

**THE EFFECTIVENESS OF TRADE UNIONS IN MEETING TEACHERS' NEEDS: A
CASE OF PRIMARY EDUCATION SECTOR UNIONS IN LUSAKA DISTRICT**

BY

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DECLARATION

I, **Mwansa Chungu**, by submitting this Master's dissertation, do hereby declare that this represents my original work. The information presented in this dissertation is the result of my research work and that it has not previously been submitted for the award of a degree, diploma or any other academic qualification at this University or any other University.

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ABSTRACT

Employees in the primary education sector are faced with a number of challenges in their places of work. In order to deal with these challenges, they form trade unions in an attempt to enhance their strength and fight for improved terms and conditions of service. In order to be effective trade unions, provide collective strength, improved wages through collective bargaining and provide member services for their teachers in the primary education sector.

The general objective of the research was to examine the effectiveness of trade unions in meeting teachers' needs in the primary education sector in Lusaka district. Specifically, it aimed at examining the effectiveness of trade unions in providing collective strength to teachers in the primary education sector. It also aims at analysing the effectiveness of trade unions in improving wages for teachers and assess the effectiveness of trade unions in providing member services.

This research employed a mixed method research design. This means that it collected both qualitative and quantitative data. The sample comprised of 116 ordinary teachers and trade union officials in Lusaka district. From the sample, sixteen respondents were trade union officials and 100 were ordinary teachers drawn from the ten schools. Ten were trade union officials based at the schools where the research was conducted from. Then three trade union officials were at district level and three trade union officials were at national level. Purposive sampling was used to sample trade union officials. While Multistage and simple random sampling were used to sample ordinary teachers. To collect data questionnaire and interview guide were used. To analyse qualitative data, content analysis was used while Statistical Package for Social Statistics (SPSS) was used to analyse quantitative data.

The findings of the research indicate that trade unions are effective in providing collective strength for teachers in the primary education sector. This is so, because trade unions recruit their members using two methods, capturing where teachers are neither consulted nor asked to apply for membership. Trade unions are somewhat effective when it comes to improving wages in the primary education sector. This is done through collective bargaining. Trade unions are also somewhat effective in the provision of member services because trade unions provide

member services like loans, land, school sponsorship and union branded clothes but the services are not enough.

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LIST OF FIGURES

Figure 1.6: Conceptual Framework	5
Figure 3.1: Map of Lusaka District.....	21
Figure 4.1: Membership Distribution among the Unions in Primary Education Sector.....	33
Figure 4.2: Reasons why Teachers do not join Trade Unions	36
Figure 5.1: Whether or not Teachers Presented Demands to Union officials.....	40
Figure 5.2: Demands that Teachers Submitted to their Union Leaders	41
Figure 5.3: Whether Demands were met or not	43
Figure 5.4: Demands that were met	44
Figure 5.5: Reasons for not being happy with the Previous Collective Bargaining Process ...	46
Figure 6.1: Primary School Teachers Receiving Member Services from their Unions.....	52
Figure 6.2: Types of Member Services Received by Teachers from their Unions.....	55
Figure 6.3: Extent to which Teachers are Happy with Member Services Provided by Unions	56
Figure 6.4: Reasons for Teachers Unhappiness with Member Services.....	57

LIST OF TABLES

Table 4.1: Methods of Recruiting Union Membership	30
Table 4.2: Union Membership	31
Table 4.3: Teachers who do not belong to Trade Unions	32
Table 4.4: Age of Teachers who do not belong to Unions.....	33
Table 4.5: Gender of Teachers who do not belong to Unions	34
Table 4.6: Gender of teachers who do not belong to trade unions.....	35
Table 5.1: Level of Satisfaction with Previous Collective Bargaining	45
Table 6.1: Receiving Member Services versus age group of Teachers	52
Table 6.2: Receiving Member Services by Gender	53
Table 6.3: Receiving Member Services by Marital Status.....	54
Table 6.4: Receiving Member Services by the Number of years Worked.....	54

LIST OF ABBREVIATIONS

BETUZ	-	Basic Education Teachers Union of Zambia
CSO	-	Civil Society Organisations
DEBS	-	District Education Board of Secretaries
HIPC	-	Highly Indebted Poor Countries
HRD	-	Human Resource Development
IMF	-	International Monetary Fund
MUZ	-	Mine Workers Union of Zambia
NPM	-	New Public Management
NUPPEZ	-	National Union of Public and Private Education of Zambia
PAM	-	Palvelvalojen ammattiliitto
PF	-	Patriotic Front
PPP	-	Public Private Partnership
PROTUZ	-	Professional Teachers Union of Zambia
SESTUZ	-	Secondary School Teachers Union
SPSS	-	Statistical Package for Social Sciences
TUICO	-	Tanzania Union of Industrial and commerce
UNIP	-	United Nation Independent Part
ZNUT	-	Zambia National Union of Teachers

TABLE OF CONTENTS

DECLARATION.....	i
COPYRIGHT	ii
APPROVAL	iii
ABSTRACT	iv
ACKNOWLEDGEMENTS.....	vi
LIST OF FIGURES	vii
LIST OF TABLES.....	viii
LIST OF ABBREVIATIONS.....	ix

CHAPTER ONE: INTRODUCTION AND BACKGROUND

1.1 Introduction.....	1
1.2 Background	1
1.3 Statement of the Problem.....	2
1.4 Research Objectives	3
1.4.1 General objective.....	3
1.4.2 Specific Objectives.....	3
1.5 Significance of the Research.....	3
1.6 Conceptual Framework	5
1.7 Structure of the Dissertation	6
1.8 Conclusion	7

CHAPTER TWO: LITERATURE REVIEW

2.1 Introduction.....	8
2.2 Literature on the effectiveness of trade unions in providing collective strength to teachers in the primary education sector.....	8
2.3 Literature on the effectiveness of trade unions in improving wages for teachers in the primary education sector.....	11

2.4 Literature on the effectiveness of trade unions in providing member services to teachers in the primary education sector	14
2.5 Lessons drawn from the literature.....	17
2.6 Gaps in the Literature.....	18
2.7 Conclusion	18

CHAPTER THREE: RESEARCH METHODOLOGY

3.1 Introduction.....	20
3.2 Type of Research	20
3.3 Site of the Research.....	20
3.4 Research Approach	21
3.5 Research Design.....	22
3.6 Sources of Data	23
3.7 Population and Sample Size.....	23
3.8 Sampling Methods	24
3.9 Methods of Data Collection	24
3.10 Reliability of Data.....	25
3.11 Validity of Data.....	25
3.12 Methods of Data Analysis.....	25
3.13 Research Ethics	26
3.14 Limitations of the Research	26
3.15 Conclusion	27

**CHAPTE FOUR: EFFECTIVENESS OF TRADE UNIONS IN PROVIDING
COLLECTIVE STRENGTH TO TEACHERS IN THE PRIMARY EDUCATION
SECTOR**

4.1 Introduction	29
4.2 Trade unions’ ability to recruitment teachers as members in the primary education sector	29
4.5 Challenges faced by trade unions to provide collective strength to strength teachers.....	36
4.6 Conclusion	38

**CHAPTER FIVE: EFFECTIVENESS OF TRADE UNIONS IN IMPROVING WAGES
FOR TEACHERS IN THE PRIMARY EDUCATION SECTOR**

5.1 Introduction	39
5.2 Trade unions’ approach to collective bargaining in the Primary education sector	39
5.2.1 Meeting teachers to hear their demands	39
5.2.2 Consolidating teachers’ demands and presenting them to the government	42
5.2.3 Bargaining with the government	42
5.3 Extent to which collective bargaining meets teachers’ demands.....	43
5.4 Extent to which primary school teachers are happy with the collective bargaining process	45
5.5 Challenges faced by unions during collective bargaining	47
5.6 Conclusion	50

**CHAPTER SIX: EFFECTIVENESS OF TRADE UNIONS IN PROVIDING MEMBER
SERVICES TO TEACHERS IN PRIMARY EDUCATION SECTOR**

6.1 Introduction	51
6.2 Member services that trade unions are supposed to provide to teachers	51
6.3 Extent to which primary school teachers receive member services from their union	52
6.3 Extent to which teachers are happy with member services provided by unions.....	56
6.4 Challenges faced by union officials in providing member services	58
6.5 Conclusion	60

CHAPTER SEVEN: SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

7.1 Introduction	61
7.2 Summary of Conclusions	61
7.3 Recommendations	63
7.3.1 Policy Recommendations	63
7.3.2 Areas for Future Research	64
REFERENCES	65
APPENDICES	69
APPENDIX A	69
QUESTIONNAIRE FOR TEACHERS OF PRIMARY SCHOOLS OF LUSAKA DISTRICT	69
APPENDIX B	74
INTERVIEW GUIDE FOR TRADE UNION LEADERS	74

CHAPTER ONE

INTRODUCTION AND BACKGROUND

1.1 Introduction

The purpose of this Chapter is to introduce the dissertation and its background. To achieve its purpose, the Chapter begins by presenting the background of the research, then the statement of the problem. Then the chapter will focus attention on the research objectives. Thereafter, the Chapter will present the significance of the research, then the conceptual framework. The Chapter will also present the structure of the dissertation. Finally, present a conclusion of the Chapter.

1.2 Background

Employees in the education sector are faced with a number of challenges. These challenges include low pay, poor terms and conditions of employment for teachers, unfriendly working environment, poor management services, lack of financial incentives and lack of job satisfaction (Robbins, 2015). To deal with these challenges, workers decided to form trade unions. This was in an attempt to enhance their strength and fight for improved terms and conditions of service.

Today trade unionism is still a very important force (Rakner, 2003). The first trade union in the education sector was formed in 1953 and it was called the Northern Rhodesia African Teachers Association (NORATA), which was later changed from being an association to a trade union Northern Rhodesia African Teachers Union (NORATU). This trade union later changed its name to the Zambia National Union of Teachers (ZNUT). The name changed when Zambia gained independence in 1964. ZNUT signed an agreement with the Ministry of Education with the core mandate of fighting for better conditions of service and salaries for the educators (ZNUT, 2007).

Following the enactment of the Industrial Relations Act in 1971, which prohibited having more than one trade union in each industry, the education sector was also affected. At that time the education sector only had one trade union (Craver, 2011). Politically, Zambia became a one-party state in 1972. This allowed the government to have control over political and economic

activities in the country including labour matters. ZNUT drew its members from government schools only. However, because of the poor performance of the economy, the United National Independence Party (UNIP) government was forced to liberalise the political space and the formation of trade unions in December 1990. This enabled the Movement for Multiparty Democracy (MMD) to form government in 1991. The MMD government liberalised the external and domestic trade regime by eliminating tariffs, freeing the exchange rates and there was open trade. By the year 2000, Zambia was among the least developed countries and was highly indebted among the developing countries (Rakner, 2003).

The liberalisation of the economy by the MMD government was followed by the establishment of private schools. This was followed by the repealing of the industrial relations Act which was replaced by the Industrial and Labour Relations Act in 1993. The 1993 Act allowed the formation of new trade unions to represent workers that were not represented by the trade unions then. This saw the formation of splinter trade unions in the education sector such as the Secondary Schools Teachers Union of Zambia (SESTUZ), Primary Education Teachers Union of Zambia (PETUZ) in 1999 which later changed its name to Basic Education Teachers Union of Zambia (BETUZ) in 2004. The Professional Teachers Union of Zambia (PROTUZ) and National Unions of Public and Private Educators in Zambia (NUPPEZ) were some of them formed among others.

Under this arrangement, several trade unions started to compete for the same members within the education sector in general and in primary education in particular. For example, the trade unions that compete to meet teachers' needs in the primary education sector in Zambia include, ZNUT, BETUZ, PROTUZ and NUPPEZ. These trade unions that are competing to meet teachers' needs such as working conditions for better pay, better amenities at place of work, developed infrastructure, for teachers to have enough instructional materials, accommodation and participation in the educational processes (ZNUT, 2007).

1.3 Statement of the Problem

From the background it was noted that primary education teachers' trade unions in general in Zambia general and in Lusaka particularly compete to recruit the same teachers as their members. In addition, the same trade unions compete to meet the needs of teachers such as

working conditions for better pay, better amenities at places of work, developed infrastructure, teachers having enough instructional materials, accommodation and participation in the educational processes (ZNUT, 2007). This situation led to questions arising regarding the effectiveness of these trade unions in meeting teachers needs while competing with each other

1.4 Research Objectives

The research was guided by the following objectives:

1.4.1 General objective

The general objective of the research is to examine the effectiveness of trade unions in meeting teachers' needs in the primary education sector in Lusaka district.

1.4.2 Specific Objectives

The specific objectives are as follow:

1. To examine the effectiveness of trade unions in providing collective strength to teachers in the primary education sector in Lusaka district.
2. To analyse the effectiveness of trade unions in improving wages for teachers in the primary education sector in Lusaka district.
3. To assess the effectiveness of trade unions in providing member services to teachers in the primary education sector in Lusaka district.

1.5 Significance of the Research

The significance of this research is that it has provided information on the effectiveness of trade unions in meeting teachers needs in the Primary education sector. This information will be helpful to trade union as it will help them know how to strengthen themselves to fight for improved conditions of service the information will also help improve wages for teachers in primary schools. Furthermore, the information will help trade unions to identify member services that can be given to teachers in primary schools.

Trade unions have been chosen because they are the drivers to improved working conditions and protection of workers. If trade unions effectively perform, the benefits will not just be felt in the education sector, but the country as a whole. This is because education is the driver of a

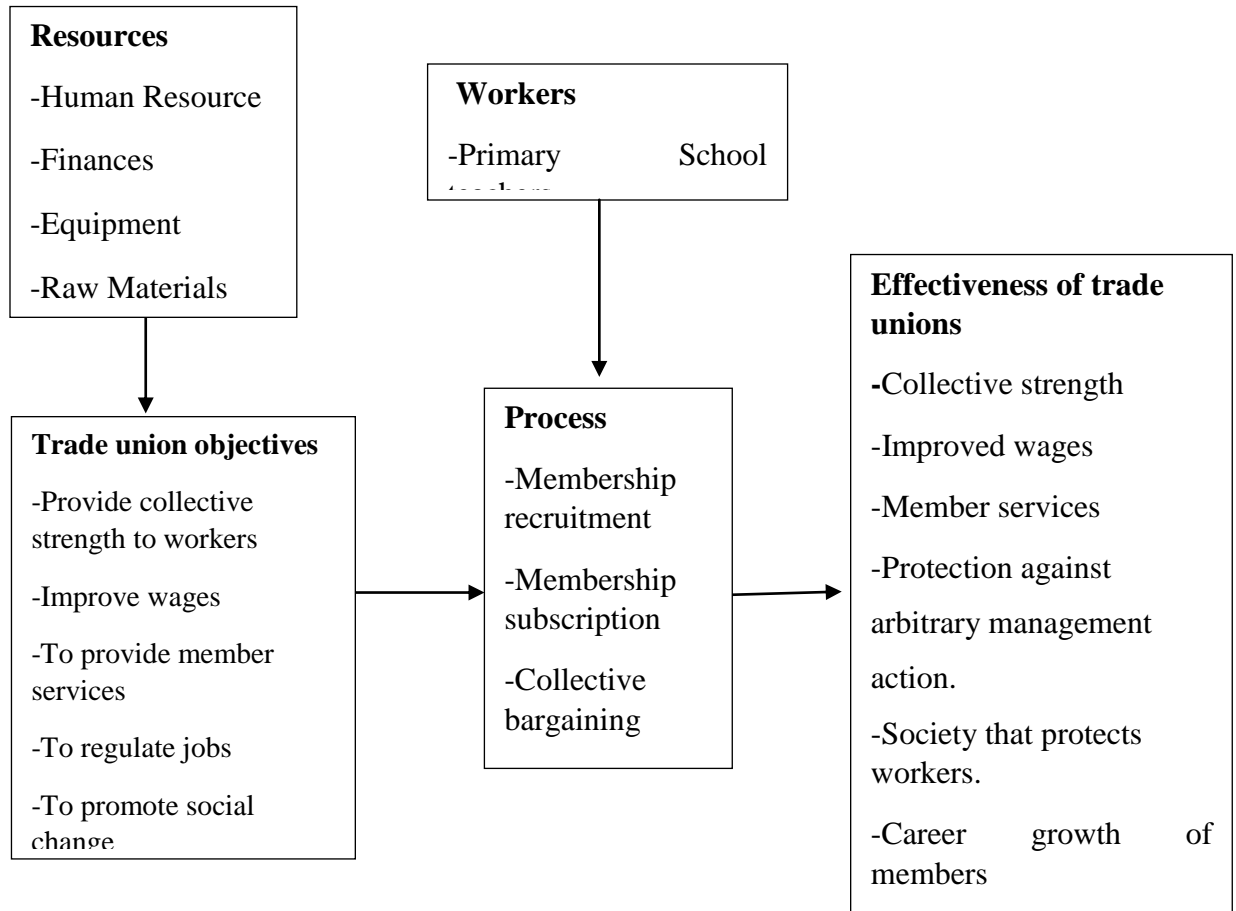
country's wealthy and economy (Mishler, 2008). Primary education sector has been chosen for this research because they lay the foundation for the future and ensure broad-based development of pupils. This is done by ensuring that pupils are able to develop their cognitive, social, emotional, cultural and physical skills. Primary education provides students with skills they will use throughout their lives to further their careers (Banda, 2007).

The information that will be provided by this research will benefit various stakeholders. These include trade unions and their members that can come up with policies that can improve their performance. This information will also benefit the public sector managers because they will gain knowledge on how to better understand the role of Trade unions and how to manage them. Trade union members who are not well abreast with the role of trade unions will also benefit from this research. Policy makers will benefit from this work because they will know the areas that need immediate attention and for the purpose of learning and information sharing (Dunning, 1984).

1.6 Conceptual Framework

The conceptual framework guiding the research is presented in Figure 1.6

Figure 1.6: A model of the conceptual framework of the effectiveness of trade unions in meeting teachers' needs in the primary education sector



Source: Researcher's Own Illustration

Figure 1.6 above shows the way the key concepts of the research are linked to each other. First and foremost, for a trade union in primary education sector to be effective, it should be able to have members who are primary school teacher. It should also be able to have members who have resources such as human resources, financial resources, equipment and raw materials. Other than that trade unions should have objectives to show their intentions. Objectives such as to provide collective strength, improve wages of workers, provide member services, to regulate jobs and promote social change. The trade union also needs to have a process to follow for recruitment such as membership.

Once one becomes a member, they have to pay membership subscription to the trade union, and the trade union leaders have to be able to collectively bargain on behalf of their members. Finally, effectiveness of trade unions has to be shown through collective strength, improved wages of workers, member services, protection against arbitrary management action. a trade union should have a society that protects members and finally contribute to having career growth of members.

1.7 Structure of the Dissertation

This dissertation has been divided into seven chapters. Chapter One introduces the dissertation and its background. Apart from the background to the research, the chapter presents the Statement of the Problem, the Objectives of the Research, Significance of the Research and Conceptual Framework.

Chapter Two reviews the relevant literature to this research. The chapter reviews literature on trade unions and teacher welfare.

Chapter Three presents the methodology used in the research. Specifically, the chapter presents the type of research, site the research, the research design, sources of data, population and sample size, sampling methods, data collection methods, reliability of data, validity of data, data analysis, ethics applied when conducting the research and the limitations of the research.

Chapter Four examines the ability of trade unions to recruit members in primary schools. It looks at the methods of recruiting trade union members in primary schools. It then examines the level of unionism in primary schools. Thereafter, it looks at the reasons why some teachers do not belong to trade unions. The chapter then focuses on the challenges faced by trade unions to recruit members.

Chapter Five analyses the ability of trade unions to engage in collective bargaining in primary schools. It looks at trade unions' approach to collective bargaining in primary schools. It then discusses the extent to which collective bargaining meets workers' demands. Thereafter, the chapter discusses the extent to which primary school teachers are happy with the collective bargaining process. It then focuses on the challenges faced by unions during collective bargaining.

Chapter Six assesses the extent to which trade unions provide welfare services to teachers in primary schools. It looks at the extent to which primary school teachers receive welfare services from trade unions. It then discusses the extent to which primary school teachers are happy with the welfare services that the trade unions offer to their members. Furthermore, the chapter focuses on challenges faced by trade union leaders in providing welfare services.

Chapter Seven presents a summary of the conclusions and recommendations of the dissertation. The chapter begins with a presentation of the summary of the conclusions. Thereafter, it presents the recommendations of the dissertation.

1.8 Conclusion

The education sector is faced with a number of challenges. In order to deal with these challenges, they decided to form trade unions. The first trade union was formed in 1953 which later led to the formation of splinter unions. The statement of the problem in this research indicates that teachers in the primary education sector of Lusaka district compete to recruit the same teachers as their members. In addition, the same trade unions compete to meet the needs of teachers such as working conditions for better pay, better amenities at places of work, developed infrastructure, teachers having enough instructional materials, accommodation and participation in the educational processes. The chapter also indicated the objectives the research which comprise of one general objective and three specific objectives. The chapter further indicates the significance of the research which will provide information on the effectiveness of trade unions in meeting teachers needs in the primary education sector. Trade unions have been chosen because they are the drivers to improved working conditions and protection of workers. Then the conceptual framework guiding the research on the effectiveness of trade unions in meeting teachers' needs in the primary education sector and the structure of the dissertation is given.

CHAPTER TWO

LITERATURE REVIEW

2.1 Introduction

This Chapter reviews literature on the effectiveness of trade unions in meeting teachers' needs in the primary education sector. In order to achieve its purpose, the chapter begins by reviewing literature on the effectiveness of trade unions in providing collective strength to teachers in the primary education sector. Thereafter, the chapter reviews literature on the effectiveness of trade unions in improving wages for teachers in the primary education sector. The chapter then reviews literature on the effectiveness of trade unions in providing member services to teachers in the primary education sector. Then the chapter presents lessons drawn from the literature. This is followed by a presentation of gaps in the literature. Finally, a conclusion is given.

2.2 Literature on the effectiveness of trade unions in providing collective strength to teachers in the primary education sector

To start with, there is no literature in Zambia and elsewhere on the effectiveness of trade unions in providing collective strength to teachers in the primary education sector. However, lessons can be drawn from experiences in other sub-sectors of education and other sectors of the economy beyond the education sector. One document worth reviewing is a master's dissertation by Nzala (2020) titled *An Assessment of Factors Influencing Newly Employed Teachers' Choice of Teacher Trade Unions in Public Secondary Schools in Lusaka District*. The purpose of the study was to assess the factors that influence newly recruited teachers' choice of teacher trade unions in public secondary schools. The methodology used in this research is a cross sectional study with the quantitative approach. The study drew a purposively selected sample of 50 teachers recruited between 2014 and 2017 and subjected them to a questionnaire. The findings indicated that there were different factors influencing teachers to join trade unions. These factors include financial and non-financial benefits. Financial benefits include educational sponsorship. Non-financial benefits include protection against exploitation by employers, goodwill trade union management and good trade union leadership. However, teachers were influenced more by personal factors such as accessing scholarships, recommendations by fellow teachers, events for members and admiration of old members' benefits.

Another document worth reviewing was a PhD thesis by Madimutsa (2016) titled *Implications of Public Sector Reform for Public Sector Unions in Zambia: A Case Study of the Civil Servants and Allied Workers Union of Zambia in Lusaka District*. The purpose of this research was to examine the implications of public sector reforms for public sector unions in Zambia. The methodology used in the study was qualitative in nature and the data collected were both primary and secondary. A sample of 25 key informants was engaged and the multistage, purposive and snowball sampling were used to select informants. The findings of the study indicated that trade unions enhanced the collective strength of workers by diversifying trade union membership and building alliances with external organisations. However, Madimutsa (2016) indicates that the strategy of diversifying the membership leads to inter-union conflicts. This is because the trade unions tend to enter each other's territory in an attempt to diversify the membership.

Another document worth reviewing was a master's dissertation by Gwasupika (2021) titled *Some Challenges Facing Trade Unions in Zambia's Local Council: A Case Study of Lusaka Province Councils*. The objective of the research was to identify the challenges faced by trade unions in local Councils in Zambia. The methodology used in the study was descriptive in nature. It employed a mixed method design to collect both primary and secondary data from 112 respondents and key informants. Purposive sampling was used to sample key informants while a combination of Multistage, simple random and stratified sampling methods was used to select respondents. The findings of the study indicated that the process of recruitment at local Councils was done when an individual filled in employment forms. Once a person became a permanent employee of the local Council then they became trade union members automatically. Trade union members were made to sign recruitment forms right after getting employed by the Council. This was done simultaneously as one signed their employment forms. However, Gwasupika (2021) indicated that though trade unions in local Councils recruited members to join their unions, they were faced with some challenges during the process of recruitment. These challenges include massive declines in employment levels which led to a reduced number of trade union membership. Having reduced employment rate negatively affected trade union membership because trade union power is limited. The other challenge is that employees who are in management positions were not allowed to join a trade union. This reduces the number of union membership and collective power.

Moeti-Lysson and Ongoro (2011), in an article *Effectiveness of Trade Unions in Promoting Employee Relations in organisation*. The research was conducted in Botswana. The methodology used was a cross sectional survey. Primary and secondary data was collected by the use of questionnaires. The findings of the article by Moeti-Lysson and Ongoro (2011) indicated that trade unions did recruit members to enhance their collective strength. Trade Union membership is by law in Botswana. A member of a trade union must be a person who has entered into a contract of employment for the hire of their labour. Not including public offices or any person employed by a local authority. The Challenges faced by trade unions to recruit members include the changing environment which has eroded their positions as key allies of the state. Also, privatisation, has led to downsizing of enterprises has adversely affected the collective strength of trade unions.

Lash (2016) in his Master's dissertation titled *Perception of Representational Efficacy in Local and National Teachers unions*. The purpose of the study was to explore educators' current perceptions of how effectively their interests are represented by their unions at the local and national levels. The methodology used is descriptive. The study used survey design. The participants were employees in the Adams Five Star School Districts in Northglen, Thornton and Westminster in the United States of America. The sample was 2,380. The respondents were 127. The data used was both qualitative and quantitative in nature. The findings by Lash (2016) indicates that unions recruited their members through affiliations. Different trade unions gain a lot of membership and have collective strength. This is as a result of commitment towards their work and the message they advocate for. The message is in two different models of the industrial trade union model and association model. The industrial trade union model focuses on member interests, such as salary and benefits, while the association model is concern with broader educational issues, legislation directed at public education, and improvement of the quality of public schools. Lash (2016) indicates that trade unions which are centralised are more likely to be successful in promoting the general will of the membership. Though trade unions are able to recruit members and strengthen their collective power, they are faced with problems such as lack of consensus among trade union members causing conflicts to be experienced by trade unions and having limited power by law.

2.3 Literature on the effectiveness of trade unions in improving wages for teachers in the primary education sector

To start with, there is no specific literature on the effectiveness of trade unions in improving wages for teachers in the primary education sector in Zambia and elsewhere. Nevertheless, lessons can also be drawn from experiences in other sectors of the economy. A document worth reviewing is a PhD thesis by Madimutsa (2016) titled *Implications of Public Sector Reform for Public Sector Unions in Zambia: A Case Study of the Civil Servants and Allied Workers Union of Zambia in Lusaka District*. The purpose of this research was to examine the implications of the public sector reforms for public sector trade unions in Zambia. The methodology used in this study was qualitative in nature and the data collected was both primary and secondary data. A sample of 25 key informants was engaged and the multistage, purposive and snowball sampling were used to select informants. The findings indicate that trade unions improve wages for workers by adopting different strategies of collective bargaining. These include decentralising the collective bargaining structure. This involves dividing workers into several bargaining units and bargaining with different employers from which the union draws its membership. The other strategy used is to conduct research on economic performance and cost of living before the union engages employers in collective bargaining. Through this strategy, the union ensures that the bargained for wages are not below the cost of the basket for basic needs. Nonetheless, Madimutsa (2016) asserts that decentralised collective bargaining is expensive and time consuming for trade unions. This was as a result of having several bargaining units that need to be attended to. Furthermore, a decentralised bargaining structure leads to union members having different conditions of employment.

Another document that was worth reviewing was a Master's dissertation by Gwasupika (2021) titled *Some Challenges Facing Trade Unions in Zambia's Local Council: A Case Study of Lusaka Province Councils*. The objective of the research was to identify the challenges faced by trade unions in local Councils in Zambia. The methodology used in the study was descriptive in nature. It employed a mixed method design to collect both primary and secondary data from 112 respondents and key informants. Purposive sampling was used to sample key informants while a combination of Multistage, simple random and stratified sampling methods was used to select respondents. The findings indicate that trade unions are effective when it comes to improving

wages this is so, because the trade unions in local Councils presented several demands but managed to secure a number of demands apart from salary increment for their workers. The demands that the trade unions managed to secure include bonuses, safety working attire for works, funeral and medical bonuses and financial assistance just to mention but a few. Gwasupika (2021) however, indicates the challenges faced by trade unions during collective bargaining and these include; trade unions concentration of power being at the top level of unions' organisational structure making it hard for ordinary union members to voice out their demands. Also, the channel of communication during collective bargaining is not fruitful because management barely listens to the voice of workers. These challenges make it hard for unions to effectively bargain in behalf of their workers.

Nchimbi (2018) in his article *The Trade Unions Performance in Tanzania: The Perceptions of School Teachers Trade Union in Singida Municipality*. The objective of the study was to explore the perception of Tanzania teachers concerning the performance of their trade unions. The methodology used in this study was a case study strategy. Ten schools were involved in the study. Both qualitative and quantitative data was used. A total sample of 209 respondents was also involved in the study. The findings indicated that teacher trade unions are effective when it comes to improving wages for their members. Trade unions achieve this through teacher education where teachers are taught on their roles as union members. Also, advocacy where trade union leaders speak with other partners to strengthen their bargaining power. This is what makes trade union leaders to effectively bargain for their workers and convince the employer to improve their conditions of service of their teachers. On the other hand, union members feel that there is poor communication between union members and union leaders, this makes union members feel marginalised by their leaders and many union members think that the union leaders do pursue their own interest at the expense of its members.

Wagaki (2013) in her Master's dissertation titled *Effectiveness of Trade Unions' Strategies in Enhancing Teacher Professional Performance in Public Secondary Schools in Kieni West District, Kenya*. The purpose of this study was to establish the effectiveness of trade unions in teachers' professional performance in public secondary schools in Kieni West District. The Methodology used in this study is descriptive survey design the study sampled 26 teachers and 22 head teachers. The study used stratified random technic and census method respectively.

Data was collected using questionnaires. Qualitative and quantitative procedures were employed in data analysis. The findings indicate that teacher trade unions were effective when it comes to improving wages for their members. To achieve this, trade unions were involved in fighting for motivational recognition to teachers as well as fairness in promotion. Trade unions were also involved in advocacy activities that were aimed at improving their professional performance. All this was done using collective bargaining with the employer, in an effort to improve wages for their teachers. The challenge that teacher trade unions faced in improving wages is that there was a disconnection between union activities and the professional performance of teachers.

Hollup (2004) in his study titled *Educational Policies, Reforms and The Roles of Teachers Trade Unions in Mauritius*. The purpose of the study was to know more about the status and role of teacher trade unions in Mauritius. The methodology used in this study are interviews with the government teacher's trade union, teachers' trade unions in primary common front, teachers, deputy head teachers and head teachers in urban and rural primary schools, Ministry of Education official and the former minister of education was also interviewed. The findings indicated that teacher trade unions are effective when it comes to improving wages for their members. Trade unions improved wages by making suggestions, submitting memorandums and protesting against decisions that reduced or worsen the terms of service for workers by doing that hoped that their 'voices' would be considered. The trade unions also use the principle of equal pay which aligned primary and secondary school teachers' salaries. Trade unions continue to fight for and to defend for the interests of their teacher members to maintain the rights and privileges they are entitled to. This is done in order to improve teachers' wages.

Bryson (2007) wrote an article titled *The Effect of Trade Unions on Wages*. The objective of this study was to find out the economic implications of trade union wage bargaining for workers, firms and society. The methodology used in the study was observation method. This was done by comparing wage outcomes for unionised workers. Having control for all characteristics affecting both union status and wages. Primary and secondary data was used from very informative sources. The findings indicated that teacher trade unions are effective when it comes to improving wages for their members. The study brought out the fact that trade unions' success depended largely on their bargaining strength which is based on the ability of employers to concede above market wages. Additionally, the findings indicated that collective bargaining

of trade unions have a direct effect on trade unions for teachers' wages especially when this resulted in a new employment contract with renegotiated wages. Increased wages on trade union members reflects union bargaining strength and motivates non-union members to join trade unions.

Shrestha (2012) in his PhD thesis titled *The Effect of Trade Unions on Workers: A case study on PAM*. Palvelvalojen ammatilitto meaning trade union of service light, was one of the largest trade unions in Finland for employees from the private service industries. The objective of this study was to identify how trade union PAM works in offering benefits to its members. The methodology used was descriptive and the study used both qualitative and quantitative research methods. Primary and secondary data was collected by use of questionnaires and personal interviews. The sample size of 1000 members out of 64 respondents was used. The findings indicated that trade unions are effective when it comes to improving wages for their members. Trade unions have significant impact on members when it comes to fighting for workers' salaries and conditions of service. This is so because PAM has negotiated more than 50 collective agreements which are done for the benefits of workers, which ultimately enhances the working conditions of the workers. This has made members of trade union PAM to believe that joining a union increased the wages as one of the most important factors in improving their daily life and well-being.

2.4 Literature on the effectiveness of trade unions in providing member services to teachers in the primary education sector

Like the sections above, there is no literature on the effectiveness of trade unions in providing member services to teachers in the primary education sector in Zambia and elsewhere. Nonetheless, lessons can be drawn from experiences in other sectors. Madimutsa (2016) titled *Implications of Public Sector Reform for Public Sector Unions in Zambia: A Case Study of the Civil Servants and Allied Workers Union of Zambia in Lusaka District*. The purpose of this research was to examine the implications of the public sector reforms for public sector trade unions in Zambia. The methodology used in this study was qualitative in nature and the data collected was both primary and secondary data. A sample of twenty-five key informants was engaged and the multistage, purposive and snowball sampling were used to select informants. The findings indicated that trade unions provide both financial and non-financial services to

their members. These include loans, training workshops, union branded clothes, financial rewards for membership recruitment and fight against casualisation of labour.

Gwasupika's (2021) Master's dissertation titled *Some Challenges Facing Trade Unions in Zambia's Local Councils: A Case Study of Lusaka Province Councils* is another document worth reviewing. The objective of the research was to identify the challenges facing trade unions in local councils in Zambia. The methodology used was descriptive in nature and it employed a mixed method design to collect both primary and secondary data from 112 respondents and key informants. Purposive sampling was used to sample key informants while a combination of multistage, simple random and stratified sampling methods was used to select respondents. The findings indicate that trade unions in local councils give their members services such as loans, funeral grants, medical schemes and plots. Nevertheless, she argues that these services are not enough to meet members' needs. Gwasupika (2021) indicates that union leaders face a number of challenges to provide services to their members. These challenges are lack of finance, political influence and lack of support from both management and union members.

A journal article by Kakunta *et al.* (2020) titled *Re-examining the Role of Teacher Trade unions' in Promoting welfare and Sustained Livelihood for their Members: A Case of Teacher Trade unions in Lusaka Zambia*. The objective of the study was to explore how the teacher trade unions have helped in promoting teacher welfare and sustained livelihood. The methodology used in this research was descriptive study design. The target population comprised four national teacher's trade union officials. Targeting one official from each of the four national teacher trade union secretariats. Sixteen teachers and 16 trade union leaders at school level of the selected schools. Purposive sampling method was used to sample national teachers' trade union officials and four school level trade union leaders from selected primary and secondary schools in Lusaka district. Data was collected through interviews, focus group discussions and documentary review. The findings of the study indicated that teacher trade unions provided member services. These services include full support at funerals of members, education assistance funds and loan facility empowerment. Though teacher trade unions provided these services for their members, the teachers were not satisfied with the member services that they

received from their trade unions. This is because these services do not promote a sustained livelihood for them.

In his Master's dissertation, Chishimba (2015) conducted a study titled: *Perceptions of Teachers on Teacher Trade Unions Representation at the School Level: A Case of Selected Primary and Secondary Schools in Lusaka District*. The purpose of the study was to investigate the perception of teachers on teacher trade unions' representation at the school level. The methodology used in this study was a descriptive survey design with combined qualitative and quantitative methods. Data was collected through interviews, schedules and questionnaires. The sample consisted of 123 participants: 80 unionised teachers, 30 local union representatives, 10 head teachers, and 3 ministry officials. Stratified random sampling and purposive sampling techniques were used to select the sample. The findings of the study revealed that unionised teachers had a negative perception on teacher union representation. The general feeling from the majority of teachers was that local union representatives do provide member services for their members, however, the member service provision is not adequate for the teachers at school level. It was also revealed that lack of meetings between teachers and union representatives had resulted in poor communication, leaving teachers feeling neglected by their trade unions. Though teacher trade unions provided services for their members, the teachers are not satisfied with the member services, indicating that the services were not enough.

Nyarko (2010) conducted a study titled "*Trade Union Services and Benefits*". The purpose of the study is to strengthen trade union strength and help them resist policies and programmes that seek directly or indirectly to roll-back the gains attained thus far. The methodology employed in this study was descriptive analysis. The study used a combination of questionnaire, direct interviews and review of existing documents on unions in Ghana. Data was collected from a sample of twelve trade unions in six confederations and trade unions in both private and public sectors including the informal economy. The findings indicate that trade unions provide member services. Trade unions use collective bargaining as a tool for both wage and non-wage negotiations. Wage negotiations include salaries, leave and housing allowances. Non-wage negotiations include worker education, health insurance and legal representation. These benefits market the unions to both existing and potential members. Though trade unions provided

all these services the members were not satisfied with the level at which these services are provided.

2.5 Lessons drawn from the literature

There are six major lessons that can be drawn from the literature reviewed. The first lesson is that trade unions use a number of strategies to provide collective strength to workers. These are requesting new members to join trade unions, diversifying the trade union membership, building alliances with external organisations, protecting members against exploitation by employers, goodwill trade union management and good trade union leadership and accessing scholarships, recruiting members by affiliations using either the industrial trade union model or association model, trade union membership is by law in Botswana and public officers or any person employed by the local authority cannot be a trade union member (Madimutsa, 2016; Gwasupika, 2021; Nzala 2020; Lash, 2016). The second lesson is that trade unions face a number of challenges to provide collective strength to workers. These are inter-union conflict, massive decline in employment levels which has led to having a reduced number of trade union membership and employees who are in management are not allowed to join unions. (Madimutsa, 2016; Gwasupika, 2021; Moeti-Lysson and Ongoro, 2011).

The third lesson is that trade unions improve wages for their workers by adopting different strategies of collective bargaining. These strategies include; decentralising the collective bargaining structure, dividing workers into several bargaining units and bargaining with different employers from which the trade union draws its membership, conduct research on economic performance, and cost of living before the trade union engages employers in collective bargaining and trade unions presents several demands in order to secure a number of those demands. Trade unions use worker education and advocacy to partners in order to strengthen their collective power (Madimutsa, 2016; Gwasupika, 2021; Nchimbi, 2018).

The fourth lesson is that trade unions face challenges during the process of collective bargaining which include trade unions concentrating their power at the top level hence making it hard for ordinary trade union members to voice out their demands, the channel of communication being bad during collective bargaining because management barely listens to the voice of workers.

Trade union members feel marginalised by their trade union leaders (Nchimbi, 2018; Gwasupika, 2021). The fifth lesson is that trade unions provide member services and these services are both financial and non-financial services. The financial services include loans, rewards for membership, training workshops and land while non-financial services include union branded clothes, recruitment and fight against casualisation of labour (Madimutsa, 2016). The sixth lesson is that trade unions face challenges in providing services to their members. These challenges are lack of finance, political influence and lack of support from both management and trade union members (Gwasupika, 2021).

2.6 Gaps in the Literature

There are three major gaps in the relevant literature reviewed. The first gap is that much of the relevant literature reviewed focuses on sectors other than education. The second gap is that the literature on education concentrates on the secondary education sub-sector while very little is written about the other sub-sectors of education such as primary and tertiary education. The third gap is that most of the literature reviewed used descriptive research methods. There were no statistical tests done in the process of conducting most of the researches where the literature is drawn. Trade unions improve wages for their workers by adopting different strategies of collective bargaining.

2.7 Conclusion

The main lessons drawn were that trade unions used a number of strategies to provide collective strength to workers. These are requesting new members to join trade unions, diversifying the trade union membership, building alliances with external organisations, protection against exploitation by employers, goodwill trade union management and good trade union leadership and accessing scholarships, recruiting members by affiliations using either the industrial trade union model or association model, trade union membership is by law and public officers or any person employed by the local authority cannot be a union member.

The other lesson is that trade unions use strategies such as decentralising the collective bargaining structure, dividing workers into several bargaining units and bargaining with different employers from which the trade union draws its membership, conduct research on economic performance and cost of living before the union engages employers in collective

bargaining and union presenting several demands in order to secure a number of those demands. Trade union use worker education and advocacy to partners in order to strengthen their collective power. The other lesson is that trade unions provide member service and these services are both financial and non-financial services. The financial services include loans, rewards for membership, training workshops and land non-financial services include union branded clothes, recruitment and fight against casualisation of labour. Though the reviewed literature had so many lessons it also had a number of gaps. The gaps in the literature reviewed focused on other sectors other than the primary education sector. The other gap is that literature on education concentrates on the secondary education sub-sector while very little is written about the other sub-sectors of education such as primary and tertiary education. Finally, most of the literature reviewed used descriptive research methods. There were no statistical tests done in the process of conducting most of the researches where the literature is drawn. Trade unions improve wages for their workers by adopting different strategies of collective bargaining.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Introduction

This chapter represents the methodology that was adopted for the research. The chapter focuses on the type of research, site of the research, research approach, research design, the sources of data, population and sample size, the sampling methods, the methods of data collection, the reliability of data, the validity of data, the data analysis techniques and the ethics that were applied when conducting the research. The chapter then presents the limitations of the research. Finally, a conclusion is given.

3.2 Type of Research

The type of research that was conducted was an explanatory research. Explanatory research refers to a method that explores why something occurs when limited information is available. It helps increase understanding of a given topic. It ascertains how or why a particular phenomenon occurs, and predict future occurrences (Tegan, 2021). In this research, the cause-effect relationship that was examined is between trade unions and meeting teachers' needs in the primary education sector. An explanatory research was chosen because it helps the researcher understand a particular problem in depth by providing more information about a specific topic (Surbhi, 2016). In this research, an attempt was made to examine the effect of trade unions on provision of collective strength to teachers, improvement of wages for teachers and provision of member services to teachers in the primary education sector. Primary education sector unions were chosen because they organise teachers at the foundation stage in the education process. Therefore, the ability to meet their needs is very important so that they are motivated to provide a strong foundation for learners.

3.3 Site of the Research

This research was conducted in the primary education sector trade unions in Lusaka district. Lusaka was chosen because it is among the provinces with the largest population of the primary school going children with a total of 389,162 (Policy Monitoring and Research Center, 2020).

As a result of being highly populated Lusaka has the highest demand for public services, this means that even the demand for primary school teachers is higher. Lusaka has the highest cost of living because of that teachers in Lusaka district face the most challenges to meet their basic needs. The other reason for choosing Lusaka district was that is where most headquarters of the primary education sector unions are located. The primary schools that participated in this research are well highlighted below on the map shown in Figure 3.1.

Figure 3.1: Map of Lusaka District



Source: Maps of the World (2020)

3.4 Research Approach

This research used a mixed methods approach. In this regard, it combined the qualitative and quantitative approaches. On the one hand, qualitative approach is a scientific method of observation to gather non-numeric data (Legard, Keegan & Ward, 2003). Qualitative data helped to understand the research problem by providing in-depth information about a problem under investigation (Legard, 2003). In this research, qualitative data that was collected focused on how trade unions provide collective strength to teachers, improve teachers' wages and

provide member services to teachers. On the other hand, quantitative data refer to data that are based on quantities obtained using a quantifiable measurement or expressed as statistics or numbers. This data can be quantified, grouped or expressed in terms of statistics or frequencies (Schutt, 2012). In this research, this approach was used to collect data on the level of unionisation, wages for teachers and union services accessed by teachers. The importance of collecting quantitative data is that it provided deeper insight on the effectiveness of trade unions in meeting teachers' needs in the primary education sector in Lusaka district. The reason for using the mixed methods approach was that qualitative and quantitative approaches complement each other. Mixed research also helped to come up with new information about a problem that cannot be made available if a single research approach was adopted (Rahman, 2017).

3.5 Research Design

This research adopted a non-experimental design. A non-experimental design means that the researcher had little or no control over the conditions under which the research was conducted. The researcher interacted with the research participants in their natural settings (Surbhi, 2016). The specific type of non-experimental design used in this research was the case study design. A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context (Mikkelsen, 1995). This research was a case study of primary education sector trade unions. The importance of using a case study is that it gives the opportunity to gain a greater understanding of the subject in hand and reduces the potential for any bias, by diluting the agenda of a particular individual (Gandhi, 2014). In this regard, this case study gained a deeper understanding of the extent to which trade unions in the primary education sector are able to meet the needs of teachers. These needs are in the areas of providing collective strength to teachers, improving wages for teachers and providing member services to teachers. The case study design also helps the researcher to come up with recommendations on how to strengthen a social unit as it interacts with its environment (Madimutsa, 2019). In this regard, this case study was able to make recommendations on how to strengthen primary education sector unions in the process of meeting teachers' needs. This case study was conducted between October and December, 2020.

3.6 Sources of Data

The research used primary sources of data. Primary data are data that have not been collected or analysed by other researchers (Surbhi, 2016). The sources of primary data in this research were trade union officials and teachers in the primary education sector. The reasons for collecting primary data was to collect information for the specific purpose of the study in essence, the questions the researcher ask are tailored to elicit the data that will help with the study (Green & Thorogood, 2014). Primary data were collected in this research so that information could be gathered on what is not yet known about the effectiveness of trade unions in meeting the needs of teachers in the primary education sector.

3.7 Population and Sample Size

The sample size of this research was 126 teachers in Lusaka district. Primary data was collected from a total sample of 116, comprising 16 trade union officials and 100 ordinary teachers. The trade union officials included one representative from the 10 schools that were selected, 3 union officials at district level from each union and 3 union officials at national level. The trade unions from which these trade union officials were selected include National Union of Public and Private Educators of Zambia (NUPPEZ), Zambia National Union of Teachers (ZNUT) Basic Education Teachers' Union of Zambia (BETUZ) and Professional Teachers Union of Zambia (PROTUZ). A sample of 16 trade union officials was chosen because it was considered adequate to provide qualitative data on the effectiveness of trade unions in primary schools in Lusaka district. According to Creswell (1998), a sample of between 5 and 25 is adequate to represent a phenomenon hence 16 trade union officials is adequate enough to provide qualitative data in research. The rest, 100 respondents, were ordinary teachers across public primary education sector in Lusaka district. A sample of 100 ordinary teachers was chosen because it was considered large enough to provide quantitative data for this research. This was in line with the assumptions of The Central Limit Theorem (CLT). States that a random sample equal to or greater than thirty will give characteristics similar or almost similar to those of the population from which the sample is drawn. The larger the sample size, the lower the margin of error (Wayne, 2016).

3.8 Sampling Methods

This research used multi stage sampling method to sample ordinary teachers. Multi stage sampling is a type of sampling that involves dividing the population into groups or clusters and selecting the sample in stages (Mikkelsen, 1995). The selection of teachers was done in four stages. Firstly, there was a collection of a list of public primary schools at the District Education Board of Secretary's (DEBS) office. The second stage involved dividing the schools into five zones namely, Eastern, Western, Southern, Northern and Central zone. The third stage involved the use of simple random sampling of picking two schools from each zone. The fourth stage involved setting a list of all teachers at each school then using stratified sampling to select the teachers from the sampled schools. The union officials were sampled by using purposive sampling. This researcher used her judgment to select one representative from the 10 schools that were selected, 4 union officials at district level from each union, and 4 union officials at national level involved the research. Using her judgment, the researcher selected union officials that are considered to be representative of the population (Mikkelsen, 1995).

3.9 Methods of Data Collection

Semi-structured interviews were conducted with trade union officials during collection of qualitative data. Semi-structured interviews are interviews which involve a number of pre-set questions and the interviewer does not strictly follow a formalized list of questions (Adams, 2014). An interview guide was used. The interview guide contained questions of union officials. In this research open-ended questions were asked thereby giving room for discussion with the interviewee. Semi-structured interviews are preferred because they encourage two-way communication between the interviewee and the interviewer and enable the interviewer to get detailed information about a case. A questionnaire was used to collect quantitative data from ordinary teachers. A questionnaire is a fixed set of questions with a particular sequence. Questionnaires are preferred because of their advantage of cost effectiveness. They are the most affordable way of gathering quantitative data. In addition, since questions are prepared ahead of time, it allows the researcher to be prepared and appear competent during the interview (Blandford, 2013).

3.10 Reliability of Data

The method that was used to ensure that the collected data were reliable is internal consistency. Internal consistency refers to the consistency with people's responses across the items on the measures reflect the same underlying construct (Cacioppo & Petty, 1982). To ensure consistency of the responses, this research asked logically related questions and the answers were checked for their logical connection to the corresponding questions. The responses that were logically connected to the corresponding questions were taken to be reliable data. And these are the data presented in this dissertation.

3.11 Validity of Data

Content validity was used in this research to ensure validity of both qualitative and quantitative data. Content validity is defined as a condition where the domain of the concept is made clear and the analyst shows whether the measures fully represent the domain (Leung, 2014). To ensure content validity of both qualitative and quantitative data, the interview guide and questionnaire that were used to collect data were designed in a manner that ensured that the key aspects of the phenomenon under investigation were covered. On the one hand, the aspect of trade unions that were covered in this research is the ability of the trade unions to organise teachers in the primary education sector and bargaining with employers for improved wages and trade union member services. On the other hand, teachers' needs that were covered in this research are collective strength, improved wages and union member services.

3.12 Methods of Data Analysis

This research used both qualitative and quantitative data analysis techniques. For Quantitative data, a computer programme called Statistical Package for Social Sciences (SPSS) was used. This computer programme helped with the generation of graphs, tables and figures for different variables that are under analysis (Green & Thorogood, 2014). SPSS was used because it provides data analysis for descriptive and bivariate statistics, numerical outcome predictions for identifying groups. On the other hand, qualitative data were analysed using the method of narrative analysis. Narrative analysis involves a cluster of analytic methods for interpreting texts or visual data that have a stored form (Legard, Keegan and Ward 2003). The use of this method to analyse qualitative data in this research involved help organise and make sense of the data

collected by making it functional and purposeful. Enabling the researcher to have a holistic view of the subject (Leung 2015).

3.13 Research Ethics

This research observed the following ethical issues: Firstly, permission to collect data was obtained from the District Education Board Secretary (DEBS) for Lusaka. This is because the Ministry of General Education is very strict when it comes to giving their information to individuals for private benefit. Secondly, informed consent was requested from all the individual participants. This means that participation was voluntary. Thirdly, the participants were enlightened about the research and allowed to ask questions where they needed clarity. Fourthly, participants were assured of their right to decline answering questions which they felt uncomfortable to answer. Fifthly, the participants were assured of confidentiality, of which their identity was kept anonymous and assured them that the research was purely for academic purposes.

3.14 Limitations of the Research

During the research process, a number of challenges were encountered. These challenges presented some limitations to the research. The following are the limitations of this research:

1. As opposed to having all the interviews with key informants being face-to-face, some of them were conducted via telephone. This was due to the COVID-19 pandemic. The use of telephones to conduct the interviews made it difficult to ask many probing questions. However, to ensure validity and reliability of the collected data, the researcher made sure that key probing questions were asked.
2. Because of the COVID-19 pandemic, some schools had very few teachers and the few who were available were very busy. Immediately after teaching their classes, they were not allowed to linger around the school premises. This situation made it very difficult for the researcher to secure enough time to administer the questionnaire to teachers and conduct interviews with union officials who were based at these schools. However, with the help of head teachers the researcher remained in the staff room to wait for teachers as they came through.

3. Some teachers were not willing to reveal their personal information despite the researcher explaining to them that the research was strictly for academic purposes. However, using persuasion and adequate explanation of what the research is about the researcher managed to convince the teachers to share their personal information.
4. Some teachers did not want to answer the questionnaire for free. Instead, they wanted to be paid some money. Such potential respondents were removed from the sample and were replaced with those willing to participate in the research free of charge.
5. The researcher administered the questionnaire to 110 teachers. However, 100 teachers answered the questionnaire accordingly while 10 did not. As such, 10 questionnaires were removed from the research because they contained unreliable data. Because of this, the sample of ordinary teachers was reduced from the initial 110 to 100 ordinary teachers. Even after removing 10 teachers a sample of 100 ordinary teachers was chosen because it was considered large enough to provide quantitative data for this research. This was in-line with the assumptions of The Central Limit Theorem (CLT). States that a random sample equal to or greater than 30 will give characteristics similar or almost similar to those of the population from which the sample is drawn. The larger the sample size, the lower the margin of error (Creswell, 1998).

3.15 Conclusion

In conclusion, this chapter has presented the methodology that was adopted for the research. The chapter focused attention on the type of research was an explanatory research, site of the research which was conducted in the primary education sector trade unions in Lusaka District. Then the research approach which used a mixed methods approach, research design of which the research adopted a non-experimental design, the sources of data the research used primary sources of data, population and sample size total sample of 116, comprising 16 trade union officials and 100 ordinary teachers. The trade union officials included one representative from the 10 schools that were selected, 3 union officials at district level from each union and 3 union officials at national level. Then when sampling the sampling methods used were multistage sampling method to sample ordinary teachers and purposive sampling to sample trade union officials. The methods of data collection semi-structured interviews were conducted with trade

union officials during collection of qualitative data. A questionnaire was used to collect quantitative data from ordinary teachers. To ensure the collected data was reliable internal consistency was ensured. The validity of data content validity was used in this research. For data analysis a computer programme called Statistical Package for Social Sciences (SPSS) was used to analyse quantitative data. Then qualitative data were analysed using narrative analysis. Finally, the chapter presents the limitations of the research.

CHAPTER FOUR

EFFECTIVENESS OF TRADE UNIONS IN PROVIDING COLLECTIVE STRENGTH TO TEACHERS IN THE PRIMARY EDUCATION SECTOR

4.1 Introduction

This Chapter presents and discusses research findings related to the first specific objective which reads: To examine the effectiveness of trade unions in providing collective strength to teachers in the primary education sector in Lusaka district. In order to achieve this purpose, the chapter is divided into six sections. The first section is the introduction. The second section looks at the methods of recruiting union members in primary education sector. The third section examines the level of unionisation in primary education sector. The fourth section looks at the reasons why some teachers do not belong to trade unions. The fifth section focuses on challenges faced by trade unions in recruiting members. The last section gives a conclusion of the chapter.

4.2 Trade unions' ability to recruitment teachers as members in the primary education sector

This research reveals that trade unions use various methods to recruit members in primary education sector. The first method involves workers being captured by the trade unions without applying for membership. Table 4.1 below shows that 55.2 per cent of the 96 unionised teachers were captured by the trade unions without themselves applying to become members. These teachers just discovered that they belonged to a trade union after noticing membership subscriptions being deducted from their pay slips. The use of this method means that the trade unions in primary education sector in Lusaka district use undemocratic methods to recruit members.

Table 4.1: Methods of recruiting union members

Methods used to recruit members	Frequency	Percentage (%)
I was just captured	53	55.2%
I applied to become a member	43	44.8%
Total	96	100%

The second method used to recruit union members involves the workers being asked to apply for membership. Table 4.1 above shows that 44.8 per cent of the 96 unionised teachers applied to become union members. The use of this method is confirmed by information provided by the union leaders. The General Secretary for BETUZ mentioned that:

As BETUZ we usually conduct worker education and sensitisations to deliberately familiarise teachers on union activities and benefits of belonging to BETUZ. Through worker education and sensitisation we end up recruiting new members. Whenever new teachers are recruited by the government, we always visit schools to educate new teachers on unionism and recruit those willing to join. The process of recruitment in the primary education sector is different from the local Council Gwasupika (2021) indicated that recruitment at local councils is done before commencement of work when one is filling out employment forms and the process depends on the position one is being employed on.

PROTUZ also uses the method of approaching the workers, explaining to them the benefits of joining the trade union and requesting them to apply for membership. The General Secretary for PROTUZ mentioned that “we usually visit schools to market the trade union and inform those who want to be members about the benefits of belonging to PROTUZ”. The union official added that:

Once the teachers have been informed about PROTUZ they freely request for membership forms and join the trade unions (General Secretary, PROTUZ).

NUPPEZ uses a similar method. The NUPPEZ Deputy General Secretary revealed that:

As NUPPEZ we market our union to the teachers by sharing our manifesto and all the relevant information about our union then conduct recruitment on a one-to-one basis with our teachers (NUPPEZ Deputy General Secretary).

Table 4.2 Methods of recruiting union members by different trade unions in the primary education sector

Methods used to recruit members	Teacher Trade Unions							
	BETUZ		ZNUT		PROTUZ		NUPPEZ	
	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
Just captured	22	57.89%	21	65.6%	4	28.57%	6	50.00%
Applied to be a member	16	42.11%	11	34.4%	10	71.43%	6	50.00%
Total	38	100%	32	100%	14	100%	12	100%

Table 4.2 shows that majority of the teachers belonging to BETUZ were just captured 22 out of 38 (representing 57.89%) as compared to those that just applied 16 out of 38 (representing 42.11 percent). Among teachers belonging to ZNUT, 21 out of 32 (representing 65.6%) of the teachers were just captured as compared to 11 out of 32 (representing 34.6%) that applied. Teachers belong to PROTUZ, 10 out 14 (representing 71.43%) were just captured as compared to those that applied 4 out 14 (representing 28.57%). Among teachers belonging to NUPPEZ 6 out 12 (representing 50%) just applied as compared to that applied 6 out 12 (representing 50%). The finding indicated that ZNUT has the highest number of teachers that are being captured among the primary education sector, and PROTUZ has the highest number of teachers that just applied among the primary education sector. Furthermore, the new knowledge that we get from this research is that all unions in the primary education sector use undemocratic means to recruit

their members either to a larger extent or to a lower extent. ZUNT is the most undemocratic unions because it captures more members than recruiting through application. In line with Gwasupika (2021) who indicated that unions use undemocratic means to recruit their members.

PROTUZ is the most democratic union in the primary education sectors because most of its members are recruited through application and least of its members are captured. On the other hand, Chishimba (2015) argues with these findings indicating that a union can only be democratic if it used democratic means of recruitment completely.

4.3 Level of Unionisation in the primary education sector

Table 4.3: Union membership

Belonging to a Union	Frequency	Percentage (%)
No	4	4.0%
Yes	96	96.0%
Total	100	100%

Table 4.3 above shows that the level of unionisation in primary education sector in Lusaka district is very high, standing at 96 per cent. Madimutsa (2016) indicates that some workers do not belong to trade unions in the formal sector. Gwasupika (2021) also indicates that the level of unions in local councils is at 95 per cent. Making the primary education sector higher than local councils. This implies that the unions are able to effectively recruit members in the primary education sector. Mishler (2014) argues that trade union membership has reduced drastically as a result of having stiff competition between unions, hence fighting for the same members. However, as noted earlier, the main method used by the unions to recruit members is undemocratic. Teachers are actually forced to belong to trade unions without being given the opportunity to choose for themselves. This implies that union leaders connive with management to effect deductions of union membership subscriptions without the consent of workers. These findings are in line with Gwasupika (2021) which indicates that trade unions concentration of power at the top is massive that is why they easily manage to recruit their members using undemocratic means.

In terms of the most dominant union, Figure 4.1 above indicates that BETUZ is the most dominant union with 39.6 per cent of the 96 unionised workers in primary schools in Lusaka district. This is followed by ZNUT at 33.3 per cent. The other two unions have less than 15 per cent of the union membership each. This finding suggests that BETUZ is more effective in recruiting members in primary schools. Looking at the type of union that BETUZ is, it can be argued that closed and restrictive unions are more attractive to primary school teachers than open and expansive unions. On the one hand, BETUZ restricts its membership to teachers in basic schools. On the other hand, the other three unions extend their membership to teachers at all the levels of education including secondary schools. This kind of openness towards membership recruitment makes them less attractive to primary school teachers. These findings are in line with Madimutsa (2016) who revealed that open and expansive unions increase conflicts and competition between trade unions.

Figure 4.1: Teacher membership distribution in the Unions in primary education sector

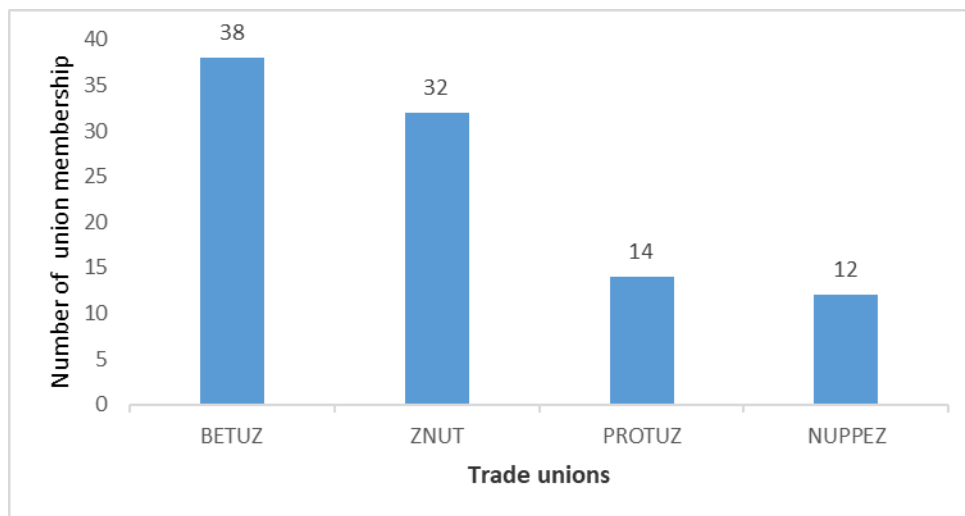


Table 4.4: Distribution of teachers who do not belong to trade unions

Marital status	Count	Percentage (%)
Single	1	25.0%
Married	3	75.0%
Widowed	0	0.00%
Divorced	0	0.00%
Total	4	100%

Although teacher unions have high membership there are also a few teachers who do not belong to unions. Majority of the teachers are married indicating 3 out of 4 representing 75 per cent are married and one out of 4 representing 25 per cent are single. The findings also indicate that none of the teachers are widowed or divorced. From the findings it shows that the people who join trade unions mostly are the young entrants whose financial pool is very limited hence they go to trade unions for financial help. Also, the married people these are people with so many responsibilities hence their financial muscle is strained so they go to their unions for financial help.

Table 4.5: Age of teachers who do not belong to Unions

Age	Count	Percentage (%)
Below 29	1	25.0%
30-39	1	25.0%
40-49	2	50.0%
Above 50	0	0.00%
Total	4	100%

Table 4.5 above indicates that the majority of teachers 2 out of 4 teachers representing 50 per cent of teachers are between the ages of 40 to 49 do not belong to a union. Also, one teacher between the ages of 30 to 39 representing 25 per cent. The findings also show that one out of four teachers representing 25 percent was below 29 years. Above 50 there was 0.0 per cent membership. This finding is in line with Madimutsa (2016) who indicates that some workers in the formal sector do not belong to Unions. Gad (1997) argues that age of trade unions membership does not matter but the fact that unions have been weakened by incorporation of union officials within government corporate structures, making it difficult for them to challenge reform measures adopted by the government which are detrimental to the welfare and sustained livelihood of teachers.

Table 4.6: Gender of teachers who do not belong to trade unions

Sex	Count	Percentage (%)
Male	4	100%
Female	0	0%
Total	4	100%

Table 4.6 indicates that the majority of teachers who do not belong to trade unions are male 4 out of 4 representing 100 per cent indicating that majority of males do not join trade unions. This is similar to a study conducted by Caver (2020) which indicated that over the recent years, trade union membership among women has increased significantly to the point where we now have more women than men who are current members of trade unions. However, the findings by Antonio (2003) are different indicating that there has not been any significant growth in women and youth participation in trade union for the twenty-six ZCTU affiliate only five have a membership of more than 50 per cent and these are in the female dominated sectors.

4.4 Reasons why some teachers do not belong to Trade Unions

Figure 4.2 below shows the reasons given by the four teachers who do not belong to trade unions. The major reason given by these teachers is that trade union leaders misused membership money received as subscriptions. The second reason is that trade unions do not add any value to the teaching profession. The third reason is a lack of information about trade unions. From these reasons, it can be noted that trade union resources are not used to promote the well-being of members.

Figure 4.2: Reasons why teachers do not join trade unions

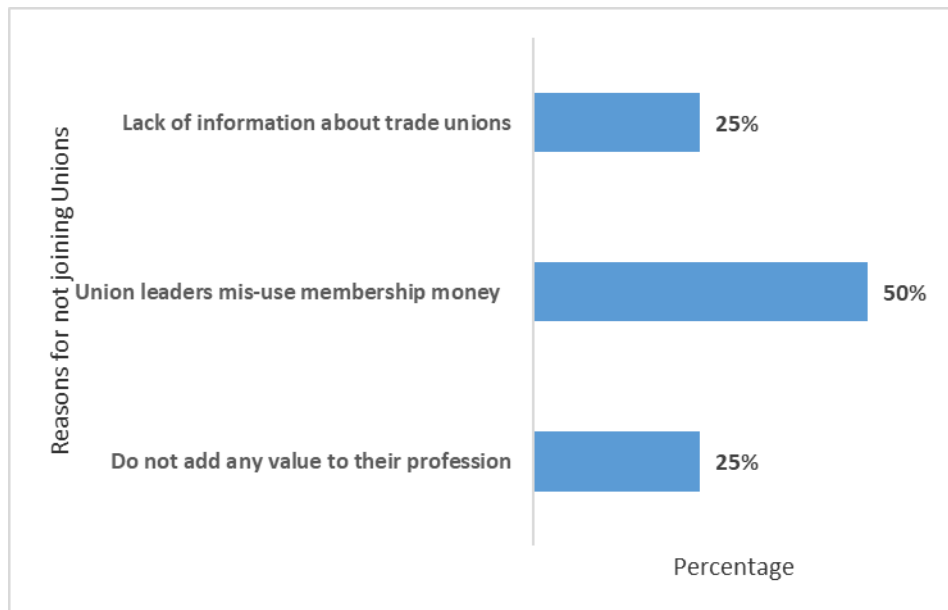


Figure 4.4.1 above shows that most of the Teachers 2 out of 4 (representing 50%) did not join trade union because they think trade union leaders misuse membership fees. Meaning the money that trade unions members contribute do not amount to the service that union leaders offer. One union member said the money that the money they contributed as members was too much compared to the services they received. Followed by one out of 4 teachers (representing 25%) said they do not belong to unions because of lack of information about trade unions. Meaning the union leaders did not visit their teachers in schools on a regular basis to sensitise them about unions. One out 4 teachers (representing 25%) said they did not belong to a union because a trade union did not add any value to their profession. Meaning teachers did not benefit from union services.

4.5 Challenges faced by trade unions to provide collective strength to strength teachers

There are five major challenges faced by union leaders to recruit members in the primary education sector. The first challenge is lack of resources. One of the union leaders said that:

Having limited resources may sometimes lead to failure to deliver the demands of teacher (General Secretary, NUPPEZ).

A similar response was given by another union leader who said that:

There are a lot of challenges that unions face like having very limited resources compared to the vast problems that teachers have. Other than that, the government takes long to remit these contributions, which makes it hard for the union to function accordingly (Secretary General, ZNUT).

The second challenge facing union leaders to recruit members is competition among the unions. One union leader revealed that:

The challenge the union faces during recruitment is that there is high competition among unions. Different teacher trade unions want more members to join them hence, there is a scramble for teachers to join these unions (General Secretary, NUPPEZ).

The third challenge is the resistance from some teachers. The General Secretary of NUPPEZ indicated that:

There is opposition from new teachers who are difficult to convince on the benefits of joining a Trade union (General Secretary, NUPPEZ).

The fourth challenge facing union leaders to recruit members is difficulties of accessing remote parts of the country. A union leader stated that “as a union we lack transport to reach out to the rural parts of the country. This has resulted in having very few teachers in rural areas belonging to unions” (Deputy Secretary General, BETUZ).

The fifth challenge faced by union leaders was the recruitment of members that lacked coordination between the trade unions and management. One trade union leader mentioned that:

Human resource personnel take a long time to do inputs or start deductions of union membership fee from the new members. There is also a lack of coordination among these end users because in some instances, you may find that different unions are deducting from one union member. This poses a challenge and may be discouraging to new teachers wanting to join unions (General Secretary, PROTUZ).

4.6 Conclusion

In conclusion, trade unions have to a larger extent the ability to recruit members in the primary education sector. The research established that trade unions use two methods to recruit members in the primary education sector. It has been established that unions mainly use application which teachers do after worker education, sensitisation and marketing. The other method trade unions use to recruit members through capturing whereby a teacher only discovered the deduction of union subscription on their pay slip without their concern. The research established that trade unions were more effective in recruiting members in primary schools. This was so because the results obtained from this study indicate that the majority of teachers belonged to a trade union. Also, it was established that trade unions that were more restrictive in structure had a larger membership compared to trade unions that were open. However, the teacher recruitment in terms of belonging to a trade union was undemocratic because trade union leaders enlisted union members without their consent through capturing. The research also established that though trade unions had the ability to recruit teachers they also had teachers who did not belong to trade unions. Other than that, trade unions also faced with a number of challenges such as limited resources, competition among trade unions to get more members, trade union officials unable to reach the rural areas and a lack of coordination between human resource personnel and management.

CHAPTER FIVE

EFFECTIVENESS OF TRADE UNIONS IN IMPROVING WAGES FOR TEACHERS IN THE PRIMARY EDUCATION SECTOR

5.1 Introduction

This Chapter presents and discusses research findings relating to the second specific objective which reads: To analyse the effectiveness of trade unions in improving wages for teachers in the primary education sector in Lusaka district. To achieve its purpose, the chapter is divided into six sections. Section one gives an introduction while section two looks at trade unions' approach to collective bargaining in the primary education sector. Section three discusses the extent to which collective bargaining meets workers' demands. Section four will discuss the extent to which primary school teachers are happy with the collective bargaining process. Section five will focus on the challenges faced by unions during collective bargaining. Section six is the conclusion of the chapter.

5.2 Trade unions' approach to collective bargaining in the Primary education sector

The main strategy used by trade unions to improve wages for teachers in the primary education sector was to engage in collective bargaining with employers. The trade unions use a three-step approach to collective bargaining in the public primary education sector. The steps in this approach are meeting union members to hear their demands, consolidating the demands and presenting them to the government, and bargaining with the government. The details of these steps are discussed below.

5.2.1 Meeting teachers to hear their demands

The first step taken by the trade unions in the collective bargaining process involves trade union leaders meeting their members in primary schools to hear their demands. ZNUT General Secretary indicated that:

Before the collective bargaining process with the government, we hold meetings with our members in schools although attendance is usually poor from the teacher members. We still hold meetings to know our members' grievances and demands. Our union attaches great importance to holding meetings with teacher members. The union tries to hold meetings at least twice a year.

The findings are similar with that of Waurika (2021) who indicated that at local Councils' negotiations started at branch level to encompass the trade union officials and their members. This was done in order to know trade union members' grievances and demands that they needed. This was done in order to address the issues that affected workers.

Figure 5.1: Whether or not teachers presented demands to union officials

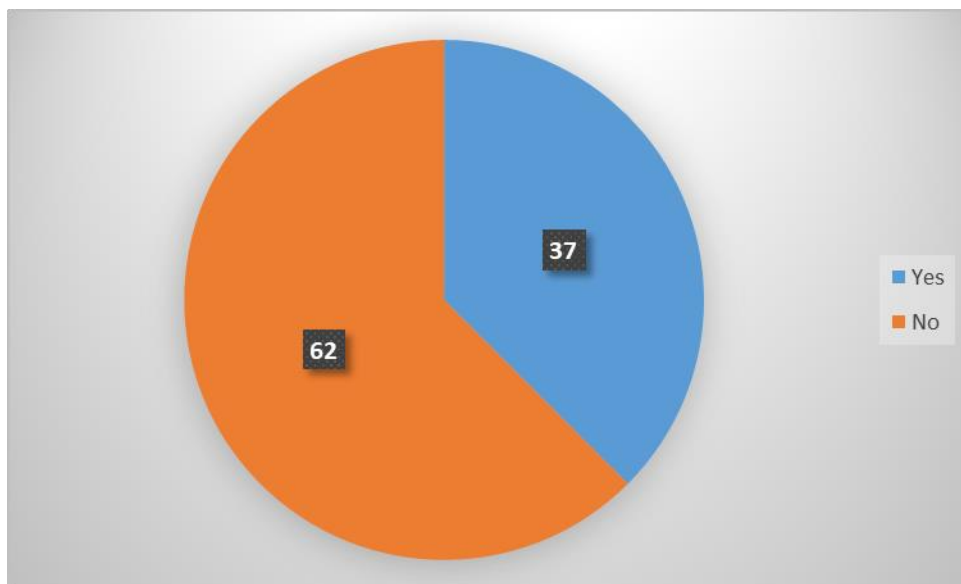


Figure 5.1 above indicates that the majority of teachers 60 out of 96 (representing 62%) did not present anything while a few teachers 36 out of 96 (representing 37%) presented demands to trade union leaders. This finding indicated that the level of activism among teachers was very low. This was because only less than half of the teachers presented demands to their trade union leaders. These findings are in line with those of Chishimba (2015) who revealed that the level of activism among trade unions in the private sector was higher than trade unions in the primary education sector. This was so because 75 per cent of members in the private sector presented

demands in the previous collective bargaining process compared to 37 per cent of teachers in the primary education sector

Figure 5.2: Demands that teachers submitted to their union leaders

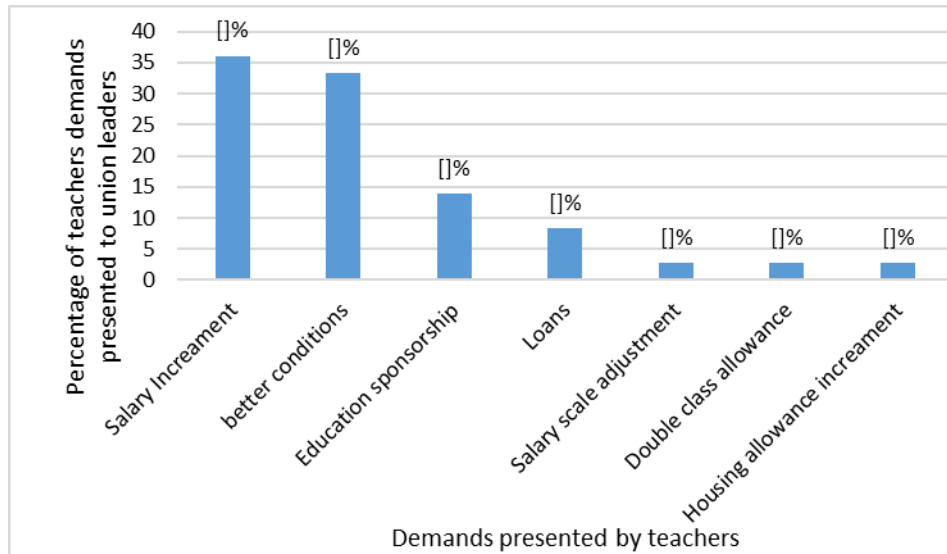


Figure 5.2 indicates that 13 out of 36 teachers (representing 36%) presented salary increments. Then 12 out of 36 teachers (representing 33%) teachers indicated that they wanted better conditions of service. Also 5 out of 36 teachers (representing 14%) indicated that they presented education sponsorship. Then 3 out of 36 teachers (representing 8%) presented loans also one out of 36 teachers (representing 3%) salary scale adjustment. While one out of 36 teachers (representing 3%) indicated double class allowance. Then one out of 36 teachers (representing 3%) indicated housing allowance increment.

The demands that trade union official presented include Salary increment, health insurance, salary scale adjustment, funeral insurance. The demands that union officials submitted to the government are different from the demands that teachers presented (NUPPEZ Union Official Based at School).

These findings are similar to Chishimba’s (2015) findings that also indicated that trade union officials did not always present what trade union members demanded for all because of a lack of having meetings between teachers and trade union officials which resulted into poor communication leaving teachers feeling neglected by their trade union officials.

5.2.2 Consolidating teachers' demands and presenting them to the government

The second step involves different teacher trade unions meeting to come up with a consolidated list of demands that they present to the government. The trade unions discuss and debate issues that affect the teachers and then choose the most critical issues that need immediate attention after which all the trade unions agree with the consolidated demands. Some of the demands that trade unions submitted to the government include salary increment was on top of the list because all the trade unions submitted it, followed by health insurance which was mentioned by both ZUNT and BETUZ. The next demand was the salary scale adjustment which was mentioned by NUPPEZ and PROTUZ. The other demands that were mentioned by all union leaders are increased funding by the government that responds to the needs of the trade unions and funeral insurance to be extended to parents of trade union members. Unfortunately, the demands that the trade union officials presented were not representative of what the trade union members wanted. This was so because some of the demands that trade union leaders presented did not come from teachers like funeral insurance extension to include parents of trade union members, health insurance and increased funding for trade unions. This indicated that trade union leaders were not representative of their teachers instead preferred to present their own demands to the government for collective bargaining.

5.2.3 Bargaining with the government

The third step involves the trade union's negotiating with the government. Annually, the trade union representatives meet government representatives to determine teachers' salaries and other working conditions. Once an agreement was reached with the government, the trade unions sign the collective agreements on behalf of their members and communicate accordingly. The Secretary General for NUPPEZ said that:

“Bargaining is a give-and-take process to be able to capture the real value and satisfy both parties' interests, there is need to build a lasting relationship between the union and the government in order to get a fruitful outcome”.

Wagaki (2010) argues with these findings when indicated that trade union officials in Kenya do not believe in unionism being a give and take instead, it is a situation of getting from the

employer what trade union members demand for in order for the trade unions to thrive. This is why trade unions advocate for their members, create alliances with organisations in order to strengthen their voice and build their teachers professional performance. All this is in a venture to improve wages and improve the wellbeing of their workers.

5.3 Extent to which collective bargaining meets teachers' demands

Figure 5.3: whether demands were met or not

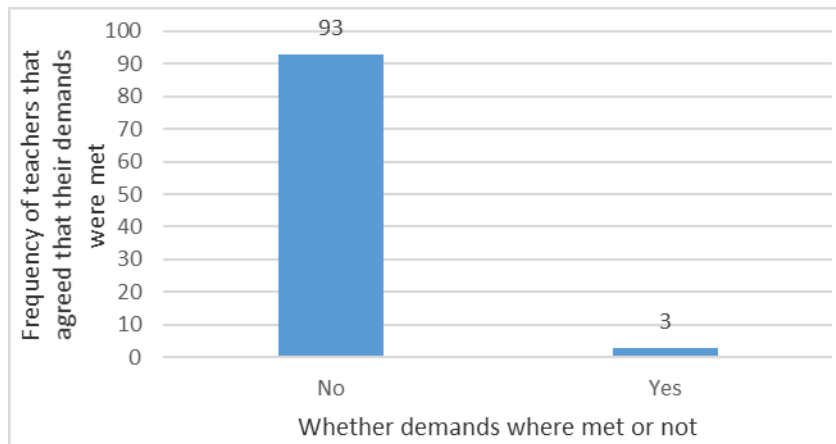
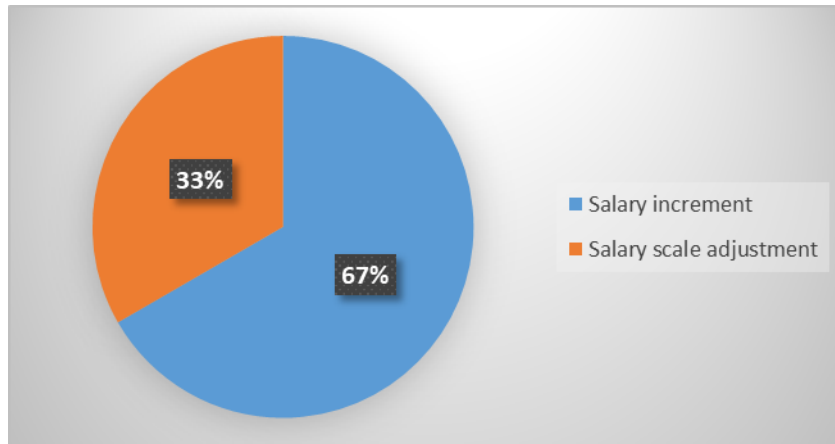


Figure 5.3 shows whether the demands that teachers presented to their union leaders were met or not. The majority of the teachers 93 out of 96 (representing 96.9%) indicated that the demands that they presented to union leaders were not met. Nanjakululu (2016) argues that teachers' demands should be met because good education rests in the hands of the teaching force. The teaching force is one of the most important resource in the primary education sector, because primary teachers helps build the educational foundation of a child. While the least number of teachers 3 out of 96 (representing 3.1%) indicated that the demands they presented to their union leaders were met. The gap between the demands that were met and the demands that were not met is huge hence, the results imply that it was to a lesser extent to which demands were met because very few teachers indicated that their demands were met. Gwasupika (2021) who argues that the services provided by trade unions are not enough to meet member's needs. Member's needs are satisfied if there is reduction in the need for services. Trade union members are happy with collective bargaining only if union officials demand for issues that affect trade union members such as salary increment and this demand is awarded accordingly. However, in the primary education sector the demands of teachers are not met because trade union officials

are not aggressive enough to put the interest of their teachers. Instead they put their own interest first at the expense of trade union members.

Figure 5.4: Demands that were met



Several demands were presented to trade union leaders but the results from this research indicated that only two demands were met as indicated by three teachers. Figure 5.4 show that 2 out of 3 teachers (representing 67%) indicated that salary increment was met while 1 out of 3 teachers (representing 33%) indicated that salary scale adjustment was met. What was awarded was too little compared to what was presented. All the trade union leaders indicated that the demands that they managed to secure when the collective bargaining process came to an end is salary scale adjustment and salary increments then the demands that they failed to secure included health insurance, increased funding by the government that responds to the needs of the unions and funeral insurance to be extended to parents.

ZNUT General Secretary indicated that union members had requested for 15 percent salary increment. However, 5 per cent was given to teachers after collective bargaining. Meaning 10 per cent difference from the demands that the union members requested for. Which makes the demand given to union members to be little.

These findings are similar to that of Kakunta *et al.* (2020) who indicated that even though unions provide wages for their teachers, trade unions are not doing their job satisfactorily because they are reluctant during collective bargaining. Indeed, unions are not doing their job

because what was requested for by the teachers was 15 per cent but what the unions managed to secure was 10 per cent lower. It can be safely said that unions in the primary education sector are somewhat effective when it comes to provision of increased wages.

5.4 Extent to which primary school teachers are happy with the collective bargaining process

Table 5.1: level of Satisfaction with previous collective bargaining.

Satisfied with collective bargaining	Frequency	Percentage
Yes	3	3.1%
No	93	96.9%
Total	96	100%

Table 5.1 show that the level of satisfaction in the previous collective bargaining was very low, 3 out of 96 (representing 3.1%) were happy with the way unions handled the previous collective bargaining process. Then 93 out of 96 trade union members (representing 97%) were not happy with the way trade unions handled the previous collective bargaining process. The findings indicate that there are more workers who are satisfied with the collective bargaining process of their trade union officials at local councils. According to Gwasupika (2021) level of satisfaction with the way unions handled collective bargaining is at 42 per cent compared to the primary education sector which is at 3.1 per cent. The findings indicate that to a larger extent teacher were not happy with how union leaders handled the previous collective bargaining process in the primary education sector. The reasons for trade union members' dissatisfaction in the previous collective bargaining process are presented in the Figure 5.5 below 5.5.

Figure 5.5: Reasons for not being happy with the previous collective bargaining process

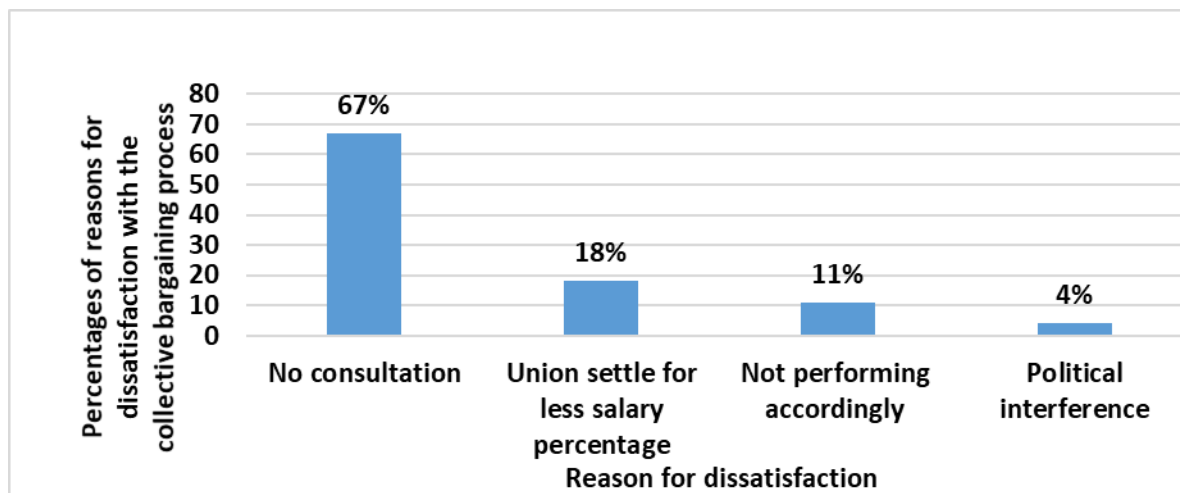


Figure 5.5 shows the reasons for not being happy including; Teachers not being consulted 62 out of 93 (representing 66.7% percent). No consultation means that union leaders do not visit their teachers to find out about their needs and challenges, and there is no communication between union members and their union leaders. This finding is in line with Nchimbi (2018) who indicated that union members feel that there is poor communication between union members and union leaders, this makes union members feel marginalised by their leaders. The findings by Nchimbi are similar with that of Lash (2016) who shows that trade union officials have proven to be bad communicators all because they did not usually consult with their members on a lot of issues making it hard for both trade union officials and trade union members to reach a consensus on a lot of issues.

Also, teachers were not happy with the way the trade union leaders handled the previous collective bargaining process due to trade unions settling for a less percentage 17 out of 93 (representing 18.3%). This means that salaries were increased but the increment was of a very minimal percentage. Also, the other reason why teachers were not happy with the way the trade union leaders handled the previous collective bargaining process was that trade unions were not performing accordingly 10 out of 93 (representing 10.8%). Not performing accordingly meant that the trade unions did not meet their intended objectives and trade union leaders did not work to meet the expectations of their trade union members. This finding was in line with Nyarko's (2010) findings who indicated that trade unions in both the public and private sectors of Ghana

were not happy with the way trade union officials handled collective bargaining. He indicated that the trade unions took a long time to resolve issues affecting their members. That trade unions were too casual and lacked seriousness during negotiations. The least number of teachers were not happy with the way the trade union leaders handled the previous collective bargaining process because of political interference 4 out of 93 representing 4.3 per cent. What this meant was that teachers felt that trade union leaders did not work independently but got instructions from the government. This finding is in line with Simuyaba's (2011) who suggested that trade unions should forgo the closer links with political parties but build their own strategic alliances with the civil society organisations in order to influence public policy. If public policies are not handled well they adversely affect the well-being of trade union members and the nation at large.

5.5 Challenges faced by unions during collective bargaining

There are five major challenges faced by trade union leaders during collective bargaining. The first challenge is inadequate funds from the government. One of the trade union leaders said that:

The major challenge faced by trade unions is having limited resources which cripples trade unions. Trade unions fail to perform accordingly concerning service delivery as a result of having inadequate resources. Even if they put in their best as long as the funds are limited unions fail to perform and in the long run lose the trust and confidence of their union members (NUPPEZ Deputy Secretary General).

This challenge is similar to that of Ndiritu's findings (2015), who indicated that the lack of finances was one of the greatest challenges faced by trade unions in Western Europe but was overcome by creating partnerships and having multiple sources of income rather than relying on the government.

The second challenge that trade unions faced was the multiplicity of trade unions, which divided and weakened them during collective bargaining.

Having so many unions breeds a lot of competition among trade unions and having so many trade unions negatively affected collective bargaining because trade unions lost trust from the government. Which has led to trade unions to brand themselves but this has also negatively affected the government winning trust in these many unions (General Secretary, BETUZ). Having many unions breeds competition and conflicts as indicated by Madimutsa (2016) who revealed that having open and expansive unions increase conflicts and competition between trade unions.

Lash (2016) indicated that trade unions which are centralised are more likely to be successful in promoting the general will of the membership. Though trade unions are able to recruit members and strengthen their collective power, they are faced with problems such as lack of consensus among trade union members causing conflicts to be experienced by trade unions and having limited power by law.

The third challenge that trade unions faced was political interference during the collective bargaining process. One trade union leader indicated that:

Separating politics from the government is hard because these politicians are our bosses even when we bargain we do it cautiously because one does not want to lose their job. But there is a need to separate politics and trade unionism during collective bargaining (Deputy General Secretary, NUPPEZ).

The findings are similar with what Madimutsa (2016) revealed that trade unions need to separate themselves from any form of political influence. This was because political influence adversely affected the policy decisions of trade unions and in the long run negatively affected

the trade union members. Trade Union members also had to put pressure on their trade union officials so that they effectively participated in the collective bargaining processes on their behalf. If this was done, it would strengthen the collective bargaining power of trade union members.

The fourth challenge that trade unions faced was mistrust from their trade union members. One trade union leader indicated that:

Union members do not trust their leaders because they think their leaders do not satisfy their needs instead they work to satisfy the needs of the government (PROTUZ Union Official Bases at School). These findings are in line with Nchimbi (2018) who reveals that many union members think that the union leaders do pursue their own interest at the expense of its members. Trade unions need to win the hearts of its members through effective collective bargaining.

Madimutsa (2016) asserts that decentralised collective bargaining is expensive and time consuming for trade unions. However, having several bargaining units strengthens the bargaining power of trade unions. Furthermore, a decentralised bargaining structure leads to union members having different conditions of employment.

The fourth challenge that trade unions faced was employers resisting demands that trade unions submitted during collective bargaining. One trade union leader revealed that:

Employers resist some of the demands that we submit and these demands are what the teachers want but if our employers keep shutting them out we will seem to be failing in our duties as union leaders (ZNUT Secretary General). If trade unions effectively bargain they win the hearts of its members. Shretha (2012) revealed that trade unions have significant impact on members when it comes to fighting for workers' salaries and conditions of service. This is so because

unions that negotiated more and sign collective agreements which benefit workers draws a lot of members. Which ultimately enhances the working conditions of the workers. This has made members of trade union to believe that joining a union increases wages, as one of the most important factors in improving their daily life and well-being.

5.6 Conclusion

In conclusion, trade unions are somewhat effective in the provision of wages to their teachers. To achieve this, trade unions engaged in collective bargaining. Trade unions used a three-step approach in collective bargaining. The steps involved in this approach are meeting trade union members to hear their demands, consolidating the demands and presenting them to the government and bargaining with the government. The research established that more than half of the teachers did not present any demands to trade union officials. Further several demands were presented to trade union leaders by teachers and these demands include salary increments, better conditions of service, education sponsorship, loans, salary scale adjustment, double class allowance and housing allowance increment. However, only two demands were met which are salary increment and salary scale adjustment as indicated by a few teachers. The findings indicate that 93 out of 100 per cent indicated that the demands were not met. Then 3 out of a 100 per cent indicated that the demands were met. The research also established that all trade union members those whose demands were met and those whose demands were not met, were not satisfied with the way trade union officials handled the previous collective bargaining process. Therefore, four reasons were identified as to why teachers were not happy with the previous collective bargaining in which there were no consultations, trade unions settle for a less percentage in salary increase, they did not perform accordingly and was characterised by political interference. In addition, the research also established several challenges that trade union leaders faced during collective bargaining which are limited resources, union leaders being mistrusted by trade union members, political interference and employers resisting demands.

CHAPTER SIX

EFFECTIVENESS OF TRADE UNIONS IN PROVIDING MEMBER SERVICES TO TEACHERS IN PRIMARY EDUCATION SECTOR

6.1 Introduction

This Chapter presents and discusses research findings related to the third specific objective which was to assess the effectiveness of trade unions in providing member services to teachers in the primary education sector. To achieve its purpose, the chapter is divided into five sections. Section one gives an introduction. Section two looks at member services that trade unions are supposed to provide to teachers. Section three discusses the extent to which teachers are happy with member services provided by trade unions. Section four focuses on challenges faced by trade union officials in providing member services. Section five is the conclusion of the chapter.

6.2 Member services that trade unions are supposed to provide to teachers

The services that trade union officials from the primary education sector are supposed to provide for their member are both financial and non-financial services. Non-financial services include training workshops, union branded clothes, health insurance, rewards, fight against casualisation of labour and legal representation. Financial services include loans, educational sponsorship, help with capital projects and bargaining for housing, double class and settling allowances. These findings are similar with the findings by Madimutsa (2016) who indicated that the member services that trade unions provide to their members in the public sector include financial and non-financial services. The member services that trade unions provide to teachers in the primary education sector were an incentive for teachers by virtual of belonging to a trade union. Teachers qualify to have access to these services equally and without bias.

6.3 Extent to which primary school teachers receive member services from their union

Figure 6.1: Primary school teachers receiving member services from their unions

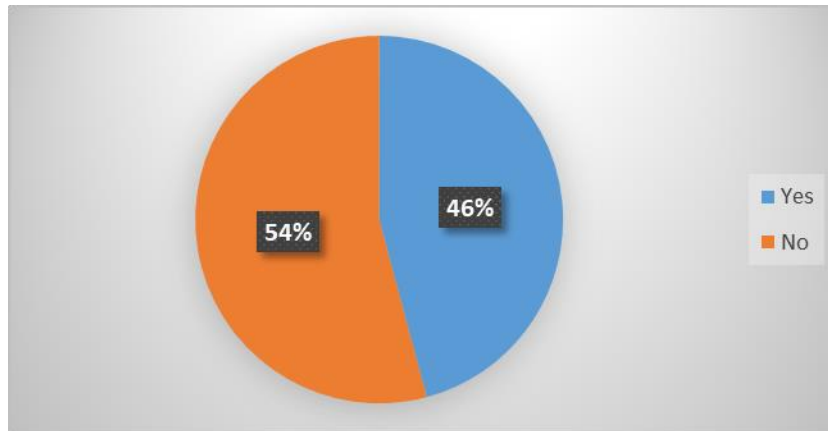


Figure 6.1 shows that 52 out of 96 teachers (representing 54%) of the primary education sector indicated that they did not receive any member services from their union. Only 4 out of 96 teachers representing 46%) indicated that they received welfare services from their trade union. This finding implies that trade unions in the primary education sector do not provide member services to most of their teachers. The findings indicate that the primary education sector's provision of member services is higher 46 percent compared to the public service unions which is at 32 percent Madimutsa (2016). Though the member services are provided these services do not satisfy the needs of the teachers.

Table 6.1: Receiving member services versus age group of teachers

Age Group	Yes	No	Total
29-39	28	31	59
40-50	16	21	37
Total	44	52	96

Table 6.1 shows that despite most teachers in both age groups not receiving member services, those aged between 29-39 years had a higher chance of receiving the services than those aged between 40 to 50 years. From Table 6.1, it can be noted that those who received the services in the age group of 29 to 39 years were 28 out of 59 teachers (representing 47.8% of the teachers

in that age group). This was in contrast to 16 out of 37 teachers in the age group of 40 to 50 years (representing 43.2% of the teachers in that age group). This means that the unions are pro-younger teachers in terms of provision of member services than the older teachers. The sample did not have any teacher above 50 years. Therefore, the results cannot be generalised to teachers above 50 years. The findings by Hollup (2004) indicate that age does not matter when it comes to accessing member services. All trade union members should have access to these services without fear or favour because the member services are an entitlement to all union members. If the member services are distributed equally, it becomes a driving force to motivate more members to join unions. However, these member services do not come for free they need a strong financial capacity of unions hence member service provision has proven to be a challenge to most trade unions who are financially weak.

Table 6.2: Receiving member services by gender

Gender	Yes	No	Total
Male	13	13	26
Female	31	39	70
Total	44	52	96

Table 6.2 shows that although most of the teachers did not receive member services from their unions, males had a higher chance of receiving the services than females. From Table 6.2, it can be noted that 50 percent of the males received the services (13 out of 26 males) compared to 44.3 percent of the females (31 out of 70 females). This implies that the trade unions are pro-male teachers in terms of provision of member services to members. Male receive member services more than females this is because most men are more persuasive and convincing compared to female regardless of having more female members. Males are still more dominant when it comes to accessing member services however, Madimutsa (2016) argues that there is need for equitable distribution of member services between male and female union members.

Table 6.3: Receiving member service by marital status

Marital Status	Yes		No	
	Frequency	Percentage	Frequency	Percentage
Single	7	53.8%	6	46.2%
Married	37	46.8%	42	53.2%
Widow(er)	0	0.0%	2	100.0%
Divorced	0	0.0%	2	100.0%
Total	44	45.8%	52	54.2%

Table 6.3 shows that teachers who were single are starters their financial pool is limited they stand a chance of seeking member services. Married people also have many problems and responsibilities they may have dependants and children to take care of so their finances are limited married people's option is to go to their unions for financial help. This is in line with (ZNUT Union Official Based at School) who revealed that limited finances are what causes the single and married seek member services to the unions compared to the, widowed or divorced.

Table 6.4: Receiving member services by the number of years worked.

Number of years worked	Yes		No	
	Frequency	Percentage	Frequency	Percentage
1-5	4	80.0%	1	20.0%
6-10	9	39.1%	14	60.9%
11-15	13	50.0%	13	50.0%
16-20	6	42.9%	8	57.1%
above 20	12	42.9%	16	57.1%
Total	44	45.8%	52	54.2%

Table 6.4 shows that majority of teachers who had worked for one to 5 years indicated that they had received member services at 80 percent. Meaning the younger ones whose financial pool was limited were more likely to visit trade unions for financial help. Followed by those who had worked for 11 to 15 years indicated that they had received member services at 50 percent. Those who had worked for 16 to 20 years and above 20 years indicated that they had also received the member services at 43 percent each. While the number of teachers who had worked for 6 to 10 years indicated that they had also received member services. Kakunta *et al.* (2020) argue in their

findings indicating that age did not matter when it comes to accessing member services, all teachers who belong to trade unions are entitled to equal member services.

NUPPEZ official based at the school reveals that member services are what draws teachers to join unions. This is why unions brand themselves in a way that they market themselves. This is done by use of attractive member services like international travel trips, entrepreneurship training and financial assistance which attract potential members and make them join trade unions.

Bryson (2007) disagreed with these findings indicating that effective collective bargaining was what drew teachers to trade unions. Also, increased wages on teachers reflected trade union bargaining strength and motivated non-union members to join trade unions.

Figure 6.2: Types of member services received by teachers from their unions

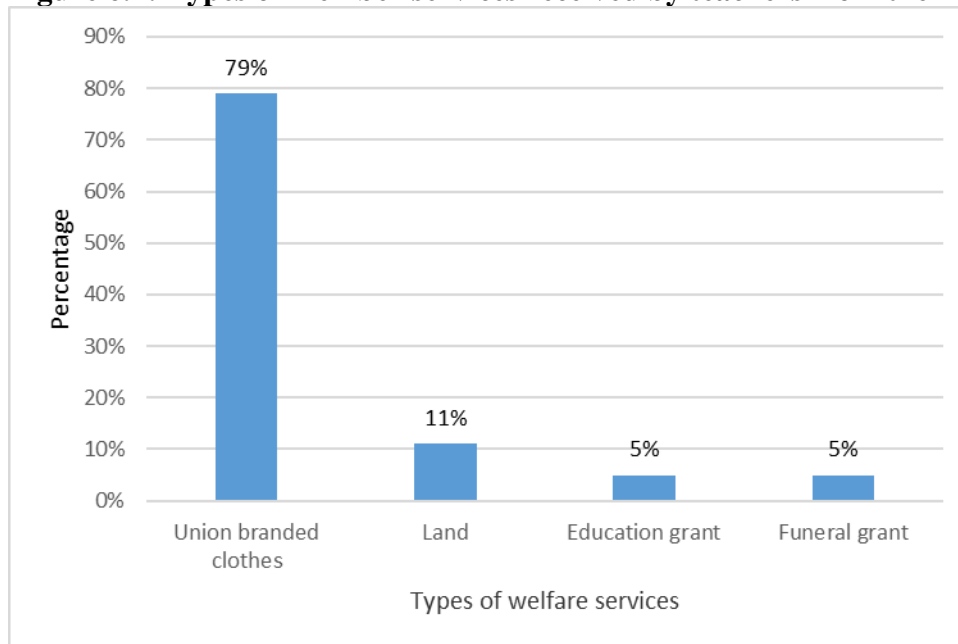


Figure 6.2 shows that the major services offered to teachers by their trade unions were union branded clothes. These clothes include *chitenge*, shirts, T-shirts and face masks. This service was received by 35 out of 44 who had received member services from the unions (representing

79 percent). This was followed by those who received land (11%). The least popular services were education and funeral grants which accounted for 5 percent each.

ZNUT Union Official Bases at School indicated that the provision of these services such as branded clothes was done annually. This was done so that members could wear branded clothes whenever they had trade union events like teacher's day or the annual general meeting. PROTUZ Union Official based at Schools indicated that in some cases, the provision of services such as education and funeral grants depended on the availability of funds. Also, the frequency of provision of these services was dependent on the availability of funds. These findings are similar with those of Madimutsa (2016) who indicated that adequate funding was trade unions' driving force. This was why trade unions in the private sector built alliances with other organisations in order to strengthen their financial base and to cushion their financial burden. Trade unions in the private sector ensured adequate and effective provision of member services and these services were both financial and non-financial member services.

6.3 Extent to which teachers are happy with member services provided by unions

Figure 6.3: Whether teachers are happy with the member services that the union offer to their members

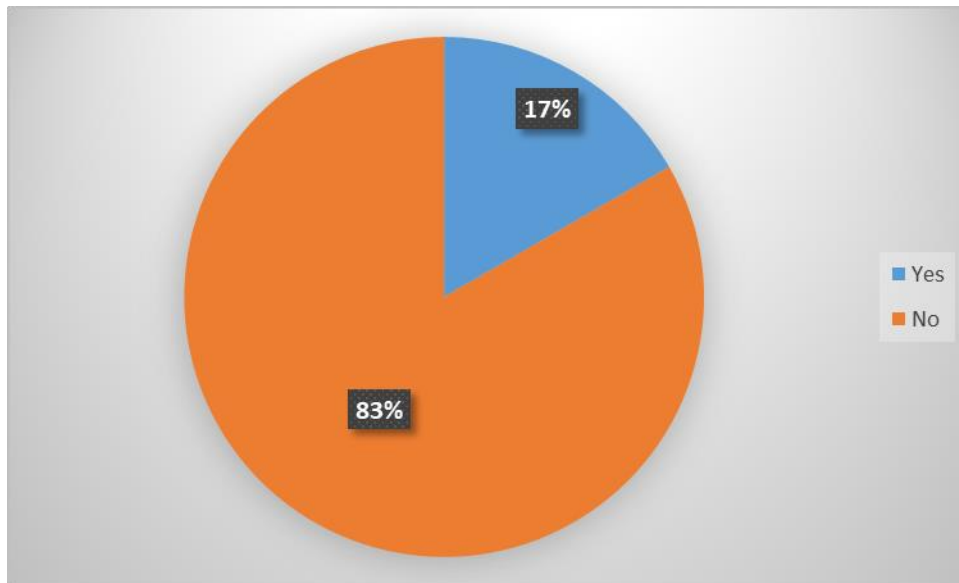


Figure 6.3 shows that the majority of the teacher's 80 out of 96 teachers (representing 83%) indicated that they were not happy with the member services that the trade unions offered to their members. Only 16 out of 96 teachers (representing 17%) indicated that they were happy

with the services the trade unions offered to their members. The research finding indicated that trade unions in primary schools were ineffective in the provision of member services to their members.

PROTUZ official based at school reveals that the majority of union members in the primary education sector are unhappy with the member services that trade unions offer to their members. This is so because teachers feel that union officials do not take teachers demands seriously. In instances where teachers submit demands the demands are not considered. Additionally, there is so much power on the top making it hard for union officials to work together with the ordinary teachers.

Figure 6.4: Reasons for teachers' unhappiness with member services

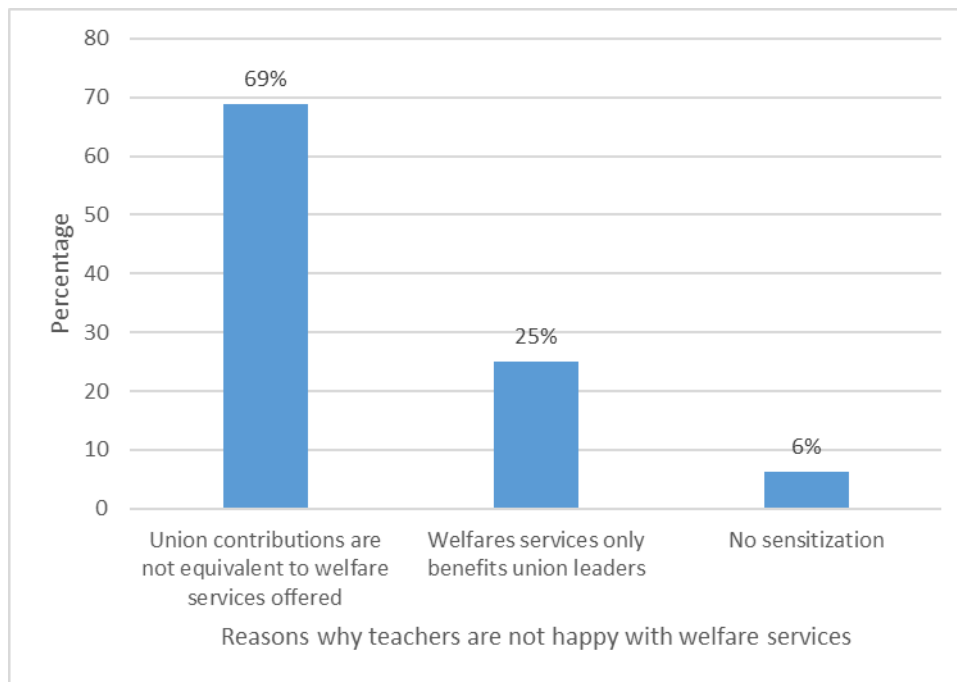


Figure 6.4 shows that the major reason for teachers' unhappiness with the member services provided by the trade unions was that their membership contributions to the trade unions were not equivalent to the member services that were offered to them. This reason was given by 55 out of 80 teachers (representing 69%). This meant that the members felt that they pay more to

the unions than the services they receive. This reason was followed by member services only benefited trade union leaders, 20 out of 80 (representing 25%) of the teachers indicated that they were not happy because they felt that their members service benefited union officials instead of its members. These findings are in line with Gwasupika (2021) who indicated that trade union leaders faced a number of challenges in providing member services to their members. These challenges were lack of finances, political influence and lack of support from both management and trade union members. Lack of satisfaction was the least reason for teachers' unhappiness with the member services provided by trade unions. This reason was given by 5 out of 80 teachers (representing 6%). These findings are similar to those of Nyarko's (2010) who indicated that though trade unions provided all member services, the members were not satisfied with the level at which these services were provided. No sensitisation meant that trade union leaders did not visit schools to sensitise teachers on how they can access member services.

6.4 Challenges faced by union officials in providing member services

There are three major challenges faced by trade union officials in providing member services to their members in the primary education sector. The first challenge was limited resources. One of the trade union leaders said that:

Having limited resources limits us from exploiting our full potential this is because different union members have so many financial problems to cater to their members' needs satisfactorily. The percentage that trade unions get from union subscriptions is too little to cater to the needs of teachers. Further, providing adequate services to union members is dependent on having a very strong financial muscle which most unions lack (Secretary General, ZNUT).

Financial problems facing the trade unions were worsened by employers who delayed to remit members' subscriptions to the trade unions. The Secretary General of PROTUZ mentioned that:

"the government takes long to remit these contributions which makes it hard for the unions to function accordingly. Unions may seemingly not

meet teachers' needs. This is all because of limited finances which are not remitted on time".

The findings are similar to Chishimba's (2015) who indicated that the general feeling from the majority of teachers was that, local trade union representatives did provide member services for their members. However, the member service provision was not adequate for the teachers at school level. This was because the government took long to remit these contributions.

The second challenge faced by trade union leaders was lack of a social security policy that guided trade unions on member services. PROTUZ union official based at school said that:

Because of lack of a social security policy, trade unions lack awareness of how far they can go when it comes to the provision of member services. This is so because trade unions lack a guiding policy on these welfare services. Hence most unions will try to give more than they can afford as a way of trying to satisfy the needs of their members (Deputy General Secretary, BETUZ).

The third challenge that trade union leaders faced was lack of demand for the services from members. One trade union leader mentioned that:

BETUZ General Secretary revealed that union members generally lack information on member services in urban areas. Worse still in rural areas. Which is as a result of inadequate sensitisation on these member services. Hence, most union members do not demand for these services.

The findings of Nchimbi (2018) revealed that trade union members felt that there was poor communication between trade union members and trade union leaders, this made union members to feel marginalised. Hence, the need for effective communication between trade union officials and trade union members was inevitable.

6.5 Conclusion

Trade unions in the primary education sector are somewhat effective when it comes to providing member services to their members. These include union-branded clothes, land, education sponsorship and funeral grants. However, the extent to which trade union members received these services was low. This was so because the findings indicated that 46 out of a 100 per cent of teachers received member services compared to 56 out of a 100 per cent who did not receive member services. The few services that were offered were also not evenly distributed. The trade unions tended to be pro-younger members, pro-male, pro-single and pro-number of years worked from one year to 5 years. This level of service provision resulted in the majority of the teachers being unhappy with the member services offered by the trade unions. There were three major reasons for teachers' unhappiness with the member services. Teachers felt that the member services were less than their membership contributions, member services benefited trade union leaders only and they lacked sensitisation on the services offered by their trade unions. There were three challenges faced by trade union leaders in the provision of member services to the trade union members. These were limited resources, lack of a social security policy to guide the trade unions on member services and lack of demand for the services from members.

CHAPTER SEVEN

SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

7.1 Introduction

The purpose of this Chapter is to present the summary of conclusions and recommendations of the Dissertation. In order to achieve its purpose, the Chapter begins with a presentation summary of conclusions. Thereafter, recommendations are given.

7.2 Summary of Conclusions

The conclusions are presented in line with the objectives of the research. The first specific objective of the research was to examine the effectiveness of trade unions in providing collective strength to teachers in the primary education sector of Lusaka district. The conclusions regarding this specific objective show that trade unions have to a larger extent the ability to recruit members in the primary education sector. This is so, because 96 out of 100 teachers belong to a trade union and 4 out of 100 per cent of teachers do not belong to a union. The research has established that unions use two methods to recruit members in the primary education sector. It was established that unions mainly use application which teachers do after worker education, sensitisation and marketing. The other method trade unions used to recruit members was capturing where a teacher just found trade union deducting on their pay slip without their concern. The research established that trade unions were more effective in recruiting members in primary schools. This was so because the results obtained from this study indicated that the majority of teachers belonged to a trade union. Also, it was established that trade unions that were more restrictive in structure had a larger membership compared to trade unions that were open. However, the teacher recruitment in terms of belonging to a trade union was undemocratic because trade union leaders got union members without their consent through capturing. The research also established that though trade unions had the ability to recruit teachers they also had teachers who did not belong to trade unions. Other than that, trade unions were also faced with a number of challenges such as limited resources, competition among trade unions for more members, trade union officials being unable reach the rural areas and a lack of coordination between human resource personnel and management.

The second specific objective of the research was to analyse the effectiveness of trade unions in improving wages for teachers in the Primary education sector of Lusaka district. Regarding this specific objective, trade unions are somewhat effective in provision of wages to their teacher. The findings indicate that 93 out of 100 per cent indicated that the demands were not met. Out of a 100 per cent indicated that the demands were met. To achieve this, trade unions engage in collective bargaining. Trade unions use a three-step approach in collective bargaining. The steps involved in this approach are meeting trade union members to hear their demands, consolidation of the demands and presenting them to the government and bargaining with the government. The research also established that more than half of the teachers did not present any demands to trade union officials. Further several demands were presented to trade union leaders by teachers including salary increments, better conditions of service, education sponsorship, loans, salary scale adjustment, double class allowance and housing allowance increment. However, only two demands were met which are salary increment and salary scale adjustment as indicated by a few teachers. The research also established that all trade union members were not satisfied with the way trade union leaders handled the previous collective bargaining process. Therefore, four reasons were identified why teachers were not happy with the previous collective bargaining which were no consultation, trade unions settling for a less percentage for salary increment, not performing accordingly and political interference. In addition, the research also established several challenges that trade union leaders were faced with during the collective bargaining process which are limited resources, mistrust of trade union leaders by trade union members, political interference and employers resisting demands.

The third specific objective of the research was to assess the effectiveness of trade unions in providing member services to teachers in the primary education sector of Lusaka district. The conclusion regarding this specific objective indicated that trade unions in the primary education sector are somewhat effective when it comes to providing member services to their members. This was so, because the findings indicate that 46 out of a 100 per cent of teachers received member services compared to 56 out of a 100 per cent who do not receive member services. These include trade union-branded clothes, land, education sponsorship and funeral grants. However, the extent to which trade union members receive these services is low. The few services that are offered are also not evenly distributed. The trade unions tend to be pro-younger

members, pro-male, pro-single and pro- number of years worked one to 5 years. This level of service provision has resulted in the majority of the teachers being unhappy with the member services offered by the trade unions. There are three major reasons for teachers' unhappiness with the member services. Teachers felt the member services were less than their membership contributions, member services benefited trade union leaders only, and lack of sensitisation about the services. There are three challenges faced by trade union leaders in the provision of member services to the trade union members. These are limited resources, lack of a social security policy to guide trade unions on member services and lack of demand for the services from members.

The general objective of the research is to examine the effectiveness of trade unions in meeting teachers' needs in the primary education sector in Lusaka district. The general conclusion of this research was that trade unions were effective when it comes to teacher recruitment. This was so because of the large membership. However, teacher recruitment in terms of belonging to a trade union is undemocratic because trade union leaders got trade union members without their consent through capturing. The other general conclusion was that trade unions were somewhat effective in improving the wages for teachers in the primary education sector. Lastly, trade unions were somewhat effective in providing member services to teachers in the primary education sector.

7.3 Recommendations

Arising from the study, the following recommendations on how to enhance the effectiveness of trade unions in Primary Schools were arrived at. The recommendations are in two categories. These are policy recommendations and areas for future research.

7.3.1 Policy Recommendations

To ensure the effectiveness of trade unions in the primary education sector of Lusaka district, the following recommendations should be considered by either policy-makers at the national level, by all trade unions, all District Education Board of Secretaries by all School head teachers and all trade union members and other parties involved in trade unionism.

1. There is need for unions to improve their communication with their members and coordination between themselves to ensure that they are both kept in light of everything surrounding their unions. Once the communication structures are strengthened the failings of unions in the primary education sector will be reduced and trade unions will thrive.
2. Trade Unions need to come up with their own income generating or money-making ventures the government can never satisfy the financial need of all unions but just cushion their financial burden. Hence, unions need to venture into activities that will grow their financial base apart from reliance on membership subscription.
3. There is need for the government to come up with a social security policy that guides unions on the member services that unions need to offer. As it is unions do not know exactly how much they are supposed to give their members.
4. Unions need to merge and come up with one union that speaks for all having so many unions breed a lot of competition among unions and negatively affects their performance and the government loses trust in the trade unions.
5. There is need to separate politics from unionism this is so because politicians are bosses and union leaders are subordinate hence need to create a friendly environment so that union leaders freely bring to the table the needs of their members without fear or favour.

7.3.2 Areas for Future Research

The research was limited to primary education sector trade unions of which secondary education sector was excluded. Therefore, a comparative research should be conducted, to compare the effectiveness of primary school and secondary school trade unions.

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APPENDICES

APPENDIX A

QUESTIONNAIRE FOR TEACHERS OF PRIMARY SCHOOLS OF LUSAKA DISTRICT

Dear Respondent,

I am a postgraduate student at the University of Zambia. I am conducting a research titled “**The Effectiveness of Trade Unions in the Education Sector: The Case of Primary Schools in Lusaka District**”

You have been randomly selected to participate in this study by way of responding to this questionnaire. The information you give is purely for academic purposes only and will be treated with complete confidentiality. Your anonymity is highly guaranteed, as you do not have to indicate your name or any other form of identification on this questionnaire.

It is important that you be honest in your responses. However, you reserve the right to refuse to take part in this study and you can also terminate your participation at any time.

INSTRUCTIONS

- a. Please do not write your name.
- b. Kindly answer all questions.
- c. Tick [] where applicable and fill in the spaces provided where necessary.

SECTION A: DEMOGRAPHIC CHARACTERISTICS

**For official
use only**

1. Age

1. Below 30 years 2. 30-39 3. 40-49 4. 50-59 5. 60years
and above

2. Sex:

1. Male 2. Female

3. Marital status

1. Married 2. Single 3. Widow(er) 4. Divorced

4. Number of years worked

1. 0-5 years 2. 6-10 years 3. 11-15 years 4. 16-20 years
5. above 20 years

SECTION B: UNION MEMBERSHIP RECRUITMENT

5. Do you belong to any trade union?

1. Yes 2. No **(if no to then skip to Q.9)**

6. If yes to Q.5, what is the name of the union?

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.....
.....

7. How long have you been a trade union member?

1. 0-5 years 2. 6-10 years 3. 11-15 years 4. 16- 20 years
5. above 20 years

8. What process did you follow for you to become a member of this union?

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9. If no to Q.5, why are you not a member of a trade union?

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(Skip to Q.21)

SECTION C: COLLECTIVE BARGAINING

10. What demands did you present to your union leaders in the previous collective bargaining process?

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11. Were all your demands met by the time collective bargaining was concluded?

1. Yes 2. No

12. Which of these demands were met by the time collective bargaining was concluded?

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13. Which of these demands were not met?

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14. Are you happy with the way your union handled the previous collective bargaining process?

1. Yes (if yes, skip to Q.16) 2. No

15. If no to Q.14, what was wrong with the way the union handled the previous collective bargaining process?

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SECTION D: WELFARE SERVICES TO UNION MEMBERS

16. Have you received any welfare services from your union (apart from collective bargaining issues)?

1. Yes 2. No (if No, skip to Q.20)

17. If yes to Q16, what is the most recent welfare service that you received from your union?

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18. Are you happy with the welfare services that the union offers to its members?

1. Yes (if yes, skip to Q.21.) 2. No

19. If No to Q18, what is wrong with these welfare services?

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..... (Skip to Q.21)

20. If No to Q.16, why have you not received any welfare services from your union?

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SECTION E: RECOMMENDATIONS TO STRENGTHEN TRADE UNIONS IN THE EDUCATION SECTOR

21. What do you think should be done to strengthen trade unions in the education sector?

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End of Questionnaire

Thank You

APPENDIX B

INTERVIEW GUIDE FOR TRADE UNION LEADERS

Dear Respondent,

I am a postgraduate student at the University of Zambia. I am conducting a research titled **“The Effectiveness of Trade Unions in the Education Sector: The Case of Primary Schools in Lusaka District”**

You have been randomly selected to participate in this study by way of responding to this questionnaire. The information you give is purely for academic purposes only and will be treated with complete confidentiality. Your anonymity is highly guaranteed, as you do not have to indicate your name or any other form of identification on this questionnaire.

It is important that you be honest in your responses. However, you reserve the right to refuse to take part in this study and you can also terminate your participation at any time.

INSTRUCTIONS

- a. Please do not write your name.
- b. Kindly answer all questions.
- c. Tick [] where applicable and fill in the spaces provided where necessary.

BACKGROUND INFORMATION

Date of interview:

Start time of interview:

Name of School:

Name of union:

Position held in the union:

Gender

Male ()

Female ()

UNION MEMBERSHIP RECRUITMENT

1. What is the organisational structure of your union?

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2. What categories of workers do you recruit as members into the union?

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3. What is the process of recruiting members into your union?

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4. What challenges do you face when recruiting members?

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COLLECTIVE BARGAINING

5. What process do you follow when conducting collective bargaining as a union?

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6. What demands did your union present to the government in the previous collective bargaining process?

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7. Of these demands, which ones did you manage to secure when the collective bargaining process came to an end?

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8. What benefits did you secure for your members in the previous collective bargaining process?

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9. Which demands did you fail to secure?

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10. What challenges do you face in the process of collective bargaining?

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SERVICE DELIVERY TO UNION MEMBERS

11. What welfare services do you provide to your members

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12. How often do you provide them?

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13. What challenges do you face when providing these welfare services to your members?

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**RECOMMENDATIONS TO STRENGTHEN TRADE UNIONS IN THE
EDUCATION SECTOR**

14. What do you think should be done to strengthen trade unions in the education sector?

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End of interview

Thank You