary checks and balances. Centralised bargaining for the entire industry is not going to work – integrity and autonomy are critical.	Focus on establishing a broader structure with checks and balances to address non-wage related issues such as socio-economic challenges, industry viability, beneficiation of local strategic minerals, competitive local component industry, better collaboration between stakeholders, etcetera, most of which fall outside the scope of current sector bargaining.
4. Efficacy of current societal corporatist structures to address criticism of auto industry stakeholders, ensuring socio-economic challenges can be raised and debated in a non-negotiation environment.	Reflecting on the historical role societal corporatist structures played in addressing socio-economic challenges, current structures can provide for partnership between government, organised business and labour, government by a policy framework.	Currently, there is no structured interface between these structures and automotive stakeholder representative structures, resulting in a disjointed focus on the viability of the industry.

5. Build strategic relationships focusing on how different sector structures can collaborate in addressing the industry challenges.	The focus of strategic relationships should be on creating structures and identifying champions who are passionate drivers of objectives and targets set out for the industry.	There is a perceived lack of meaningful stewardship due to a lack of cohesion and focus beyond sectoral or company levels. Parties do not respect the outcomes of their engagements by failing to implement or enforce agreed-upon outcomes (government).
6. Automotive industry leadership must adopt a stewardship approach in addressing the challenges facing the industry, focusing on inclusivity and thinking beyond its own interests.	Leaders to adopt a stewardship philosophy to find long-term solutions to the challenges facing the industry, beyond labour stability; take ownership for the viability of the industry; influence processes within representative structures; and accept joint responsibility for the future of the industry.	Stakeholder leaders focus on sector and representative interests. Serious leadership challenge when parties disrespect outcomes of their engagements by failing to implement or enforce agreements.
7. Comprehensive focus on the viability of the South African automotive industry integrated into a collective bargaining framework.	There is a consensus that the sustainability of the industry must be addressed as a collective responsibility by all stakeholders. Various challenges were raised, such as a lack of common vision and interaction between industry stakeholders; an inability to exploit local resources for component and vehicle production; an enabling regulatory framework; and failing infrastructure.	The threat to the industry is that, by and large, the challenges facing the industry fall outside the scope of current sector collective bargaining, and there is no collaborative structure to deal with them.

6.6 CONCLUSION

In considering the structuring of a broader collective bargaining framework for the South African automotive industry, one has to take into account the complexity of having four independent bargaining structures with no structured collaboration framework, government and concomitant pluralistic elements of conflicting interests and goals. Stakeholders with radically different viewpoints saw issues differently and found it difficult to explore solutions that serve the greater multi-stakeholder interest. The challenge was to get stakeholders to accept a collective responsibility for securing the future viability of the automotive industry.

Paradox studies adopted an alternative approach to tensions, exploring how organisations can attend to competing demands simultaneously (Smith and Lewis, 2011). Although choosing among competing tensions might aid short-term performance, a paradox perspective argues that long-term sustainability requires continuous efforts to meet multiple, divergent demands (Cameron, 1986; Lewis, 2000). Tensions are inherent and persistent, depicting how purposeful and cyclical responses to paradox over time enable sustainability—achieving peak performance in the present that enables success in the future.

The simplified model, based on the procedures of Boyatzis (1998) and Nowell et al. (2017), identified recurrent themes, which were then grouped into paradoxical pairs, constituting the tensions in structuring the constructs of stewardship-based collective bargaining concepts. These paradoxical pairs reflect the challenges the current participants in collective bargaining have identified in the current collective bargaining framework. The next step in the process of developing a broader collective bargaining structure is the development of an artefacts framework, which will serve as input to the integrated decision-making process, and apply interactive dialogue as an integrative thinking process to resolve the paradoxes. This process was explored in the next chapter.

CHAPTER 7: FINDINGS – INTEGRATIVE THINKING

7.1 OVERVIEW

This part of the findings covers two analysis techniques, which were applied sequentially, namely interactive dialogues and integrative thinking. Through interactive dialogues, participants representing parties involved in collective bargaining in the automotive industry debated the paradoxical statements arising from the challenges facing sector collective bargaining and explored potential solutions for reducing these tensions. In the second step, through a process of integrative thinking, the tensions of opposing solutions were constructively reconciled by generating a holistic model containing elements of respective solutions, but going beyond the individual resolutions (Martin and Austen, 1999; Martin, 2007). Ultimately, by applying these techniques, the researcher explored the following objectives:

- Develop an artefacts framework that reflects the outcomes of the stewardship-based integrative process and explores how it could be built into a national, sector and plant-level bargaining framework. This will inform a stewardship-based approach to develop proposed models for broader collective bargaining.
- By applying integrative thinking, generate solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives.

The following Figure presents an overview of the sequential application of the interactive dialogues and integrative thinking models to develop the artefacts framework:

Figure 7.1: Applying Interactive Dialogue and Integrative Thinking models in the development of a Broader Collective Bargaining Framework (Source: Author's construction)

7.2 INTERACTIVE DIALOGUES

The themes and paradoxical pairs developed inductively through the application of thematic analysis were presented to the participants at the Interactive Dialogue Conference. The participants were encouraged to reflect on the themes and paradoxes, focusing on developing resolutions for the paradoxes. Reflecting on the implications of inter-participant influences in interactive dialogues, Fay et al. (2000) cautioned that participants should be influenced most by those with whom they interact in the discussion, rather than being influenced by a dominant speaker. In this regard, the researcher ensured that conversations were not dominated by individuals by encouraging open and frank debate, seeking consensus on challenges, current status and strategies to overcome the challenges. The outcomes were then classified into four categories: (1) consensus; (2) competing solutions offered; (3) consensus may be possible with further discussion; or (4) disagreement.

During the individual participant interviews phase, none of the participants expressed any views on the question covering broader collective bargaining (see Appendix H, "Summary of Stakeholder Organisation Interviews Responses"), despite the researcher trying to engage them by posing clarifying questions. This was a major concern how to encourage the parties to engage in an interactive dialogue session on this topic. To stimulate constructive discussions, the prompting questions in Table 7.1, extracted from interview statements, were integrated into the introduction of each discussion on paradoxical statements. The prompting questions were selected from actual participant responses to interview questionnaire questions on a particular topic, which the researcher believed would stimulate a discussion on the particular theme. An attempt was made to cover all the participants in the selection of statements. The originator of the prompting question was not disclosed when the question was introduced in the interactive dialogue, but the context was explained to the participants.

7.2.1 PARADOXICAL STATEMENTS AND PROMPTING STATEMENTS/QUESTIONS

As summarised in Table 7.1, the following themes and paradoxical pairs were developed through inductive thematic analysis and served as input for the interactive dialogue discussion with representatives from the research participant organisations.

Table 7.1: Paradoxical Statements and Prompting Questions

THEMES	PARADOXICAL STATEMENTS	
1. Industry collective bargaining topics should extend beyond "bread-and-butter" issues.	Sector bargaining should be restricted to wages and substantive conditions (bread-and-butter) of employment.	Should extend beyond bread-and-butter issues to address industry viability, exploring agreed broader or interactive structures, and should generally be determined by prevailing conditions in the automotive industry.
	Prompting Questions: "There is at times reference to stability of the industry, but this is glibly used in an attempt to confirm parties' commitment to the success of the industry." (AMEO). How can industry viability discussions be integrated into the current focus on wage and substantive conditions of employment negotiations?	
2. Current sector collective bargaining is outdated and must be reviewed.	Current sector collective bargaining has served the industry well, contributing to labour and industry stability and long-term agreements.	Current sector collective bargaining is outdated; consequently, the one-size-fits-all approach results in inflexible negotiations, inefficiency in the bargaining process, and the digression of substantive issues, own agendas, repetitive demands.
	Prompting Questions "Consequences of this outdated framework are that a 'one-size-fits-all' approach has been adopted, resulting in inflexible negotiations." (NAAMSA).	

	What could be done to improve the current sector collective bargaining to respond to this criticism?	
3. Pursue the establishment of a stewardship-based broader collective bargaining framework for the industry.	Current sector collective bargaining is fit for purpose, and it is possible to develop a framework of negotiations between enterprise level, sector and industry level, with necessary checks and balances. Centralised bargaining for the entire industry is not going to work – integrity and autonomy are critical.	Focus on establishing a broader structure with checks and balances to address non-wage related issues such as socio-economic challenges, industry viability, beneficiation of local strategic minerals, competitive local component industry, better collaboration between stakeholders, etcetera, most of which fall outside the scope of current sector bargaining.
	Prompting Questions: "There is not always alignment in interest and focus areas among members of the bargaining council in the sense that ideology often impacts the thinking and approach to collective bargaining." (Solidarity) Despite the fact that the parties to two bargaining structures have agreed in several negotiations to develop a broader collective bargaining framework and, furthermore, agreed to the conditions for such a framework, no progress has been made in complying with this clause. Is this due to poor stewardship?	
4. Efficacy of current societal corporatist structures to address criticism of auto industry stakeholders, ensuring socio-economic challenges	Reflecting on the historical role societal corporatist structures played in addressing socio-economic challenges, current structures can provide for partnership between government, organised business and labour, government by a policy framework.	Currently, there is no structured interface between these structures and automotive stakeholder representative structures, resulting in a disjointed focus on the viability of the industry.

can be raised and debated in a non-negotiation environment.	Prompting Questions "I do not believe that it (NEDLAC) is able to exert the influence that we need insofar as dealing with several structural problems within our economy." (AMEO/Solidarity). Given that societal corporatist structures played a major role in the transformation of the automotive industry during the Apartheid years, is there still a role for such structures to continue to the viability of the industry?	
5. Build strategic relationships focusing on how different sector structures can collaborate in addressing the industry challenges.	The focus of strategic relationships should be on creating structures and identifying champions who are passionate drivers of objectives and targets set out for the industry.	There is a perceived lack of meaningful stewardship due to a lack of cohesion and focus beyond sectoral or company levels. Parties do not respect the outcomes of their engagements by failing to implement or enforce agreed-upon outcomes (government).
	Prompting Questions: "There is a general lack of meaningful stewardship among industry stakeholders due to a lack of cohesion and focus beyond sectoral or company levels, often characterised by self-interest and bureaucracy." (NAACAM/AMEO) How can we develop a stewardship that is passionate and champions of industry viability beyond enterprise interest?	
6. Automotive industry leadership must adopt a stewardship approach in addressing the challenges facing the industry, focusing on inclusivity and thinking	Leaders to adopt a stewardship philosophy to find long-term solutions to the challenges facing the industry, beyond labour stability; take ownership for the viability of the industry; influence processes within representative structures; and accept joint responsibility for the future of the industry.	Stakeholder leaders focus on sector and representative interests. Serious leadership challenge when parties disrespect outcomes of their engagements by failing to implement or enforce agreements.

beyond its own interests.	"There is a general lack of meaningful stewardship in the industry due to a lack of cohesion and focus beyond company and sectoral levels." (NAACAM/NAAMSA) The stewardship approach to address challenges through collaborative partnership has been predominantly applied to social-ecological sustainability disciplines, but no evidence could be found of it being used in addressing challenges in collective bargaining. How can this approach contribute to addressing challenges in the industry?"
7. Comprehensive focus on the viability of the South African automotive industry integrated into a collective bargaining framework.	There is consensus that the sustainability of the industry must be addressed as a collective responsibility by all the stakeholders, as opposed to sporadic and often disjointed efforts. Various challenges were raised, such as a lack of common vision and interaction between industry stakeholders; an inability to exploit local resources for component and vehicle production; an enabling regulatory framework; and failing infrastructure.
	Prompting Questions: "The threat to the industry is that these challenges fall outside the scope of current sector collective bargaining, and there is not a collaborative structure to deal with it." (AMEO) The automotive and steel industries, respectively, developed master plans focusing on the long-term viability of the respective industries. Once again, parties have agreed to an Industry Policy Forum to address these challenges in a collective bargaining framework, but very little progress has been made. What can be done to address this issue?

7.2.2 INTERACTIVE DIALOGUE ANALYSIS

The Interactive Dialogue responses were recorded in Appendix I. The views of the participants as to how the paradoxical challenges could be resolved were classified into four categories: "Consensus", "Competing solutions offered, "Consensus may be possible with further exploration", and "Disagreement". The exploratory outcomes reflected the summarised views of the

participants as to how the tensions could be resolved. This served as input into the Integrative thinking model that contributed to building an artefacts framework, ultimately forming the basis for a stewardship approach to collective bargaining. Due to time constraints, the researcher completed the categorisation exercise after the meeting, which was then forwarded to all the participants for input and comment. The summary below reflects the outcome of the interactive dialogue.

The following summary of the outcomes of the Interactive Dialogue discussion:

- Industry collective bargaining topics: Although this theme covered bargaining topics, the participants steered the discussion into industry viability challenges. They expressed the opinion that collective bargaining and industry viability are mutually dependent, and therefore negotiations should be structured in a way that accommodates both. And as such, although "bread-and-butter" issues and industry viability are different constructs, they are mutually dependent in terms of viability, stability and affordability. The challenge was to engage stakeholders in discussions on finding a balance between industry viability and socioeconomic aspects. There was general consensus on the mutual dependability aspect, but the proposed structure requires further exploration. There was also consensus that the bargaining issues should extend beyond the traditional bread-and-butter issues to include industry challenges, the latter of which should be covered in non-negotiation industry structures.
- Sector collective bargaining challenges: There was consensus that current sector collective bargaining benefitted the industry, but that it had limitations impacting not only sector bargaining, but the viability of the industry in general. The view was that current sector collective bargaining was also being challenged by factors such as the government's failure to address socio-economic challenges impacting workers, notably affordable housing, transport, and medical aid. This results in these issues being raised as worker demands during wage negotiations.
- Restructuring current collective bargaining: Although it served the industry well, there was consensus that things had to change to establish a "fit-for-purpose" structure responding to the long-term viability of the industry. Better alignment was needed between bargaining structures, such as company, sector, and industry interfaces. The parties did not explore a resolution, nor did they reflect on a possible framework for a broader industry bargaining structure.

- Broader collective bargaining forum: The participants were more inclined to explore a "broader structure" in the discussion, instead of a broader collective bargaining forum as envisaged in two collective bargaining agreements. The view expressed was that such a structure should have clear terms of reference with broad parameters that provide guidance to sector and plant-based negotiations, while also ensuring the autonomy of the sector approach is preserved. They also appealed for better alignment between bargaining structures, the company-sector-industry interface.
- Challenges facing SA automotive industry: The parties recognised that there were structures in place which could address these challenges, such as the Industry Policy Forum, the South Africa Automotive Master Plan (SAAM) 2005, and the South African Steel and Metal Fabrication Master Plan 1.0, however, due to poor discipline, leadership and lack of maturity among leadership, little progress had been made in addressing the broader industry challenges.
- Societal corporatism and economic performance: In reflecting on the historical role societal corporatist structures played in the transformation of the South African society, including labour relations in the automotive industry, the participants were in agreement that such an approach would be beneficial. The participants were unanimous in their criticism that the current societal corporatist structure, NEDLAC, failed in spearheading socio-economic discussions. There was general support for a national platform that would bring about greater ministerial coherence and better focus on viability challenges. Structured collaboration between industry stakeholders will bring about greater coherence in focusing on the challenges.
- Stewardship-based approach: The participants were in agreement that industry leaders must engage beyond company and sector interests, and must lead with discipline, maturity, consistency and accountability. Their view was that, despite the complexity of the industry and the diversity of leadership, it was possible to find a synergistic approach to overcome competition, supplier modality tensions, regulatory challenges, and so forth. Industry leaders must adopt a stewardship approach in addressing the long-term viability challenges of the industry.

In summary, as presented in Table 7.2, the interactive dialogue provided for a structured and engaging discussion on the themes and paradoxical statements developed. On most of the par-

adoxes raised, the participants agreed on the challenges facing current sector collective bargaining, and opportunities to address them, but there was a reluctance to explore a broader collective bargaining framework. The next step was to apply the interactive thinking process as per Martin's (2007) model.

Table 7.2 Condensed Overview of Interactive Dialogue Discussion and Assessment (Appendix I and J)

THEMES	INTERACTIVE DIALOGUE SUMMARY	EXPLORATORY REVIEW	
		ASSESSMENT	OUTCOMES Consensus; Competing solutions offered; Consensus may be possible with further exploration; Disagreement)
1. Industry collective bargaining topics.	• Collective bargaining and industry viability are not mutually exclusive, and as such, "Bread-and-butter" issues and industry viability are mutually dependent.	• Collective bargaining and industry viability are mutually dependent, and therefore negotiations should be structured in such a way as to accommodate both.	• Consensus, bargaining issues should comprise wages and substantive conditions of employment, as well as industry viability challenges.
2. Current sector collective bargaining structures.	• Although it served the industry well, there is consensus that current sector collective bargaining is outdated and should be reviewed. • Focus should be on a "fit-for-purpose"	• Although current sector collective bargaining benefited the sector, it has limitations, impacting not only sector bargaining but also the viability of	• Consensus

	structure responding to the long-term viability of the industry.	the industry in general. • Better alignment between bargaining structures; company-sector-industry interface; etcetera. • Societal-corporatist structures are a means to explore a "fit-for-purpose" structure.	• Consensus • Consensus
3. Broader collective bargaining forum	• Explore a "broader structure" with checks and balances, clear terms of reference, and a so-called "fit-for-purpose" principle, which could lead to a policy framework. • Better alignment between bargaining structures; company-sector-industry interface; etcetera.	• A "one-size-fits-all" structure is possible provided that checks and balances are built into such a structure, as well as ensuring autonomy of the sector approach is preserved. • Clear terms of reference.	• Consensus • Consensus
4. Societal corporatism and economic performance.	• Historically, societal corporatism played a role in transform-	• Explore societal-corporatist structures. There is no unanimity on	• Consensus may be possible with further exploration.

	ing the South African society, including labour relations in the automotive industry. NEDLAC has failed in its role of spearheading socio-economic discussions, as there is no interaction with industry. • A national platform is required to bring about greater ministerial coherence and better focus on viability challenges.	how to address the issue. Some expressed the view that current structures must be reviewed to better focus on viability challenges, while others felt that a national platform would bring about greater ministerial coherence to address the challenges.	
5. Building a strategic relationship	• Perceived lack of meaningful engagement between the parties. • Focus should be on creating structures and identifying champions, who are passionate drivers of agreed-upon objectives and targets.	• Despite the complexity and diversity of the industry, it is possible to find a synergistic approach to overcome industry challenges.	• Consensus, focus on a synergistic approach
6. Challenges facing the South African automotive industry.	• Already agreed structures in place, but due to poor discipline and leader-	• There are structures in place to address the challenges facing the industry, but	• Consensus

	ship, very little progress has been made to address industry challenges. • Challenges are discipline in follow-through, policy certainty, and maturity among the bargaining partners.	there is a general comment that due to poor discipline, poor leadership and lack of maturity among leadership, there is little progress in delivering the masterplan objectives.	
7. Stewardship approach to drive sustainable development and growth.	• The participants' view is that leaders must engage beyond company and sector interests, and must lead with discipline, maturity, consistency, and accountability. • It is possible to find a synergistic approach to overcome competition and other challenges.	• We need to adopt a stewardship approach in addressing the long-term viability challenges of the industry.	• Consensus

7.3 INTEGRATIVE THINKING

In the interactive dialogue session, participants discussed the paradoxical pairs by reflecting on the challenges of current collective bargaining, industry viability, societal corporatism, the role of stewards, and industry structures, exploring possible views on how to address the tensions. Applying integrative thinking (Martin and Austen, 1999; Martin, 2007c; Karakas and Kavas, 2008; Benson and Dresdow, 2009) to these outcomes, the researcher developed a stewardship-

based broader collective framework that sought to address the viability and socio-economic challenges facing the South African automotive industry, by addressing two objectives:

- Generate alternative solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives, and
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant level bargaining framework, that will inform a stewardship-based approach to structure proposed models for broader collective bargaining. In essence, the artefacts framework referred to a structured approach for understanding, designing, developing, evaluating and iteratively refining artefacts, which are tangible products such as tools, models, or conceptual frameworks (Venable, Pries-Heje and Baskerville, 2016; Achampong and Dzidonu, 2017.) In the context of this research, the framework will provide a systematic approach to understanding the complex challenges of collective bargaining in the South African automotive industry, breaking it down into specific actions for creating a framework of building blocks that will underpin a broader collective bargaining framework.

To understand how paradoxical statements, interactive dialogue, and integrative thinking concepts were applied in addressing the two objectives, a schematic (Figure 7.2) was developed below to illustrate how these three concepts are integrated to explore a stewardship-based, broader collective framework for the automotive industry. The framework shows schematically how the Interactive Dialogues outcomes (Maccoby, 1996; Bolchini and Paolini, 2006) will be fed into Martin's (2007) Integrative Thinking process to give rise to the Artefacts Framework. This presented an overview of the process to generate a proposed stewardship-based broader collective bargaining framework.

The first step in this process was the development of the paradoxical statements (see Chapter 6), which served as input in the Interactive Dialogue session. In turn, the outcomes of the Interactive Dialogue served as input into the Integrative Thinking process (Martin and Austen, 1999; Martin, 2007a; Karakas and Kavas, 2008). In finding a solution to the tensions existing in the current sector, collective bargaining requires embracing the multifaceted nature of the automotive industry and developing an understanding of its complexity and causal relationships. Martin's (2007) model demonstrated how, through integrative thinking, the complexity of opposing tensions can be embraced and explored to address the challenges associated with the complexity of opposing solutions, rather than avoiding them.

The Integrative Thinking model consists of four distinct elements (Martin and Austen, 1999, p 2 - 8):

- Salience: Identify the most pertinent facts relevant to the outcomes.
- Causality: Making sense of what was relevant and showing the link between these factors.
- Architecture: Identify a delivery framework covering which tasks were important and how they should be tackled and when.
- Resolution: Developing creative resolutions of the tensions.

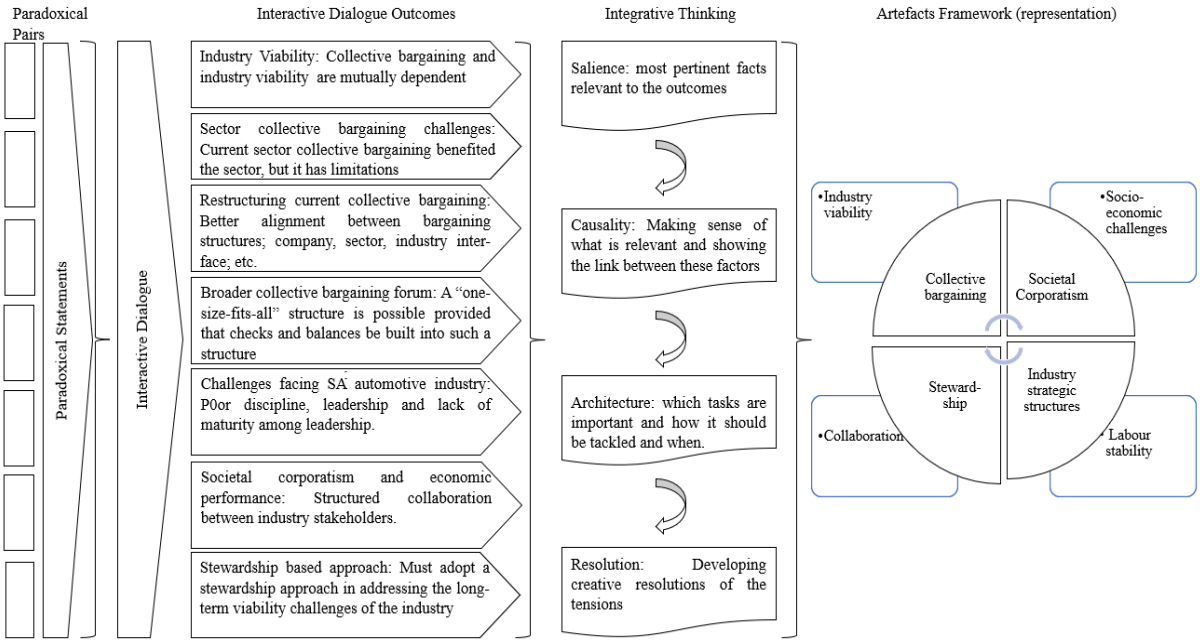


Figure 7.2: Development of Paradoxical statements and sequential application of Interactive Dialogue and Integrative Thinking models to develop the Artefacts Framework (Source: Author's construction)

7.3.1 SALIENCE

The first step involved identifying all features relevant to the challenges identified. These factors may include processes, people, environmental factors, and events that could impact the development of a restructured collective bargaining framework, either positively or negatively. A typical question was, "What do we choose to give attention to and what not?"

To determine the features relevant to the challenges, the researcher reviewed the Interactive Dialogue summary (Table 6.2), including the Exploratory Outcomes, to identify features that participants raised as problematic or potential solutions. The features represented descriptive aspects of challenges that must be overcome. The following process was followed to develop the salient factors relevant to the development of the artefacts framework:

- Key features: For each interactive dialogue theme, the key consensus positions identified by the participants in the interactive dialogue that will contribute to resolving the challenge were noted as the key features.
- Relevant factor: For each key feature, the relevant elements identified in describing the key feature were logged as a relevant factor, as well as a description of the relevant factor.

In considering the interactive dialogue theme, "stewardship approach to sustainable development and growth", the participants identified the complexity of the industry and diversity of leadership as key features which must be addressed to develop a synergistic approach to overcome challenges such as competition, intra-company challenges, regulatory challenges, etcetera. These were the relevant factors that participants considered when responding to competition challenges and focusing beyond the company or sector level. This approach was unpacked for all the other interactive dialogue themes. It is important to note that the summary in Table 7.2 represents a consolidated view of all participants as captured during the interactive dialogue.

The table below captures a summary of the most pertinent factors relevant to developing the artefacts framework.

Table 7.3: Summary of the Salient factors relevant to exploring the development of the Artefacts Framework

INTERACTIVE DIALOGUE THEMES	KEY FEATURES	RELEVANT FACTORS	DESCRIPTION
		• Competition	• Intra-organisation for rights to build a new model.

• Stewardship approach to sustainable development and growth	• Complexity of industry and diversity of leadership • Industry leaders must engage beyond company and sector interests.		• Inter-company competition between competitors.
		• Poor stewardship approach	• Captains of industry's commitment to a structured approach to the long-term viability of the industry is questionable.
• Challenges facing the South African automotive industry	• Structures in place were negatively impacted by poor discipline and leadership. • Lack of maturity among leadership • Intra- and inter-company competition	• Collaboration • Policy certainty • Maturity among bargaining partners	• Poor collaboration between bargaining councils – AMEO, MIBCO, MEIBC, BCNTM; between employer representatives; between industry strategic master plans.
• Broader collective bargaining forum	• Broader collective bargaining is possible, provided checks and balances are built in. • Clear delineation between industry, sector and enterprise bargaining	• Ensure autonomy of sector is preserved. • Clear terms of reference	• Not included in industry master plans as a strategic pillar. Negotiations are sometimes confrontational – employers give in to excessive demands by unions.

• Societal corporatism and economic performance	• Influential historical role of societal corporatism • Greater ministerial coherence	• Non-functioning industry structures • Weak societal corporatist structures	• Despite parties agreeing to strategic industry structures, such Industry Policy Forum, to develop a Broader Collective Bargaining Framework, etcetera, very little progress has been made. • Lack of commitment to industry structures by stakeholders.
• Outdated sector collective bargaining	• Collective bargaining and industry stability are not mutually exclusive. • Complexity of socio-economic bargaining challenges.	• Sector collective bargaining challenges. • Integrated bargaining structure – labour stability, viability and maturity of leaders.	• Propensity of the union to focus on bread-and-butter and benefit demands. • Consensus that it served the industry well, but has limitations impacting the viability of the industry.
• Industry viability	• Collective bargaining and industry viability are mutually dependent.	• Acceptance of dependency between industry viability, labour stability and affordability. • Ongoing interaction by the parties and not just at wage negotiations.	• Collective bargaining framework should be integrated in processes dealing with industry viability, labour stability and affordability of products.

7.3.2 CAUSALITY

Causality was the second step of integrative thinking and mapped the links between the variables considered salient, to identify critical relationships and choices under consideration. The causality must demonstrate the link between interactive dialogue themes, processes, people, environmental factors, events, and so forth, that might impact the development of a restructured collective bargaining framework, positively or negatively. In essence, this involved trying to make sense of what was presented.

In developing the causal framework, the researcher reviewed the interactive dialogue summary and outcomes, and the salient factors, to identify core elements and relationships, as well as dependent variables. The causal framework was developed with no participant input, but by applying information gained from the development of paradoxical statements and interactive dialogue to the integrative thinking model (Martin and Austen, 1999; Martin, 2007; Karakas and Kavas, 2008) It was proposed that the core elements form the building blocks that will most likely produce the desired outcome around which the artefacts framework will be developed, and the key enablers, the essential components that will provide the foundation within the corporate framework of leadership, policy-certainty, accountability and discipline, ultimately guiding the development of an enabling framework for a restructured collective bargaining proposal. In the context of this research, the variables were essentially key characteristics or properties of a collective bargaining framework, emanating from the development of paradoxical pairs and interactive dialogue. The enabling variable described a factor or condition which can be manipulated or applied to observe the effects on the dependent variables:

- Core elements: Societal-corporatism; Industry viability, Stewardship and Collective bargaining.
- Key enabling variables: Collaboration; bargaining issues; Labour stability; competitiveness; industry structures; bargaining partners' maturity
- Dependent variables: International competitiveness; socio-economic challenges; Relevancy; Ministerial coherency; Industry master plans.

The causality map was developed following an interactive dialogue, whose outcomes served as input. In essence, the causal framework showed the core elements which will form the foundation of the artefacts framework and the interface with the key enabling variables and dependent variables. For example, during the interactive dialogue, participants identified collaborative stewardship as essential in addressing the challenges of industry complexity and leadership

diversity. They argued that this approach will contribute to a synergistic platform to overcome competition, supplier modality tensions, intra-company challenges, infrastructure, and regulatory challenges. A collaborative approach will address capacity building in the industry, as well as a coherent approach to addressing challenges within the multi-government regulatory framework. Hence, collaboration was identified as an enabling variable, while capacity building and ministerial coherence were identified as dependent variables.

Figure 7.3: Causal map showing the links between Core elements, Enabling and Dependent variables within the Stewardship framework of Leadership, Policy-certainty, Accountability and Discipline

(Source: Author's construction)

7.3.3 ARCHITECTURE

The third step in integrative thinking was creating an architecture. Considering the causal factor map, the challenge was always where to start. In addressing this conundrum, it was essential to focus not only on the relationships between the variables but also on those between the key stakeholders. As such, an architecture framework must demonstrate the connection between

the industry's viability and sustained growth, thereby enhancing the viability of the respective companies and the well-being of the societies within which they operate. In addressing the question of how businesses can thrive and sustain growth while enhancing shareholder value and the well-being of the societies within which they operate, Cossin et al. (2015) were of the view that the answer resides in understanding the roles of key players and how they relate to each other. Applying his model of a stewardship ecosystem, the following schematic illustrates the relationship between automotive role players, partners, and social stakeholders in driving a sustainable automotive industry. The elements were interactive, demonstrating a mutual inter-dependence and a beneficial relationship.

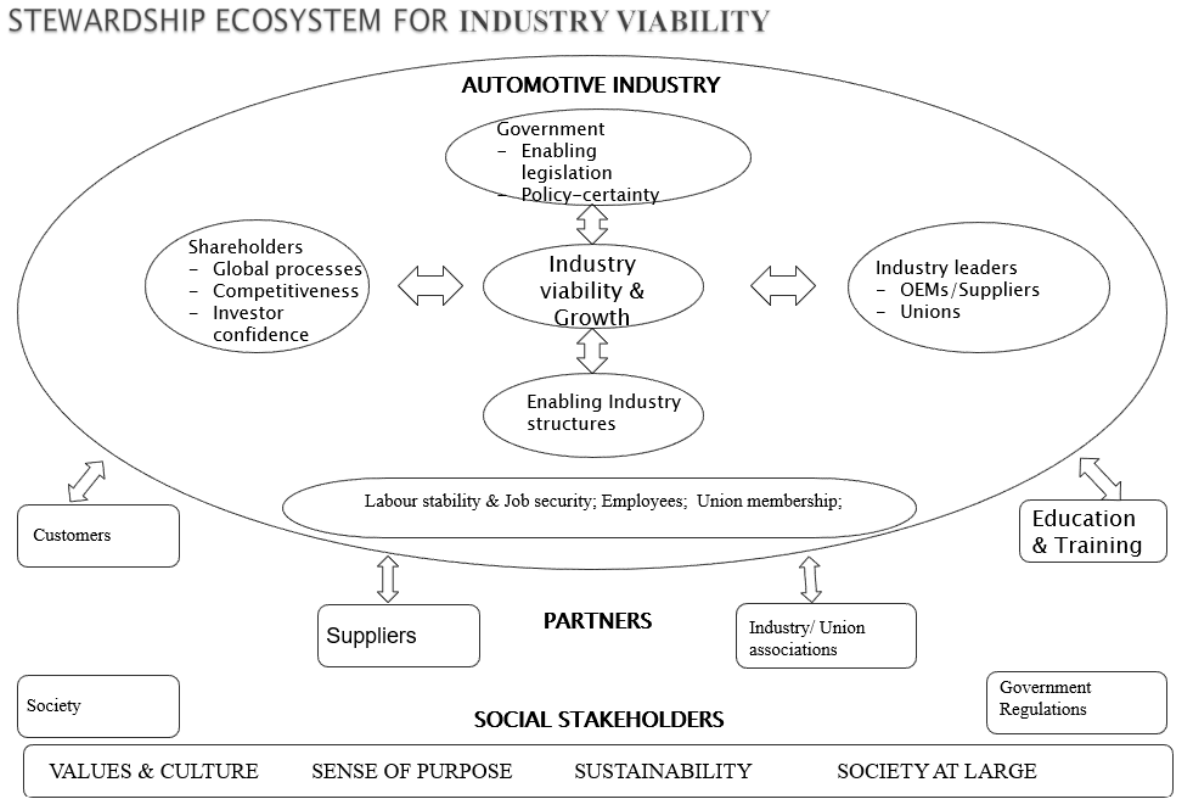


Figure 7.4: Stewardship Ecosystem for the Automotive Industry's viability
(Adapted from Cossin et al. (2015, p. 9)

Another important feature of such an architecture was to try and reconcile the opposing tensions. Considering the exploratory dialogue outcomes and the variable map and stewardship ecosystem, the following overview presents a constructively reconciled approach to resolving the tensions between opposing solutions, incorporating elements from both.

Table 7.4: Reconciling the tensions of opposing solutions

CORE THEMES	TENSIONS	RESEARCHER COMMENT
Industry viability and sector collective bargaining	• Bargaining dominated by wage-related demands. • Disconnect between sector collective bargaining and industry viability.	• Both industry master plans, automotive and steel, do not specifically focus on collective bargaining/labour stability as a strategic pillar (SAAM 35; Steel Industry Masterplan 1.0). • At least one bargaining structure, AMEO, has agreed to establish an Industry Policy Forum in order to "consider and deliberate on strategic issues" impacting on the automotive industry (NBF Agreement, 2016)
Restructuring of collective bargaining	• Restructuring is possible, but a "one-size-fits-all" bargaining framework will fail if no clear terms of reference are set to delineate national, sector and plant-level bargaining. • A national convention is proposed to review collective bargaining challenges and the viability of the industry.	• At least two bargaining structures, AMEO and MEIBC, have agreed to investigate the possible establishment of a broader collective bargaining forum involving all sectors of the automotive industry. This clause has been carried over for years with little progress in its implementation (AMEO and MEIBC Agreements).

	• Global tendency to move away from centralised collective bargaining.	• Most industry agreements contain a clause prohibiting "…no further claims/demands…" at industry or plant level, in respect of substantive wage and/or benefit on-cost items covered in agreements (AMEO, MEIBC, MIBCO)
Stewardship approach to industry viability	• Captains of industry's commitment to a structured approach to the long-term viability of the industry is lacking. • Despite the complexity of the industry and diversity of leadership, it is possible to find a synergistic approach to overcome competition, supplier modality tensions, intra-company challenges, infrastructure challenges, regulatory challenges, etcetera.	• The stewardship ecosystem approach for industry viability could provide a framework to pursue the implementation of collective bargaining agreements and master industry plans: - It can provide an approach to assist the parties in taking a more holistic approach to industrial relations stability. - Protect and enhance the capability of bargaining structures and create economic and societal value over time - Provide the traction for the bargaining structures to scope a process to explore implementation of agreements
Societal-corporatism	• NEDLAC has failed in its role of spearheading socio-	• The collective bargaining structures should engage the

	economic discussions as there is no interaction with industry to understand its needs. • A national platform is needed that will bring about greater ministerial coherence and better focus on viability challenges.	existing societal-corporatist structures. • The parties to collective bargaining in the automotive industry have agreed to establish an Industry Policy Forum "to consider and deliberate on strategic issues which affect the future of the automobile manufacturing industry in South Africa …" (NBF Agreement, p22). This agreement allows for stakeholder deliberations on, among other things, future collective bargaining structures, future viability of the automotive industry, etcetera, the point being that there is already a structure in place to deal with these issues.

7.3.4 RESOLUTION

The final step of the integrative thinking process was Resolution. A major challenge in the research was to explore an integrative link between a competitive industry, enhancing the viability of the respective organisations and a stewardship collaboration that focused on a shared ownership of the industry viability. Martin and Austen (1999, p5) referred to this a challenge not to be seen "… as an insurmountable bind, but rather as a tension to be creatively and flexibly managed". In exploring an integrative collective bargaining framework that will contribute to ongoing stability of the industry, creating an environment to drive ongoing viability chal-

lenges, the participants' views vacillated between the current collective bargaining being outdated and needing to be reviewed, a "one-size-fits-all" approach being possible or retaining the current sector collective bargaining. So, instead of an "either/or" approach, the researcher opted for a course of ongoing fine-tuning of existing collective bargaining structures, thereby ensuring that the right problem was identified and addressed. The first step in developing an artefacts framework was to outline the key elements of a stewardship-based broader collective bargaining proposal.

7.3.5 SUMMARY

The intention of applying integrative thinking was to reconcile the tensions identified during the interactive dialogue session, particularly those where there was no consensus between the parties. This provided for a structured process to design and develop an artefacts framework that underpinned a restructured collective bargaining framework to give effect to collective bargaining agreements, and to develop a broader collective bargaining framework for the automotive industry.

The salience stage identified the key features that represented consensus positions among the participants, resolving the challenges. The following key features were identified:

- Recognising the complexity of the industry and diversity of leadership, industry leaders must engage beyond company and sector interests.
- Societal-corporatist structures should promote structured collaborations between stakeholders and stakeholder organisations, drive industry policy certainty, and greater inter-ministerial coherence.

The causality demonstrated the link between interactive dialogue themes, processes, people, environmental factors, events, and so forth, that might impact the development of a restructured collective bargaining framework, positively or negatively. The core elements defined were societal corporatism, industry viability, stewardship, and collective bargaining. The core elements will form the foundation of the artefacts framework, as well as the interface with the key enabling variables and dependent variables.

The architectural framework highlighted the connection between the industry's viability and sustained growth, thereby enhancing the viability of the respective companies and the well-

being of the societies in which they operate. An important step in this stage was to reconcile the tensions of opposing solutions (Table 7.3).

The following summary of the reconciling of tensions:

- Industry viability and collective bargaining: Agreement that industry viability and collective bargaining were mutually dependent. This should be reflected in bargaining topics and structures.
- Restructuring of industry bargaining structures: This was possible provided that the framework was underpinned by clear terms of reference, transparent delineation between industry, sector and plant level bargaining. A national convention was proposed to review collective bargaining and the viability of the industry challenges.
- Stewardship approach to industry viability: Captains of industry must play a stewardship role in addressing the long-term viability of the industry. Despite the complexity of the industry and diversity of leadership, it was possible to find a synergistic approach to overcome competition, supplier modality tensions, intra-company challenges, infrastructure challenges, regulatory challenges, etcetera.
- Societal corporatist structures: These structures must drive greater ministerial coherency and better focus on viability challenges.

7.4 ARTEFACTS FRAMEWORK

The artefacts framework sought to integrate the interactive dialogue recommendations and integrated thinking outcomes. The following key elements constitute the artefacts framework for a broader collective bargaining model:

- Stakeholder inclusivity: All sectors of the automotive industry - OEMs, Motor Components, Vehicle Body Building, Metal and Engineering, and New Tyre Manufacturing sectors.
- Levels of bargaining: Appropriate levels of bargaining - Industry, sector and plant bargaining; bargaining subjects and designated levels.
- Collaborative framework for how bargaining structures will collaborate
- Clearly defined bargaining chambers/chapters for each sector.

- Clear delineation between substantive bargaining, consultative topics and bargaining models.
- Ensuring industry viability and collective bargaining are mutually connected.
- Drafting of a Constitution that will govern industry collective bargaining.

Figure 7.5 below depicts an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be incorporated into a national, sector, and plant-level bargaining framework, which will inform a stewardship-based approach to structure proposed models for broader collective bargaining.

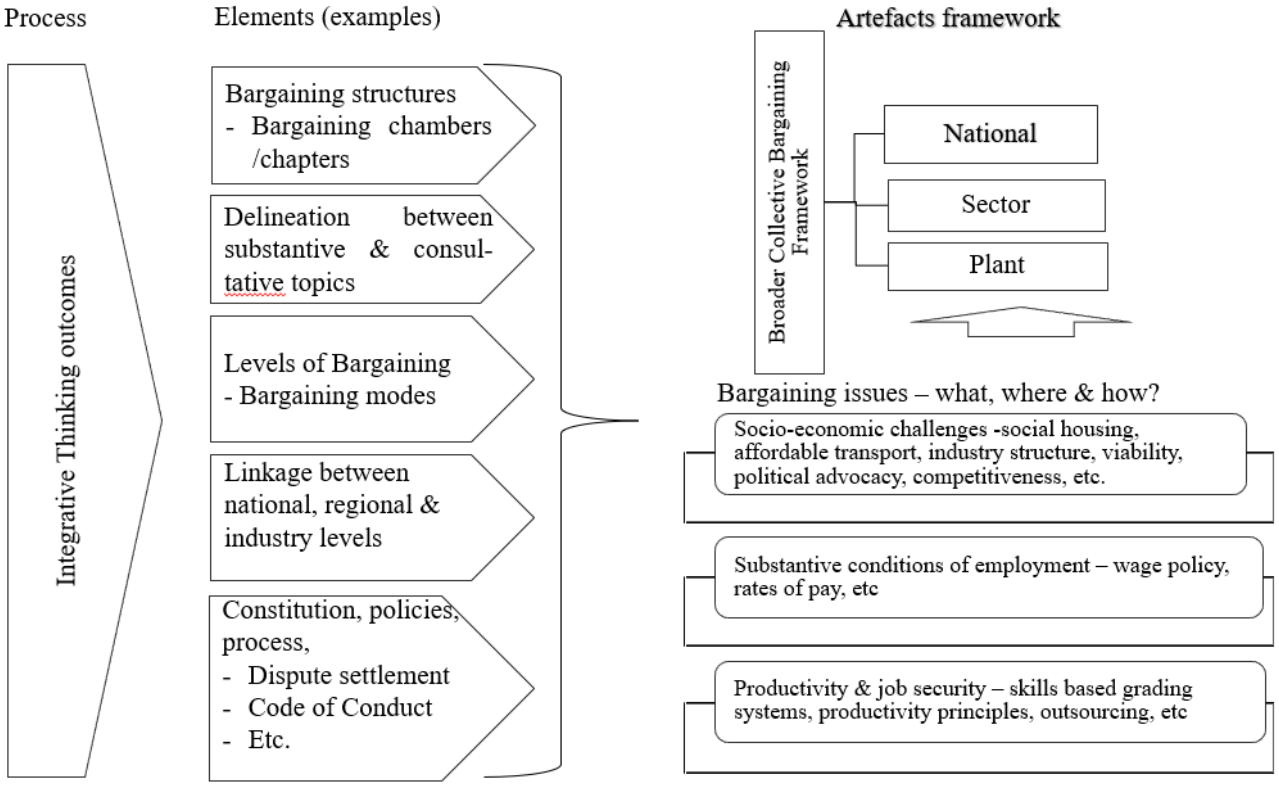


Figure 7.5: Proposed Artefacts Framework (Source: Author's construction)

7.5 STEWARDSHIP-BASED RESTRUCTURED COLLECTIVE BARGAINING FRAMEWORK – PROPOSAL

The second part of the objective in developing an artefacts framework was to determine how it can be applied in developing a stewardship-based approach to structure proposed models for

broader collective bargaining. This section outlined how one proposed model for broader collective bargaining could be implemented. The approach will be to apply the key elements developed above (7.4) that constituted the artefacts framework to develop such a proposal.

The challenge which remained was how to integrate the current independent bargaining councils in a framework that would not only focus on the interests of the respective sectors but also, in a collaborative approach, focus on the interests of the respective plants and the industry as a whole. As most of the OEMs were involved in export to global markets, factors such as labour stability and international competitiveness were key to securing the long-term viability of the automotive industry.

The current automotive industry bargaining comprises four independent bargaining councils that service the automotive value chain, namely NBF, MIBCO, MEIBC, and BCNTM.

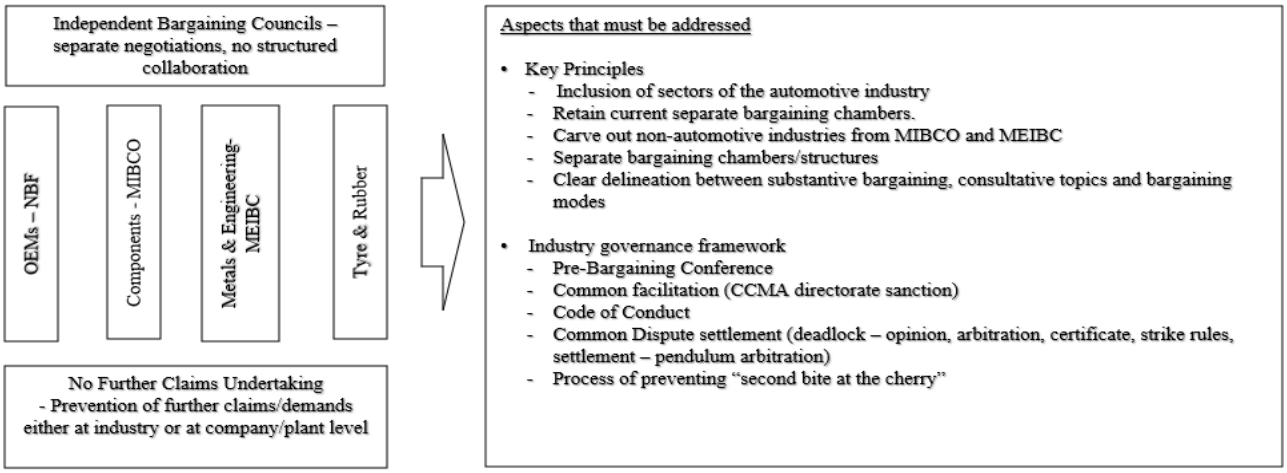


Figure 7.6: Current Independent Sector Collective Bargaining Structure
(Source: NBF & MIBCO Agreements and Website)

The architectural framework highlighted the connection between the industry's viability and sustained growth, thereby enhancing the viability of the respective companies and the well-being of the societies in which they operate. An important step in this stage was to reconcile the tensions of opposing solutions (Table 7.3 and summary in 7.3.5). These elements underpin the development of a stewardship-based broader collective bargaining framework:

- Industry viability and collective bargaining are not mutually exclusive. Therefore, bargaining issues should not be dominated by wage-related demands, but should be balanced to include elements that focus on the viability of the industry.
- There should be a central coordinating structure comprising sector representatives which focuses on broader industry collaboration.
- Adoption of a stewardship approach to industry viability beyond company and sector level, including both intra- and inter-competition.
- Collaboration between sector collective bargaining, industry master plans, industry viability structures such as the industry policy forum, etcetera, should be institutionalised.
- Societal-corporatist structures that focused on socio-economic challenges facing the industry were pivotal. The following framework, developed through the application of inductive thematic analysis, interactive dialogue and integrative thinking, in some way responds to the challenges of the industry. The framework responded to the "objectives and functions of the proposed broader collective bargaining forum" as envisaged in the NBF and MEIBC agreements. The challenge will be how to get the current sector bargaining councils to explore and adopt this concept.

In considering implementing the proposal depicted in Figure 7.7, careful consideration should be given to the critical success factors (Anonymous, 2008; Coleman, 2013b; Godfrey, 2016; Barchiesi, F, 2018):

- Automotive Bargaining Council: In order to avoid multiple levels of negotiations, this body should be a consultative forum where broad industry issues are deliberated and agreed upon. All bargaining councils, government and NEDLAC should be represented on this forum, preferably at the leadership level. The focus should be on developing comprehensive guidelines for sector negotiations, policies, and the review of strategic structures, bargaining structures, and other relevant aspects.
- Sector Collective bargaining: It might be necessary to review existing councils to carve out direct automotive chapters. MIBCO, for instance, follows a complex value-chain approach that encompasses the automobile component industry, bodybuilding, remanufacturing, reconditioning, and repair sectors, as well as automotive dealerships and petrol stations.
- Differentiation: Industry levels, such as national, sector and plant level interests must be clearly defined. Furthermore, a clear delineation between substantive bargaining, consultative topics and bargaining modes is needed.

- Consultation and negotiation: Developing a broader industry-wide collective bargaining framework as a consultative approach, but certain elements might require negotiations.

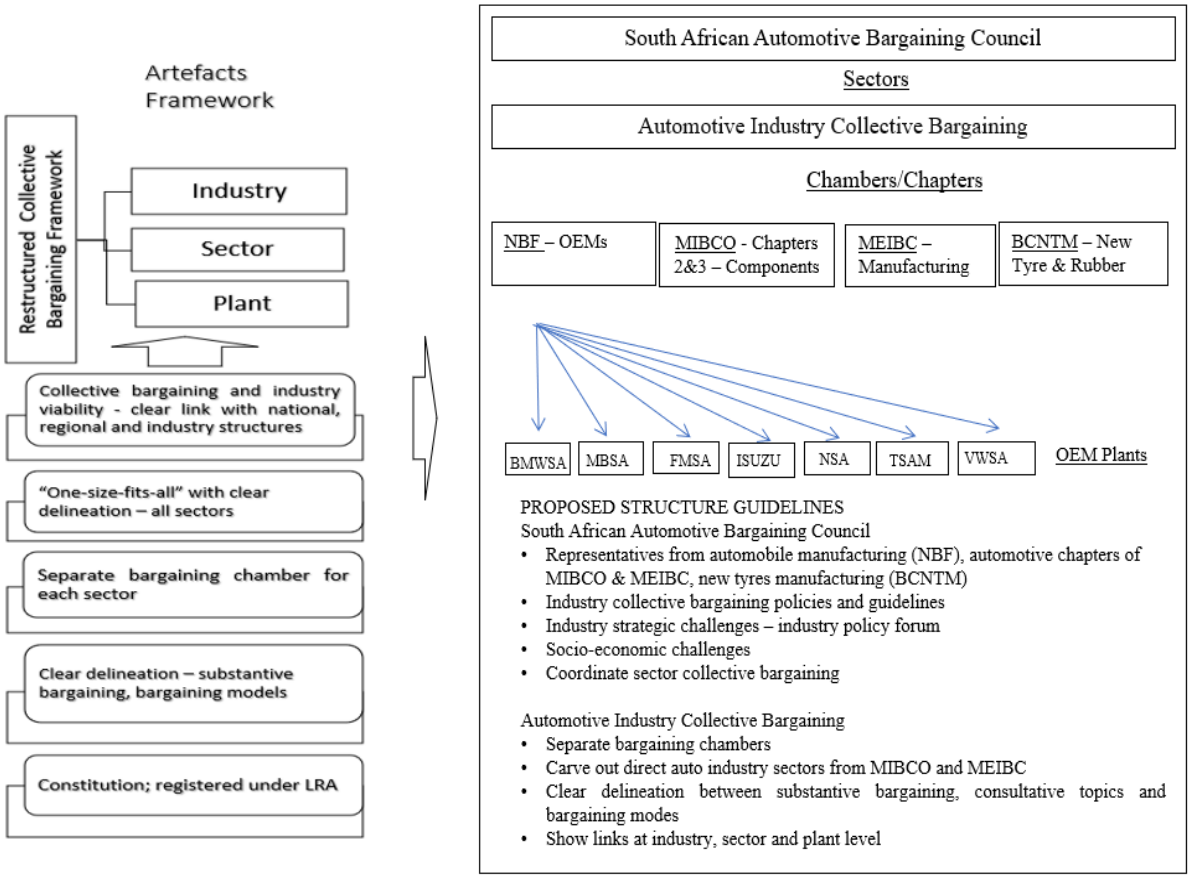


Figure 7.7: A Proposed Stewardship-based Broader Collective Bargaining Framework
(Source: Author's construction)

7.6 CONCLUSION

The focus of this phase of the research was to get stakeholders to collectively agree on how to respond to the challenges facing collective bargaining in the automotive industry. Interactive dialogue sessions were convened to engage the leadership of the parties in addressing the paradoxical pairs representing similarities and dissimilarities in their responses to the interviews.

The major challenge of the research was to explore an integrative link between a competitive industry, enhancing the viability of the respective organisations, and a stewardship collaboration that focuses on shared ownership of industry viability. The challenge which remained was how to integrate the current independent bargaining councils in a framework that would not

only focus on the interests of the respective sectors but also, in a collaborative approach, focus on the interests of the respective plants and the industry as a whole. Ultimately, existing bargaining structures were modified by applying the outcomes of the Integrative Thinking model to develop a proposed broader collective bargaining framework.

CHAPTER 8: DISCUSSION

8.1 INTRODUCTION

In this chapter, the research findings, derived from the sequential application of paradoxical analysis, interactive dialogue, and integrative thinking, are interpreted and connected to the respective literature conclusions. The discussion explored the potential synergy between the research findings and the literature's insights related to the respective findings, as well as the implications for the literature. The chapter also explored the applied contribution of the research, informed by its direct impact on addressing the multiplicity of challenges in collective bargaining faced by the South African automotive industry, as well as the scholarly contribution, which explored an original and unique body of knowledge contribution to the existing field, advancing the understanding of the topic. In addition, the methodological contribution was explored through the review of the sequential application of paradox theory, interactive dialogue, and integrative thinking to resolve paradoxes in interorganizational problems with multiple stakeholders.

The research findings informed the development of an artefacts framework that underpinned the structuring of a stewardship-based broader collective bargaining framework proposal, which aimed to contribute to the viability of the South African automotive industry and address socio-economic challenges facing it. In pursuing this, two areas of focus were explored. Firstly, summarising the key conclusions of the literature review on collective bargaining, societal corporatism, and stewardship, and secondly, comparing these conclusions with the findings of the paradox analysis, interactive dialogue, and integrative thinking application.

The research aimed to develop a framework that addressed the challenges of labour stability, productivity, cost efficiency, international competitiveness, and skills within a collaborative industry framework, with the goal of enhancing the industry's export potential. At least six of the seven OEMs are vehicle exporters. In addition, it explored the application of a collaborative stewardship approach, commonly applied to address challenges in socio-ecological sustainability disciplines (Cockburn et al., 2019b) to address challenges in collective bargaining within the South African automotive industry.

The objectives of the research relevant to this chapter are:

- Analyse the process of integrative thinking that will generate alternative solutions to the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant-level bargaining framework. This will inform a stewardship-based approach to structure proposed models for broader collective bargaining.

The research aimed to broaden the application of stewardship theory beyond sustainability and resilience challenges in social-ecological systems and apply it to the viability challenges in the South African automotive industry. The intention of the study was to apply interactive dialogue and integrative thinking as mechanisms to explore the paradoxes arising from stakeholder views on collective bargaining, societal corporatism, and stewardship, which can underpin a stewardship model that facilitates the development of a broader collective bargaining arrangement.

In applying a collaborative stewardship approach to challenges in labour relations, many paradoxes surface in relation to the socio-economic challenges that the parties seek to resolve**.** In explaining paradoxes and their impact on effective leadership, Peters (2012) pointed out that alternative solutions do not always follow from each other, and selecting one could negate the other, resulting in a suboptimal solution. Considering broader collective bargaining, each party in the negotiating structure has its own views and expectations on how such a framework could be structured. The diverse views of the parties will create paradoxical circumstances that must be considered when finding solutions in the best interest of the industry.

Martin (2007) proposed integrative thinking as a mechanism to embrace the complexity in understanding paradoxes in diverse relationship challenges and create optimum solutions**.** Karakas and Kavas (2008, p. 8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the

individual models, but goes beyond them." This concept explores the tensions between conflicting ideas to generate a best-fit idea that incorporates elements of the others but is superior to them.

The first comparative discussion reviewed the findings of a two-staged process. Firstly, themes and paradoxical pairs were developed inductively through thematic analysis, which constituted the tensions in the statements of the stakeholder participants' interviews. Secondly, the themes and paradoxical statements were presented to the participants in the interactive dialogue conference. The participants were encouraged to reflect on the themes and paradoxes, focusing on developing resolutions for the paradoxes. The findings of this process are compared with relevant literature reviews and reflected below:

8.2 COMPARATIVE REVIEW OF PARADOX AND INTERACTIVE DIALOGUE FINDINGS AND LITERATURE CONCLUSIONS

Paradox studies adopted an alternative approach to tensions, exploring how organisations can attend to competing demands simultaneously (Smith and Lewis, 2011). Although choosing among competing tensions might aid short-term performance, a paradox perspective argues that long-term sustainability requires continuous efforts to meet multiple, divergent demands (Cameron, 1986; Lewis, 2000). The paradox analysis identified several tensions in proposals to address the challenges of the current sector's collective bargaining and the development of a stewardship-based, broader collective bargaining forum.

The interactive dialogue provided a structured and engaging discussion on the themes and paradoxical statements developed. On most of the paradoxes raised, the participants agreed on the challenges facing current sector collective bargaining, and opportunities to address them, but there was a reluctance to explore a broader collective bargaining framework.

8.2.1 CLARITY ON COLLECTIVE BARGAINING TOPICS

In the South African automotive industry, collective bargaining typically covered a wide range of topics related to employee rights, wages, and working conditions, including issues such as benefits, working hours, and safety standards (NBF Agreement, 2019; MEIBC Agreement, 2022). Centralised bargaining, where negotiations occur at the industry level, can also influence wage structures and impact firm-level investments (LRS, 2022; Kenton, 2025).

With respect to current sector collective bargaining in the South African automotive industry, industry representatives interviewed in the research agreed that current sector collective bargaining has served the industry well, contributing to labour and industry stability. However, some argued that there were limitations, such as addressing the long-term sustainability challenges. Regarding the topics that should constitute collective bargaining, there was a consensus among stakeholders that collective bargaining and industry viability are mutually dependent; therefore, negotiations should be structured to accommodate both. They agreed that although "bread-and-butter" issues and industry viability are different constructs, they are mutually dependent in terms of viability, stability and affordability of the industry. As such, there was consensus that the bargaining issues should extend beyond the traditional bread-and-butter issues, generally considered as wages and substantive conditions of employment, to include industry challenges – issues impacting on the viability of the industry and socio-economic conditions, the latter of which should be covered in "non-negotiating" structures, focusing on a collaborative problem-solving approach.

Although wages, benefits and substantive conditions of employment are common bargaining topics in collective bargaining (Karnite, 2003; Coleman, 2013b; NBF Agreement, 2019; LRS, 2022), extending the bargaining issues to viability challenges is evidenced in international collective bargaining processes, as was the case with VWAG's response to IG Metall's wage and termination of collective agreement demands during the 2024 collective bargaining agreements. VWAG argued that for the company to remain competitive and secure jobs, pay cuts, needs-based training places, future-proof standard bargaining agreement with standard working conditions across the company operations, will go a long way in securing the company's future (Boesenberg, 2024) In their response, the company shifted the focus of collective bargaining away from wages and substantive conditions of employment to international competitiveness and job security.

Considering the automotive industry's transition toward electric vehicles, Keil (2024) noted that this transition presented a key challenge for organised labour, employers, government and customers in the sector. Introducing electric vehicles into the transportation value chain will not only impact production processes but also the supply chain and end-product users. Although this transition implies not only shifting production towards a socially and ecologically responsible form of transport, in response to societal and corporatist pressures, it will also impact workers and contribute to the ecological reorganisation of production (Karnite, 2003; Keil,

2023; Kenton, 2025). The impact is far-reaching – suppliers dependent on the distribution of components, potential job losses, restructuring of production processes and upskilling of employees. The political nature of this transition necessitates engaging broader societal alliances, sector stakeholders, government and the retail industry. This is another example of how advances in the industry go beyond bread-and-butter challenges.

In summary, the stakeholder representatives' view to extend the bargaining topics beyond wages and substantive conditions of employment to include viability challenges facing the industry is reflected in the examples outlined in the preceding paragraphs. The references to the VWAG challenging financial position and taking a leading role in steering the collective bargaining process with IG Metall; UAW's application of pattern bargaining to respond to challenges in the automotive industry in the USA, and the industry's response to the transition toward elective vehicles, all reflect on collective bargaining taking on a strategic approach in addressing viability challenges in the industry, instead on just wages and substantive conditions of employment. This supports the view of stakeholders that the bargaining topics should be extended beyond wages and substantive conditions of employment to include viability challenges.

8.2.2 VIEWS ON CURRENT SECTOR COLLECTIVE BARGAINING

With respect to current sector collective bargaining in the South African automotive industry, industry representatives agreed that this approach has served the industry well, contributing to labour and industry stability. However, some argued that there are limitations, such as addressing the long-term sustainability challenges. Despite the consensus on sector collective bargaining, there are opposing views that current sector collective bargaining is outdated and should be reviewed. In addition, some participants considered that a "one-size-fits-all approach, perceived to be a broader collective bargaining approach, will result in inflexible negotiations and a digression of substantive issues. Reflecting on the view that sector collective bargaining must be reviewed to bring about greater efficiency in the bargaining process, some participants suggested that this in itself is a challenge, as the focus is on a particular sector, typically the OEMs, without considering implications for the other sectors.

During the interactive dialogue, stakeholder representatives reached a consensus on several key challenges. The following summary of the discussion on sector collective bargaining:

- Current sector collective bargaining was also being challenged by factors such as the failure of the government to address socio-economic challenges impacting the workers, notably affordable housing, transport and medical aid.
- Although current sector collective bargaining benefited the sector, it has limitations, impacting not only sector bargaining but also the viability of the industry in general.
- There should be better alignment between bargaining structures; company-sector-industry interface, etcetera.
- Societal-corporatist structures are a means to explore a "fit-for-purpose" structure.

In considering the views of stakeholder representatives during the interactive dialogue session, the perspectives of several authors on various facets of sector collective bargaining are relevant. One such facet was the role integrative bargaining can play in improving the quality of collective bargaining. Integrative bargaining is a form of collective bargaining useful in deliberating on general conditions of employment, such as health and safety, absenteeism and labour turnover, and the introduction of new technology (Barry and Friedman, 1998). During integrative bargaining, the parties seek agreements that provide a compromise alternative, often not envisaged by the parties (Druckman and Wagner, 2021). Barry and Friedman (1998) noted that integrative bargaining is beneficial when the negotiating parties are willing to explore challenges that are not fundamentally in conflict, thereby ensuring a win-win outcome for the negotiations. However, integrative bargaining requires open communication, a problem-solving approach, collaborative participation from all parties, an open exchange of information, and agreement on common goals (Finnemore and Van der Merwe, 1988; Barry and Friedman, 1998; Druckman and Wagner, 2021). Nel et al. (2012) suggested that parties involved in negotiations must pursue a negotiated outcome that is supported by a trusting relationship between them. An example of integrative negotiations is the 2013 – 2014 United Nations' negotiations to develop a set of Sustainable Development Goals (SDGs) in pursuit of sustainable global development (Druckman and Wagner, 2021).

Bispinck and Dribbusch (2011), Bosch and Kupets (2021), and Keil (2023) reflected on the pressure of sector collective bargaining in the German metal and electrical engineering industry, considering alternative forms of collective bargaining in response to several economic de-

velopments. They argued that economic and social challenges, such as new market developments, intensified international competition, steadily mounting overall unemployment, and a shift in neoliberal deregulation and liberalisation, caused sustained pressure on collective bargaining. Employer organisations, labour, and government considered the impact on their respective organisations and the economy as a whole.

Selwyn (2012) highlighted how globalisation was increasingly opening up new sources of collective power in developing countries, referring to how workers in the export grape sector in North East Brazil leveraged their structural and associational power to secure concessions from their employers. This demonstrated the significant role workers' collective actions and organisational capabilities play in shaping capitalist development. Under pressure from retailers in the European market to deliver high-quality grapes in a timely manner, large-scale farmers were under pressure to retain a permanent workforce that is trained and skilled. The workers were able to maintain high wages and secure permanent employment by taking advantage of the pressures and exploiting their structural and associational power. The structural power, emanating from workplace bargaining power as well as marketplace bargaining power, and associational power base enabled the workers to negotiate better working conditions, wages, and other conditions of employment with their employers (Selwyn, 2012; Webster, 2015; Arata, Hauschild and Sckokai, 2017).

In summary, despite parties to sector collective bargaining structures in the South African automotive industry agreeing that the current sector collective bargaining arrangement served the industry well, contributing to labour and industry stability. They were in agreement that the current process's inability to address the future viability of the industry was problematic. Exploring new collaborative approaches in modern collective bargaining practices was essential in fostering positive labour-management relationships and achieving mutual benefits. One compelling example of successful collaborative bargaining can be seen in the partnership between Ford Motor Company and the United Auto Workers (UAW) union in the United States. In 2019, both parties engaged in negotiations that focused on addressing key issues such as job security, wages, and benefits. Through a collaborative approach, they were able to reach a mutually satisfactory agreement that not only ensured the well-being of workers but also promoted the long-term sustainability of the company (Felker, 2019; Psico-smart, 2024) .

8.2.3 REFLECTING ON BROADER COLLECTIVE BARGAINING

Broad-based collective bargaining refers to a type of collective bargaining where negotiations extend beyond a single company or industry, encompassing a wider range of employers and workers. It is an approach to labour relations that aims to set industry-wide or regional standards for wages, working conditions, and other employment terms (Slinn, 2020; Stanford, 2024; Centre for Future Work, 2025)

Reflecting on the pursuit of a broader collective bargaining forum, the stakeholder parties agreed that there is a need to transform collective bargaining so that it remains relevant, not only in contributing to industrial peace and stability, but also in achieving internationally competitive benchmark productivity. However, they argued there should be checks and balances built into such a system to address non-wage-related issues and socio-economic challenges. The parties are of the view that the challenges to sector collective bargaining are more fundamental, which can be addressed in a mega or broader collective bargaining forum. Others argue, however, that current sector bargaining has served the industry well, contributing to labour peace and stability. Although the international trend of collective bargaining moving towards enterprise bargaining is recognised, the parties did not reflect on trends in the country, but rather on further strengthening collective bargaining.

Concerning the stakeholders' view on the need to transform current collective bargaining, Stanford (2024) noted that in recent years, labour relations experts have expressed growing interest in the potential of broader-based bargaining systems to enhance the effectiveness and efficiency of collective bargaining. These negotiations would cover workers in entire industries, regions, or occupations, rather than individual workplaces or sectors. By negotiating common benchmarks for wages, benefits and working conditions that apply to all employers in a given segment of the economy, these broader bargaining systems can bring about a collaborate focus among industry stakeholders, extending beyond enterprise and sector level, preventing a 'race to the bottom' in job quality, and neutralize employer efforts to prevent unions from establishing small beachheads in individual workplaces (Stanford, 2024).

Furthermore, Psico-smart editorial team (2024) pointed out that the landscape of collective bargaining and negotiations is evolving rapidly to accommodate the changing business environment. Key emerging trends such as digitalisation, remote work, and diversity and inclusion

are reshaping the traditional approaches to labour relations. They argued organisations must adapt to these trends by fostering open communication, embracing technology, and promoting a culture of collaboration to effectively navigate the complexities of negotiations in today's global economy (Psico-smart, 2024).

Labour advocates and researchers around the world have been investigating the possibility of new systems of sectoral or broader-based collective bargaining as an alternative strategy for reversing the decline in collective bargaining coverage, which has occurred in many countries (Noggle, 2010; Centre for Future Work, 2025).

A case in point about an outdated collective bargaining framework, collective bargaining in the German metals and engineering industry has undergone a steady transformation as the industry responded to economic crises, international competition and political-economic challenges (Bosch and Kupets, 2021; Keil, 2023; Boesenberg, 2024). Unions, such as IG Metall made concessions as the decentralisation of collective bargaining impacted on employment, remuneration and benefits processes. More and more company-level developments forced works councils (company-level union structure) to make concessions on pay, conditions of employment and a wide spectrum of benefits, in return for job preservation guarantees (Schulten, 2025).

Several distinct forms of statutory, broader-based bargaining structures have developed in Canada, primarily as attempts to regulate unfair competition and target vulnerable worker groups. In the Canadian context, broad-based collective bargaining entails negotiation structures that extend beyond a single employer and workforce, encompassing entire industries, sectors and regions (Slinn, 2020). In the construction industry, unions, rather than employers, have raised concerns about unfair competition, impacting job security, and are demanding discussions in a broader forum. These regimes have met with differing degrees of success. It is difficult to draw general conclusions from the experiences of these very different bargaining regimes. Proposals for broader-based bargaining in the private sector have faced resistance from some employers and have not been widely adopted (Stanford, 2024). Concerns often include potential restrictions on individual employer flexibility and the complexity of implementation. However, it is clear that any broader-based bargaining system must be structured in light of the particular features of the work, workers, and established bargaining practices in the industry (Slinn, 2020)

In summary, reflecting on the decline in collective bargaining coverage, Stanford (2024) supports reforming labour laws to facilitate multi-employer and other forms of broader-based collective bargaining. Such reforming would contribute to greater effectiveness and efficiency, generating equitable economic benefits for workers across the industry, and support a collaborative focus on the viability of the industry (Stanford, Macdonald and Raynes, 2022). These global views support the South African collective bargaining stakeholders' view of pursuing a broader collective bargaining framework, allowing for increased effectiveness and efficiency in the current sector collective bargaining.

8.2.4 COLLABORATION BETWEEN INDUSTRY STRUCTURES

Collaboration in collective bargaining implies that both unions' structures and employers' organisations focus on building a cooperative relationship, working together to find common ground and mutually beneficial solutions. This approach shifts from a purely adversarial stance towards one of joint problem-solving, aiming to establish a lasting and positive relationship (Post, 1990; Noggle, 2010).

In addressing collective bargaining challenges, there is consensus among the parties that collaboration between bargaining councils is important and that it should be structured, however there are different views as to what the focus of the collaboration should be - a focus on common issues, preservation of sector collective bargaining linked to strategic issues impacting on the viability of the industry, or harmonising benefits across the industry, etcetera.

The parties consider collaboration as not just restricted to bargaining councils, but also the need to build strategic relationships, focusing on how different sector structures can collaborate in addressing industry challenges. In this regard, it was highlighted that the role of industry leaders should be in building inclusivity and strategic relationships by creating structures and identifying champions who are passionate drivers of the objectives and targets set out for the industry, rather than focusing on self-interest, bureaucracy, inflexibility, and a lack of proactivity. Some parties identified a perceived lack of meaningful stewardship, attributed to a lack of cohesion and focus beyond sectoral or company levels, as a contributing factor to the lack of focus on industry challenges.

A key challenge in the application of stewardship is how stakeholders will collaborate and communicate with each other, especially in complex and diverse relationships. Citing input from Wondelleck and Yaffee (2000) and Cortner and Moore (1999), Belaire et al. (2011) expanded on the critical role collaboration and communication play in stewardship concepts, especially in structures involving radically different decision-making processes, institutionalised processes, diverse management boundaries and knowledge. Koontz and Thomas (2006) and Newig et al. (2010) suggest that stakeholder collaboration is an effective alternative to top-down, centralised approaches, especially when confronted by complex and unpredictable environmental systems.

Finding the right balance in the collaboration continuum between government, business, unions and social partners is essential to construct a stewardship framework. This can be set up through bargaining processes or a government-led legal framework. The government's role is to set fair rules to create a consistent and predictable framework, promoting collaboration in the best interest of the industry and economy (Belaire et al., 2011).

Noggle (2010) noted that teachers' unions and education district administrator officials have not only incorporated collaborative actions into collective bargaining processes, but also into operational processes, such as teacher contract renewals, performance reviews, and discipline. The parties commented that issues no longer fester until contract negotiations resume, bringing about adversarial challenges, but are addressed in the normal run of managing relationships. Noggle (2010) referred to a study that concluded that collaboration emerged from a discontent with adversarial relations.

Researchers have documented several key aspects of a successful collaborative approach to collective bargaining (Post, 1990; Noggle, 2010; McAndrew, Edgar and Geare, 2013; Huamán, Sánchez and Talledo, 2024):

- Focus on Shared Interests: Collective bargaining must identify and build on shared goals and interests rather than simply focusing on individual demands.
- Open Communication and Information Sharing: Commitment to open and honest communication, sharing relevant information and perspectives to foster trust and understanding of each other's positions.

- Joint Problem-Solving: Commitment to collaborative bargaining encourages joint problem-solving instead of a win-lose mentality, and the development of creative solutions in the best interest of both parties.
- Building Long-Term Relationships: The Process must encourage long-term relationships built on trust and respect, fostering a more collaborative work environment beyond the immediate bargaining process.
- Focus on the Bigger Picture: It is Important to understand that collaborative collective bargaining extends beyond the immediate negotiations and may include broader issues not just related to the workforce but to the long-term viability of the industry.

Although the focus of the industry stakeholder representatives' comments was on institutionalised collaboration between bargaining councils, they expanded on the need for this collaboration to be linked to strategic issues impacting the sustainability of the industry, harmonising benefits across the industry, and the adoption of a stewardship philosophy among industry stakeholders. This approach aligns with existing literature views that collaborative collective bargaining promotes the management of diverse and complex relations, improves the efficiency and effectiveness of the bargaining process, and reduces adversarial relationships.

8.2.5 SOCIETAL CORPORATIST STRUCTURES

From a societal corporatist perspective, collective bargaining is not just a bilateral process between employers and unions, but a broader social and political process involving the state. It is about aligning industrial relations with a wider societal context and focusing on societal outcomes, rather than just the specific terms of the agreement. This perspective emphasises the role of the state in mediating and regulating bargaining, collaboratively with stakeholder structures (Maree, 1993; Driffill et al., 1994; Pekkarinen, Pohjola and Rowthorn, 1994; Desai, Habib, 1997; Habib, 1997).

Reflecting on the role of societal corporatist structures, representatives expressed general criticism about the efficacy of current societal corporatist structures in addressing socio-economic challenges. This criticism stemmed from the view that historically organised business, labour, and socio-political structures played a significant role in establishing structures that contributed to the transformation of the automotive industry. In this regard, there was consensus that soci-

etal corporatist structures must play a bigger role in addressing the socio-economic and viability challenges facing the industry, providing for a partnership between government, organised business and labour, governed by a policy framework. There was no unanimity among stakeholder representatives regarding how to address their criticism of the current societal corporatist structure. Some expressed the view that current structures must be reviewed to better address viability challenges, while others felt that a national platform would bring about greater ministerial coherence to focus on these challenges.

Emphasising the role of government in societal corporatist processes, Driffell (2006) refers to Ireland as an example where a succession of tripartite social pacts has been implemented to limit inflation and promote high employment, sometimes involving the government in offering lower tax rates. The Netherlands' success in returning to lower unemployment has been characterised as partly a success of a corporatist model (Nickell and van Ours, 2000). For effective social dialogue, several key preconditions are essential, including strong, independent, and representative employer and worker structures, respect for fundamental rights such as freedom of association and collective bargaining, and a commitment from all parties to engage in dialogue (Hicks, 1988; Grunig, 2000). Both Ireland and the Netherlands' examples point to the role government can play in creating an enabling environment, allowing the stakeholders to address the societal challenges impacting their business landscape.

Edwards (2001) argued that societal corporatism has made two contributions to collective bargaining. Firstly, it has placed current industrial relations systems in a broader social context by integrating the state's role as a regulator within the labour relations framework. Secondly, it focused attention on collective bargaining outcomes beyond the engagement of employers and unions. Researchers pointed out that corporatism shifted labour relations challenges from the industrial to the political sphere, reducing the use of strikes as a bargaining weapon. (Edwards, 2001). Noto (2014) argued that despite widespread historical evidence of societal corporatism, there is a renewed interest in applying social dialogue to address labour relations and economic challenges.

The stakeholders recognised the role societal corporatism played in not only the relatively smooth transformation of the South African democracy, but also in transforming the automotive industry from labour relations conflict to international competitiveness (Finnemore and Van der Merwe, 1988; Maree, 1993; Anstey, 2006; Godfrey, 2018). Although South Africa's

experience with societal corporatism is reflected in global views of societal corporatism, the challenge stakeholders raise is how to reactivate these structures to play a key role in addressing an industry faced with global challenges. Some of the recent challenges are: The announced closure of ArcelorMittal South Africa's (AMSA) long steel blast furnace (Windell, 2025); The adoption of New Energy Vehicles (NEVs) and alternative fuel technologies, and the lack of government policies (Wiggill, 2024); Potential loss of its duty-free access to the US market through the African Growth and Opportunity Act (AGOA) (Woosey, 2025); South Africa's high reliance on exports and the importance of the AGOA agreement make the country vulnerable to global protectionism trends (Mothilal, 2025). Lastly, the influx of Chinese-brand vehicle imports in the country is creating an unequal playing field in the market (Arnoldi, 2025). Although there was consensus among stakeholder representatives that societal corporatist structures must play a larger role in addressing socio-economic and viability challenges, there was no unanimity on how to address their criticism of current societal corporatist structures.

8.2.6 STEWARDSHIP APPROACH

Stewardship, in its broadest context, refers to the judicious and responsible management of resources, whether material or otherwise, entrusted to individuals or organisations for the common good of stakeholders, the environment, and other relevant interests. (Chen, 1975; Davis, Schoorman and Donaldson, 1997; Cossin, Ong and Coughlan, 2015; Cockburn et al., 2019b)

The stakeholder participants argued that the automotive industry leadership must adopt a stewardship approach in addressing the challenges facing the industry, focusing on inclusivity and thinking beyond their own interests. There is a general consensus that leaders from all the representative structures of the auto industry must accept joint responsibility for the industry's sustainability; they must think beyond their representative interests, promote unity, and be leaders with foresight. The focus of industry leaders should be on building inclusivity and strategic relationships by creating structures and identifying champions who are passionate drivers of objectives and targets set out for the industry, addressing tendencies such as self-interest, bureaucracy, inflexibility, and a lack of proactivity. There is a perceived lack of meaningful stewardship due to a lack of cohesion and focus beyond sectoral or company levels. In addition, parties often fail to respect the outcomes of their engagements by not implementing or enforcing agreed-upon outcomes (government).

The societal corporatist philosophy underpinning the South African labour relations framework supports a collaborative stewardship approach to labour relations, particularly when dealing with socio-economic issues (Habib, 1997). As a leadership tool, stewardship enables the bringing together of various stakeholders to address socio-economic challenges. It has a strong focus on leadership, drawing on inspired insight and vision to find equitable solutions that accommodate competing interests (Davis, Schoorman, and Donaldson, 1997).

One of the challenges in structuring a broader collective bargaining forum will be not only the structure but also the relationships between bargaining councils, the establishment of collaboration and communication principles, and the creation of shared ownership among stakeholders, among other factors. This in itself will be a process of negotiation. The diverse views of the parties will create paradoxical circumstances that must be considered when finding solutions in the best interest of the industry.

Several articles in the literature review (Maree, 1993; 2009; Davis, Schoorman and Donaldson, 1997; Castro, 2025) identified some principles underscoring the application of stewardship in addressing multidisciplinary challenges, such as collective bargaining, fostering a sense of shared responsibility, promoting intergenerational rather than short-term benefits, and a need for multiple partnerships, collaborations, and linkages. In the context of this research, where an institutionalised framework is in place to address challenges in current collective bargaining agreements, stewardship can help leaders drive sustainable development and growth by balancing short-term and long-term objectives amidst competing interests. Critical for the structuring of a broader collective bargaining framework is the understanding of the roles and responsibilities of key players and how they relate to each other in the context of stewardship

8.3 INTEGRATIVE THINKING ANALYSIS OUTCOMES

In developing an artefacts framework that reflected the outcomes of the stewardship-based integrative process and exploring how it could be integrated into a broader collective bargaining framework, two analysis techniques were applied sequentially: interactive dialogues and integrative thinking. Through interactive dialogues, participants representing parties involved in collective bargaining in the automotive industry debated the paradoxical statements arising from the challenges facing sector collective bargaining and explored potential solutions for

reducing these tensions. In the second step, through a process of integrative thinking, the tensions of opposing solutions were constructively reconciled by generating a holistic model that incorporated elements of the respective solutions.

The development of a stewardship-based broader collective bargaining framework proposal involved the application of the integrative thinking process (Martin and Austen, 1999; Martin, 2007; Bolchini and Paolini, 2006). The key outcomes of the Interactive Dialogue discussion served as input for applying this model. The following summary of the process and key findings:

A major challenge in the application of the Integrative Thinking model was to interpret various literature references (Maccoby, 1996; Martin and Austen, 1999; Bolchini and Paolini, 2006; Martin, 2007d; Benson and Dresdow, 2009) in the application of the interactive dialogue outcomes, which served as input to the model. An example of this challenge was identifying the salient features, which are generally described as those relevant to the proposed solution. In this example, two types of features were identified that matched the broad model description; however, there is a distinction between the two. The first was identified as key features, which represented the key consensus positions of the stakeholder participants for each interactive dialogue theme. The relevant feature describes the relevant elements of each feature. The complexity of the industry and the diversity of leadership were identified by the participants as key features in developing a broader collective bargaining framework. The relevant feature describing a solution is its ability to overcome challenges such as competition, intra-company challenges, and regulatory challenges. Ultimately, the diverse applicability of the model in developing an artefacts framework for broader collective bargaining can be demonstrated.

The following overview of the findings of the application of the integrative thinking model:

- The salience stage identified the key features that represent consensus positions among the participants in resolving the challenges. The following key features were identified:
    - Recognising the complexity of the industry and diversity of leadership, industry leaders must engage beyond company and sector interests.
    - Societal-corporatist structures should promote structured collaborations between stakeholders and stakeholder organisations, drive industry policy certainty, and greater inter-ministerial coherence.

- The causality demonstrates the link between interactive dialogue themes, processes, people, environmental factors, events, and so forth, that might impact the development of a restructured collective bargaining framework, positively or negatively. The core elements defined were societal corporatism, industry viability, stewardship, and collective bargaining. The core elements will form the foundation of the artefacts framework, as well as the interface with the key enabling variables and dependent variables.
- The intention of applying the integrative thinking model was to reconcile the tensions identified during the interactive dialogue session, in particular those where there was no consensus between the parties. This provided a structured process for designing and developing an artefacts framework that underpins a restructured collective bargaining framework to give effect to collective bargaining agreements, and to develop a broader collective bargaining framework for the automotive industry.

In summary, the integrative thinking model provided a useful framework for analysing the paradoxical nature of the analysis and interactive dialogue. It provided a mechanism to explore an integrative link between a competitive industry and the enhancement of the respective organisations' viability, as well as a stewardship collaboration that focuses on shared ownership of industry viability. The challenge which remains is how to integrate the current independent bargaining councils in a framework that will not only focus on the interests of the respective sectors, but also, in a collaborative approach, focus on the interests of the respective plants and the industry as a whole.

8.4 CONTRIBUTION TO THE BODY OF KNOWLEDGE

In considering the contribution of paradox theory to management studies, the research findings supported its application in resolving interorganizational challenges with multiple stakeholders. Considering the contribution to management studies, paradox theory in management suggests that organisations can thrive by embracing and navigating, rather than resolving, seemingly contradictory demands. It proposed that tensions, such as innovation versus efficiency or competition versus collaboration, were persistent and interdependent. Instead of choosing one side, managers can find creative novelty and resilience by learning to manage these opposing forces simultaneously. With respect to its application to collective bargaining, paradox theory views opposing forces, such as the need for stability and the need for change, as contradictory yet interrelated elements that are inherent to the process. It suggested that these tensions were

not problems to be solved, but dynamic dualities that must be managed to achieve sustainability, such as a union and management trying to find a balance between a firm's need for productivity and workers' demands for better wages.

Paradox theory viewed interorganisational problem-solving as a process of managing contradictory yet interdependent demands, rather than a dilemma to be resolved by choosing one option. It suggested that instead of eliminating tensions, organisations should acknowledge them and find ways to sustain both sides, such as embracing complexity to create new opportunities while maintaining efficiency. Effective management can involve strategic separation of tensions or finding a synthesis that accommodates both sides simultaneously.

With respect to the application of integrative thinking to resolve paradoxes in interorganisational challenges with multiple stakeholders, the research findings embraced the reframing of a choice between opposing views in addressing the multiplicity of challenges in collective bargaining in the South African automotive industry, thereby making a methodological contribution to developing a collaborative framework that allowed for both shared oversight and individual freedom within defined parameters, that allowed for both shared oversight and individual freedom within defined parameters. It also reinforced the diverse applications of a collaborative approach in addressing societal and corporatist threats. Furthermore, it reinforces the view that integrative thinking must be championed as a crucial leadership competency in both organisational and inter-organisational problem-solving of complex challenges (Riel and Martin, 2017).

Collaborative stewardship contributes to scholarly knowledge by offering an alternative to traditional, control-based management for complex "alternative challenges" like climate change and biodiversity loss. It shifts the focus from top-down command-and-control to a more inclusive, participatory, and trust-based approach that emphasises shared responsibility, ethical leadership, and building social-ecological resilience. Its scholarly contribution lies in developing and testing new governance models, exploring the paradoxes of collaboration, and understanding how to effectively implement these approaches in diverse and contested contexts.
Collaborative stewardship contributes to sustainability beyond social-ecological challenges by enabling integrated, systemic approaches to complex problems that require navigating diverse values and interests. Scholarly contributions include developing frameworks for "boundary-

crossing" work, which fosters trust and shared knowledge among diverse actors, and demonstrating how tension and conflict can be constructive in achieving more robust and inclusive outcomes. By emphasising relational expertise and agility, collaborative stewardship provides tools to address issues like economic inequity and political contestation.

8.5 THE PROPOSED ARTEFACTS FRAMEWORK

In the context of this research, the proposed artefacts framework aims to provide a systematic approach to understanding the complex challenges of collective bargaining in the South African automotive industry, breaking it down into specific actions for creating a framework of building blocks that will underpin a broader collective bargaining framework.

In developing the artefacts framework, the intention was to set up another interactive dialogue to discuss the outcomes of the theoretical application of the interactive thinking model. However, the reconstitution of the interactive dialogue was not possible, as it was difficult to obtain a sufficient number of representative stakeholder participants who agreed to a follow-up meeting or find a date that suited all those who agreed. In view of this, the outcomes of the findings generated by the theoretical application of the integrative model were used to develop a potential artefacts framework and stewardship-based broader collective structure. The challenge lies in how these findings can be tested through an interactive dialogue process.

Before discussing the findings of the interactive dialogue and interactive thinking processes applied in the development of the artefacts framework, it is useful to summarise the outcomes of the interactive thinking process (Figure 8.1).

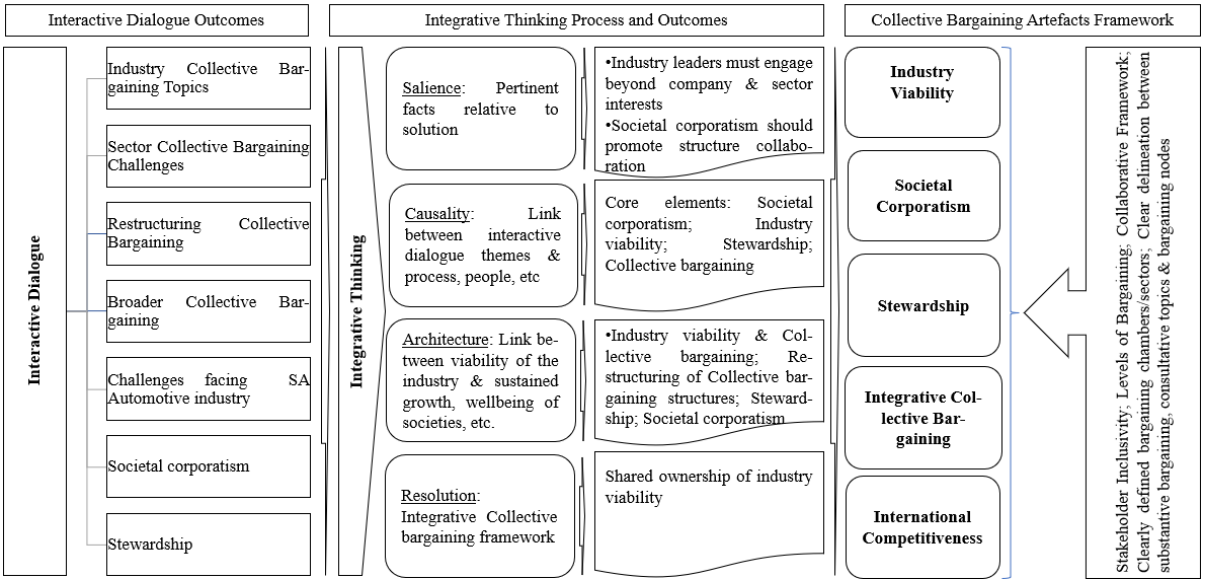


Figure 8.1: Summary of the Sequential application of the Interactive Dialogue and Integrative Thinking processes to produce the Collective Bargaining Framework
(Source: Author's construction)

Summarising the outcomes of the salience, causality and architecture steps, the core elements of the artefacts framework are the following:

- Industry stability: The South African automotive industry is currently facing a combination of challenges and opportunities, necessitating industry stakeholders to focus on both the short-term challenges and on exploring the long-term potential for growth. The gains from labour stability, plant investments, and exports will be severely tested by international trade barriers, AGOA uncertainty, global economic uncertainty, increasing competition from Chinese manufacturers, pressure to produce electric vehicles, and modest economic growth.
- Societal Corporatism: Historically, societal corporatism played a significant role in addressing automotive challenges during the Apartheid years, and there is a need for stronger collaboration between government, business, and labour to jointly focus on these challenges and develop solutions, such as policy coordination and implementation, social dialogue and labour relations, diversification of the automotive industry and socio-economic transformation.
- Stewardship: A stewardship approach is crucial for navigating the South African automotive challenges, such as economic pressures, environmental concerns, and the global shift

towards sustainable manufacturing. Such an approach must be underpinned by responsible resource management and ethical business practices.

- Integrative Collective Bargaining: Focusing on collaborative gains and shared interests, integrative collective bargaining can play a major role in addressing the challenges within the South African automotive industry, in particular, concentrating on global value chains, local content development, joint ventures, contract manufacturing, technology sharing, multi-stakeholder dialogues, interest-based bargaining, etcetera.
- International Competitiveness: Whilst the industry has stabilised greatly over the past couple years, notably labour stability, export opportunities, etcetera, and has contributed significantly to country's GDP, it needs to adapt to changing global trends such as the rise of electric vehicles, international competitiveness, enabling infrastructure etcetera. addressing these challenges in a sustainable way, the industry can enhance its competitiveness and continue contribute to sustainable economic growth.

Critical in addressing the challenges and exploring potential opportunities is how the industry will create an enabling environment underpinned by an artefacts framework, that focuses on enabling factors such as stakeholder inclusivity, levels of bargaining, collaborative framework, clearly defined bargaining chambers/sectors, and clear delineation between substantive bargaining, consultative topics & bargaining nodes.

Reviewing the NBF (2022- 2025) and MEIBC (2021 – 2024) agreements, the parties agreed to explore a proposed Broader Collective Bargaining Forum (NBF, Section A 6.2) and Industry Policy Forum (NBF, A10 and MEIBC, Annexure I), to collaboratively consider and deliberate on strategic issues impacting the future of an automotive manufacturing industry in South Africa. Among others, there is a commitment to explore the following:

- Securing the sustainability and growth of the industry
- Role player in the national discourse on national economic policy
- Promote international trade
- Reducing the cost of living for employees, improving the standard of living and reducing the costs of business in the industry

More specifically, with respect to the Proposed Broader Collective Bargaining Forum, parties to the NBF Agreement agreed to explore the following:

- Such a deliberation should include representatives from the automotive manufacturing industry (OEMs), motor components sector, tyre sectors, etcetera.
- The desired structure should have separate bargaining chambers/chapters
- Clear delineation between substantive bargaining and consultative topics and bargaining modes

Considering the outcome of the integrative thinking model, the core elements and enabling framework parameters are addressed in these two clauses, and therefore relevant to the challenges faced by the complexity of the automotive industry. The applicability of the interactive thinking process to constructively reconcile the tensions between opposing views and solutions of industry stakeholder representatives, and to generate a holistic model containing elements of respective solutions, is a useful tool in this particular context.

In essence, the artefacts framework refers to a structured approach for understanding, designing, developing, evaluating and iteratively refining artefacts, which are tangible products such as tools, models, or conceptual frameworks (Venable, Pries-Heje and Baskerville, 2016; Achampong and Dzidonu, 2017). In the context of this research, the framework will provide a systematic approach to understanding the complex challenges of collective bargaining in the South African automotive industry, breaking it down into specific actions for creating a framework of building blocks that will underpin a broader collective bargaining framework.
The architectural framework illustrates the connection between the industry's viability and sustained growth, thereby enhancing the viability of the respective companies and the well-being of the societies in which they operate. A crucial step in this stage is to reconcile the tensions between opposing solutions (Table 7.3). The following summary of the reconciling of tensions:

- Industry viability and collective bargaining: Agreement that industry viability and collective bargaining are mutually dependent. This should be reflected in the topics and structures of bargaining.
- Restructuring of industry bargaining structures: This is possible provided that the framework is underpinned by clear terms of reference, transparent delineation between industry,

sector and plant level bargaining. A national convention is proposed to review collective bargaining and the viability of the industry challenges.

- Stewardship approach to industry viability: Captains of industry must play a stewardship role in addressing the long-term viability of the industry. Despite the complexity of the industry and the diversity of leadership, it is possible to find a synergistic approach to overcome competition, supplier modality tensions, intra-company challenges, infrastructure challenges, regulatory challenges, and other challenges.
- Societal corporatist structures: These structures must drive greater ministerial coherence and better focus on viability challenges.

Given the inability to convene another interactive dialogue to test the outcomes of the integrative thinking model, the challenge lies as to how these findings can be effectively tested within an interactive dialogue process. The following sequenced process is recommended to address the conundrum of where to start and what to start with, in order to constructively reconcile the tensions of opposing solutions and generate resolutions that incorporate elements of both respective solutions. The process is in three stages (Figure 8.2):

The first stage involves initiating a discussion on industry viability and collective bargaining among employer representatives of the current sector's collective bargaining structures and captains of industry, preferably in separate forums. The intention is to consider, in a collaborative spirit, the challenges facing industry viability and collective bargaining between employer organisations. The outcomes are then presented to the auto industry CEOs and representatives of the bargaining councils for their input and recommendations. The next step is to present the findings to employer bodies in the broader employer organisations for input and consolidation. The recommendations of the initiating phase are presented to the unions for their input and support. This consultation could take place in industry policy forums or other structures where union leadership and shop stewards are involved. This will ensure the company shop stewards' involvement in the industry's strategic processes. Finally, these outcomes are then presented to the government and socio-economic forums. It is recommended that ongoing deliberations be referred to existing structures, such as the Industry Policy Forum and NEDLAC. Based on the outcomes of this process, the proposed artefacts framework is reviewed and adapted.

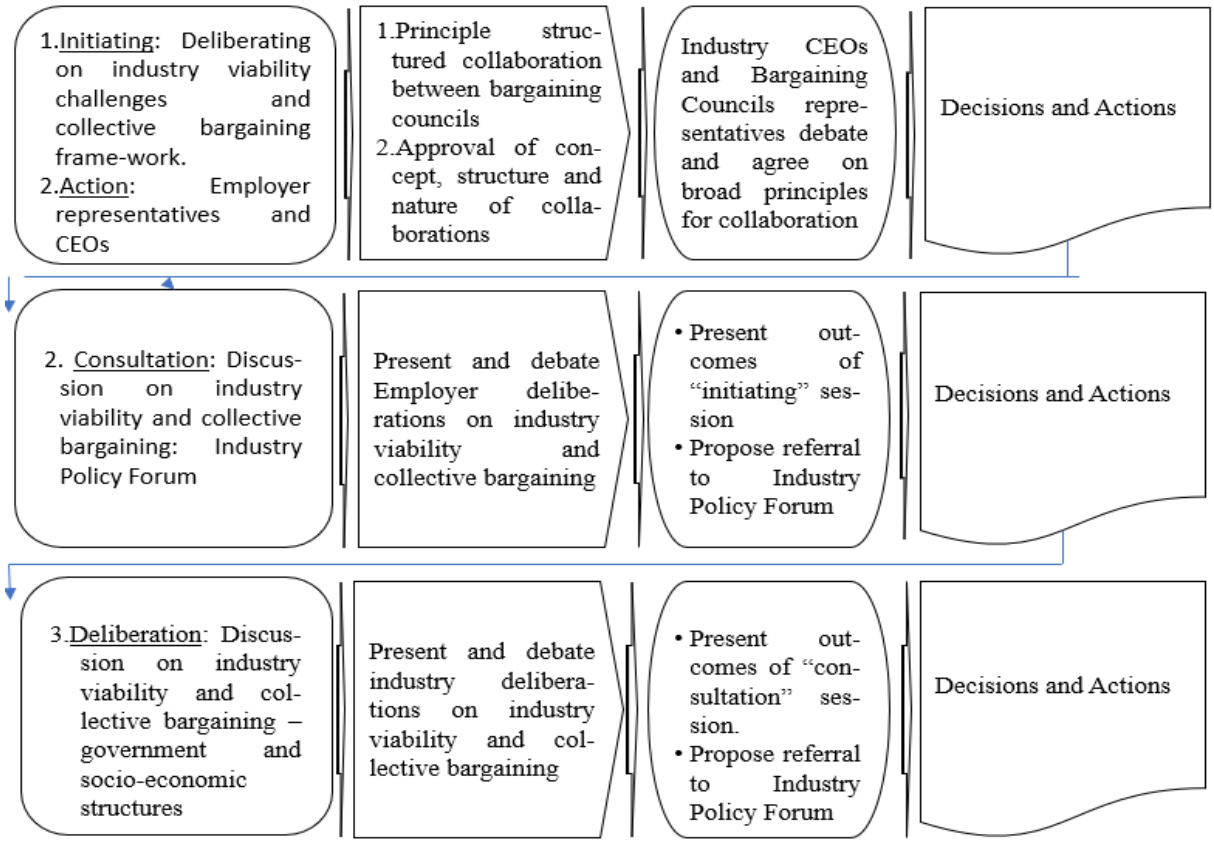


Figure 8.2: Alternative to Interactive Dialogue to test Outcomes of Integrative Thinking model

(Source: Author's construction)

8.6 CONCLUSION

Reflecting on the debate about whether qualitative research adds value to building a distinctive body of knowledge, this research aimed to make a contribution by investigating and developing a stewardship-based, broader collective bargaining framework for the automotive industry, as envisioned in several sector collective bargaining agreements. This study aims to illustrate the potential application of a collaborative stewardship approach beyond social-ecological sustainability challenges, addressing the multiplicity of challenges in collective bargaining within the South African automotive industry. The purpose of qualitative research interviews was to contribute to a body of knowledge that is both conceptual and theoretical, based on the perspectives and life experiences of the interviewees (Guba, 1981). The research approach and techniques employed in the study demonstrated how complex challenges can be addressed through the systematic application of a collaborative stewardship framework, which involves the sequential

application of various research methodologies. This framework guided the development of an artefacts framework as input to a broader collective bargaining framework. The sequential application consisted of inductive thematic analysis, interactive dialogue and integrative thinking.

When considering the structuring of a broader collective bargaining framework for the South African automotive industry, it is essential to take into account the complexity of having four independent bargaining structures with no structured collaboration framework, as well as the government and concomitant pluralistic elements of conflicting interests and goals. Stakeholders with radically different viewpoints perceive issues differently and struggle to explore solutions that serve the greater multi-stakeholder interest. The challenge is to persuade stakeholders to accept a collective responsibility for securing the future viability of the automotive industry.

Considering the chapter's objectives to explore the correlation between the analysis tools' findings and the literature review, the paradoxical review analysis and interactive dialogues' outcomes demonstrate general coherence with the relevant literature review conclusions. A typical example of this coherence is that both interactive dialogue and literature support the concept that, although collective bargaining topics typically comprise wages and substantive conditions of employment, they can be broadened to address challenges impacting the viability of the industry. Secondly, despite complexity challenges, the integrative model was applied to the outcomes of the interactive dialogue findings to develop an artefacts framework that will underpin the development of a stewardship-based broader collective bargaining framework for the industry. This supported the diverse application of the integrative thinking model.

Ultimately, the development of a broader collective bargaining concept is a cultural change process that impacts the future of collective bargaining in the South African automotive industry. There are several practical implications leaders face during any transformation journey (Martin, 2007a; Brandt, Andersson and Kjellstrom, 2019, p 31):

- Clear and transparent communication around contextual factors increases awareness and change readiness in the organisation.
- A long-term view is necessary in order to make space and time for radical changes.
- Transparency and involvement at all levels of the organisation, as well as sense-making activities, are encouraged.

- Adoption of a toolkit to guide the transformation process.
- Success depends on the change leader’s willingness and ability to collaborate with stakeholders.

CHAPTER 9: CONCLUSION

9.1 INTRODUCTION

The research aimed to explore the development of a stewardship-based broader collective bargaining framework that will seek to address the socio-economic challenges facing the South African automotive industry through applying a process of integrative thinking. The study explored integrative thinking as a process for generating innovative proposals on how the tensions within stakeholders' views on broader collective bargaining can be resolved. The following objectives supported the aim:

- Develop a framework to describe historic and current collective bargaining arrangements in the South African automotive industry
- Analyse the process of integrative thinking that will generate alternative solutions to the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such tangible objects could be built into a national, sector and plant level bargaining framework. This will inform a stewardship-based approach to structure proposed models for broader collective bargaining. The artefacts framework refers to a structured approach utilising tangible objects as the primary source of data, allowing research through their analysis and interpretation.

The intention of the study was to apply interactive dialogues and integrative thinking as a mechanism to explore all the paradoxes emanating from the interviews of collective bargaining, societal corporatism and stewardship, to structure a stewardship model that will underpin the development of a broader collective bargaining, giving effect to what is envisioned by the parties in the 2016 NBF and MEIBC Agreements. Although no research could be found that has applied integrative thinking in the collective bargaining context, the concept was applied to examining challenges emanating from disciplines such as organisational development, strategic managerial decision-making and change management (Cossin, Ong and Coughlan, 2019; Donaldson and Davis, 2015; Hocking et al, 2001).

When considering the structuring of a broader collective bargaining framework, it is essential to take into account the complexity of having four independent bargaining structures and the pluralistic elements of conflicting interests and goals. Stakeholders with radically different viewpoints see issues differently and find it difficult to explore solutions that serve the greater multi-stakeholder interest. Given the stakeholder diversity and complexity, the challenge for the automotive industry is how to get the stakeholders to accept a collective responsibility to secure the future viability of the automotive industry. That responsibility could be structured in a stewardship philosophy.

9.2 MAIN REASONS FOR DOING THE RESEARCH

This research was undertaken because of its contextual importance and its potential to make an original scholarly contribution.

Firstly, its contextual importance is considered. As the global economy becomes increasingly interconnected, nations are being challenged to maintain and advance their industries (Anonymous, 2023). A case in point is the South African automotive industry, which is not only challenged by globalisation trends but also lacks an enabling policy framework to deal with local issues, such as poor port management and persistent electricity shortages. The industry's viability hinges on how industry leaders, government, labour and other stakeholders can collaborate proactively to address the systemic challenges facing the industry.

Although collective bargaining is well entrenched, it remains decentralised across the South African automotive industry. This creates complexities, with very little collaboration between sector collective bargaining structures representing the OEMs, component suppliers, new tyre manufacturers and the logistics industry. Furthermore, a review of recent agreements reveals that these structures primarily focus on wages and substantive employment conditions, rather than issues collectively impacting the future viability of the industry (NBF Agreement, 2016; MEIBC Agreement, 2016).

Given the rapidly changing environment, both internationally and domestically, it is imperative that the industry collectively responds to these challenges. In particular, this study is concerned with how the industry can give effect to clauses in the NBF (2016) and MEIBC (2016) agreements to establish a broader collective bargaining framework and industry policy forum that

will institutionalise a collective approach to address the challenges facing the industry across the value-chain. Notable challenges are labour instability, sequential strikes, above-inflation increases, government advocacy, bargaining structures, and social demands such as affordable housing, transport and medical aid, etcetera (Katz, Harry, 1997; Anstey, 2006; Jordaan et al., 2018, Anon., n.d.)

Secondly, the study intends to make a scholarly contribution. Several studies have examined the use of a collaborative stewardship approach in addressing socio-ecological challenges such as conservation and sustainability goals, natural resource management in urban areas, policy development for natural forest systems, multi-stakeholder collaboration in policy formulation, shareholder interest in strategic management, sustainability in agricultural systems, etcetera (Donaldson and Davis, 1991; Butler and Koontz, 2005; Belaire et al., 2011; Barendse et al., 2016; Cockburn et al., 2019). These studies highlight some principles underscoring the application of stewardship in addressing multi-disciplinary challenges such as collective bargaining, engendering a sense of shared responsibility, inter-generational rather than short-term benefits, a need for multiple partnerships, collaborations and linkages, etcetera.

In a socio-ecological context, collaborative stewardship is generally defined as a process involving multiple, diverse resource users in a particular landscape who act together and share risks, resources, and responsibilities to take care of natural resources in a way that a full and balanced account of the interests of stakeholders and society at large is achieved (Barendse et al., 2016; Welchman, J, 2012; Cockburn et al., 2019). Examples of the implementation of stewardship programmes include sustainability in agri-environmental systems in the United Kingdom resulting in improved land and catchment management (Welchman, J, 2012); a decisional process model for stewardship enabling decision makers address rehabilitation of contaminated sites (Hocking et al., 2001); improve land and catchment management in Australia (Cockburn et al., 2019a); several collaborative initiatives involving the USDA Forest Service to build agreement and manage conflict across diverse settings and resources (Selin, Schuett and Carr, 2000). Selin, Schuett and Carr (2000) argue that findings from this study support recent evidence that collaborative initiatives are achieving important economic, quality of life, and bio/physical outcomes (Selin, Schuett and Carr, 2000).

The stewardship approach, as a process to address challenges through collaborative partnership, has been predominantly applied to socio-ecological sustainability disciplines (Cockburn

et al., 2019), but no evidence could be found of it being used in addressing challenges in collective bargaining. In the context of this research, where there is an institutionalised framework in place to address challenges in the current collective bargaining agreement, a stewardship approach could help leaders drive sustainable development and growth by balancing short- and long-term objectives amidst competing interests (Cossin and Ong, 2016). Therefore, this research examines the application of a collaborative stewardship approach to address the development of a broader collective bargaining framework as envisaged by the parties in sector bargaining agreements.

9.3 SUMMARY OF MAIN FINDINGS

The exploratory case study method was applied to the research as it best suited exploring an understanding of the interrelated activities and views of stakeholders, which is multi-perspectival in that the researcher considered not just the voice and perspective of the parties involved in the challenge, but the interaction between them (Tellis, 1997; Yin, 2011).

The primary method of data collection involved conducting interviews and interactive dialogues with participants from the employer bodies and unions of two automotive bargaining councils, the Motor Industry Bargaining Council (MIBCO) and the National Bargaining Forum (NBF), the government, the Department of Labour and Employment, and the industry, NAAMSA. The Metal and Engineering Industries Bargaining Council (MEIBC) and the Bargaining Council for New Tyre Manufacturing (BCNTM) did not participate in the research.

Two analysis techniques were applied sequentially, namely interactive dialogue and integrative thinking. Through interactive dialogue, participants representing parties involved in collective bargaining in the automotive industry debated the paradoxical statements arising from the challenges facing sector collective bargaining and explored potential solutions for reducing these tensions. In the second step, through a process of integrative thinking, the researcher constructively reconciled the tensions of opposing solutions by generating a holistic model that contained elements of the respective solutions but went beyond the individual resolutions (Martin and Austen, 1999; Martin, 2007a). Ultimately, by applying these techniques, the researcher explored the following objectives:

- By applying integrative thinking, generate solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives
- Develop an artefacts framework that reflects the outcomes of the stewardship-based integrative process and explore how it could be built into a national, sector and plant-level bargaining framework. This will inform a stewardship-based approach to develop proposed models for broader collective bargaining.

9.3.1 INTERACTIVE DIALOGUE OUTCOMES: COLLECTIVE BARGAINING

The interactive dialogue explored the participants' views on what constitutes bargaining issues, current sector collective bargaining, the future of the South African automotive industry, the role of societal corporatist structures and the role of leadership in addressing the challenges facing the long-term sustainability of the industry.

With respect to industry collective bargaining topics, the participants concurred that collective bargaining and industry viability are mutually dependent and therefore negotiations should be structured in such a way to accommodate both. And as such, although "bread-and-butter" issues and industry viability are different constructs, they are mutually dependent in terms of viability, stability and affordability. Although there was a general consensus on the mutual dependability aspect, the participants were reluctant to explore a proposed structure to give effect to this mutual dependence. However, there was consensus that the bargaining issues should extend beyond the traditional bread-and-butter issues to include industry challenges, the latter of which should be covered in non-negotiations industry structure.

Concerning current sector collective bargaining challenges, there was consensus that although it benefitted the industry, there are limitations impacting not only sector bargaining, but the viability of the industry in general. The view is that current sector collective bargaining is also being challenged by factors such as the failure of the government to address socio-economic challenges impacting the workers, notably affordable housing, transport and medical aid. This results in these issues being raised as worker demands during sectoral wage negotiations.

With respect to restructuring current sector collective bargaining, the participants concluded that although it served the industry well, current processes have to change to establish a "fit-for-purpose" structure responding to the long-term viability of the industry, beyond current

bread and butter negotiations. Better alignment was needed between bargaining structures; company, sector, industry interface, etcetera. The parties did not explore a proposed structure nor did they reflect on a possible framework for a broader industry bargaining structure

In responding to a broader collective bargaining forum concept, the participants were more inclined to explore a "broader structure" philosophy in the discussion instead off a broader collective bargaining forum as envisaged in two collective bargaining agreements. The view expressed was that such a structure should have clear terms of reference with broad parameters giving guidance to sector and plant-based negotiations, as well as ensuring that the autonomy of the sector approach is preserved. They also appealed for better alignment between bargaining structures and clarity on company-sector-industry interface.

In discussing the challenges facing SA automotive industry and the interface with collective bargaining, the participants recognised that there are structures in place which could address these challenges, such as the Industry Policy Forum, NEDLAC, dtic initiatives, business chambers, etcetera, however, due to poor discipline, leadership and lack of maturity among leadership, little progress has been made in addressing the broader industry challenges. A case in point is the independent development of the South African Automotive Master Plan (SAAM) 2005, initiated by NAAMSA, and the South African Steel and Metal Fabrication Master Plan 1.0, initiated by SEIFSA, although both coordinated by dtic.

Concerning societal corporatism and economic performance, the participants reflected on the historical role that societal corporatist structures played in transforming the South African economy, including labour relations in the automotive industry. They were in agreement that such an approach would be beneficial in addressing long-term viability challenges, such as electric vehicle production in the country. The participants were unanimous in their criticism that the current societal corporatist structure, NEDLAC, has failed in spearheading socio-economic discussions. There was general support for a national platform that would bring about greater ministerial coherence and better focus on viability challenges. Such an approach will promote a structured collaboration between industry stakeholders.

With regards to a stewardship-based approach, the participants were in agreement that industry leaders must engage beyond company and sector interests, and must lead with discipline, maturity, consistency and accountability. Their view is that despite the complexity of the industry

and diversity of leadership, it is possible to find a synergistic approach to overcome competition, supplier modality tensions, regulations challenges, and so forth. Industry leadership must adopt a stewardship approach in addressing the long-term viability challenges of the industry.

9.3.2 INTEGRATIVE THINKING OUTCOMES: ARTEFACTS FRAMEWORK

In finding a solution for the tensions existing in the current sector collective bargaining process, it required embracing the multi-varied nature of the automotive industry, and developing an understanding of its complexity and causal relationships. Martin's (2007) model shows how, through integrative thinking, the complexity of opposing tensions can be embraced and explored to address the challenges associated with the complexity of opposing solutions, rather than skirt around them. In summary, the following objectives were addressed:

- Generate alternative solutions addressing the paradoxes emanating from collective bargaining, societal corporatism and stewardship perspectives, and
- Produce an artefacts framework documenting the outcomes of the stewardship integrative thinking process and how such issues could be built into a national, sector and plant level bargaining framework, that will inform a stewardship-based approach to structure proposed models for broader collective bargaining. The artefacts framework approach utilises tangible objects, documents, and other materials as primary data sources to explore research topics, creating and evaluating practical solutions to address problems.

The following findings of the four distinct elements of Martin's Integrative Thinking (Martin and Austen, 1999, p 2 - 8):

In the first step, identifying salient features, all features relevant to the challenges identified during the interviews and development of the paradoxical tensions, were documented. In considering the participants' response to the interactive dialogue theme, "stewardship approach to sustainable development and growth", the researcher identified the following key features that must be addressed to develop a synergistic approach to overcome challenges such as competition, intra-company challenges, regulatory challenges, etcetera: complexity of the industry and diversity of leadership challenges; clear delineation between industry, sector and enterprise bargaining; greater ministerial coherency; intra-organisation and inter-industry competition;

historical role of societal corporatist structures; collective bargaining and industry viability interdependence; mother company influences, etcetera. These are the relevant factors to be considered in developing an artefacts framework for further application of the model.

The second step, that of causality, expounded on how to make sense of what is relevant and determining the link between these factors. The causal framework was developed with no participant input, but by interrogating the information gained from the interviews, development of paradoxical statements and interactive dialogue, building on the salient features, identifying critical relationships and choices under consideration. In essence, the causal framework shows the core elements which will form the foundation of the artefacts framework and the interface with the key enabling variables and dependent variables. The enabling variable describes a factor or condition which can be manipulated or applied to observe the effects on the dependent variables.

The following features were identified:

- Core elements: Societal-corporatism; Industry viability, Stewardship and Collective bargaining.
- Key enabling variables: Collaboration; bargaining issues; Labour stability; competitiveness; industry structures; bargaining partners' maturity
- Dependent variables: International competitiveness; socio-economic challenges; Relevancy; Ministerial coherency; Industry master plans.

The third step in applying the integrative thinking model was creating an architecture, which essentially identifies a delivery framework covering which tasks are important, how they should be tackled and when. Such an architecture framework must show the link between the viability of the industry and sustained growth, enhancing the viability of the respective companies and the well-being of the societies within which they operate. This step is about understanding the roles of key role players and how they relate to each other. Applying concepts of stewardship ecosystem (Cossin, Ong and Coughlan, 2015; Cossin and Ong, 2016), the following overview represents the relationship between automotive role players, partners and social stakeholders in driving a sustained automotive industry.

- Automotive industry core: Roles of industry stakeholders and government; enabling structure.
- Partners: Customers, suppliers and labour.

- Social stakeholders: Society at large; government policies.
- Values: Values and culture; sense of purpose, sustainability

The final step in applying the interactive thinking model involves utilising the various stages of the model to develop a resolution. The resolution considered all the salient features relevant to the development of an artefacts framework, the core elements and linkages of a causality map, which will form the foundation and the key features of a stewardship ecosystem, essential building blocks of the architecture. The first step in developing an artefacts framework was to outline the key elements of a stewardship-based broader collective bargaining proposal. Using the stewardship ecosystem as a base, the salient and causality features were integrated.

The following key elements constitute the artefact framework for a broader collective bargaining model:

- Stakeholder inclusivity: All sectors of the automotive industry - OEMs, Motor Components, Vehicle Body Building, Metal and Engineering, New Tyre Manufacturing sectors.
- Levels of bargaining: Appropriate levels of bargaining - Industry, sector and plant bargaining; bargaining subjects and designated levels.
- Collaborative framework for how bargaining structures will collaborate
- Clearly defined bargaining chambers/chapters for each sector.
- Clear delineation between substantive bargaining, consultative topics and bargaining models.
- Ensuring industry viability and collective bargaining are mutually connected.
- Drafting of a Constitution that will govern industry collective bargaining.

9.3.3 PROPOSED ARTEFACTS AND STEWARDSHIP-BASED BROADER COLLECTIVE BARGAINING FRAMEWORK.

The following framework, developed through the application of inductive thematic analysis, interactive dialogue and integrative thinking, in some way responds to the challenges of the industry. The framework responds to the "objectives and functions of the proposed broader collective bargaining forum" as envisaged in the NBF and MEIBC agreements. The challenge will be how to get the current sector bargaining councils to explore and adopt this concept.
Proposed Artefacts and Stewardship-based Broader Collective Bargaining Framework:

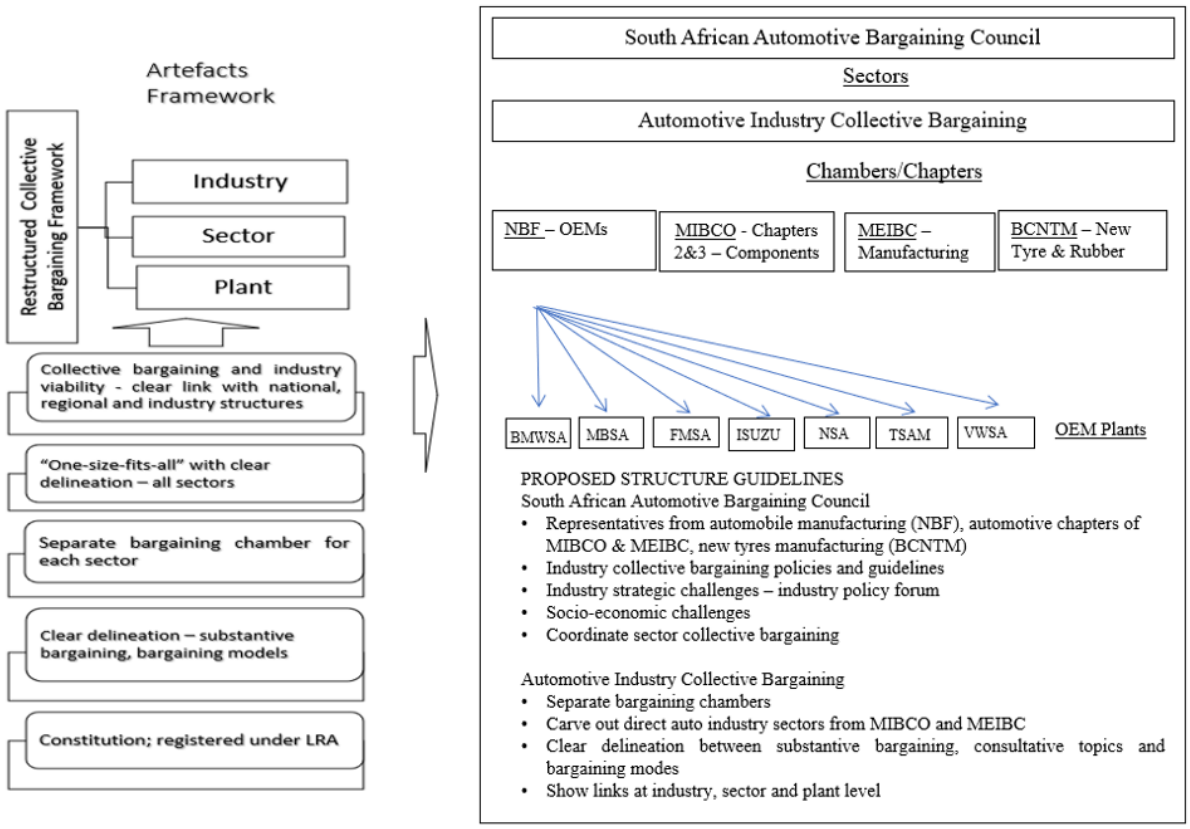


Figure 9.1: Proposed Artefacts and Stewardship-based Broader Collective Bargaining Framework (Source: Author's construction)

9.4 CONTRIBUTION OF THE STUDY

Sandberg and Alvesson (2011) suggested that gap-spotting enables the exploration of research limitations and the identification of new opportunities for research. Several primary modes of gap-spotting were noted and provided a framework for identifying the study's contributions. This section provides an overview of the study's contributions to the body of knowledge. The following types of contributions are covered: (1) scholarly, depicting the application of a collaborative stewardship approach to a new context; (2) methodological, covering the application of paradox theory and integrative thinking to interorganisational challenges with multiple stakeholders, and (3) practical, as to how collaborative stewardship approach was applied in addressing the multiplicity of challenges in collective bargaining in the South African automotive industry.

Regarding the scholarly contribution of the study, two areas are addressed. Firstly, the study has applied a collaborative stewardship approach to a new context, beyond the typical context

of social-ecological sustainability challenges. That is, a literature search revealed that the stewardship approach to addressing challenges through collaborative partnerships has been predominantly applied to social-ecological sustainability disciplines (Cockburn et al., 2019). Several articles referred to the diverse application of a collaborative stewardship approach in addressing socio-ecological challenges such as conservation and sustainability goals, natural resource management in urban areas, policy development for natural forest systems, multi-stakeholder collaboration in policy formulation, shareholder interest in strategic management, and sustainability in agricultural systems (Donaldson and Davis, 1991; Butler and Koontz, 2005; Belaire et al., 2011; Barendse et al., 2016; Cockburn et al., 2019). These authors highlight several principles that could be applied to collective bargaining, including: having a sense of shared responsibility, focusing on intergenerational benefits rather than short-term ones, and recognising the value of multiple partnerships, collaborations, and linkages. However, no evidence could be found of the application of collaborative stewardship to addressing challenges in collective bargaining. Sandberg and Alvesson (2011) referred to this as a case of application gap-spotting, where an established theory or technique is applied to a new, unexplored area.

The second area of scholarly contribution of the study relates to the concept of centralisation, which was applied in exploring collective bargaining arrangements in the South African automotive industry. The global trend indicates a strategic shift toward a hybrid model, balancing centralised and decentralised processes, driven by technological advancements and the pursuit of market access (Artiles and Moner, 2003; Maree, 2009; Aglio and Di Mauro, 2020). Researchers have argued that a major driver of decentralisation has been the shift from national or sectoral-level bargaining to enterprise-level agreements. In South Africa, however, the industry is primarily following a strong centralisation trend in its manufacturing and supply chain, although some pressure for decentralisation is emerging due to evolving market dynamics. This was initially led by employer and government initiatives to prioritise flexibility and neoliberal policies, but has been met with varying degrees of union and government resistance (Bernaciak, 2015; OECD, 2019). This contradictory nature of available research evidence is an example of confusion gap-spotting (Sandberg and Alvesson, 2011). The research aimed to resolve some of this confusion by examining the feasibility and identifying the complexities of the proposed increase in centralisation of the South African automotive industry.

Despite criticism, centralised collective bargaining in the South African automotive industry has been resilient and has made a significant contribution to labour stability (Anstey, 2006).

However, South Africa's automotive sector has experienced several challenges, resulting in 12 company closures and 4,000 job losses over the past two years. Industry faces challenges from U.S. tariffs, low localisation, and domestic sales much lower than the 2035 master plan (Dludla, 2025). These challenges impact the entire automotive industry and cannot be addressed at the sector level. The proposal developed in this study is to introduce a broader and highly centralised, stewardship-based, collective bargaining framework, comprising a centralised forum that includes relevant stakeholders, including the government. This forum would facilitate discussions and resolutions of strategic challenges to the industry, with increased centralisation at sectoral collective bargaining.

With respect to the study's methodological contribution, the research approach and techniques employed in the study also showed how complex challenges can be addressed by the systematic application of various research methodologies, which guided the development of an artefacts framework as input to a broader collective bargaining framework. In this regard, two areas were identified: (1) the application of paradox theory and its methods to interorganisational problems with multiple stakeholders, and (2) the application of integrative thinking to resolve paradoxes in interorganizational problems involving multiple stakeholders.

Firstly, with respect to the application of paradox theory in addressing interorganisational problems with multiple stakeholders, the literature demonstrates a diverse application of paradox theory and how paradoxical tensions can be addressed. With respect to the application of paradox theory in addressing interorganisational challenges with multiple stakeholders, the following research overviews as examples: (1) exploring potential processes to manage the increasing threat of natural disasters and potential paradoxes arising from inter-country-inter-disaster organisations collaborations in managing disasters (Jarzabkowski et al., 2022); (2) analysing the complexity and global inter-connectedness of COVID-19 impact on the academic environment, confronted by demands for teaching quality, research productivity, diminishing financial resources (Keller et al., 2021); (3) reflecting on multistakeholder collaborative roundtable approach as a platform for the stakeholders to engage each other on current practices to reach consensus challenges such as sustainable development, innovation and problem-solving, building business legitimacy; and (4) with respect to the simultaneous pursuit of competition and cooperation on inter-firm relationships, the research explored a conceptual framework that explicates key paradoxical conditions, paradoxical tension, and performance implications of tension in such relationships (Gnyawali et al., 2016).

Considering the complexity of the South African automotive industry, with multiple stakeholders and the impact of global parent companies, inter-company competition, trade tariffs, labour stability, etcetera, the sequential application of paradoxical theory, interactive dialogue and interactive analysis contributed to the development of a draft concept for a stewardship-based broader collective bargaining framework. In developing the draft broader collective bargaining framework, interorganisational challenges with multiple stakeholders had to be addressed. This analysis contributed to the scholarly contribution in respect to the application of paradox theory and its methods to interorganisational challenges with multiple stakeholders.

The second methodological contribution was the application of integrative thinking to resolve paradoxes in interorganisational challenges with multiple stakeholders. Integrative thinking is a problem-solving methodology that resolves paradoxes by constructively facing the tension of opposing ideas and generating a creative, superior solution. Rather than choosing one over the other, it transforms an "either/or" choice into a "both/and" possibility, moving beyond compromise to a more innovative outcome (Martin, 2007a; Riel and Martin, 2017).

The challenge at this stage was to understand how the multifaceted nature of the automotive industry could be effectively addressed in developing an understanding of its complexity and causal relationships. In applying Martin's (2007) four-step model, the researcher identified the most relevant features that constitute a proposed solution, how core elements and variables interact with one another, and reconciled the tensions of opposing solutions. The major challenge of the research was to explore an integrative link between a competitive industry, enhancing the viability of the respective organisations, and a stewardship collaboration that focuses on shared ownership of industry viability. Ultimately, the researcher could propose a modification of existing bargaining structures leading to a proposed broader collective bargaining framework. Martin's (2007) model demonstrates how, through integrative thinking, the complexity of opposing tensions can be embraced and explored, thereby addressing the challenges associated with the complexity of opposing solutions, rather than avoiding them.

The integrative thinking model was useful in analysing the paradoxical analysis and interactive dialogue. It provided a mechanism to explore an integrative link between a competitive industry and the enhancement of the respective organisations' viability, as well as a stewardship collaboration that focuses on shared ownership of industry viability. The research demonstrated

that it was possible to apply integrative thinking in a complex, multi-varied, and global environment, and as such, contributed to the application of integrative thinking as a tool to resolve paradoxes in interorganisational challenges with multiple stakeholders.

The research has also made a practical contribution in the application of a collaborative stewardship approach in addressing the multiplicity of challenges in collective bargaining in the South African automotive industry. The framework that was developed responded to the "objectives and functions of the proposed broader collective bargaining forum" as envisaged in the NBF and MEIBC agreements. The challenge has been how to give effect to these agreements, and how to get the current sector bargaining councils to explore and adopt this concept. This research has provided a forum for engagement and developed a proposal, which can be further debated within the automotive industry.

In pursuit of the future viability of the automotive industry, the research highlighted that the focus should extend beyond current manufacturing processes to also include the beneficiation of local strategic materials, the production of competitive local components, and enhanced collaboration among stakeholders. With respect to strategic structures, it should focus on building relationships that go beyond individual stakeholder interests. A collective bargaining framework should be integrated into such a focus. In this regard, automotive leaders must take ownership of the future viability of the industry, thinking beyond their own interests, be able to influence processes within the representative structures, and accept joint responsibility for the industry's future.

The research pointed to a collaborative stewardship framework focusing on the viability of the industry, labour stability, and competitiveness, as key building blocks. Regarding the strategic viability of the industry, at least two bargaining council agreements mention the need for an industry forum to consider and deliberate on strategic issues affecting the industry's future viability. This forum should address the current state of the automotive industry and propose strategies to enhance its performance, including increasing exports, promoting local content manufacturing, and creating employment opportunities.

With respect to labour stability and competitiveness, the focus is on establishing a collaborative bargaining framework for the automotive industry consisting of two components: a consultative industry forum where broad industry issues are deliberated and agreed upon. The focus

should be on developing broad guidelines for sector negotiations, policies, and the review of strategic structures, bargaining structures, and other relevant aspects. The second component should cover sector collective bargaining, with a clear delineation between substantive bargaining, consultative topics, and bargaining modes.

9.5 PRACTICAL IMPLICATIONS AND RECOMMENDATIONS

The challenge which remains is how to integrate the current independent bargaining councils into a framework that will not only focus on the interests of the respective sectors but, in a collaborative approach, focus on the interests of the respective plants and the industry as a whole. As most of the OEMs are involved in exports to global markets, factors such as labour stability and international competitiveness are key to securing the long-term viability of the automotive industry.

Despite the fact that the parties to current sector collective bargaining have agreed to the establishment of a broader collective bargaining forum and an industry forum "…to consider and deliberate on strategic issues which affect the future of the automobile manufacturing industry in South Africa…" (NBF Agreement, 2019, p.13), very little progress had been made. During the interactive dialogue, the participants referred to the Motor Industry Task Group, which was established in 1992, to review the existing automotive policies and ultimately contributed to the development of the Motor Industry Development Plan (MIDP) and significantly contributed to the transformation of the industry. Another strategic approach was the recent collaboration between Business Unity South Africa (BUSA), ESKOM leadership and other stakeholders to address the electricity challenges, ultimately leading to the formation of a leadership compact and the development of an Energy Action Plan and a monitoring structure.

In addressing the question of how businesses can thrive and sustain growth, whilst enhancing shareholder value and the well-being of the societies within which they operate, Cossin et al. (2015) are of the view that the answer lies in stewards understanding their roles and how they relate to each other.

The research proposes the following recommendations as mechanisms to drive the development and execution of an industry collaborative stewardship framework that will drive the focus on strategic viability of the industry and labour stability, and competitiveness:

In June 2023, President Ramaphosa entered into a partnership with the business sector to address key challenges in energy, transport, logistics, crime, and corruption. This partnership has already achieved some notable successes in the energy sector, with improvements also seen in transport and logistics. The proposal is that this partnership be replicated for the South African automotive industry to address the challenges of power outages due to Eskom issues, high interest rates impacting consumer spending, supply chain disruptions, fluctuating exchange rates, a decline in new vehicle sales, lack of electric vehicle infrastructure, and the need to adapt to changing global mobility trends; all contributing to a strained market and making it difficult for manufacturers to operate efficiently. This partnership should report to the President.

In 1992, the South African government established the Motor Industry Task Group (MITG), a team of industry experts, to advise on long- and short-term strategies for the future of the South African automotive industry, which led to the Motor Industry Development Programme (MIDP) (Barnes and Black, 2013; Lamprecht, Rudansky-Kloppers and Strydom, n.d.). This structure could be re-constituted to address the existing state of the automotive industry and propose strategies to improve its performance, including increasing exports, promoting local content manufacturing, and promoting employment opportunities.

With respect to labour stability and competitiveness in the automotive industry, the following should be considered in support of the above proposals:

Automotive Bargaining Council: To avoid multiple levels of negotiations, this body should serve as a consultative forum where broad industry issues are deliberated and agreed upon. All bargaining councils, the government and NEDLAC should be represented on this forum. The focus should be on developing comprehensive guidelines for sector negotiations, policies, and the review of strategic structures, bargaining structures, and other relevant aspects.

Sector Collective Bargaining: It may be necessary to review existing councils to establish direct automotive chapters. MIBCO, for instance, follows a complex value-chain approach that encompasses the automobile component industry, bodybuilding, remanufacturing, reconditioning, and repair sectors, as well as automotive dealerships and petrol stations.

Differentiation: Industry levels, such as national, sector and plant level interests must be clearly defined. Furthermore, a clear delineation between substantive bargaining, consultative topics and bargaining modes is needed.

Consultation and negotiation: Developing a broader industry collective bargaining framework involves a consultative approach, but certain elements may require further negotiations.

9.6 RESEARCH RECOMMENDATIONS

Recommendations for further research are provided, addressing the study's limitations, delimitations, and contributions.

9.6.1 LIMITATIONS

Several limitations of the study are acknowledged. Firstly, no feedback was received from participants on the findings of the interactive dialogue and integrative thinking application. Although the summary and assessment of the interactive dialogue were shared with the participants individually in writing, requesting input, no further contribution was made. Ideally, a follow-up interactive dialogue should have been. However, a reconstitution of the interactive dialogue was not possible. Even the initial constituting of the interactive dialogue It was quite challenging both in terms of getting the parties to agree on a date and the length of time of their availability and obtaining a majority representation. Given this limitation it is quite possible that some parties may disagree with the findings generated through the researcher’s application of integrative thinking.

Given the lack of participation of the participants in a review of the integrative thinking outcomes, it is recommended that this can be explored in a further study focusing on testing the findings with participants from the industry structures through another interactive dialogue if one can be convened, or else through individual interviews.

Participation of all automotive collective bargaining structures and relevant government departments was a second limitation that arose. With the exception of two collective bargaining structures and one government department, the majority of industry stakeholders participated in the survey interviews and in the interactive dialogue session. Their absence could mean that some viewpoints are not reflected in the findings. Further research could be conducted to follow

up with those who initially did not participate to determine if they have any additional insights to share regarding the findings.

9.6.2 DELIMITATIONS

The research was delimited in that it focused only on the automotive industry and only on participants involved in current sector bargaining negotiations. Over the past couple of years, the development of broader collective bargaining and industry policy forums has been a union demand in several collective bargaining negotiations; as a result, the respective parties have already developed entrenched positions on the issues. The research also did not extend to collective bargaining arrangements in other industries, such as mining, or in other developing countries. For example, collective bargaining in the South African mining industry has long been decentralised into enterprise-level negotiations. So, it will be interesting to explore the road they have travelled from heavily centralised bargaining under the Chamber of Mines to enterprise negotiations under the Minerals Council framework (Motlhamme, 2023). With respect to collective bargaining in developing countries, Lamarche (2015) argued that there are large differences in bargaining institutions, structures and outcomes between these countries. Future comparative research studies could, therefore, explore the impact of democratic processes in developing countries on bargaining structures, labour coverage, bargaining demands, and other related factors.

Another delimitation was that different bargaining processes were not explored, with the focus being on giving effect to the current commitments of the industry policy forum of a proposed broader collective bargaining for the automotive industry. In this regard, decentralised bargaining options focusing on industry, sector and enterprise modalities were not explored, and could be the focus of future research.

9. 7 CONCLUSIONS

The South African automotive industry has long been the cornerstone of South Africa's manufacturing economy. Considering the future, sustaining and growing this sector requires a concerted effort from all stakeholders – industry, government, labour and society. However, the automotive sector faces numerous challenges, but also has opportunities beyond the current global manufacturing strategy afforded by exploring the African automotive market. The research suggests a stewardship approach in which leadership from all sectors of the industry

collaborate across industries and borders to create a sustainable and growing automotive ecosystem not only in South Africa but also across Africa as a whole.

Recent challenges facing the South African automotive industry include:

South Africa's reliance on exports, particularly through AGOA, makes the country vulnerable to global protectionist trends. The February 2025 announcement by USA President Trump of 25% levies on USA imports of steel and aluminium poses challenges and opportunities for the South African automotive industry (Droppa, 2025; Mothilal, 2025; Woosey, 2025). According to Mothilal (2025), CEO of the National Association of Automotive Component and Allied Manufacturers (NAACAM), this challenge emphasised the importance of proactive policy interventions from the government and ongoing collaboration between industry stakeholders, labour and government to navigate the challenges and exploit the opportunities critical for the long-term sustainability of the industry.

Several South African automotive industry experts and journals commented that the challenges facing the South African automotive industry serve as a microcosm of the broader issues Africa may encounter in the era of globalisation (Droppa, 2025; Mabusela, 2025; Mothilal, 2025; Wiggill, 2024; Woosey, 2025). They referred to the persistent, unreliable electricity supply from the country's electricity supplier, in that the resultant load shedding and high electricity costs pose a significant threat to the industry. Consistent and affordable electricity is critical for the industry's growth. The industry also relies heavily on efficient port management for the import and export of vehicles and components. Inefficient port management creates bottlenecks, leading to delays in vehicle and component movement, which negatively impacts costs and the country's competitiveness. Other challenges are a lack of electric vehicle infrastructure and fluctuating exchange rates. The broader question of Africa's ability to withstand the impacts of globalisation hinges on proactive measures, collaboration, and a commitment to addressing systemic challenges. Only through a concerted effort can the automotive industry and businesses across Africa emerge stronger and more resilient in the face of an ever-changing global landscape.

It is considered that the research will make a contribution not only to address the several challenges facing collective bargaining in the South African automotive industry, but providing a platform to address the multi-varied challenges facing the industry. The strategic collaborative

stewardship approach will not only provide a collaborative framework for labour stability and competitiveness, but a platform where the stakeholders can consider and deliberate on strategic issues impacting on the future of the automotive industry in South Africa.

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APPENDICES

APPENDIX A: INTERVIEW GUIDE

"Through applying a process of integrative thinking, the research aims to explore a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry."

Your participation in this interview is highly appreciated and will contribute significantly to the completion of this research. It is anticipated that the interview will take approximately 120 minutes.

The research aims to broaden the application of stewardship[1] beyond sustainability and resilience challenges in social-ecological systems to engender a discussion on the viability challenges in the South African automotive industry. The South African automotive industry landscape comprises of key role players such as government, employers, unions, etcetera, whose actions and interactions impact on the long-term viability of the industry and for the benefit of the greater society. This research seeks to investigate a stewardship-based approach in exploring a broader collective bargaining framework that will seek to address the socio-economic challenges facing the South African automotive industry through a process of integrative thinking.

The intention of the study is to apply integrative thinking[2] as a mechanism to explore the paradoxes emanating from stakeholder views of collective bargaining, social corporatism and stewardship which will underpin a stewardship model that will facilitate a structure to develop concepts of broader collective bargaining.

The following objectives will support the aim:

- Describe the current collective bargaining arrangements in the South African automotive industry.
- Collect ideas for future collective bargaining arrangements to contribute to the viability of the industry.
- Produce an artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining and how such issues could be built into a national, sector and plant level bargaining framework by considering the following.
    - Produce a basic artefacts framework documenting paradoxical pairs and suggestions on if they should be resolved at a national, sector and plant level and how.

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[1] "Stewardship theory defines situations in which managers are not motivated by individual goals, but rather are stewards whose motives are aligned with the objectives of their principals."(Davis, Schoorman and Donaldson, 1997, p21).

[2] Martin (2007) proposes integrative thinking as a mechanism to embrace the complexity of conflicting situations by exploring tensions among conflicting ideas to generate a new one which contains elements of the others but is superior to both.

- Produce a detailed artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining, including:
  - A categorisation of the paradoxes in terms of the degree of resolution or consensus.
  - Proposed structures, procedures and mechanisms for a stewardship-based approach for broader collective bargaining.
- Analyse the process of integrative thinking that was applied during the interviews and interactive dialogues in an attempt to produce a best-fit solution for stewardship-based approach to broader collective bargaining.

Your input will provide valuable information in addressing paradoxical tensions emanating from the labour relations challenges impacting on the viability of the automotive industry relating to collective bargaining, societal corporatism and stewardship perspectives. This input will also contribute to adding richness and depth to available literature on the application of paradox theory, integrative thinking and stewardship in addressing challenges in the automotive industry.

You have agreed to the interview by perusing the "Request for Permission to Conduct Research" as well as the "Informed Consent Declaration" forms, the latter of which you signed. You can exercise the option to keep your responses, comments and proposals confidential and to ensure anonymity nothing you say will be contributed to you personally. With your permission the interview will be recorded only to ensure completeness and accuracy. You will remain anonymous in the research report and articles using this interview data. You have the choice to change your decision at any time during the interview by indicating so to the interviewer. You will remain anonymous, and a pseudonym will be used to identify you on the transcripts and final publication and identifying remarks such as names and job titles will be changed accordingly. However, reference will be made to the stakeholder group you are representing, e.g., union, employer, etcetera.

Rhodes University has given ethical clearance to this research project ***(Ethics Approval Number: 2021-5008-6366)*** and I have seen/may request to see the clearance certificate by contacting the Ethics Coordinator (ethics-committee@ru.ac.za).

You also have the right to withdraw from the interview at any time. Are you comfortable to continue with the interview?

The research method that will support the study will be an exploratory case study approach. It implies that the interviewer will endeavour to develop a comprehensive understanding of the interrelated activities and views of stakeholders involved in collective bargaining in the automotive industry.
Do you have any questions at this stage before we begin with the interview?

Interview Guide Questions

There are no right or wrong answers, as you will be sharing your experiences with me. So, please feel free to respond to the questions as openly and freely as possible. If some of the questions are too sensitive both from a personal or organisation perspective, please indicate so and we will skip the question.

1. Developing paradoxical pairs emanating from views and perceptions of bargaining issues

A paradox arises out of alternative solutions which do not follow from one another, and both appear to be likely, but selecting one will negate the other. This implies that parties in a collective bargaining relationship might have different views on issues, which all appear to be a likely solution, but selecting one will bring about tensions in the process. This question seeks to identify the views of parties as to what constitutes a bargaining issue, what is their position, how it should be addressed and in what structure and level.

1.1 In your view, what are the bargaining issues to be addressed in the automotive industry?
1.2 How should these issues be addressed?
1.3 In what structure should it be addressed?
1.4 And on what level?
1.5 What is your position on each of these issues?

2. Views on current sector collective bargaining

Currently wage increases and substantive conditions of employment for hourly paid workers in the automotive industry are negotiated in sector collective bargaining forums, such as OEMs, Components and Tyre. Internationally, there is pressure on sector collective bargaining, and enterprise bargaining is prevalent in the USA.

2.1 What are your organisation's views on current sector collective bargaining with reference to arrangements, structures, procedures, etcetera?
2.2 Why is your organisation involved in collective bargaining?
2.3 What are the challenges in the current collective bargaining arrangements?
2.4 If there are, how can it be addressed?
2.5 Has it served the needs of your membership?
2.6 If no, how can it be improved to better serve the needs of your membership?
2.7 If yes, how can it be improved further?
2.8 What are your views about collaboration between the bargaining forums?
2.9 Internationally, sector collective bargaining has been challenged by factors such as globalisation, international competitiveness, cost and productivity, social changes, decline in trade union membership, etcetera.

3. Future of the South African automotive industry

How does the industry consider and deliberate strategic issues impacting on the future of the automotive industry, government policies and social cohesion?
The OEMs and the representative union have agreed in the NBF and MEIBC structures (2016) to an Industry Policy Forum structure to consider and deliberate on strategic issues impacting

on the future of the industry, such as future of collective bargaining, wage model indices and future wage agreements, government incentives, etcetera.

3.1 Is your organisation involved in such structures?
3.2 What are your expectations?
3.3 How can government play a role in providing a stable and predictable operating framework for the industry?
3.4 What other structures are in place to address the future of the industry that involve all stakeholders?
3.5 How effective are these structures?
3.6 In your view what are the issues that should be debated in the normal negotiation processes and which issues require another structure? If there are such issues, what should this structure look like? How should this structure be developed?

4. Societal Corporatism

The current labour relations framework has its roots in corporatism, which is a multifaceted concept, covering organised systems of wage bargaining, the role of state intermediation and scope of agreements negotiated in national economies. Corporatism underpins the maturing of negotiations and constructive interaction between labour and capital, which resulted in corporatist structures such as Motor Industry Task Group (MITG), NEDLAC, etcetera, but recent challenges during negotiations extended beyond bread-and-butter issues to social issues such as viability challenges, rise in general standard of living of workers, access to affordable houses, education, transport and medical aid.

4.1 To what extent does policy and investment choices of corporatist institutions, such as NEDLAC, impact on existing power relations in serving (1) the working class? (2) employers?
4.2 Current negotiations are limited to wages and substantive conditions of employment, and do not explicitly address social issues. What are the long-term sustainability issues in the industry? How does your organisation envisage these challenges should be debated?
4.3 To what extent has societal corporatism contributed to the rise in general standard of living of workers?
4.4 Given your views on societal corporatism, what are the issues that it raises? (e.g., access to affordable housing, education and world class transport)
4.5 How should these issues be addressed and at what level?

5. Role of leadership in the automotive industry

This research explores the idea that leaders of representative structures should take on the role of stewards. Stewards are not motivated by self-interest, but focus on the achievement of broader objectives in the long-term interests of society. Stewardship leadership is therefore characterised by leading with positive social impact, safeguarding the future and driving social good.

5.1 Who are the key leaders in the South African automotive stewardship ecosystem?
5.2 What is expected of these leaders in driving the viability of the industry
5.3 From your own organisation's view, what are the challenges working with the other stakeholders, including government, on focusing on the viability of the industry?
5.4 The demise of the automotive industry in Australia highlighted a number of similarities to the South African automotive industry such as, (long history of car production, significant government support, significant raw materials but limited local beneficiation, OEMs and component suppliers are geographically concentrated, low volume production and lack of economies of scale, and so forth). In your opinion, what are the main challenges facing the South African automotive industry and how can they be overcome?
5.5 Is your organisation actively involved in processes and structures focusing on the viability of the industry? And if so, please tell me about them.

Thank you for agreeing to the interview. Not only will your input contribute to understanding the challenges of broader collective bargaining in the South African industry, but will also contribute to adding richness and depth to available literature on the application of paradox theory, integrative thinking and stewardship in addressing challenges in the automotive industry.

APPENDIX B: LETTER REQUESTING PERMISSION TO CONDUCT RESEARCH

Date
Title, Organisation
Dear …,

REQUEST FOR PERMISSION TO CONDUCT RESEARCH

I am a registered PhD student in the Business School at the Rhodes University. My supervisors are Professors Noel James Pearse and Rosaan Krüger.

I am hereby seeking your organisation's consent to be interviewed as participant in the research. To assist you in considering this request the following information:

1. The proposed topic of my research is, "Through applying a process of integrative thinking, explore a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry." This will be achieved through the following objectives:

1.1 Describe the current collective bargaining arrangements in the South African automotive industry.

1.2 Collect ideas for future collective bargaining arrangements to contribute to the viability of the industry.

1.3 Produce an artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining and how such issues could be built into a national, sector and plant level bargaining framework by considering the following.

- Produce a basic artefacts framework documenting paradoxical pairs and suggestions on if they should be resolved at a national, sector and plant level and how.
- Produce a detailed artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining, including:
    - A categorisation of the paradoxes in terms of the degree of resolution or consensus.
    - Proposed structures, procedures and mechanisms for a stewardship-based approach for broader collective bargaining.

1.4 Analyse the process of integrative thinking that was applied during the interviews and interactive dialogues in an attempt to produce a best-fit solution for stewardship-based approach to broader collective bargaining.

2. Rhodes University has given ethical clearance to this research project ***(Ethics Approval Number: 2021-5008-6366)*** and you may request to see the clearance certificate by contacting the Ethics Coordinator. (ethics-committee@ru.ac.za).

3. The researcher intends to publish the research results in the form of a thesis, possible conference papers or journal articles. However, confidentiality and anonymity of records will be maintained and that the name and identity of the organization or representative will not be revealed to anyone who has not been involved in the conducting of the research. I undertake those details such as personal identification, business names and other details that might reveal identification will be replaced with pseudonyms to remain anonymous

4. By participating in this research project, your organisation may contribute to further enhancing the viability of the automotive industry, by generating ideas for alternative labour relations arrangements that address broader socio-economic issues impacting the viability of the industry, which are not in the scope of current negotiations.

Should my request meet your approval, I kindly request the name and contact details of the mandated representative/s to be interviewed as participant/s in the research. The participant/s will receive a Participant Informed Consent Declaration letter outlining the interview process, which must be signed. To assist you in reaching a decision, I have attached to this letter:

(a) A copy of an ethical clearance certificate issued by the University
(b) A copy the research instruments which I intend using in my research

Should you require any further information, please do not hesitate to contact me or my supervisor. Our contact details are as follows:

- Johann F Evertse
  Mobile: 0825602097
  Email: jflevertse@yahoo.com
- Professor Noel Pearse, Rhodes Business School
  Telephone: 0466038963
  Email: n.pearse@ru.ac.za

Upon completion of the study, I undertake to provide you with feedback. Your permission to conduct this study will be greatly appreciated.

Yours sincerely

Johann F Evertse

APPENDIX C: PARTICIPANT INFORMED CONSENT DECLARATION

(To be signed by research participants)

Research Project Title:

Through applying a process of integrative thinking, explore a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry.

Johann Francois Lewis Evertse from the Rhodes Business School, Department of Commerce, Rhodes University, has requested my permission to participate in the above-mentioned research project. The nature and the purpose of the research project and of this informed consent declaration have been explained to me in a language that I understand.

I am aware that:

1. The purpose of the research project is to, through applying a process of integrative thinking, explore a stewardship-based broader collective bargaining framework that will seek to address the viability and socio-economic challenges facing the South African automotive industry. This will be achieved through the following objectives:

    1.1 Describe the current collective bargaining arrangements in the South African automotive industry.
    1.2 Collect ideas for future collective bargaining arrangements to contribute to the viability of the industry.
    1.3 Produce an artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining and how such issues could be built into a national, sector and plant level bargaining framework by considering the following.
        - Produce a basic artefacts framework documenting paradoxical pairs and suggestions on if they should be resolved at a national, sector and plant level and how.
        - Produce a detailed artefacts framework documenting the outcomes of a stewardship-based approach for broader collective bargaining, including:
            - A categorization of the paradoxes in terms of the degree of resolution or consensus.
            - Proposed structures, procedures and mechanisms for a stewardship-based approach for broader collective bargaining.
    1.4 Analyse the process of integrative thinking that was applied during the interviews and interactive dialogues in an attempt to produce a best-fit solution for stewardship-based approach to broader collective bargaining.
2. Rhodes University has given ethical clearance to this research project ***(Ethics Approval Number: 2021-5008-6366)*** and I have seen/may request to see the clearance certificate by contacting the Ethics Coordinator (ethics-committee@ru.ac.za).

3. By participating in this research project, I will be contributing towards further enhancing the viability of the automotive industry, by generating ideas for alternative labour relations arrangements that address broader socio-economic issues impacting the viability of the industry, but which are not in the scope of current negotiations.

4. I will participate in the project by agreeing to be interviewed and sharing my organisation's views on matters pertaining broader collective bargaining.

5. My participation is entirely voluntary and should I at any stage wish to withdraw from participating further, I may do so without any negative consequences.

6. I will not be compensated for participating in the research, but my out-of-pocket expenses will be reimbursed.

7. There may be risks associated with my participation:

   7.1 The following risks are associated with my participation:

   7.1.1 The concept of Broader Collective Bargaining in the automotive industry is a controversial issue and the respective parties have their particular views on the matter. A significant concern is that the views and strategies of the organisation might be disclosed outside the standard bargaining platforms.

   7.1.2 Organisation and representative views might differ and therefore care should be taken to ensure anonymity.

   7.2 The following steps will be considered to address the risks

   7.2.1 The researcher will ensure that anonymity and security of data are maintained at all times during the research.

   7.2.2 All references identifying individuals and organisations that might jeopardise anonymity or create conflict for the participant, will be changed.

   7.2.3 The participant will be regularly asked during the interviews whether him/her is comfortable with continuing.

   7.2.4 The researcher will keep a reflexive journal of events, reflections, etcetera. which will ensure the accuracy of interview logistics and will be kept confidential.

8. The Researcher intends to publish the research results in the form of a thesis, possible conference papers or journal articles. However, confidentiality and anonymity of records will be maintained, and my name and identity will not be revealed to anyone who has not been involved in conducting the research, *unless I indicate to the contrary/recognise that as a public figure, my identity will inevitably be/become known in which case I agree to and accept the loss of confidentiality.*

9. In terms of the Protection of Personal Information Act, it remains my right to request the Researcher to provide me with a detailed explanation of exactly how confidentiality and anonymity will be achieved. I may request to know how my personal information will be

stored securely, for how long it will be stored, and whether it is likely to be used again in further research.

10. In terms of the Protection of Personal Information Act, I possess the right to receive feedback about this research. This will take the form of a transcribed copy of my interview or copy of the research thesis*, unless I elect not to receive feedback.*

11. Any further questions that I might have regarding the research or my participation will be answered by *Johann F Evertse* contactable on the following:
    - E-mail: jflevertse@yahoo.com
    - Mobile: 0825602097
    - Telephone: 0437486054

12. By signing this informed consent declaration, I am not waiving any legal claims, rights or remedies.

13. A copy of this informed consent declaration will be given to me, and the original will be kept on record.

I, ……., have read the above information / confirm that the above information has been explained to me in a language that I understand and I am aware of this document's contents. I have asked all the questions that I wished to ask and these have been answered to my satisfaction. I fully understand what is expected of me during the research.

I have not been pressurised in any way and I voluntarily agree to participate in the above-mentioned project.

I agree/disagree (SELECT APPLICABLE) to the Researcher's request to take photographs and/or videos of me as part of this research project, recognising that agreement here is likely to raise the risk of compromising my anonymity and that steps will be taken to ensure this does not happen if my approval is granted.

I **agree/disagree** to the Researcher's request to voice record my comments and opinions during interviews, the purpose of which is to ensure the accurate recording of my views. Furthermore, I have the right to request a copy of interview transcriptions to confirm that my opinions are accurately recorded.

……. …….

Participants signature **Date**

APPENDIX D: ETHICS APPROVAL CERTIFICATE

Rhodes University Human Research Ethics Committee PO Box 94, Makhanda, 6140, South Africa t: +27 (0) 46 603 7727 f: +27

RC-241114-045 https://www.ru.ac.za/re-

24 September 2024

Mr Johann Evertse

Email:19e9034@campus.ru.ac.za

Review Reference: 2024-5008-9053

Dear Mr Evertse,

Re: Human ethics renewal application: Applying integrative thinking to a collaborative stewardship approach to Broader Collective Bargaining in the South African Automotive Industry

Researcher: Mr Johann Evertse
Supervisors: Professor Noel James Pearse

This letter confirms that the above Annual Report has been reviewed and APPROVED by the Rhodes University Human Research Ethics Committee (RU-HREC). Your Approval number is: 2024-5008-9053

Approval has been granted for I year. An annual progress report will be submitted in order to renew approval for an additional period.

Please ensure that the Human Research Ethics Committee is notified should any substantive change(s) be made, for whatever reason, during the research process, this includes changes in investigators. Please also ensure that a brief report is submitted to the ethics committee on the completion of the research. "Ille purpose of this report is to indicate whether the research was conducted successfully, if any aspects could not be completed, or if any problems arose that the Human Research Ethics Committee should be aware of. Ifa thesis or dissertation arising to this research is submitted to the library s electronic theses and dissertations (ETD) repository, please note\' the committee of the date of submission and/or any reference or cataloguing number allocated.

Sincerely,

Janet Hayward

Dr Janet Hayward

Chair: Rhodes University Human Ethics Committee, RU-HREC cc:

APPENDIX E: INTERACTIVE DIALOGUE GUIDE

1. Background

The problem in this phase of the research is getting the stakeholders to agree on how to respond to the challenges facing collective bargaining in the South African automotive industry. Interactive dialogues sessions are proposed as a process to engage the leadership of the parties involved in collective bargaining within the automotive industry.

2. Development of paradoxical pairs

The responses to the interview questions will be coded to identify recurrent themes and classify them. The resulting codes will be grouped into paradoxical pairs, which constitute the tensions in structuring the constructs of stewardship-based collective bargaining concept/s. The viewpoints of the various parties will be set out in the framework and include the level at which they believe the matter should be dealt with (i.e., National, Sectoral, Plant level, or None – meaning the party is of the view the issue should not form part of collective bargaining). Annexure A provides an illustrative example of one element of this framework, namely the views of the Motor Industries Bargaining Council (MIBCO) on the issue of the provision of affordable housing. Referring to the example given in Annexure A, the union is of the view that it should be integrated in the company's corporate social investment initiatives, whilst the company suggests that it should never be a demand in the collective bargaining process, but it is the responsibility of government. The point is that the parties accept that affordable housing should be addressed in the construct of their relationship, but the tension is about how and who. These dialogues will therefore explore the respective organisation's views on how to resolve selected paradoxical challenges that were derived from the analysis of the interview data and developed into an artefacts framework.

3. Interactive dialogues

The artefacts framework serves as input into the integrated decision-making process of Martin (2007) to generate innovative proposals on how the tensions within the stakeholders' views on broader collective bargaining can be resolved, thereby leading to ideas for the application of a stewardship[3] approach to collective bargaining within South Africa's current societal corporatist[4] legal framework.

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[3] A broad definition of stewardship is that it is an inclusive process in which stakeholders exercise a clear sense of purpose and engagement in a collaborative basis to address complex challenges that would otherwise not have been addressed individually (Cockburn, et al, 2019; Cossin et al, 2015).

[2] Societal corporatism or social democratic corporatism is based upon a social partnership between capital and labour to address their interests through collective bargaining involving capital and labour facilitated by government (Coleman, 2013).

Maccoby's (1996) interactive dialogue approach will be used to explore the artefacts framework which arose from the analysis of interviews. Interactive dialogue is a method for engaging leadership in leading change by guiding them to identify and explore different interpretations of organisational attributes and arriving at better views of what needs to be done (Maccoby, 1996). The interactive dialogues will take place through plenary sessions involving mandated representatives of the industry stakeholder structures, employer bodies, unions, etcetera. Alternatively, separate caucus sessions with the mandated representatives will be arranged to explore key paradoxes.

These dialogues will apply integrative thinking to resolve the paradoxes. Karakas and Kavas (2008, p.8) define integrative thinking "…as the ability to constructively reconcile the tensions of opposing models, and instead of choosing one model at the expense of the other, generating a creative resolution and a holistic model that contains elements of the individual models, but goes beyond them." Alternatively, if integrative thinking does not produce a resolution of a paradoxical pair, the participants will be asked to (1) clarify the collective bargaining structures where further engagement should occur to address these paradoxes and (2) suggest the processes that will facilitate these engagements.

4. Conducting an Interactive Dialogue

The following process based on Martin (2007) is proposed. These will be facilitated interviews with mandated representatives of the industry stakeholder structures conducted by the researcher supported by an independent facilitator with experience in collective bargaining.
The paradoxical pairs will be presented to the mandated representatives in an exploratory approach to seek their views as to how the paradoxical challenge could be resolved. As the researcher represented the employers over many years, to avoid any bias, the co-facilitator will present the paradoxical statement to the union representatives.
The outcomes of the deliberations will then be classified as "consensus", "disagreement with no solutions offered, "alternative solutions offered". Should any other classification evolve, its application will be discussed with the supervisor. This will be built into a framework for a stewardship approach to collective bargaining.

5. Steps for an Interactive Dialogue

5.1 Opening: Introductions and explanation of the process, including the introduction of a co-facilitator[5].

5.2 Presentation of paradoxical pairs statements: A selection of statements developed from the interview process, which appear to be in conflict in terms of employer and union perspectives, will be presented to mandated representatives of the stakeholders.

5.3 Exploring organisation's views: Through an exploratory approach, the facilitators will investigate views how to resolve the paradoxical challenges. The outcomes of the session

[5] As the researcher represented employers in collective bargaining over many years, to avoid any bias, a co-facilitator with experience in collective bargaining will support the interactive dialogue sessions

will be classified either as “consensus”, “competing solutions offered”, “consensus may be possible with further discussion”, “disagreement”.

6. Opening statement for a dialogue

“Thank you for agreeing to the dialogue session. Your contribution here will contribute to understanding the challenges of exploring stewardship-based collective bargaining concepts in the South African automotive industry.
The focus in this phase of the research is getting the stakeholders to agree on how to respond to the challenges facing collective bargaining in the South African automotive industry. Interactive dialogues sessions are proposed as a process to engage the leadership of the parties involved in collective bargaining within the automotive industry. These dialogues will explore the respective organisation’s views on how to resolve the paradoxical challenges that were derived from the analysis of the interview data and developed into an artefacts framework.

We will follow these steps:

- Introductions and explanation of the process.
- Presentation of paradoxical pairs statements.
- Exploring your views on resolving the paradoxical pairs.
- Classifying and summarising the outcomes of the dialogue.”

7. Analysis of dialogue data

The data collected from the dialogues will be analysed to produce two outcomes:

- Stewardship-based collective bargaining: Recommendations for the application of a stewardship approach to collective bargaining.
- Integrative thinking: An analysis of how integrative thinking was demonstrated by participants.

Rhodes University has given ethical clearance to this research project ***(Ethics Approval Number: 2021-5008-6366)*** and I have seen/may request to see the clearance certificate by contacting the Ethics Coordinator (ethics-committee@ru.ac.za).

APPENDIX F: PARAPHRASE/SUMMARISE RAW DATA: NUMSA AND SOLIDARITY

5.4.1.1 PARAPHRASE OR SUMMARISE RAW DATA: NUMSA	5.4.1.2 PARAPHRASE OR SUMMARIZE RAW DATA: SOLIDARITY
• Bargaining issues should generally be determined by **prevailing conditions** in the automotive industry. Currently the focus should be on grading. - Issues should first be debated at company level in strategic forums before it is tabled at the bargaining level as demands. - Outcomes should be pro-worker centred and finding common ground is imperative. • Current sector collective bargaining is not a sustainable form of bargaining in the medium to long-term, due to the changing nature of business units as well as impasse in worker and employer demands. - There needs to be a continuous evaluation of the needs of the industry. - However, it has not only allowed the union to improve working conditions for workers, but the worker and employer perspectives of the industry have been advanced. • Collaboration between bargaining forums is imperative to promote achieving bargaining consensus. • Government can contribute to a stable and predictable industry by supporting the implementation of the automotive masterplan objectives within the agreed timeframes. • NUMSA's long-term sustainability issues include keeping workers relevant despite the introduction of new technologies in the manufacturing process. Also to negotiate a decent wage for workers ensuring a standard of living not negatively impacted by social and economic demands.	• Bargaining issues are bread and butter issues such as wages and benefits; as well as viability challenges of the industry. • Collective bargaining structures should be a combination of plant and sector level bargaining. • Views on sector collective bargaining: Sector collective bargaining is the most appropriate bargaining structure that will respond to the diversity of the industry. Viability and social issues must be addressed in a "non-negotiation" structure. Sector collective bargaining is working well in certain sectors responding to the diversity in a particular sector. In some chambers there is flexibility to have in-house agreements focusing on the specific enterprise needs, but still controlled by the bargaining council. Solidarity is involved in sector collective bargaining to professionally represent their members in these structures, ensuring professional bargaining council management, build labour and strategic relations with organised labour with the view to influence outcomes that are realistic and fair. • Challenges in collective bargaining: - Not always alignment in interests and focus areas among members of bargaining councils. - Diversity in collective bargaining stakeholders. Lack of commitment to bargaining council sustainability and stakeholder interaction. - Different unions have vastly different ideologies which determine their thinking and approach to collective bargaining.

• From a worker's perspective the main challenges facing the South African automotive industry are: - Managing transition to electric vehicles in a pro-worker manner; - Establishment of relevant infrastructure to allow South Africa to manufacture its own vehicles considering it has all the raw materials. - Address skills deficit in local manufacturing capabilities. • NUMSA is represented in all strategic platforms related to the automotive and other industries, such as oversight committees along the value chain is active and functional. - Union represents the interests of workers in several strategic structures in the South African automotive industry. Their expectation is a pro-worker automotive industry.	• How can the challenges be addressed? Develop an understanding among the parties that there might be opposing viewpoints and that cooperation despite different views is possible on points where there is a meeting of the minds, the focus being on encouraging building strategic relationships. The parties must find ways to address challenges to current sector collective bargaining predominantly focusing on wages and benefits, by developing negotiations guidelines and upgrading of negotiation skills of participants, for instance. • Solidarity membership benefits: It offers a range of benefits to its members beyond the collective bargaining benefits responding to the needs of members. Solidarity has a wealth of structures and institutions that work to meet other needs of members. • Collaboration between bargaining councils: Where it will be beneficial to collective bargaining in the industry consideration can be given to this on a mandated principle. • Challenges facing the South African automotive industry: - The inability of government to provide basic social infrastructure benefits has resulted in social demands being placed on collective bargaining agendas. - High wages and demands, multi-qualified artisans, short-term interest negotiations style; poor negotiations skills. - Large unions dominate this sector which narrow the views and approach followed to closely align with a particular ideology. • Expectations of strategic industry structures: It must focus on the strategic issues

	impacting on the industry; how the different sector structures can collaborate in addressing the challenges facing the industry, including local production of components. Employers, government, unions, financing houses, must work together. Solidarity's goal and expectations are to build strategic relationships and increase its involvement and influence to guide decisions to the benefit of our members and South Africa in general. Although Solidarity is not actively involved in strategic industry structures, they are represented by the bargaining councils such as MIBCO and MEIBC. • Role of government: It must provide a platform for engagement by all stakeholders focusing on viability challenges; ensuring compliance of the bargaining councils. Government should support local manufacturing and enable the industry operate on a free market principle. • Bargaining structures: The focus should not just be on wages and benefits, but also finding ways to address the impact of external challenges on the industry. This must not be a negotiations structure. For instance, could the industry not have met with ESKOM to find ways how to address and minimise the impact of loadshedding on the industry? • Role of corporatist structures: It must facilitate discussions on the viability of the broader industry and how employers and employees must contribute and benefit; also contribute to policy development which should bring about greater industry stability benefitting all stakeholders. • Long-term sustainability issues for the industry: - Beneficiation of local strategic minerals; competitive local component pro-

	duction; improved collaboration between all stakeholders. In this regard government's role must be to bring country and industry stability. - Expectation of stewards: Stewards must think beyond representative interests; promote unity and commitment and must be able to influence processes within representative structures. • Challenges facing the South African automotive industry: Globalisation: More and more are local companies integrated in their parent company production strategies, which impact on local decision-making processes. Also, modernisation of plants and new technology roll-out could result in loss of jobs. Multi-skilled workers and continued upskilling; stability. The location of export vehicle manufacturing in terms of transport cost and reach to markets like Europe is becoming a factor in that Morocco is keen to lure manufacturers to relocate their plant to the North African country

APPENDIX G: EMERGING TOPIC COMPARISON OF SIMILARITIES, OR PATTERNS WITHIN RAW DATA OF STAKEHOLDERS NUMSA AND SOLIDARITY

TOPIC	SIMILARITIES, OR PATTERNS WITHIN RAW DATA: NUMSA.	SIMILARITIES, OR PATTERNS WITHIN RAW DATA: SOLIDARITY.
1. Bargaining issues	• Should generally be determined by pre-vailing conditions in the automotive industry, such as grading.	• Bread and butter issues such as wages and benefits; as well as auto industry viability and social challenges of the industry.
2. Bargaining structures	• The first round of bargaining should be at company level before the issues are tabled at the sector collective bargaining level.	• Should be a combination of plant and sector level. Viability and social issues must be addressed in a "non-negotiation" structure.
3. Current sector collective bargaining	• It is not a sustainable form of bargaining in the medium to long-term. A continuous evaluation of the needs of the industry is necessary. However, sector collective bargaining has contributed to the improvement of working conditions for workers.	• It is the most appropriate bargaining structure that will respond to the diversity in the industry. • It is working well in certain sectors responding to the diversity in that particular sector. • Participating in sector collective bargaining enables the union to professionally represent their members, ensuring professional bargaining council management, building labour and strategic relations with organised labour with the view to influence outcomes that are realistic and fair. • There is flexibility for some inhouse agreements focusing on the specific enter-

		prise needs, but still controlled by the bargaining council.
4. Collective bargaining expectations	• Outcomes should be pro-worker centred. Parties should strive to find common grounds in the negotiations. • Keeping workers relevant during introduction of new technologies in the manufacturing process. • Negotiate a decent wage for workers ensuring a standard of living not negatively impacted by social and economic demands.	• Instead of over-emphasis on wages and benefits, the parties should explore a concept of total increase, which includes wages and benefits, allowing flexibility in "cutting the cake". • Develop negotiations guidelines and upgrade negotiation skills. • Understanding among the parties that there might be opposing viewpoints and that cooperation is possible despite diverse views.
5. Collaboration between bargaining structures.	• It is imperative as it promotes achieving bargaining consensus.	• Recommended where it will be beneficial, consideration can be given to this on a mandated principle.
6. Challenges in collective bargaining	• Must include but not limited to an impasse in worker and employer demands. • Negotiations structures are fluid and as such issues are fluid. • Negotiating a decent wage for workers ensuring standard of living is not negatively impacted by social and economic pressures.	• There must be a way to address challenges in current collective bargaining where there is a focus on wages and benefits. • Not always alignment in interest and focus areas among members of bargaining council – diversity in collective bargaining stakeholders; lack of commitment to bargaining council sustainability and stakeholder interaction; different unions have vastly different ideologies which determine their thinking and approach to collective bargaining; focus on wages and benefits.

7. Role of stakeholders	• Government can contribute to a stable and predictable industry by supporting the implementation of the automotive masterplan objectives within the agreed timeframes.	• Government: Must provide a platform for engagement by all stakeholders focusing on viability challenges as well as ensuring compliance of the bargaining councils. Government should support local manufacturing and enable the industry to operate on a free market principle. • Corporatist structures: Must facilitate discussions on the viability of the broader industry; how employers and employees must contribute and benefit; contributing to policy development which can bring about greater industry stability benefitting all stakeholders. • Stewards: They must think beyond representative interests; promote unity and commitment; must influence processes within representative structures; accept joint responsibility for the future of the industry.
8. Challenges facing the South African automotive industry.	• Managing transition to electric vehicles in a pro-worker manner; exploiting raw materials to expand local production of vehicles; address skills shortages. • Establishment of relevant infrastructure to allow South Africa to manufacture its own vehicles considering it has all the raw materials.	• Globalisation: More and more are local companies being integrated in parent company global production strategies, which impact on local decision-making processes. - The subsequent modernisation of plants and new technology roll-out do impact on job security; multi-skilling

	• Address skills deficit in local manufacturing capabilities.	of workers and production stability. - The location of export vehicle manufacturing in terms of transport cost and reach to markets like Europe is becoming a factor and production facilities such as Morocco, are keen to lure manufacturers to relocate their plant to North African countries. • The inability of government to provide basic social infrastructure benefits has resulted in social demands being placed on collective bargaining agendas. • There is pressure on the beneficiation of local strategic minerals, thus improving competitiveness of local component production. This could also improve collaboration between all stakeholders.
9. Expectations of strategic structures	• Creating a pro-worker automotive industry. • Keeping workers relevant during introduction of new technologies in the manufacturing process. • Negotiate a decent wage for workers ensuring a standard of living not negatively impacted by social and economic demands	• Must focus on strategic issues impacting on the industry; how the different sector structures can collaborate in addressing the challenges facing the industry, including local production of components. • Building strategic relationships with stakeholders thereby increasing our involvement and influence in guiding decisions to the benefit of our members

		and South Africa in general.

APPENDIX H: SUMMARY OF RAW DATA FOR OTHER STAKEHOLDER ORGANISATIONS: BARGAINING COUNCILS, EMPLOYERS, GOVERNMENT AND INDUSTRY ORGANISATIONS

INTERVIEW QUESTIONNAIRE QUESTION **(Note X, Y refer to the Interview Questionnaire Question)**	SUMMARY OF SPECIFIC SAMPLE RESPONSES			
	BARGAINING COUNCILS	EMPLOYERS	GOVERMENT	INDUSTRY ORGANISATION
1. Bargaining topics	• Should be restricted to bread-and-butter issues such as wages and substantive conditions of employment. • Issues impacting on the viability of the industry beyond the employment relationship as long as it improves labour stability and industry viability or which could be harmonized across the industry.	• Wages and substantive conditions of employment. • There is a need for a strategic engagement on issues impacting on the viability of the industry.	• Issues of mutual interest • Scope to consider topics such as changing nature of work, production, viability and future skills could be considered.	• No comment
2. What constitutes bargaining issues in the automotive industry? (1.1)	• Bread-and-butter issues addressed through negotiations in current sector bargaining structures.	• Bread-and-butter issues are adequately covered in 'fit-for-purpose" sector bargaining.	• Through negotiations or social dialogues in legislated or mutually agreed upon structures – industry or sector level.	• No comment

	• Issues impacting on the viability of the industry beyond the industry in the bargaining structures, as long as it improves labour stability and the viability of the industry.	• Current sector collective bargaining is fit for purpose. • "One-size-fits-all" approach is problematic when dealing with industry viability challenges. There is a need for a broader industry platform that will support collective efforts to ensure success of the industry at all levels. • The framework should outline the balance between enterprise level, sector and industry level discussions with necessary checks and balances.		
3.Views on sector collective bargaining. (1.5)	• Negotiations should strive to achieve minimum conditions set by BCEA. • Improvement to conditions unacceptable as long as it	• The industry is complex, divided and driven by structure and hence important that bargaining issues be separated. • Critical though that	• Negotiating conditions of employment is critical to ensure there is no abuse in the workplace. Addressing social security issues also important.	• No comment.

	supports the viability of the industry.	these be managed in a manner that does not have a deleterious impact on the industry.	• Wages must keep track with inflation	
4.Organisations' views on current sector collective bargaining (2.1)	• Current sector bargaining is legislated or by agreement and provides a legal framework that govern negotiations. • Contributes to sustainability and labour stability by providing a legal framework to address issues in a particular sector.	• Sector bargaining is more appropriate, but with limited scope: - Simply focusing on bread-and-butter issues - Industry is complex and divided, driven by structure and affordability. - Need to ensure competitive terms, conditions and remuneration of the industry. • There is scope for central collective bargaining that will focus on broader industry issues. • Centralised bargaining for the entire industry is not going to work – integrity and	• Advantage of collective bargaining as contained in the LRA, is that it sets uniform conditions of employment and negates labour being used for competitions. • A positive aspe of the negotia tions is the long term agreement which bring about stabilit and allow th parties to focu on the future o the industry.	• Current collective bargaining structure is outdated, consequently the one-size-fits-all approach resulted in inflexible negotiations, digression of substantive issues. • Must be reviewed to bring about greater efficiency in the bargaining process, such as a process to deal with substantive issues, national agreement on wage structures and interaction between various sector bargaining. • Long-term agreements which bring about stability allowing the parties to focus

		autonomy are critical		on the viability of the industry.
5.Why is your organisation involved in sector bargaining and has it served the needs of the respective membership? (2.2)	• Create labour peace and stability in the industry and contribute to economic growth. • Yes, it served the needs of the membership	• Consensus that it adds value to shopfloor employee relations contributing to labour stability. • This is the path that hourly paid colleagues continue to elect as their preferred made of bargaining. • Remains a key feature of employee relations architecture.	• No direct involvement in negotiations – responsible for regulatory framework.	• Support member organisation in negotiation strategy development and strategic engagement with stakeholders
6.Challenges to current sector collective bargaining (2.3)	• Challenges to sector bargaining are more fundamental, such as non-uniform approach, which can be addressed in a mega or broader collective bargaining platform • Having one bargaining council in the automotive industry.	• Sector collective bargaining in itself is a challenge as its focus is on the respective sector without considering implications for the rest of the industry. • There is a disconnect with the broader industry.	• Proliferation of trade unions, which makes it difficult to negotiate because of diversity in positions. • Too many court challenges as a way to frustrate collective bargaining. • Lack of expertise to deal with complex matters which are beyond matters of mutual interest.	• Collaboration between employer organisations in preparing for negotiations and during negotiations.

7.Collaboration between bargaining forums. (2.8)	• Bargaining councils should be able to collaborate on common issues, whilst preserving the sector bargaining integrity, such as harmonizing benefits across the industry.	• Currently limited and unstructured. • Collaboration between bargaining forums is important and should be formalised and linked to strategic issues impacting on the sustainability of the industry. • Tension: Focus of collaboration – strategic level focusing on the viability of the industry vs generic issues affecting the sector or where a unified stance is required.	• It allows for flexibility and takes into consideration the dynamics within the system.	• Bargaining forums should be able to collaborate on common issues, whilst preserving sector bargaining integrity. • It is possible to collaborate on harmonizing benefits across the industry allowing the sectors to concentrate on bread-and-butter issues. • Adoption of stewardship philosophy by industry stakeholders to find long-term solutions to the challenges facing the industry in relation to labour stability.
8.Main challenges facing the South African automotive industry. (2.9)	• Similar challenges facing the South African automotive industry. • The threat to the industry is that these challenges fall outside the scope of current sector bargaining	• Transform collective bargaining to ensure it contributes towards competitiveness, productivity changing nature of the workforce, transformation	• Volatility of our labour market, climate change issues, future of work, currency volatility, high wage demands during economic downturn.	• No comment

	and there is no collaborative structure to deal with it. • Declining trade union membership. • Although bargaining councils have come a long way it's not flexible to address socio-economic challenges.	of work, etcetera. • Internationally collective bargaining is moving towards enterprise bargaining, among other because of lack of maturity in union leadership, destructive nature of negotiations. • Industry is facing similar challenges as international collective bargaining: globalisation, international competitiveness, decline in trade union membership, etcetera.		
9.Stakeholder expectations. (3.2)	• Challenges of unemployment, skills development, transformation should be explored. • Focus must be on establishing structures that will focus on the economic challenges as well as explore	• The focus must be on value proposition and must move away from traditional approaches of independent structures. • Actively pursue the business case for South Africa as	• Minimize job losses	• No comment

	international market opportunities	a preferred automotive manufacturing destination. • Must focus on strategic issues impacting on the viability of the industry; the right parties must be involved and it must not be a dumping ground for unresolved issues.		
10. The role of government in providing a stable industry. (3.3)	• Government, in consultation with industry stakeholders, must provide a policy framework addressing the sustainability of the industry. • Parties must see each other as strategic partners.	• Government's role is to provide the requisite regulatory/legal framework that enables industry to invest, become more successful and competitive – a conducive environment. • Must provide political certainty, stability, integrity. • High level participation in strategic structures; collaborative ap-	• Government has provided the legal framework for labour relations stability with several enabling legislation – LRA provides for a code of good practice on central collective bargaining	• Government must provide a policy framework for sustainability of the industry but the industry must take ownership

		proach to policy formulation.		
11. Societal corporatism structures impact on the automotive industry. (4.1)	• Societal corporatism structures such as NEDLAC, has the potential to be the glue to address socio-economic challenges. • However, there is little interface with bargaining structures.	• Provides for a structure where socio-economic challenges can be raised and debated in a non-negotiation's environment. • Provides for a partnership between government, organised business and labour, governed by a policy framework that not only look at the viability of industry, but also individual stakeholder interests. • NEDLAC is an elitist structure far removed from the industry and does not exert any influence on addressing the challenges facing the industry.	• Central in building societal corporatist structures that help shape the automotive industry. The LRA, national minimum wage, BCEA, etcetera, are all enabling legislation established through social dialogue.	• No comment
12. Views of the long-term sustainability challenges	• Focus on the interaction between various components of the industry.	• Lack of a common vision among indus-	• Challenges such as productivity, greener indus-	• No comment

facing the industry. (4.2)	• Focus on establishing a broader structure with checks and balances to address non-wage related issues and socio-economic challenges	try stakeholders – focus on the indus. • Regulatory uncertainty or at best lack of clarity on regulatory requirements & inconsistent application of the rules where it exists. • Failing infrastructure, basic service interruptions – water, electricity • We need to transform collective bargaining for it to remain relevant, to ensure it contributes towards competitiveness, productivity, etcetera.	try, move towards the fourth industrial revolution and how to reskill the demands of the changing nature of work. • Social dialogue at industry level is critical in dealing with these issues.	
13. Challenges working with other stakeholders in addressing the viability challenges. (5.3)	• Focus on inclusivity instead of individual representative, company or organisation interest. • Champions, passionate drivers and accountability	• General lack of meaningful stewardship due to lack of cohesion and focus beyond sectoral or company levels. • Self-interest, bureaucracy, inflexibility and lack of proactivity.	• When parties do not respect the outcome of their engagements or fail to enforce their agreed outcome or implement the agreements.	• No comment

		• Rotation of international company CEOs often impact on the stakeholder engagement.		
14. Role of leadership in the automotive industry	• Leaders from representative structures in the automotive industry must accept joint responsibility for the sustainability of the industry. • Important that they focus on the interaction between various components of the industry and not just on a single industry. • Important that the right leaders be identified – leaders with foresight and ability to identify challenges.	• Represents leaders from representative structures in the automotive industry, consisting of organised labour, bargaining councils, employer organisations, government, tertiary institutions, etcetera. • Leaders must understand the challenges facing the industry, be able to think beyond representative interests, be able to influence processes within representative structures; accept joint responsibility for	• Leaders must be competent to engage in dialogues on difficult challenges facing the industry with respect and in the spirit of give and take.	• Leaders should be driven by understanding of the economic challenges, committed to transformation, focus on the viability and not on short-term interest; ability to focus beyond company interest; understand international competitiveness, etcetera. • Serious leadership challenge is when parties do not respect the outcome of their engagements or fail to enforce their agreed outcome or make an ef-

		the future of the industry.		fort to implement agreements

APPENDIX I: INTERACTIVE DIALOGUE RESPONSES

After initially trying to restrict participant input to a particular theme, paradox or issue, the researcher allowed discussions to develop, but ensured that issues identified in the thematic analysis were covered in the discussions. In summarising the interactive dialogue inputs, theme groupings developed as the participants responded to the different themes during the discussions. (AMEO – Automobile Manufacturers Employers' Organisation; MIBCO – Metal & Engineering Industries Bargaining Council; NAACAM – National Association of Automotive Component & Allied Manufacturers; NEASA – National Employers' Association of South Africa)

RESPONSES THEME	PARTICIPANT	PARTICIPANT RESPONSES
1. Industry viability deliberations	AMEO	• Perceived disconnect between collective bargaining and industry viability. ⇒ Linking the two will add value to the collective bargaining process. • Industry viability discussions generally take place in preparation for collective bargaining to motivate a particular proposal. ⇒ Ongoing discussions of industry viability in industry structures can also help shape what is included into the broader collective bargaining process.
	MIBCO	• Despite entrenched processes, negotiations are dominated by wage discussions, often resulting in conflict as a result of excessive wage demand and counter arguments of viability concerns. Viability of industry is not featuring in this conflict.

		⇒ Getting the parties to engage in finding a balance between sustainability of business and ensuring decent liveable wage.
	NAACAM	• No recorded contribution
	NEASA	• No recorded contribution
	SOLIDARITY	• No recorded contribution
2. Broader collective bargaining	AMEO	• Such a structure is possible, but the terms of reference must be clear, because if the intention is to create an "one-size-fits-all" approach through a broader collective bargaining framework, it's going to fail. Important to set broader parameters within the industry must work and leave it to sectors or plant to address specific issues respectively.
	MIBCO	• Support the view that current sector negotiations are outdated and must be restructured, however collective bargaining is still relevant. ⇒ Propose a national convention to review collective bargaining and the viability of the automotive industry.
	NAACAM	• "One-size-fits-all" approach can work, but with checks and balances, as well as an element of autonomy in the sector approach.
	NEASA	• It is possible but the biggest challenge is how to deal with the issue of "one-size-fits-all" imperative to build flexibility, involvement in bargaining councils; cater for the difference in the industry.
	SOLIDARITY	• There is a need to change our way of negotiations – central wage policy; disciplined leadership; unrealistic demands; lengthy negotiations cycle.
3. Challenges to collective	AMEO	• It is possible to address the challenges of collective bargaining in a broader collective bargaining structure.

bargaining structures		• More and more there is a tendency in Europe to move to plant level bargaining because of unique needs of the plants. • Must look at Anglo Platinum who recently signed a 5-year agreement in a relatively short period of negotiations despite dealing with a number of unions. ⇒ Any new structure must ensure integration of industry, sector and lant level negotiations.
	MIBCO	• Important that industry champions get together.
	NAACAM	• Referring to maturity of union leadership, some unions have a high degree of maturity, understand business perspectives, make a contribution to what's good for the industry, but some have a short-term view and bargain for quick fixes or take a conflict approach to bargaining. • As a result, the bargaining process is loaded and set for failure from the first moment. • Reference to a "cost hostage" to explore solutions to stalemate and avoid any form of industrial action or make short-term concessions. ⇒ It is possible to extend bargaining forums sharing sector specific elements with an across-the-board policy that deals with all the sectors, specific wage practices that deals with the uniqueness of each of the specific sectors. ⇒ Need for a more pragmatic, strategic balanced approach to negotiations; incorporating "cross-cutting" policy elements that can be developed to get better social cohesion.
	NEASA	• Nothing happens in between collective bargaining cycles – no review of negotiations and action plan to address unresolved issues.

		⇒ Build a continuous improvement framework into bargaining process
	SOLIDARITY	• Collective bargaining challenged by tabling of socio-economic demands, such as affordable housing, medical aid, transport, etcetera, which should be dealt with by government. • Escalating plant-based benefit to sector negotiations ⇒ Introduced revised negotiation structure where common industry issues can be dealt with, such as wage mode, social benefits. ⇒ Limit number of engagements during collective bargaining putting pressure on parties to focus on issues
4. Integrated societal corporatist approach to address socio-economic and economic challenges.	AMEO	• Reflecting on the value of recent private-public partnerships between government and business, to address the challenges facing the economy, such as infrastructure (roads, ports, energy, etcetera.) • Extending this to the social challenges facing the industry would have significant benefits. Unfortunately, NEDLAC has become a post box for S189 processes in parastatals restructuring conflicts.
	MIBCO	• MIBCO is of the view that setting up another structure is perhaps counter-productive as all the stakeholders are already active in NEDLAC and maybe a national dialogue is needed to reactivate the focus of NEDLAC.
	NAACAM	• There is a need to restructure the social dialogue as bargaining forums have become confrontational. Therefore, must find a way to remove conflict issues, such as affordable medical aid, transport, housing, outside the wage bargaining process. ⇒ Restore social dialogue structures, such as NEDLAC, Industry Policy Forums, etcetera.

		Critical that these structures not become a dumping ground for non-resolved negotiation issues, but to focus on the viability challenges. • NEDLAC must go back to its roots as a consultative forum where meaningful discussions can take place between all stakeholders and government, to promote economic growth and participation in economic decision-making and social equity. • NEDLAC has a proud record in post-Apartheid restructuring in setting up of transformation structures and processes such as Labour Relations Act (LRA), Motor Industry Task Group (MITG), Broad-based Black Economic Empowerment, etcetera, so there is precedent. ⇒ The forums are there – they must be given new terms of reference to give new impetus.
	NEASA	• No recorded contribution.
	SOLIDARITY	• No recorded contribution
5. Stewardship approach to drive sustainable development and growth	AMEO	• Responding to issues raised in the interviews concerning stewardship in the automotive industry, competition between companies and expat CEOs, AMEO is of the view that competition is actually more between company production facilities, as supposed between organisations. Considering Mercedes-Benz South Africa for instance, the competition is between the global production units, as opposed to BMWSA, VWSA, Ford SA, Nissan SA or Toyota SA.
	MIBCO	• There is a need for captains of industry to rally together to address among other structure shortcomings. What is needed are true champions, who have got the expertise and able to think beyond company and sector levels.

		• Some critical behaviours that must govern the relationships are: discipline, maturity, consistency; but it must be supported by technical competencies and regulations. • But the conundrum is where must these issues be dealt with? Sector or an industry regulatory framework?
	NAACAM	• Maturity of role players critical.
	NEASA	• No recorded contribution
	SOLIDARITY	• Maturity of role players critical – professionalism, encourage cohesion, influence worker expectations. Concern that union leadership is abdicating their responsibilities allowing employees' high expectations to become major problem in the bargaining process.
6. Challenges facing the South African automotive industry	AMEO	• Discipline is imperative to exploit the assertive oversight structures, different work streams, for implementation of the automotive masterplan. • There's a disconnect in that critical conversations are not happening at designated levels incorporating all the role players. • Referring to the role of government, there is a lack of urgency in resolving policy uncertainty on issues such as new energy vehicles.
	MIBCO	• No recorded contribution
	NAACAM	• A major challenge is discipline, consistency and industry focus. A case in point is the Automotive Master Plan, a good framework for managing a whole range of issues, but sadly already experiencing fault lines. ⇒ Need to have a partnership agreement with government and all stakeholders to address major

		challenges facing the industry – ports, rail, load shedding, collapsing infrastructure, etcetera.
	NEASA	• No recorded contribution
	SOLIDARITY	• No recorded contribution

APPENDIX J: OVERVIEW OF INTERACTIVE DIALOGUE DISCUSSION AND ASSESSMENT

THEMES	INTERACTIVE DIALOGUE SUMMARY	EXPLORATORY REVIEW	
		ASSESSMENT	OUTCOMES Consensus; Competing solutions offered; Consensus may be possible with further exploration; Disagreement)
A. Industry viability deliberations.	• There is general consensus that collective bargaining and industry viability are not mutually exclusive and that there is a pressing need to review the process. "Bread-and-butter" issues and industry viability are different constructs but mutually dependent in terms of viability, stability and affordability.	• Collective bargaining and industry viability are mutually dependent and therefore negotiations should be structured in such a way to accommodate both. • With respect to a proposed structure to explore resolution, the parties did not reflect on possible framework for broader industry bargaining structure.	• Consensus • Consensus may be possible with further exploration

	• There is also a tendency by the employers to raise industry viability during wage negotiations preparation, instead of ongoing engagement in industry structures. The challenge is to get stakeholders to engage in discussions of finding a balance between industry viability and the socio-economic aspects. • The participants did not advise on any specific structure or process to manage this paradoxical pair.		
B. Outdated collective bargaining structures.	• Current sector collective bargaining is being challenged by a number of factors: Failure of government to address socio-economic challenges experienced by workers with the result that demands such as affordable housing, transport and medical aid are	• Although current sector collective bargaining benefited the sector, it has limitations impacting not only on sector bargaining but on the viability of the industry in general. • With respect to a structure, the participants were not forthright as what could	• Consensus • Consensus may be possible with further exploration.

	placed on the negotiation agendas; "cherry-picking" tendency of the union selecting best practice individual company benefits as industry demands; focus on ticking off "bread-and-butter demands at the expense of affordability; maturity of union leaders. • Although it served the industry well, there is consensus that things have to change to establish a "fit-for-purpose" structure responding to the long-term viability of the industry. Reference is made to a need for a mind-set change of structure, incorporating economic indicators in guiding "bread-and-butter" issues, longer-term stability and sustainability challenges. • Expounding how such a structure could look like, the view is there	constitute such a structure. • Expounding how such a structure could look like, the view is there should be better alignment between bargaining structures; company-sector-industry interface; etcetera. • With respect to how such a concept could be explored, reference was made to societal-corporatist structures, such as social dialogue, national convention, industry policy forum, legal framework, as a means to explore this "fit-for-purpose" structure.	• Consensus • Consensus

	should be better alignment between bargaining structures; company-sector-industry interface; etcetera. • With respect to how such a concept could be explored, reference was made to societal-corporatist structures, such as social dialogue, national convention, industry policy forum, legal framework, as a means to explore this "fit-for-purpose" structure.		
4. Broader collective bargaining forum.	• There is a view that current sector bargaining is outdated and should be revised. • It would appear that the participants are more inclined to explore a "broader structure" with checks and balances, clear terms of reference, a so-called "fit-for-purpose" principle, which could lead to a policy framework.	• A "one-size-fits-all" structure is possible provided that checks and balances be built into such a structure, as well as ensuring autonomy of the sector approach is preserved. • Important that the terms of reference must be clear, including broad parameters that industry must work in at the same time giving guidance	• Consensus • Consensus

			to sector and plant-based negotiations.	
7	Challenges facing the South African automotive industry.	• The participants recognise that there are already agreed structures in place but due to poor discipline and leadership, very little progress has been made to address industry challenges. • Reference was made to existing structures within which a broader structure could be explored, such as Industry Policy Forum, South Africa Automotive Masterplan (SAAM) 2025, long-standing agreements to pursue such a structure. Challenges are discipline in follow-through, policy certainty, maturity among the bargaining partners.	• There are structures in place to address the challenges facing the industry, but there is a general comment that due to poor discipline, poor leadership and lack of maturity among leadership, there is little progress in delivering the masterplan objectives. (The industry structures referred to are: South African Automotive Masterplan (SAAM) 2035, South African Steel and Metal Fabrication Master Plan 1.0, Industry Policy Forum, long standing agreements to pursue Broader Collective Bargaining and Statutory Bargaining Council)	• Consensus
8	Societal corporatism and economic	• Participants referred to the historical role societal corporatism played in transforming	• With respect to process, there is a proposal to explore socie-	• Consensus may be possible with

	performance.	the South African society, including labour relations in the automotive industry. A general view expressed that NEDLAC has failed in its role of spearheading socio-economic discussions as there is no interaction with industry so as to understand its needs. • Instead, a national platform is needed that will bring about greater ministerial coherency and better focus on viability challenges. Reference was made to public-private-partnership arrangements to address the energy crisis, with tangible success.	tal-corporatist structures such as social dialogue, national convention, industry policy forum or legal framework. There was no unanimity with respect to how to address the issue: some expressed the view that current structures must be reviewed to better focus on viability challenges, whilst others felt that a national platform will bring about greater ministerial coherency to focus on the challenges.	further exploration.
9	Stewardship approach to drive sustainable development and growth.	• A lot has been said about the role of stakeholders when discussing the long-term viability of the industry, but not frequently about the critical role of the captains of the	• We need to adopt a stewardship approach in addressing the long-term viability challenges of the industry. SAAM 35 could be a vehicle to achieve this.	• Consensus

	industry in shaping the industry. The participants' view is that leaders must engage beyond company and sector interests, and must lead with discipline, maturity, consistency, accountability. • Despite the complexity of the industry and diversity of leadership, it is possible to find a synergistic approach to overcome competition, supplier modality tensions, intra-company challenges, infrastructure challenges, regulatory challenges, etcetera. • The SAAM is a collaborative stewardship approach, but discipline, maturity and resilience are needed to achieve the fruits of a growing and stable industry. • The following quote sums up the discussion, "Quite good at	• Despite the complexity of the industry and diversity of leadership, it is possible to find a synergistic approach to overcome competition, supplier modality tensions, intra-company challenges, infrastructure challenges, regulatory challenges, etcetera.	

	talking, but very poor with implementation and follow-through, making sure the plan comes together for the benefit of all. thus, moving away from lip service.” (AMEO).		