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Contents

History of Clinical Sociology

Hommage à Robert Sévigny

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Résumé

C'est avec beaucoup de tristesse que nous vous annonçons le décès de Monsieur Robert Sévigny survenu à Montréal le 13 mai 2025 à l'âge de 94 ans. Il était l'époux de feue Thérèse Paquet-Sévigny, et le père d'Odile, sa fille et de feu Éric, son fils. Professeur émérite à l'Université de Montréal, Robert Sévigny (PhD sociologie, Université Laval) a joué un rôle central dans le développement d'une approche clinique de la sociologie. En 1966-1967, il fut chercheur invité à l'Association pour la recherche et l'intervention psychosociologique (ARIP) à Paris puis au Centre Carl Rogers, à La Jolla, Californie en 1980-1981. Il a su constamment relier les apports de la France et des États-Unis pour développer ses recherches et ses pratiques d'intervention au Québec. En 1991, il fut à l'origine, avec Jan Fritz, Eugène Enriquez et Vincent de Gaulejac, du Comité de recherche en sociologie clinique (RC 46) au sein de l'Association internationale de sociologie (AIS) et du Comité de recherche en sociologie clinique (CR 19) au sein de l'Association internationale des Sociologues de Langue Française, dont il fut le premier Président. Cela achevait une démarche qui avait débuté dès 1982, lors d'un précédent congrès de l'AIS.

Nous soulignons quatre idées centrales de la pensée de M. Sévigny: la dimension de l'approche clinique en sociologie et sciences sociales; la notion de sociologie implicite; la perspective interdisciplinaire et

l'avenir de l'approche clinique en sociologie et sciences sociales dans le contexte social actuel.[1]

Mots clés

Sociologie clinique, sociologie implicite, pouvoir d'agir, révolution numérique

1. Approche clinique en sociologie et sciences sociales

Dans un article publié dans la revue *International Sociology* en 1997, M. Sévigny développe les caractéristiques majeures d'une approche clinique du social.[2] Le terme « clinique », signifiant « être près du lit d'un patient » est certes une image issue du monde médical, mais elle réfère essentiellement à cette idée d'une pratique centrée sur des cas individuels, et plus spécifiquement, des cas-problèmes qui doivent être résolus. Et cela s'applique à des individus, mais aussi à des groupes, des organisations ou d'autres situations sociales. Par ailleurs, l'inspiration première en sociologie d'une telle approche se retrouve dans les travaux de l'École de Chicago, mais aussi, en psychologie (en France, Daniel Lagache , 1983; et aux É.U., Carl Rogers, 1968), et en psychologie sociale, dont la dynamique des groupes (Kurt Lewin, 1972).

Le choix du titre est aussi indicatif : il est bien question d'une « Approche clinique dans les sciences sociales ». Nous pourrions dire aussi, une approche clinique en sociologie, plutôt que sociologie clinique, ce qui met l'accent alors sur le processus, la démarche même de la production des connaissances sur le social davantage que sur le cadre disciplinaire constitué.

Une première dimension d'une approche clinique est qu'elle doit être une pratique orientée vers l'action. Cela implique la mobilisation des personnes dans leur engagement à agir sur leur contexte social de vie. La relation individu et société est à comprendre comme

1 Nous invitions le lecteur ou la lectrice à prendre connaissance de l'entretien fait avec M. Robert Sévigny dans la présente revue, ce qui permet de voir davantage l'ampleur de ses recherches et pratiques d'intervention. Volume 19, no.2 en 2024, pp. 1-25.

2 Nous suivons de près ici le texte de cet article, avec notre traduction de l'anglais pour certains passages.

une unité inséparable, un « fait social total », pour reprendre l'expression de Marcel Mauss (1923-24). Ces propositions reflètent la signification donnée à la notion de clinique : intervenir auprès d'individus en situation sociale qui demandent de résoudre une difficulté, d'apporter du changement.

Une autre dimension est importante : le processus de la connaissance ou de la production de données l'emporte sur le seul constat de faits *déjà-là*. La théorie est essentielle à la pratique, mais les ressources théoriques de départ doivent être pertinentes au cas étudié et laisser place à des théories émergeant de la pratique. La démarche clinique suppose un autre rapport à la science. Elle repose non seulement sur l'interdisciplinarité nécessaire pour éclairer la complexité du rapport individu et société, mais sur l'échange des savoirs entre les partenaires différents engagés dans le processus. Les connaissances théoriques existantes sont dépendantes de la situation sociale, d'une pratique vécue qu'il faut comprendre et analyser.

La question du « contrôle » ou du pouvoir du chercheur-intervenant est centrale. La posture clinique est une ouverture à la singularité et la complexité spécifique de la situation qui échappe au « contrôle » pré-établi de variables explicatives. C'est une différence radicale avec l'approche scientifique comme l'illustre la méthode expérimentale en laboratoire. La relation clinique entre le chercheur et les acteurs sociaux repose plutôt sur l'implication réciproque des partenaires dans un travail réflexif semblable à un processus de transfert et de contre-transfert. Cette implication du chercheur suppose une « non-neutralité » du chercheur dans la situation : il est lui-même « acteur social », mais conservant une posture critique nécessaire. En contrepartie, cela conduit à donner toute son importance au savoir des autres acteurs. En bref, la relation entre un chercheur et intervenant et ses interlocuteurs en est une d'implication critique réciproque, d'échange, de dialogue et non celle « d'expert » qui impose une vision théorique ou technique.

2. La sociologie implicite

C'est dans ses principaux travaux de recherche et ses implications dans l'intervention que va se construire le cadre conceptuel de ce

qui deviendra un concept central dans la pensée de M. Sévigny (Sévigny, 2019), son apport original, la sociologie implicite. Ce fut d'abord sa recherche sur «l'aliénation dans la vie quotidienne de Montréalais» à travers des témoignages de familles vivant dans des quartiers urbains à Montréal (Sévigny, 1969). Puis surtout, ce furent ses recherches sur la santé mentale au Québec analysant, sur une dizaine d'années, les différentes formes de thérapies en à partir d'entretiens en profondeurs avec grande diversité de praticiens (Sévigny, 1986,1993a). Il est intervenu aussi en Chine et à Singapour pendant les années 1987-2018, Sévigny, 2009(a)(b), ce qui a permis de mieux cerner la dimension pluriculturelle de la pratique clinique.

Cette aventure de la « sociologie implicite » se retrouve bien dans le développement d'une « sociologie clinique » au sens où nous l'avons exprimé conjointement dans un texte récent, « *Changement social à l'aune de la sociologie clinique. Quand l'action devient connaissance* » (Rhéaume, Sévigny, 2018). [3]Après avoir montré que la sociologie clinique s'enracine dans toute une tradition psychosociologique de recherche-action, de la dynamique des groupes au changement planifié, nous retenons deux éléments qui viennent spécifier une sociologie clinique : une posture clinique d'ouverture sur « toute » l'expérience et la théorisation propre des interlocuteurs impliqués dans une recherche et son articulation avec la grille conceptuelle herméneutique du chercheur que fut le développement de la sociologie implicite. Ces deux pôles sont à relier étroitement : la posture clinique de la recherche sur le monde social est indissociable de la référence conceptuelle ou théorique du chercheur. De façon dialectique, l'un vient modifier l'autre : l'approche clinique est alors spécifiée par un schéma conceptuel et celui-ci doit demeurer ouvert à l'expérience effective de l'autre, par exemple celle d'un intervenant ou intervenante, ou de tout acteur social qui est l'objet de la recherche visée. D'où également ce rapport à l'action : ce sont les individus et acteurs sociaux qui sont impliqués dans cette démarche de réflexion afin de mieux agir sur leur situation problématique.

3 Nous suivons de près ici également les textes de 2019 et 2018.

Une autre caractéristique de la posture clinique est la dimension langagière d'une sociologie de l'implicite. C'est dans la prise de parole des intervenants en interaction avec le chercheur que se dégage progressivement l'implicite, le « non élaboré » explicitement dans le discours, mais contenu déjà dans celui-ci. L'implicite est parfois le « tacite » qui reste dans l'esprit de l'interlocuteur, le « retenu » du discours qui finalement s'exprime. C'est aussi le travail créatif d'élaboration, d'interprétation du chercheur, qui, partagé avec l'autre, permet de dépasser les seules références explicites du discours de la personne et d'ouvrir sur de nouvelles pistes de connaissance. Notons en ce sens, que les chercheurs eux-mêmes sont porteurs de savoirs implicites qui appellent à être explicités.

3. L'interdisciplinarité en sociologie clinique

Parler de sociologie clinique c'est soulever aussi la question de l'appartenance à un champ disciplinaire. Sommes-nous en présence d'une nouvelle discipline ou plutôt d'un autre rapport aux disciplines? Mais alors, sur quelle base théorique?

Dans un texte, publié dans le Dictionnaire de sociologie clinique (Sévigny, 2019), est abordé directement cet enjeu, *l'interdisciplinarité*. Une discipline désigne « l'obéissance à une règle de conduite et une branche de la connaissance ». C'est une façon bien structurée de produire de la connaissance sur un objet donné. La physique s'appuie sur une méthode empirique rigoureuse, de type expérimental, une théorisation formalisée par l'outil mathématique, et étudie l'ensemble des phénomènes dits physiques, « naturels ». Et ainsi de suite pour tout un ensemble de sciences que l'on retrouve dans les universités et les centres de recherche. Les sciences humaines ou sociales vont se démarquer par des règles de méthode différentes et leurs objets, l'action humaine ou l'action sociale. Généralement, les nouvelles disciplines se font sur la base de disciplines déjà existantes suivant des exigences liées à un objet différent et d'autres contraintes méthodologiques. Cela est vrai pour la sociologie.

L'interdisciplinarité serait alors, dans ce premier sens, le croisement avec des savoirs déjà « disciplinés » en empruntant régulièrement aux acquis des disciplines ainsi reliées. Mais la place

que va occuper une nouvelle discipline s'inscrit dans des rapports de pouvoir entre les disciplines, dans le champ institutionnel, en particulier à l'université, et cela à travers une longue histoire où se sont établis des liens hiérarchisés suivant les normes scientifiques dominantes.

C'est dans ce contexte qu'il serait question, pour la sociologie clinique, de multidisciplinarité, d'interdisciplinarité, voire « d'indisciplinarité ». Le lien avec l'intervention et l'action sociale oblige à recourir davantage à divers apports disciplinaires : anthropologie, sciences politiques, économie, philosophie, ce qui rend peu probable l'émergence d'une nouvelle discipline « autonome ». C'est en ce sens que M.Sévigny parle plutôt « d'approche clinique dans les sciences humaines » dans un chapitre d'un livre collectif (Enriquez et al.,1993b). Il faut porter, selon lui, un regard réflexif et remettre régulièrement en question le sens d'une recherche, le sens d'une institution, le sens et les frontières d'une situation sociale. L'objet étudié et le terrain de recherche ou d'intervention guident alors le choix des concepts, des théories, des méthodes par le « sociologue » qui est amené d'autant à interroger et à analyser sa propre implication. Cela est élaboré dans cet autre texte « Changement social à l'aune de la sociologie clinique » (Rhéaume et Sévigny) publié dans un autre ouvrage collectif (Fortier et al., 2018).

Se dégager d'une discipline de référence est la condition pour pouvoir établir une véritable « interdisciplinarité », par l'ouverture qu'elle nécessite quand sont abordés les rapports humains mis en situation sur l'ensemble des disciplines pertinentes. Mais cela permet aussi d'ouvrir sur d'autres formes de savoirs mis en cause dans la recherche-intervention, des formes de savoirs « non-scientifiques ».Cela ouvre sur une perspective épistémologique plus radicale. Le savoir scientifique n'est qu'une forme de savoir impliquée dans une recherche et une intervention cliniques.

L'approche clinique donne toute son importance au savoir dit « ordinaire », d'expérience. De plus, la notion même d'implicite nous plonge dans la complexité du langage, des différentes strates de signification qu'il implique. Par exemple, l'univers artistique est un autre monde d'expression qui intervient, au moins minimalement,

dans plusieurs des pratiques d'intervention, par le théâtre, par l'utilisation des jeux de rôle, avec l'usage de dessins, de schémas, de photos, mais aussi par des références aux diverses expériences ou références artistiques (peinture, cinéma, architecture, littérature…) qui font partie de l'expérience culturelle de chaque personne. Nous pouvons ajouter une autre forme de savoir : le savoir spirituel, qui exprime une quête fondamentale sur les grandes questions existentielles de l'origine, du sens de vie, de la mort…C'est le cas de références à des religions constituées, mais plus largement aussi, à des types de savoirs philosophiques.

Peuvent être ainsi distinguées cinq types de savoirs, dont trois au moins sont directement impliqués dans toute recherche-intervention dans les groupes et les organisations, voire dans les relations interpersonnelles. En effet, un chercheur fonde sa légitimité sur sa référence au savoir scientifique, les participants les plus fréquemment sollicités sont des professionnels ou des travailleurs dont la référence première est un savoir-faire spécialisé. Mais tous les participants font également appel à un autre type de savoir, le savoir d'expérience de vie, le savoir ordinaire, de sens commun. Deux autres types de savoirs peuvent aussi intervenir, soit le savoir esthétique, de création artistique et le savoir spirituel, de quête de sens par rapport aux grandes questions existentielles de vie et de mort.

La posture clinique, ouverte, « non-directive », centrée sur la parole ou l'expression d'autrui était pour lui une voie d'entrée par excellence, face à cette complexité des savoirs.

4. L'approche clinique en sociologie confrontée aux changements sociétaux

M. Sévigny donnait beaucoup d'importance au contexte sociétal macro-social, comme étant source de possibilités et de contraintes dans les pratiques de recherche et d'intervention sociales cliniques. Il souligne que depuis les dernières décennies, il est question du développement d'une nouvelle modernité liée à la mondialisation de l'économie, ou d'hypermodernité quand l'accent est mis sur une technologie avancée, une idéologie néo-libérale axée sur la

performance, la forte valorisation de l'individu dit « autonome », un accent sur le temps présent, etc.

Jusqu'à la fin de sa vie, il prenait connaissance d'ouvrages récents sur les changements sociaux. Sa lecture de Yuval Noah Harari (2018)[4], qui montrait comment nous étions confrontés aujourd'hui à une révolution numérique comme forme sociale dominante, l'interpellait. Tout cela entraîne de nouvelles contraintes, mais aussi de nouvelles possibilités dans tout ce qui affecte les interventions qui visent à accroître le pouvoir d'agir des individus sur leur situation sociale de vie, au travail comme dans leur vie quotidienne, pouvoir d'agir qui est au cœur de l'intervention liée à la sociologie clinique.

Pour le pire, cela constituerait une nouvelle source d'aliénation sociale, d'un sujet qui a de moins en moins de prise sur le contexte de sa vie et qui est soumis à des contacts humains éphémères et peu approfondis, qui exigeraient au contraire plus de temps, de la durée et de l'espace, davantage d'enracinement dans des lieux significatifs avec les autres. Pour le mieux, les nouvelles technologies, quand elles sont maîtrisées, peuvent accompagner la constitution de liens sociaux de qualité pouvant contribuer à redéfinir des institutions favorables à un pouvoir d'agir accru.

Par exemple, dans les années soixante, les interventions en dynamique de groupe ou dans le développement organisationnel étaient bienvenues**.** Il était possible de prendre le temps d'un travail collectif en groupe, de créer des espaces de parole, de planifier une plus grande participation dans les organisations. Il s'agissait alors d'une modernité participative où se combinaient les valeurs démocratiques et l'expression individuelle et ce, au cœur de l'entreprise. C'est nettement plus difficile aujourd'hui dans nos organisations dites «performantes» et nos relations «virtuelles» multiples.

Est-ce pour autant la fin d'une approche clinique en sociologie ou en sciences sociales? De nos pratiques et d'une posture inspirées par la dynamique des groupes et la non-directivité? En reprenant plus spécifiquement la question du changement, pour les individus et les collectifs, de leur pouvoir d'agir dans le cadre plus large des

4 Nous résumons ici les idées centrales du texte.

grands changements sociaux, la question de la participation, dans les milieux dits intermédiaires (groupes, organisations) demeure un enjeu toujours présent, peut-être plus encore de nos jours. Selon M. Sévigny, il faut se méfier des lectures critiques qui isolent en quelque sorte le cadre macrosocial de toute la complexité des interactions sociales au risque d'introduire un mode d'explication de forces dominantes, sans appel.

Sa conviction profonde, c'est qu'une approche clinique est une intervention qui part des individus-sujets en situation de travail, dans la pratique, dans leur milieu de vie, qui permettait et permet encore d'ouvrir sur une grande variété de changements et d'actions possibles en rapport au niveau institutionnel plus global. Cela doit s'inscrire comme autant de formes de résistance ou de changement dans le champ académique, universitaire, ou professionnel. Là aussi les orientations éducatives reflètent les tendances socio-économiques et politiques dominantes de la société, avec les accents mis sur « l'utilité » des formations, la technologie, l'excellence.

Il demeure d'autant plus important de renforcer nos affiliations dans de grandes associations académiques ou des réseaux professionnels où puisse s'exprimer avec force une orientation clinique explicite en sociologie, une condition importante du maintien à plus long terme d'une vision humaniste et critique de la pratique sociale.

Des hommages importants

Lors de ses funérailles, le 23 août 2025, tout près de 80 personnes ont été réunies autour de plusieurs témoignages de collègues universitaires, d'anciens étudiants et étudiantes, de membres de la famille, de responsables de milieux communautaires ou de pratique. Tout cela pour souligner l'influence majeure qu'il a exercé au Québec, mais aussi dans divers pays : France, USA, Chine en particulier. Et témoigner aussi de cet homme ouvert, chaleureux, modeste, créateur de liens personnels et sociaux. C'était un père et un conjoint exceptionnel de l'avis de membres de sa famille.

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Articles

Los nudos socio-psíquicos del Burnout docente en Brasil

The Socio-Psychic Knots of Teacher Burnout in Brazil

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Resumen

La literatura señala que el colectivo docente es uno de los más susceptibles al desarrollo del síndrome de burnout (SB). Para profundizar en la comprensión de este fenómeno, realizamos 16 entrevistas socio-clínicas en profundidad con docentes de educación básica en Brasil entre 2020 y 2022, seleccionados en una etapa previa de investigación por presentar alto riesgo de burnout. Desde el enfoque de la Sociología Clínica, nuestro objetivo es problematizar los nudos socio-psíquico del burnout, entendidos como configuraciones en las que se entrelazan experiencias subjetivas y contradicciones sociales que generan impasses persistentes y sufrimiento laboral. Tomando como punto de anclaje analítico el contexto pandémico, sostenemos que el burnout se configura como un Síntoma Social Dominante del trabajo docente en la contemporaneidad. Como resultado de la degradación del sentido de la actividad profesional, su estructura sintomática refleja la radicalización de los supuestos manageriales en el ámbito educativo. Esta orientación conceptual busca cuestionar la tendencia a individualizar el burnout, psicologizando contradicciones de carácter estructural. En efecto, los datos indican que el agotamiento docente es, ante todo, un fenómeno colectivo e institucional,

expresión de un proceso histórico-social en curso, marcado por la flexibilización y la precarización de las relaciones laborales.

Palabras clave: Agotamiento profesional; burnout docente; Síntoma Social Dominante; Sociología Clínica.

Abstract

The literature indicates that teachers are among the professional groups most susceptible to developing burnout syndrome. To deepen the understanding of this phenomenon, we conducted 16 in-depth socio-clinical interviews with basic education teachers in Brazil between 2020 and 2022, selected in a previous research stage for presenting high risk of burnout. From the perspective of Clinical Sociology, our objective is to examine the socio-psychic knots of burnout, in which subjective experiences and social contradictions intertwine, generating persistent impasses and work-related suffering. Taking the pandemic context as an analytical framework, argue that burnout serves as a Dominant Social Symptom of contemporary teaching work. As a result of the erosion of meaning in professional activity, its symptomatic exhaustion reflects the radicalization of managerial assumptions within the educational field. Our conceptual approach seeks to challenge the prevailing narrative that tends to individualize teacher burnout, often by attributing it to psychological factors while overlooking the structural contradictions and conflicts inherent in teachers' work. Indeed, our data suggest that teacher burnout is fundamentally a collective and institutional phenomenon—an expression of a broader socio-historical process marked by the flexibilization and precarization of labor relations.

Keywords: Professional exhaustion; teacher burnout; Dominant Social Symptom; Clinical Sociology.

1. Introducción[1]

Aunque el burnout ha sido estudiado desde la década de 1970 (Maslach y Shaufeli, 1993), solamente en 2019 la Organización Mundial de la

1 (i) esta investigación fue aprobada por el Comité de Ética e Investigación de la Universidad del Estado de Minas Gerais (CAAE 46413921.4.0000.5115); (ii)

Salud (OMS) lo reconoció como un fenómeno vinculado al trabajo y al empleo. Este reconocimiento condujo a su inclusión en la nueva Clasificación Internacional de Enfermedades (CIE-11), que entró en vigor en enero de 2022 (World Health Organization, 2019). En la literatura, es ampliamente aceptada la definición propuesta por Maslach y Leiter (1997), según la cual el Síndrome de Burnout (SB) constituye un fenómeno psicosocial relacionado con el trabajo, identificado y compuesto por tres dimensiones. El *agotamiento emocional* se manifiesta en la sensación constante de cansancio, como si el trabajador ya no encontrara energías ni recursos emocionales para afrontar su rutina, lo que suele generar frustración. La *despersonalización* (o deshumanización) puede observarse a través de la irritación predominante, la insensibilidad emocional, el aislamiento afectivo o incluso por la aparición de sentimientos negativos, como el cinismo y la incredulidad. Por último, la baja realización profesional implica sentimientos de insatisfacción, incompletud e incompetencia, lo que también produce un declive en la autoestima y el autoconcepto del trabajador.

Además de esta tríada, es común que el burnout venga acompañado de manifestaciones psicosomáticas variadas, como trastornos gastrointestinales, cefaleas tensionales, dolores musculares, insomnio, palpitaciones y taquicardia, dificultades de atención, concentración y memoria, además de una disminución y un estado de ánimo constantemente bajo (Benevides-Pereira, 2002; Cardoso et al., 2017). También pueden presentarse conductas compulsivas relacionadas con la alimentación y el consumo abusivo de alcohol, tabaco y otras drogas, como mecanismos compensatorios para mitigar el sufrimiento derivado del agotamiento profesional (Andrade y Cardoso, 2012).

Actualmente, existe una amplia literatura dedicada al agotamiento profesional docente en Brasil (Codo y Vasques-

Un agradecimiento especial debe dirigirse a Isabela Teodoro dos Santos y Maria Fernanda Flausino Couto, egresadas del curso de Psicología de la Universidad del Estado de Minas Gerais (UEMG), quienes participaron en la etapa de recolección de los datos analizados en esta investigación; (iii) Esta investigación fue financiada por la UEMG, a través del Programa de Becas de Productividad en Investigación (PQ), convocatoria PROPPG nº 06/2021.

Menezes, 2000; Carlotto, 2002; Carlotto y Palazzo, 2006; Carlotto y Câmara, 2007; Cardoso et al., 2017), dado que constituye uno de los grupos profesionales más vulnerables al burnout en nuestra sociedad (Dalcin y Carlotto, 2017). Estos autores indican que el desarrollo del SB en esta población suele pasar desapercibido y agravarse progresivamente, muchas veces sin el conocimiento ni la percepción de sus pares o superiores. Entre los factores desencadenantes del agotamiento, se destacan la indisciplina del alumnado, el exceso de demandas burocráticas y paradójicas, la presión y las expectativas irreales dirigidas a los docentes, la falta de autonomía en la toma de decisiones, la sobrecarga laboral y la naturalización del estrés. Codo y Vasques-Menezes (2000) también subrayan la falta de reconocimiento social y financiero, la precariedad material y estructural de las escuelas y las limitaciones para la progresión profesional. En el ámbito institucional, la respuesta predominante frente al surgimiento del burnout tiende a ser individual, a través del alejamiento del docente y su posterior derivación a médicos o psicólogos especializados (Dalcin y Carlotto, 2017).

Para proponer caminos alternativos a esta respuesta individualizante, este estudio se propone problematizar los nudos socio-psíquicos (Gaulejac, 2020) del burnout docente, con el objetivo de comprenderlo en su complejidad (Castro, 2013). Siguiendo a Gaulejac (2020), entendemos los nudos socio-psíquicos como configuraciones donde afectos, recuerdos, emociones y mecanismos de defensa se amalgaman inseparablemente con situaciones sociales generadoras de sufrimiento, violencia o humillación. En la experiencia subjetiva, estos elementos conforman una unidad indisoluble que se manifiesta en forma de repeticiones, síntomas, impasses existenciales o conflictos persistentes. Son "nudos" precisamente porque entrelazan lo subjetivo con lo objetivo, lo individual con lo colectivo, lo interno con lo externo, la historia con la historicidad, produciendo una trama en la que lo psíquico y lo social se co-determinan. Desde esta perspectiva, los nudos socio-psíquicos permiten analizar los impasses contemporáneos del sujeto como efectos de tales entramados, en particular cuando se trata de contextos de sufrimiento en el trabajo. Nombrar el burnout docente como producto de nudos socio-psíquicos implica superar la dicotomía

entre lo psíquico y lo social, reconociendo que la repetición del malestar individual encuentra sus raíces en una historia social más amplia, y que la clínica puede abrir vías para desatar estos nudos al articular la experiencia singular con las determinaciones colectivas.

Para ello, nos apoyamos en datos empíricos recogidos durante los años 2020 y 2022, en una investigación previa cuyo objetivo fue comprender los factores de riesgo psicosociales del burnout en profesores durante la pandemia de COVID-19. En aquella ocasión, se aplicó un cuestionario sociodemográfico y el Inventario de Burnout de Maslach (MBI) a una muestra de 467 docentes de diferentes regiones de Brasil. No nos detendremos en el análisis detallado de estos datos —pues ya han sido explorados en otro estudio (Xxxxx et al., 2023)—, pero sí nos basaremos en ellos para avanzar en nuestras problematizaciones.

Con el fin de profundizar en la comprensión de estos factores de riesgos psicosociales, realizamos entrevistas socio-clínicas en profundidad con 16 docentes que, en la etapa cuantitativa previa, habían presentado un alto riesgo de burnout según los puntajes del Maslach Burnout Inventory (MBI). Se buscó preservar diversidad de trayectorias, incluyendo profesores y profesoras de diferentes regiones de Brasil, de ambos sexos, con distintas edades y tiempos de experiencia en la enseñanza, tanto en instituciones públicas como privadas. A cada participante se le garantizó el anonimato y el consentimiento informado.

El dispositivo de entrevistas se estructuró a partir de los marcos referenciales de la Sociología Clínica (Gaulejac et al., 2012; Braz, 2021, Braz et al., 2024), concebidos no solo como un método de recogida de datos, sino como un encuadre clínico que posibilita la emergencia de la palabra y la elaboración del sufrimiento. La implicación del investigador —también docente, aunque del nivel de Educación Superior— constituyó un vector fundamental, pues exigió una postura clínica sostenida en la escucha compleja y en un trabajo constante de análisis de la implicación. Este posicionamiento favoreció la creación de un espacio fecundo para que los participantes pudieran expresar las tensiones y contradicciones de su labor, así como coconstruir y resignificar sentidos acerca de su experiencia

profesional. Asimismo, tras cada encuentro se elaboraron diarios clínicos, que no se limitaron a un registro descriptivo, sino que sirvieron de soporte analítico para analizar los casos, atendiendo particularmente a los efectos de los movimientos transferenciales y contratransferenciales que atravesaron el proceso.

El contexto pandémico fue tomado como punto de anclaje analítico, pues en consonancia con Pessanha y Trindade (2022), defendemos que las ofensivas neoliberales (Dardot y Laval, 2016) y manageriales (Gaulejac, 2007) exacerbaban un proceso de precarización del trabajo docente iniciado en los años noventa en Brasil (Oliveira y Ribeiro, 2022). Por ello, las vivencias de los docentes durante la pandemia parecen revelar, in statu nascendi, los efectos socio-psíquicos de la radicalización de las contradicciones sociales que atraviesan esta profesión.

Bajo la Sociología Clínica, en diálogo con el psicoanálisis, sostenemos que el burnout docente no puede ser comprendido únicamente como un cuadro nosográfico individual, sino como la expresión de contradicciones históricas y organizacionales que, al radicalizarse durante la pandemia, cristalizan en forma de Síntoma Social Dominante. En este proceso, los docentes quedan atrapados en paradojas irresolubles que se condensan en nudos socio-psíquicos, es decir, configuraciones en las que lo social y lo psíquico se entrelazan inseparablemente. Partiendo de esta hipótesis, proponemos un análisis socio-clínico que conecta las fuentes de sobrecarga laboral, las manifestaciones del burnout y los nudos socio-psíquicos que sostienen el sufrimiento docente. Esta inflexión conceptual busca cuestionar la lógica predominante que tiende a individualizar el agotamiento profesional de los docentes, psicologizando las contradicciones estructurales de sus oficios.

Desde una perspectiva estructural, en primer lugar, abordaremos el concepto de Síntoma Social Dominante (SSD) y lo articularemos con la noción de ideología managerial, que orienta las prácticas de gestión escolar. Luego, discutiremos el agotamiento profesional docente y presentaremos supuestos ligados a la degradación del sentido de la actividad educativa. Finalmente, tras sostener la tesis del burnout como SSD del trabajo docente en Brasil, ofreceremos

claves de comprensión que nos permitan proponer acciones colectivas de prevención y promoción de la salud docente.

2. Síntoma Social Dominante e ideología managerial

Cuando Freud comenzó a investigar la histeria, constató que el síntoma neurótico era una formación de compromiso relacionada con la represión sexual. La angustia y la inhibición estaban, por lo tanto, vinculadas a la coerción del goce sexual. Más allá de sus análisis y teorizaciones sobre la sintomatología neurótica, en *El malestar en la cultura* (1929/1996), Freud sostuvo que existe un malestar inherente a la constitución misma de la cultura, producto del antagonismo entre las exigencias pulsionales y las restricciones impuestas por la civilización. En ese conflicto, los individuos se ven marcados por la insatisfacción y la incompletud, que operan como motor de una búsqueda interminable de la satisfacción infantil perdida y jamás recuperada.

Ante tal impasse, corresponde a los individuos transitar del funcionamiento del principio del placer al principio de realidad[2], en el cual el deseo necesita ser negociado y, muchas veces, postergado. En la medida en que el sujeto es comprendido como un ser simbólico que deja atrás el registro de la necesidad e ingresa en el registro del deseo —que es, por esencia, incompleto e insatisfecho—, el malestar pasa a ser entendido como efecto de la ausencia de satisfacción plena o de totalidad. En ese contexto, la noción de síntoma se amplía en el psicoanálisis: se subvierte del discurso médico y pasa a ser entendida como el resultado de las negociaciones en el proceso civilizatorio, como un precio a pagar por la cultura, constitutiva del ser humano. Según Vanier (2002), el síntoma, como una modalidad de expresión del inconsciente (particularmente de lo reprimido), pasa también a ser concebido como una defensa frente a la angustia.

2 En resumen, desde esta perspectiva, el principio de realidad cumple la función de regir el funcionamiento psíquico. "Forma un par con el principio de placer y lo modifica; en la medida en que logra imponerse como principio regulador, la búsqueda de satisfacción ya no se realiza por los caminos más cortos, sino que toma desvíos y pospone su resultado en función de las condiciones impuestas por el mundo exterior" (Laplanche y Pontalis, 2001, p. 368).

En su teoría sobre los discursos, posteriormente Jacques Lacan explora las conexiones entre los modos de producción de la vida social y material y la constitución del sujeto, analizando cómo el síntoma se inscribe y circula en el lazo social (Costa y Dionísio, 2020). Desde esta perspectiva, el psicoanalista francés Charles Melman (1992) acuñó el concepto de *Síntoma Social Dominante* (SSD) para referirse a un campo particular en el que se expresa la singularidad del síntoma subjetivo, pero que al mismo tiempo se inscribe en un malestar cultural provocado por discursos[3] dominantes históricamente situados.

Antes de avanzar, es necesario hacer una digresión: en este estudio concebimos que todo síntoma es social, ya que entre lo social y lo psíquico existe una relación de influencia recíproca e irreductible (Gaulejac, 1999/2012). Lo social precede y coexiste con lo psíquico. Sin embargo, si lo psíquico es producto de lo social, sus efectos sobre este último son retroactivos y posteriores (Gaulejac, 1999/2012). A modo de ilustración, desde Freud comprendemos que la transmisión psíquica, la dinámica pulsional y procesos primarios como la identificación, la idealización y la introyección inciden en la organización de lo social y la transforman (Braz, 2021). Se observa, por lo tanto, una dinámica recursiva y dialéctica de lo psíquico sobre lo social, que hace que el producto se convierta también en productor de aquello que lo produjo.

El hecho de que los síntomas se alimenten de los imaginarios sociales en su constitución (Vorcaro, 2004) no es nuevo en la literatura. La originalidad de la propuesta de Melman reside en el carácter estructural y dominante que le atribuye al síntoma, el cual metaforiza una determinada organización de lo social. Aunque singular, todo SSD es producto de una formación social específica y, por lo tanto, es homólogo a ella. En la literatura, diversos estudios (Melman, 1992, 2003; Vorcaro, 2004; Silva, 2006; Benelli et al., 2017; Basoli y Benelli, 2019) problematizan la ansiedad, la depresión, la drogadicción, la anorexia y la bulimia como SSDs. Se trata de síntomas que traducen características de discursos hegemónicos que

3 El concepto de discurso se entiende aquí en su acepción foucaultiana (Foucault, 1997), como una forma de poder cuyo objetivo es normativizar y modelar acciones, percepciones y comportamientos, en tanto se basa en un determinado conjunto de saberes y se dirige a prácticas sociales e instituciones específicas.

cumplen funciones centrales en la organización de instituciones en nuestra sociedad.

Un SSD no se caracteriza por su prevalencia o incidencia estadística (Melman, 1992), sino por su inscripción y correspondencia con discursos dominantes en un momento determinado. Las dimensiones temporal y espacial son, por lo tanto, centrales en la producción de SSDs específicos. Así, como forma psíquica de expresión de conflictos sociales y culturales, el SSD se configura como una manifestación colectiva de angustias originadas en contradicciones que atraviesan nuestra sociedad. Atribuimos al burnout el estatuto de Síntoma Social Dominante porque sus nudos socio-psíquicos se inscriben en transformaciones recientes del modo de producción capitalista, marcadas por la ideología managerial (Gaulejac, 2007), como discurso dominante y regente de la división social del trabajo en el ámbito educativo.

Sobre todo tras la consolidación de la globalización financiera en la década de 1980, el modelo fordista de producción fue progresivamente sustituido por el toyotismo, lo que impulsó el surgimiento de un nuevo régimen de acumulación flexible del capital (Antunes, 2018). Frente al aumento de la competitividad y a la reconfiguración de los patrones internacionales de competencia (Braz, 2019), las organizaciones se vieron presionadas a ofrecer respuestas y sentidos capaces de sustentar las nuevas modalidades de trabajo y empleo que se imponían en el modo de producción capitalista. En este contexto, la ideología managerial emerge como un paradigma de gestión orientado a captar al máximo la energía libidinal de los trabajadores, a través de una visión utilitarista, contable, positivista e instrumental de las relaciones humanas (Gaulejac, 2007; Gaulejac y Hanique, 2024). La actividad laboral, en ese sentido, solo adquiere reconocimiento cuando puede ser traducida en cifras e indicadores de rendimiento. La economía política se transforma en una economía de gestión, y la carrera por el mérito se convierte en un imperativo (Gaulejac y Hanique, 2024), lo que obliga a cada trabajador a superarse constantemente —ya sea para alcanzar una posición destacada, afirmar su existencia social o evitar la desfiliación (Castel, 2003).

Como sistema simbólico y de organización del poder, la ideología managerial actúa como vector de identificación, pertenencia y control, orientando la regulación social a partir de presupuestos vinculados al neoliberalismo (Dardot y Laval, 2016). Según Gaulejac y Hanique (2024), esta ideología ha traspasado los límites de las organizaciones —públicas y privadas— y hoy opera como principio regulador de nuestras relaciones sociales. Apoyada en valores como el deseo de progreso, la exaltación del mérito y la búsqueda de la excelencia, el *management* parece haberse enraizado en múltiples esferas de la vida cotidiana. Constantemente se nos exige —y también nos autoexigimos— ser productivos, administrar mejor nuestro tiempo, nuestras familias, nuestras carreras, nuestras emociones y nuestras finanzas. El discurso dominante que se impone de forma categórica es el discurso de la gestión (Gaulejac, 2007). Quienes no se alinean con el léxico managerial suelen ser percibidos como perezosos, conformistas o mediocres (Braz, 2019). En una sociedad organizada en torno al trabajo, acabamos por naturalizar la adopción de este discurso en todo el tejido social.

En el ámbito educativo, durante los años 1990, diversos países de América Latina implementaron una serie de reformas educacionales (Guerrero et al., 2019; Oliveira y Ribeiro, 2022). Influenciadas por una matriz neoliberal (Dardot y Laval, 2016), y en particular en el caso brasileño, estas reformas se tradujeron en una baja inversión en la formación docente y en los sistemas públicos de enseñanza, en paralelo con la expansión del sector educativo privado (Tenti, 2005; Oliveira, 2015; Oliveira y Ribeiro, 2022). Desde entonces, la ideología managerial parece haberse consolidado como principio rector en la gestión de los sistemas educativos (públicos y privados), y la informalización y precarización del trabajo docente se manifiestan a través de la intensificación de las jornadas laborales, el aumento de contratos temporales y mal remunerados, la pérdida de autonomía profesional y el incremento de la burocracia en las escuelas.

En estos espacios, se han adoptado de manera creciente modelos de gestión inspirados en lógicas propias de empresas privadas —orientadas fundamentalmente por la racionalidad económica— como la evaluación individual de desempeño y resultados, la gestión

por proyectos, el trabajo a demanda, las evaluaciones cuantitativas sistemáticas, los esquemas de pago vinculados a metas, y la búsqueda de la máxima eficacia y eficiencia en el menor tiempo posible y con el mínimo de recursos (Tenti, 2005; Gaulejac y Guerrero, 2017; Vandevelde-Rougale y Guerrero, 2019; Oliveira y Ribeiro, 2022). Es en este escenario de flexibilización e individualización de las relaciones laborales, por ejemplo, que Venco (2019) analiza el proceso de uberización del trabajo docente en la red estatal de enseñanza de São Paulo, a partir de los principios de la Nueva Gestión Pública (Oliveira, 2015).

3. Burnout y degradación del sentido del trabajo docente

En consonancia con investigadores que se han dedicado a analizar los cambios en el trabajo docente durante la pandemia (Baade et al., 2020; Silva, 2020; Pessanha y Trindade, 2022), en 2020 realizamos una investigación cuantitativa (Santos et al., 2023) cuyo objetivo fue analizar y comprender los impactos psicosociales de ese momento histórico sobre docentes de enseñanza primaria y secundaria en Brasil, particularmente en relación con los factores de riesgos psicosociales asociados al síndrome de burnout. Importante subrayar que no se trataba de un trabajo orientado por la Sociología Clínica.

Aplicamos un cuestionario sociodemográfico y el Inventario de Burnout de Maslach (MBI) a una muestra de 467 docentes brasileños que actuaban en la educación básica, tanto en instituciones públicas como privadas. En lo que se refiere a las tres dimensiones del síndrome, el 79,9 % de los participantes presentó niveles superiores a los establecidos para individuos saludables en agotamiento emocional; el 55,2 %, en despersonalización; y el 80,9 %, en baja realización profesional. A partir del análisis de los datos del MBI, constatamos que el 7,5 % de la muestra presentaba bajo riesgo de desarrollar la enfermedad, el 15,8 % riesgo medio, y el 76,6 % alto riesgo (Santos et al., 2023). No profundizaremos aquí en dichos análisis, ya desarrollados en un estudio anterior (Santos et al., 2023), pero los retomamos para contextualizar la fragilidad y el alto nivel de exposición al burnout en esta población. Si 358 docentes se encontraban en una situación de riesgo elevado, los datos sugerían

que se trata de una categoría profesional saturada, vulnerable, sobrecargada y que atraviesa un proceso progresivo de vaciamiento del sentido de su trabajo.

Con el propósito de profundizar en la comprensión de los factores de riesgos psicosociales del agotamiento profesional, en 2022 retomamos parte de esa muestra y realizamos entrevistas socio-clínicas con 16 docentes (que habían demostrado alto riesgo de desarrollar burnout).Tomando como punto central la ideología managerial (Gaulejac, 2007) y con base en las entrevistas realizadas, defendemos el argumento del burnout como Síntoma Social Dominante del trabajo docente contemporáneo, a partir de los relatos de desgaste profesional durante la pandemia de COVID-19. Dos hipótesis fundamentan la idea de que el agotamiento sufrido por los docentes en ese periodo está vinculado a la degradación del sentido atribuido a sus oficios: 1) el trabajo remoto y el contexto pandémico reactualizaron un proceso ya en curso de precarización de las condiciones y de la organización del trabajo docente; y 2) restringieron las dinámicas de sociabilidad y las fuentes de reconocimiento entre los docentes.

Las entrevistas indicaron que, debido a la disolución de los límites espaciales, el tiempo de descanso y ocio del docente se mezcló con su tiempo de trabajo durante la pandemia (Souza et al., 2021). A su vez, su labor profesional invadió la vida doméstica, colocándolo frecuentemente en situaciones paradójicas (Gaulejac, 2007). La ausencia de fronteras claras entre el espacio familiar y el espacio laboral debilitó aún más la separación entre el tiempo de trabajo y el de descanso. Cristina, con cinco años de experiencia docente, relató:

> […] nuestra casa se convirtió en escuela. Hoy tengo una silla mejor que tuve que comprar. Tuve que comprar una computadora nueva. Mi casa no estaba preparada para dar clases. Tuve que hablar con los vecinos, vivo en un edificio, así que tuve que avisar: "a partir de hoy mis clases son grabadas". Por ejemplo, un vecino peleando dentro de su casa y yo grabando clases… otro haciendo reformas… una vecina que ni lavaba ropa en mis horarios de clase… "muy amable". Pero el hecho es que mi casa dejó de ser un espacio personal. Antes, salía del trabajo y me ocupaba

> de mis asuntos personales. Ahora, esa frontera entre lo personal y lo profesional desapareció (Cristina).

En ese escenario, la extensión de la jornada laboral fue una constante en los testimonios. Cristian contó que grabó "[…] más de 300 vídeos. Trabajaba desde las 7 de la mañana hasta las 22:30 al inicio de la pandemia". Andressa, por su parte, señaló: "Estoy sentada en mi habitación desde las 7 de la mañana hasta la medianoche, porque también curso un máster. Todo con mi propio dinero. Me hicieron firmar un contrato para eximir a la escuela de responsabilidad por no ofrecer condiciones de trabajo, y eso que tengo un problema en la columna". El trabajo extra clase se multiplicó y quedó en manos de cada docente encontrar, de forma aislada, una forma de sobrellevarlo. El testimonio de Patrícia ilustra esta situación:

> Lo que me frustra es trabajar tanto fuera del horario de clases. Porque la mayoría de las profesiones cumplen su jornada de 8 horas y después llegan a casa, disfrutan de sus hijos, miran televisión… Yo digo que amo el aula, pero fuera de ella es una locura. Esas horas extra, fuera del aula, son muy agotadoras. […] Pienso 24 horas al día en las cosas que tengo que hacer, en mis alumnos, en las clases que debo preparar, en el contenido que debo enseñar, en el material para los exámenes que tengo que entregar (Patrícia).

Otra sobrecarga surgió en torno a la violación del derecho a la desconexión, lo que también afectó la privacidad de los docentes (Mello, 2021). En muchos casos, los profesores reportaron recibir mensajes y llamadas de la dirección y de los padres fuera de su horario laboral. Edgar describió así esa experiencia:

> […] era enfermizo, muy enfermizo… hubo abusos. No bastaba con el WhatsApp, que se volvió una herramienta profesional. Había exigencias de disponibilidad en todo momento. Muchas, muchas… llamadas. Si tardaba cinco minutos en responder un mensaje, ya me llamaban. Hubo quejas. Fue muy triste… Agradecía no recibir mensajes. Tenía reuniones más allá de mi jornada, así que fue agotador… responder a las demandas de los padres y de la dirección al mismo tiempo (Edgar).

La sobrecarga, en estes casos, está vinculada a la ideología managerial (Gaulejac, 2007), presente especialmente en escuelas privadas (Gaulejac y Guerrero, 2017), donde los alumnos son tratados desde una lógica clientelista. En contextos de crisis, como el de la pandemia, las escuelas temían perder matrícula y exigían de los docentes una atención irrestricta a estudiantes y familias. Los profesores asumieron tareas que no formaban parte de sus funciones: grabar clases y subirlas a plataformas digitales, participar en reuniones fuera de su jornada formal, y responder constantemente a estudiantes y superiores a través de aplicaciones como WhatsApp. "El trabajo se triplicó. Ahora tenemos que llenar anexos de registro diario, cuestionarios… para cada alumno debo completar unos cuatro formularios", explicó Pedro.

La libertad percibida por los docentes —condición esencial para construir sentido en el trabajo (Dejours, 2012)— también fue puesta en cuestión. Cristian, con más de veinte años de experiencia, reflexionó:

> […] era enfermizo, muy enfermizo… hubo abusos. No bastaba con el WhatsApp, que se volvió una herramienta profesional. Había exigencias de disponibilidad en todo momento. Muchas, muchas… llamadas. Si tardaba cinco minutos en responder un mensaje, ya me llamaban. Hubo quejas. Fue muy triste… Agradecía no recibir mensajes. Tenía reuniones más allá de mi jornada, así que fue agotador… responder a las demandas de los padres y de la dirección al mismo tiempo (Edgar).

En los sectores público y privado, la práctica docente parece haber sido subsumida por una lógica centrada en contenidos. Naturalmente, no se trata de un fenómeno nuevo. Sin embargo, en consonancia con Pessanha y Trindade (2022), observamos que los procedimientos administrativos, de gestión y prescripción implementados por las escuelas reactualizaron la precarización del trabajo docente, en detrimento de principios educativos fundamentales para la formación de esta categoría profesional. Los siguientes relatos ilustran este proceso:

> La forma de trabajo… queremos formar alumnos más críticos, pero el sistema lo impide mucho. Y como ustedes saben, el sistema no quiere

> personas inteligentes, críticas, que exijan sus derechos. Y eso me frustra, yo no soy profesor para eso, soy profesor para transformar a mis alumnos (Cristian).

> Cuando yo estudiaba, había reprobación todos los años y la gente se lo tomaba más en serio. Hoy, como no hay reprobación, se nota que no hay compromiso; las familias simplemente empujan a los alumnos. Y uno ve que al gobierno le gusta eso, porque reprobar a un estudiante es un gasto. La dirección dice: "No podemos reprobar a tantos alumnos. ¿Cómo le voy a enviar a SEDUC ese número de reprobaciones?". Eso viene de arriba. Porque perjudica el IDEB. Nos callan cuando dicen que no se puede reprobar, que SEDUC no lo permite (Érica).

Si defendemos que los docentes se enfrentan a tensiones paradójicas (Gaulejac, 2007) en su labor, es porque, en su mayoría, creen en el impacto social y en el potencial transformador de sus oficios. Sin embargo, el ejercicio de la docencia se encuentra cada vez más atravesado por exigencias contradictorias que colisionan con el sentido ontológico de la profesión (Pessanha y Trindade, 2022). Durante la pandemia, mientras las interacciones disminuyeron, las exigencias y la productividad se intensificaron, lo que incrementó aún más el sufrimiento laboral. Leonardo compartió al respecto: "Quieren formatearnos, meternos en moldes, colocarnos en un espacio cerrado, ocho horas al día. Mis mayores frustraciones son: la limitación de mi hacer docente porque todo viene predeterminado, y la imposibilidad de reflexionar" (Leonardo).

Las demandas burocráticas y administrativas, aunque impuestas como obligatorias, no eran consideradas parte de la jornada laboral del docente, lo que llevó a su invisibilización, a pesar de ser percibidas como una estrategia de gestión y un dispositivo político de control sobre el trabajo docente. En las entrevistas realizadas, solo dos docentes mencionaron haber tenido algún espacio de negociación sobre las condiciones u organización de sus actividades. Particularmente en escuelas privadas, la amenaza tácita de despido se impuso como un imperativo, y la sobrecarga laboral se naturalizó

como parte de la rutina, sin que desde sus hogares los docentes pudieran encontrar formas efectivas de respuesta.

Característica del proceso de precarización e informalización del trabajo (Antunes, 2018; Braz, 2021), las escuelas comenzaron a transferir a los docentes los costos derivados de la organización del trabajo. Con la excepción de una profesora, todos relataron un aumento de sus gastos fijos, ya fuera por el incremento en el consumo de energía eléctrica o por la necesidad de mejorar su conexión de internet. También se mencionaron despesas variables, como la compra de cursos, computadoras, laptops, sillas, lámparas, entre otros.

La reconfiguración de los procesos laborales culminó en un deterioro de las condiciones de trabajo, lo que implicó una mayor carga psíquica para los docentes. Desde la perspectiva dejouriana (Dejours, 2012), se trata de un proceso marcado por un gasto desproporcionado de inversión emocional y cognitiva en el trabajo, que entra en contradicción con el deseo y la movilización de la inteligencia del trabajador. El testimonio de Cristina da cuenta de este fenómeno:

> Al principio me desesperé. Me molestaba dar clases grabadas, nunca imaginé que me afectaría tanto, y eso que soy también periodista. [...] Estaba acostumbrada a lidiar con cámaras, a hablar en público, pero nunca me gustó la exposición, prefería los bastidores. [...] Es una sensación de tener que encargarse todo el tiempo. Al principio trabajaba 16 horas al día, paraba solo 15 minutos para comer. Fue muy difícil, horrible... incluso lloré mucho (Cristina).

Además de la reducción del tiempo de descanso y el aumento de la sobrecarga laboral, los docentes se enfrentaron a transformaciones en las dinámicas de sociabilidad propias de su profesión. En un contexto de aislamiento social, el distanciamiento entre colegas parece haber fracturado uno de los pilares fundamentales de la producción de salud en el trabajo. De igual modo, la relación entre docentes y estudiantes también se vio profundamente afectada durante la enseñanza remota. La falta de interacción reveló una gramática de aislamiento del docente, de distanciamiento respecto a sus alumnos, y limitó los

espacios potenciales de realización en el trabajo. Aislados incluso de sus pares, sin una retribución financiera acorde a su esfuerzo, con fuentes de reconocimiento reducidas y lejos de los estudiantes, el sentido del oficio docente se degradó profundamente, lo que tensionó sus proyectos de vida y sus ideales profesionales.

El análisis de los datos recolectados en nuestra investigación, desde un enfoque socio-clínico, demostró un aumento de los factores de riesgo psicosociales predictivos del agotamiento profesional docente durante la pandemia. Si bien la precarización de las condiciones y de la organización del trabajo docente no es un fenómeno reciente en Brasil (Codo y Vasques-Menezes, 2000), parece haberse intensificado. En efecto, la elevada exposición al burnout aparece como producto de una crisis en la atribución de sentido al trabajo realizado por esta categoría profesional, lo que por su vez tiene que ver con una crisis en la dimensión socio-histórica, organizacional y existencial del trabajo docente.

El sentido del trabajo se construye en la intersección entre la diacronía y la sincronía del espacio laboral. Cada trabajador ingresa al trabajo cargando su historia, sus herencias y su genealogía; al mismo tiempo, proyecta expectativas, construye idealizaciones y se forma mediante identificaciones. La construcción de sentido es, por lo tanto, intersubjetiva y depende del potencial de invención, de las redes de cooperación de las organizaciones y de la capacidad de sostenimiento del colectivo laboral (Braz, 2021). Depende de la naturaleza inesperada de los encuentros —que se inscribe en el registro sincrónico—, pero está determinada por los capitales social, cultural, simbólico del trabajo.

Más allá de ser un proceso individual, el sentido del trabajo solo puede ser comprendido en la irreductibilidad entre lo social y lo psíquico. Aunque las vivencias singulares de la historia de cada trabajador tienen una función central en la atribución de sentido, este proceso también depende de cuánto las condiciones y la organización del trabajo ofrecen herramientas para que tal construcción sea posible. En el contexto de nuestra investigación (Santos et al., 2023), los docentes compartieron sus historias, sus luchas y los obstáculos enfrentados para alcanzar satisfacción y realización en su labor.

Sin embargo, el principal denominador común que resonó en cada entrevista fue la precariedad de los soportes materiales y simbólicos para dar sentido a sus actividades.

Privados de esos soportes, las respuestas institucionales parecieron centrarse, predominantemente, en la exigencia de mayor productividad. Mariana expresó esta cuestión situando su salud en primer plano:

> Hace unas cuatro semanas tomé una licencia de siete días porque ya tenía pensamientos repetitivos, problemas gástricos por comer en exceso debido a la ansiedad... así que pedí la baja, empecé a tomar medicina homeopática, estoy más firme en no trabajar fuera de mi horario... no trabajo los sábados... al menos no los lectivos. Estoy tratando de cuidarme más, de buscar atención psicológica... Poco a poco ir incorporando estas cosas en mi rutina... No puedo hacer todo al mismo tiempo... tengo que ir paso a paso... Ya incorporé actividad física... ya bajé 1 kilo de los 10 que gané. No pienso hacer ningún curso... no puedo... veo gente haciendo curso, curso, curso y pienso... ¡yo no puedo con eso! Estoy intentando cuidar mi salud mental (Mariana).

Las vivencias recogidas en las entrevistas no pueden entenderse únicamente como experiencias personales aisladas. Más bien constituyen la manifestación singular de contradicciones históricas y organizacionales que atraviesan la docencia en Brasil desde hace varias décadas. La pandemia actuó como un catalizador, intensificando procesos ya en curso de precarización e informalización del trabajo, y revelando con nitidez cómo las exigencias institucionales se entrelazan con la subjetividad de los docentes. Es precisamente en esta intersección entre lo social y lo psíquico donde se configuran los nudos socio-psíquicos: condensaciones de sufrimientos, recuerdos y defensas que cristalizan en repeticiones, síntomas o impasses existenciales. Estos nudos, que emergen en los relatos de cansancio extremo, pérdida de sentido, violación del derecho a la desconexión o sobrecarga burocrática, no remiten solo a malestares individuales, sino a conflictos estructurales que se inscriben en la experiencia subjetiva. En este sentido, problematizar el burnout docente como un nudo socio-psíquico permite situarlo en un plano

colectivo e institucional, abriendo paso a la interpretación que lo concibe como un Síntoma Social Dominante del trabajo docente en la contemporaneidad.

A modo de ilustración, identificamos al menos tres paradojas (Gaulejac y Hanique, 2024) centrales en el trabajo docente durante la pandemia que muestran cómo la radicalización de las contradicciones se traduce en nudos socio-psíquicos y en un Síntoma Social Dominante. Primero, se exige que los docentes cuiden de los estudiantes, mientras que ellos mismos no son cuidados y, al contrario, se los responsabiliza individualmente por el desempeño ajeno. Segundo, se les demanda asumir responsabilidades ilimitadas —ser responsables "de todo"— sin otorgarles las condiciones objetivas y subjetivas necesarias para responder a tales exigencias. Tercero, se espera que produzcan innovación pedagógica y resultados bajo un marco managerial, al mismo tiempo que se restringen su autonomía y sus márgenes de invención. Estas paradojas, lejos de ser dilemas individuales, condensan tensiones históricas y organizacionales que, en la experiencia subjetiva, se transforman en nudos socio-psíquicos que generan síntomas de agotamiento, despersonalización y pérdida de sentido.

4. Burnout como Síntoma Social Dominante del trabajo docente

Estas paradojas no sólo expresan contradicciones en el plano de la experiencia individual, sino que se inscriben en discursos hegemónicos de carácter managerial y neoliberal. Desde esta perspectiva, el burnout docente puede leerse como un Síntoma Social Dominante, en tanto cristaliza conflictos colectivos bajo la forma de malestares subjetivos. El análisis clínico-sociológico nos permite, por lo tanto, comprender cómo las sobrecargas laborales no son únicamente un efecto de la pandemia, sino la expresión radicalizada de tensiones históricas que atraviesan el oficio docente. Para ilustrar este pasaje, de las fuentes de sobrecarga laboral a su inscripción como Síntomas Sociales Dominantes y a su condensación en nudos socio-psíquicos, presentamos a continuación una tabla de síntesis. Este recurso no pretende agotar la complejidad del fenómeno, sino

ofrecer una representación esquemática de cómo los relatos docentes permiten identificar configuraciones recurrentes de sufrimiento.

Tabla 1. Fuentes de sobrecarga laboral, manifestaciones del burnout docente y nudos socio-psíquicos

Fuentes de sobrecarga laboral	**Manifestaciones del Burnout como Síntoma Social Dominante**	**Paradojas y Nudos socio-psíquicos**
Extensión de la jornada, invasión del espacio doméstico, violación del derecho a la desconexión	Quejas de agotamiento emocional extremo, falta de tiempo personal, sensación de estar permanentemente disponible	Paradoja del cuidado desbordado: se espera que los docentes protejan, acompañen y sostengan a sus estudiantes, pero ellos mismos no son cuidados; al contrario, son individualmente responsabilizados por resultados que dependen de condiciones estructurales.
Exigencias ilimitadas y burocráticas sin recursos materiales ni apoyo institucional	Sentimientos de impotencia, frustración y responsabilización individualizada frente a demandas imposibles	Paradoja de la responsabilidad imposible: se les atribuye la tarea de responder a las demandas del sistema educativo, pero sin condiciones objetivas ni subjetivas para cumplirlas, lo que genera un impasse entre el deber ser y la imposibilidad de hacer.
Presión por resultados, distanciamiento entre colegas, lógicas clientelistas y control managerial que reducen autonomía	Pérdida de sentido, despersonalización y desvalorización del trabajo pedagógico	Paradoja de la autonomía negada: se exige innovación, creatividad y excelencia pedagógica, mientras se restringen las márgenes de acción, anulando la capacidad de atribuir sentido al propio trabajo.

Como puede observarse, las fuentes de sobrecarga no se reducen a condiciones externas o cuantificables, sino que, al inscribirse en discursos dominantes, se transforman en malestares colectivos y síntomas individuales de agotamiento. Las tres paradojas identificadas condensan los nudos socio-psíquicos más recurrentes: configuraciones en las que los docentes quedan atrapados en

contradicciones irresolubles que alimentan el agotamiento, la despersonalización y la pérdida de sentido. La tabla, por tanto, sintetiza el tránsito entre las condiciones estructurales del trabajo docente y su expresión subjetiva bajo el riesgo del burnout como Síntoma Social Dominante, y prepara el análisis específico del contexto pandémico, en el cual dichas contradicciones se intensificaron.

Tomamos como foco de análisis el contexto pandémico, ya que observamos que durante ese periodo se radicalizaron contradicciones que ya atravesaban esta categoría profesional, lo que evidenció un mayor riesgo para el desarrollo del burnout. Esto puso de manifiesto cómo los discursos dominantes en torno al trabajo docente actúan como fuentes condicionantes de sufrimiento laboral. Ello implica considerar que, cuanto más se concibe la educación como una mercancía, subordinada a las leyes del mercado y a la ideología managerial (Gaulejac, 2007; Valdevelde-Rougale y Guerrero, 2019), más se cosifican las relaciones sociales en las escuelas, restringiendo las posibilidades de atribución de sentido al trabajo docente.

Al retomar las tres dimensiones del burnout, se observa que la intensificación del trabajo, la disolución de las fronteras entre el espacio profesional y el espacio familiar, la violación del derecho a la desconexión y la sobrecarga laboral vivida parecen culminar en el agotamiento emocional. El distanciamiento entre colegas, las presiones institucionales y la falta de interacción con los estudiantes, sumados a la desvalorización social y financiera de la profesión, conducen a una baja realización profesional e inducen, aunque parcialmente, a la despersonalización. Esta es, por lo tanto, la gramática que nos permite comprender la génesis y los nudos socio-psíquicos (Braz, 2021) del burnout docente en Brasil.

Dado que el burnout se caracteriza como un proceso y no como un episodio aislado (Pezé, 2022), constatamos que, para algunos docentes, el colapso del sentido del trabajo alcanzó un umbral crítico, al punto de no encontrar recursos para proyectarse en un futuro diferente. Ana nos confesó durante una entrevista: "Le estoy pidiendo a Dios salir de la educación... porque hay muchas cosas con las que no estoy de acuerdo y al final siempre soy la única que levanta la voz. Y eso me deja muy desgastada". Cuando preguntamos

a Leonardo, con 26 años de docencia, qué le producía placer en su trabajo, su respuesta fue tajante:

> Hoy, nada. Y eso es muy triste. Cuando estaba en la secundaria, quería ser científico. Una profesora me dijo que no fuera docente, que no sería feliz. Pero entré y fui feliz por un tiempo. Hoy, ya no. Las personas responsables por la educación en Brasil no saben lo que es educar. […] Las escuelas olvidaron formar. No existe formación continua, para que en el futuro no se exponga tanto al profesor. Lo que hicieron fue exigirnos sin darnos formación. Y en la desesperación, hoy en este país solo nos salvan los médicos y los psicólogos (Leonardo).

Para ocultar o suavizar los conflictos que emergen en el escenario escolar, las respuestas predominantes del *management* parecen haberse centrado fundamentalmente en el plano individual, en detrimento del colectivo. Cristina nos relató una situación que ilustra de forma elocuente este argumento. Docente desde 2015, en un momento de la pandemia comenzó a sufrir crisis de llanto y a "sentirse mal". En sus palabras: "Tuve colegas con varios problemas de salud, trombosis, alopecia… porque los profesores tenían miedo de hablar entre sí, de mostrar debilidad o cansancio y no ser bien vistos". Días después, una colega le confió que: "Daba clases con el basurero al lado, vomitaba con la cámara apagada y volvía a dar clase". Exaltada, Cristina compartió la continuación de esa experiencia:

> Ahí dije: "¡no, basta! Esto tiene que cambiar". También porque el año pasado daba clases para la EJA [Educación de jóvenes y adultos], alumnos mayores… y los adultos mayores me llamaban porque no sabían usar la computadora, y yo daba clases de 7h a 22h. Me volví loca, colapsé. No podía hablar con las personas sin agredirlas… entonces fui a hablar con la coordinadora pedagógica y le dije que no estaba funcionando. Mi sensación era que iba a estallar… y le dije que sabía que eso también les pasaba a otros colegas, y que la escuela tenía que prestarle atención. Le dije: "ustedes saben que esto está ocurriendo". Y su respuesta fue: "eso es un problema individual, cada quien tiene que lidiar con sus propios problemas". En ese momento, me dieron ganas de llorar, de arrojar el teléfono. Le dije que no era algo personal, que era un problema del trabajo. Así que le dije que resolvería mi problema individual: dejaría la

> EJA. Ella respondió que no podía hacer eso, que cómo encontrarían otro profesor. Le dije que eso era problema suyo, que encontrar otro docente era responsabilidad de la escuela, no mía (Cristina).

Mientras que Gaulejac y Hanique (2024) sostienen que los conflictos laborales son a menudo producto de contradicciones no resueltas dentro de las organizaciones, comprendemos que el discurso managerial opera precisamente para evitar que dichos conflictos emerjan colectivamente (Valdevelde-Rougale y Guerrero, 2019). Al situar el sufrimiento exclusivamente en el plano individual, se refuerzan sentimientos de fracaso, soledad y desilusión, señalados por Pezé (2022) como elementos decisivos en el desencadenamiento del burnout.

Sumidos en la urgencia, el inmediatismo y la presión constante por adaptarse, los docentes parecen experimentar de forma cada vez más intensa el peso de las exigencias que se les imponen en el espacio escolar. Si defendemos que el burnout constituye un Síntoma Social Dominante del trabajo docente, es porque su estructura sintomática deriva de conflictos que emergen de la trasposición de la ideología managerial al ámbito educativo en Brasil. Esto implica reconocer que sentimientos como la impotencia, la irritabilidad, el cansancio de sí, la hiperactividad laboral, la disolución de fronteras entre espacio familiar y laboral, la pérdida del derecho a desconexión, entre otros, no son efectos colaterales de fallas eventuales en la gestión de una institución educativa. Al contrario, tales síntomas, característicos del agotamiento profesional docente (Cardoso et al., 2017), reflejan la radicalización de los supuestos del *management*.

El cuadro nosográfico del burnout se inscribe en discursos predominantes que determinan las condiciones de trabajo del profesorado. También refleja la estructura del lazo social contemporáneo (Braz, 2019): el sufrimiento docente es fruto de un señuelo institucional, diseminado en las escuelas. En otras palabras, nuestros datos indican que los docentes más susceptibles al burnout son precisamente aquellos que más se entregan emocional y cognitivamente a su labor (Santos et al., 2023), en quienes el trabajo ocupa una función central —o incluso exclusiva— en sus vidas. Son

quienes interiorizan los imperativos del *management* y naturalizan la competencia, el aislamiento afectivo y la resignación ante el funcionamiento colectivo (Santos et al., 2023).

Se invierte una enorme cantidad de energía para alcanzar objetivos inalcanzables o para resolver conflictos que superan ampliamente el campo de autonomía y acción del docente. Tal como mostraron las entrevistas, en este escenario se instala una relación de dependencia con el trabajo, aunque la sobrecarga y el estrés tienden a ser naturalizados —sobre todo por la gestión— como si fueran fruto de elecciones individuales (aunque los docentes los vivan como respuestas a las exigencias institucionales).

Considerando su dimensión organizacional e histórico-social (Castro, 2013), el burnout debe ser comprendido como una respuesta psíquica a los conflictos entre normas sociales, culturales y los deseos y necesidades individuales de los trabajadores. Por ello, defender el burnout como Síntoma Social Dominante del trabajo docente en Brasil nos parece fundamental, ya que permite un giro reflexivo que abre paso a estrategias orientadas a cuestionar la lógica hegemónica de individualización del sufrimiento (Braz, 2021). Para que los trabajadores puedan exteriorizar las tensiones que los atraviesan, se vuelve urgente historizar el burnout docente.

Historizar el burnout significa concebirlo en su complejidad, más allá de un enfoque estrictamente nosográfico (Couto y Braz, 2023), a favor de una mirada socio-clínica que contemple las vivencias singulares de los docentes, pero vinculadas a las dimensiones organizativas e históricas de su oficio. En este sentido, una vía fecunda de acción consiste en la creación de espacios colectivos de discusión en las escuelas, que permitan la emergencia de reflexiones sobre las paradojas y contradicciones del trabajo docente. Este camino puede evitar que el problema del agotamiento profesional sea abordado únicamente desde una perspectiva individual, como si se tratara de un asunto aislado de una escuela o de ciertos profesores. Se trata, entonces, de ubicar y problematizar las transformaciones recientes del mundo del trabajo, en las que se dibuja una tendencia hacia la informalización del empleo (Antunes, 2018) y la precarización del trabajo docente.

Por último, los socio-clínicos pueden desempeñar un papel importante en este campo, colaborando con los docentes en la animación de dichos espacios de discusión en distintas instancias. Actualmente, hemos desarrollado experiencias[4] en esta dirección, que han resultado enriquecedoras. Realizamos talleres y distintas intervenciones junto a secretarías de educación, sindicatos y, sobre todo, en escuelas municipales y estatales en Brasil. No se trata de posicionarse como especialistas ni de ofrecer grupos psicoterapéuticos en las escuelas. Por el contrario, nos referimos a un rol de facilitación, orientado a la creación de espacios seguros de reflexión, donde sea posible abordar vulnerabilidades, angustias y sufrimientos diversos, pero también cuestionar las contradicciones que emergen de la organización del trabajo docente, determinadas por fuerzas políticas, económicas e ideológicas que contribuyen al sometimiento de los profesores. Así, si la pérdida del sentido del trabajo y el burnout están ligados a la fragmentación de los lazos entre pares, estudiantes y gestión (Pezé, 2022), es justamente por medio del colectivo que se torna posible la reconstrucción de dichos vínculos. Por ello, la cooperación, la solidaridad y la escucha sensible hacia el otro se presentan como ingredientes clave en la prevención del burnout.

Conclusión

El trabajo docente se ejerce en el marco de relaciones intersubjetivas (Braz, 2021) con colegas, superiores, estudiantes y sus familias. Cuando las dinámicas de sociabilidad se fragmentan y las fuentes de pertenencia y reconocimiento se reducen —producto de la radicalización de la precarización del trabajo docente—, se generan nudos socio-psíquicos en los que se entrelazan contradicciones organizacionales, institucionales y conflictos subjetivos. Estos nudos, al condensar dimensiones sociales y psíquicas en una unidad inseparable, producen un terreno fértil para el desencadenamiento de experiencias de agotamiento, decepción y pérdida del sentido social y existencial del oficio docente. La intensificación del trabajo,

4 Los relatos sobre las intervenciones llevadas a cabo por nuestro grupo de investigación serán analizados de manera detallada en un estudio posterior.

la falta de recursos financieros y la naturalización de exigencias desproporcionadas, frutos de la reconfiguración de las condiciones y de la organización del trabajo durante la pandemia, no solo debilitaron las posibilidades de éxito personal y profesional, sino que cristalizaron en impasses socio-psíquicos que atraviesan la subjetividad de los profesores.

Las vivencias de profesores durante la pandemia de COVID-19 constituyen operadores analíticos privilegiados para el estudio del burnout docente, pues evidencian cómo las ofensivas manageriales (Gaulejac, 2007; Souza et al., 2021; Pessanha y Trindade, 2022; Santos et al., 2023) y neoliberales (Dardot y Laval, 2016) intensificaron procesos de precarización ya presentes en el contexto brasileño. Al analizar el burnout desde esta clave, comprendemos que su génesis socio-psíquica está estrechamente vinculada a la degradación del sentido atribuido a la actividad laboral, de manera que puede concebirse como un Síntoma Social Dominante del trabajo docente contemporáneo, inscrito en discursos hegemónicos manageriales que organizan y determinan las condiciones de trabajo en las escuelas.

Las tres paradojas identificadas —del cuidado desbordado, de la responsabilidad imposible y de la autonomía negada— condensan los nudos socio-psíquicos más recurrentes: configuraciones en las que los docentes quedan atrapados en contradicciones irresolubles que alimentan el agotamiento, la despersonalización y la pérdida de sentido. Esta inflexión conceptual tiene dos implicaciones fundamentales. En primer lugar, permite reconocer que el cuadro nosográfico del burnout no es un efecto colateral derivado de fallos puntuales en la organización del trabajo docente, sino el reflejo de la radicalización de los supuestos manageriales que definen dichas condiciones. En segundo lugar, permite tensionar una lógica predominante que tiende a individualizar el agotamiento profesional de los docentes, psicologizando contradicciones y conflictos estructurales de sus oficios.

Pezé (2022) subraya que el burnout no es una enfermedad, sino un síndrome de adaptación. En efecto, su definición y su impacto sobre la salud de los trabajadores son cambiantes, ya que fluctúan de acuerdo con las transformaciones en las organizaciones y en el

mundo del trabajo. En este estudio, los datos analizados permiten afirmar que el agotamiento profesional docente es un fenómeno colectivo, expresión de un proceso institucional e histórico-social en curso en la sociedad contemporánea, marcado por la flexibilización y la precarización de las relaciones laborales (Venco, 2019; Pessanha y Trindade, 2022; Oliveira y Ribeiro, 2022).

La desestructuración de las trayectorias profesionales del magisterio reduce cada vez más las posibilidades de realización personal, lo que asesta un "golpe" a la salud de los docentes (parafraseando una expresión recurrente en Dejours). Concebir el agotamiento profesional como un acontecimiento individual implica invisibilizar que está sostenido por nudos socio-psíquicos que condensan paradojas estructurales. Nuestro propósito no ha sido únicamente describir factores de riesgo psicosociales o enumerar causas del malestar docente, sino problematizar estas configuraciones, mostrando cómo el burnout se constituye como un Síntoma Social Dominante que articula la experiencia singular con paradojas colectivas. Lo que está en juego es la salud mental del profesorado y la lucha por la mejora de sus condiciones laborales.

Los altos índices de riesgos psicosociales para el síndrome de burnout, por sí solos, ya evidencian la necesidad de ampliar este debate. A lo largo de nuestros análisis y reflexiones, explicitamos en qué condiciones se produce la degradación del sentido del trabajo docente. Al recorrer este camino, propusimos vías alternativas, mediante la creación de espacios colectivos y socio-clínicos de discusión y reflexión, con el objetivo de promover la salud de los docentes y reconstruir espacios de escucha y sociabilidad en las escuelas brasileñas.

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Absenteeism and Labour Precarity

A Quantitative Analysis of a South African Cleaning Services Company

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Abstract

This study investigates absenteeism among cleaners employed by a South African cleaning services company. Despite its economic importance and the challenges faced by its workforce, the cleaning services industry remains understudied, particularly in terms of absenteeism and its impacts on cleaners' livelihoods. To fill this void, a quantitative approach was employed, utilising a dataset of 5109 cleaners to analyse the prevalence and patterns of absenteeism. Results show that Black African females were disproportionately affected, and regions such as Cape Town and the North-West Province displayed the highest prevalence of absenteeism among cleaners. This study contributes to the growing body of research on precarious work and informs policy discussions and interventions on improving labour practices in low-wage sectors.

Keywords: Absenteeism, janitorial services, working hours, quantitative research, South Africa, clinical sociology

1. Introduction

This study explores the patterns of absenteeism among cleaners, also referred to as janitors or custodians, of a national cleaning company in South Africa. In this study, absenteeism refers to instances when employees are absent from their contracted work without valid reasons for an entire day, or when they have been repeatedly absent, thereby affecting the company's productivity (Acosta, 2025:30; Ashraf & Ashraf, 2024:319). Investigating absenteeism among cleaners is important because they render a crucial service to the overall functioning of a workplace. They clean, sweep, mop and vacuum floors inside schools, universities, office buildings, hospitals and shopping malls. They clean restrooms and restock supplies such as toilet paper, soap and hand sanitiser. They wash windows, empty trash bins and tidy up rooms and corridors. Yet, despite their important role in maintaining and keeping buildings safe, clean and hygienic, cleaning work is a low-status and poorly paying job that few people aspire to pursue as a career (Bayron et al., 2024; Perri, 2023; Zulfiqar & Prasad, 2022). Globally, millions of people are employed as cleaners, the majority of whom are black and female, often from socioeconomically disadvantaged and undereducated backgrounds (Cho, 2019; Flanagan, 2022; Herod & Aguiar, 2006; Zulfiqar & Prasad, 2022).

In addition to the physical drudgery of the job and poor working conditions, the cleaning industry is a victim of neoliberal labour market deregulation, re-segmentation and downsizing (Cho, 2019; Rabelo, 2017). In many countries, the neoliberal reforms of the 1990s and 2000s led to in-house and full-time cleaners being given early retirement packages or retrenched, with their positions filled by cleaners employed by outsourced third-party cleaning companies (Du Toit, 2025). For workers, this means that they are typically employed on non-standard, flexible, short-term and/or fixed-term employment contracts that erode access to proper working conditions, fair treatment, and dignity (Cho, 2019; Herod & Aguiar 2006; Knotter, 2017; Rabelo, 2017; Vidal, 2016; Warren, 2016). Similarly, in South Africa, the cleaning industry employs a large proportion of workers, mostly women from poor socio-economic backgrounds,

on casual and outsourced contracts mirroring international trends (Bezuidenhout & Fakier, 2006; Gow & George, 2011; Ntlokwana, 2016; Ntsie, 2020; Petro, 2014).

International studies on the cleaning industry tend to focus on cleaners' job satisfaction (Rodríguez-Nieto et al., 2018); resilience and coping strategies (Bayron et al., 2024); workload, occupational hazards and health (Bao et al., 2023; Charles et al., 2009), recognition, collective bargaining and union membership (Cho, 2019; Connolly et al., 2017; Eimer, 2024; Flanagan, 2022), among others. Bezuidenhout and Fakier (2006) explored the impact of neoliberalism and workplace restructuring of contract cleaners at a South African university. While their single-participant methodology limits the generalizability of their findings, their work raises important questions about exploitation in outsourced cleaning work that warrant broader empirical investigation More systematic evidence of precarity in South African contract cleaning comes from Gow and George's (2011) study of cleaning companies that demonstrates industry-wide practices of maintaining casual worker pools who lack job security and receive lower wages than permanent staff. Additionally, Ntsie's (2020) study on outsourced cleaners reveals systematic patterns of workplace rights violations, including the denial of paid annual and sick leave, with migrant workers particularly vulnerable to mistreatment, despite formal protections. These studies collectively establish that outsourced cleaning work is characterised by instability and vulnerability.

Workplace absenteeism has received considerable scholarly attention across diverse sectors and national contexts. Research has examined the causes, consequences, and management strategies of employee absence in business settings (Kocakulah et al., 2016), manufacturing (Gutsa & Luke, 2021), construction (Moyo & Smallwood, 2024), and healthcare (Haywood, 2020; Klootwijk et al., 2025). Importantly, some studies have specifically explored how employment precarity and contract type influence absenteeism patterns, demonstrating that workers on non-standard contracts experience different absence dynamics than those on permanent contracts (Restrepo & Salgado, 2013; Kim et al., 2016). Within the

South African context, scholars have identified multiple factors contributing to absenteeism, including poor working conditions, inadequate health and safety provisions, and organisational culture (Gutsa & Luke, 2021; Moyo & Smallwood, 2024). Yet, research on absenteeism in the contract cleaning industry has been overlooked and understudied.

To fill this void, this study draws on a large quantitative dataset comprising records of 5,109 permanently employed employees of a national cleaning company. The data captured for February 2022 includes entries for each of the 5,109 employees, covering age, gender, race, geographic region, hours worked, wages paid, and recorded absences (represented as negative hours paid). The study is guided by the following question: What are the patterns of absenteeism within the cleaning company, and how do they vary across different demographic groups and geographical locations? While our study does not provide insights into the causes of absenteeism among contract workers, its objective is to identify which groups of workers are most at risk of absenteeism and how company managers can address this issue through targeted interventions. Through this analysis, we aim not only to contribute to academic discussions on labour processes and precarious work but also to provide empirical evidence that can inform policy discussions and organisational practices regarding absent working hours. By shedding light on the prevalence and impacts of absenteeism, this study aims to contribute to efforts to improve working conditions in the cleaning services industry and similar low-wage service sectors. In the following sections, we will provide a discussion of the cleaning service industry in South Africa, including possible causes of absenteeism, followed by a description of the methodology and results. The study concludes with implications for policy and practice in the context of South African labour relations and beyond.

2. The Cleaning Industry in South Africa

According to the National Contract Cleaning Association (2025), the cleaning industry in South Africa employs over 100,000 people, with an estimated 1,500 cleaning companies. Established cleaning

companies with branches across South Africa include Bidvest Prestige, Servest, and Tsebo Solutions, alongside emerging medium and small cleaning companies that offer basic and specialised cleaning services to numerous industries, such as education, healthcare, commercial, mining, and industrial sectors (Goscore, 2022). Cleaning is often not considered part of the core function of an organisation or a business's focus. It is therefore most likely to be outsourced to companies specialising in cleaning work.

Market research predicts that the cleaning industry is projected to grow at a rate of 4.38% from 2023 to 2032, with an expected revenue of USD 2 billion in 2032 (Credence Research, 2025). The rise in South Africa's cleaning industry is attributed to the expansion of healthcare infrastructure, the construction of high-rise commercial buildings, and the rapid development of the food and beverage industry, which necessitates professional cleaning services. The COVID-19 pandemic heightened public awareness of hygiene and cleanliness, causing a demand for cleaning services alongside broader sectoral growth (Credence Research, 2025).

The cleaning industry is heavily racialised and gendered, where black African men and women from poor socio-economic backgrounds dominate this industry. This pattern is not accidental, as it reflects deep structural inequality where black people were steered into low-status and precarious jobs during the apartheid era, a trend that remains today. Like paid domestic work (see e.g., Ally, 2010; du Toit & Casanova, 2025), the division of labour is also gendered, where women tend to perform mostly indoor cleaning roles such as office, retail, and hospital cleaning, while men tend to perform outside cleaning roles like window washing, industrial - and waste cleaning (Bezuidenhout & Fakier, 2006; Duffy, 2007; Herod & Aiguir, 2006; SweepSouth, 2025).

Despite the cleaning industry's low status, it is governed by key labour legislations, including the Labour Relations Act 66 of 1995 (LRA), the Basic Conditions of Employment Act 75 of 1998 (BCEA) and the Employment Equity Act 55 of 1998 (EEA). Together, they provide guidance to employers and employees regarding fair treatment. However, the unique vulnerabilities of this sector called for an

additional statute. The Sectoral Determination 1 (SD1) was introduced in 1999 and applied to all contract cleaners, regulating and enforcing minimum employment standards for this sector. Consistent with our data from 2022, the SD1 stipulated that cleaners, regardless of being employed on a full-time or fixed-term contract, must receive a minimum wage of R25.52 per hour in major metropolitan areas (Area A), R23.27 per hour in rural and other regions (Area C), with KwaZulu-Natal (Area B) governed by separate bargaining council rates. Their working hours were restricted to 45 hours per week, and they were liable for an annual bonus equivalent to one month's salary. However, casual contract cleaners might miss out on bonuses due to employer non-compliance.

While the SD1 does not explicitly address absenteeism, the Basic Conditions of Employment Act (BCEA) allows employers to deduct wages for unauthorised absences, but only in proportion to the actual hours not worked (BCEA, s.34). However, employers often monitor absenteeism inconsistently and have poor documentation. As a result, workers could lose a full day's pay despite being absent only for part of the day, a practice that breaches SD1's minimum daily payment requirements (SD1, Clause 3).

Moreover, the prevalence of fixed-term, temporary, and casual employment contracts discourages workers from taking sick leave or formally requesting time off (Runciman, 2022). This dynamic might contribute to absenteeism, as workers fear pay penalties or the loss of future shifts (See Barchiesi, 2008). Thus, precarious employment conditions and insecure work dynamics could also lead to absenteeism in the outsourced cleaning industry. A question that arises is: "What factors contribute to absenteeism among contract cleaners?

3. Absenteeism among Contract Cleaners

Multiple factors contribute to absenteeism among low-income workers, such as contract cleaners. Globally, women continue to bear the primary responsibility for household and caregiving duties within their families. For women in low-wage and precarious employment, such as contract cleaning, the lack of institutional and workplace support makes it difficult to reconcile work and

family responsibilities. This imbalance increases the likelihood of absenteeism, as workers are often forced to prioritise urgent care obligations over their work (Karimbil, 2019; Mokomane, 2019).

Occupational hazards, injuries, and related health outcomes among workers employed in the cleaning industry are another factor contributing to absenteeism. Cleaners are exposed to biological waste, hazardous materials such as broken glass and needles, and contaminated surfaces and objects that can lead to a variety of illnesses and allergies (Badubi, 2017; Charles, 2009). Subsequently, low-income workers who lack access to healthcare services are more likely to miss work compared to higher-income employees who can afford timely medical intervention and support. Often, they must rely on over-the-counter medicine for severe health conditions that require professional medical treatment (Wildbret et al., 2023). In addition, demanding workloads, working with heavy equipment, long working hours, and the social stigma linked to cleaning work could lead to poor physical well-being (e.g., back pain, poor physical postures) and mental well-being (e.g., stress, fatigue, and exhaustion) among cleaners (Bao et al., 2023; Charles, 2009; Rabelo, 2017).

Tedious and repetitive tasks, a lack of identification with company goals, boredom and feeling undervalued may cause cleaners to become disconnected and alienated from their job and are, therefore, more likely to be absent (Badubi, 2017). Frequent job transfers between departments or shifts, especially without adequate training or support, can further contribute to absenteeism by disrupting routines and lowering motivation. For example, cleaners who are regularly relocated between buildings, campuses, or work teams may feel unsettled or confused, which can reduce their sense of accountability and belonging in the workplace.

Environmental and logistical barriers are also contributing to absenteeism. Poor weather conditions (e.g., heavy rain, flooding, or storms) can render roads impassable or unsafe, particularly in under-serviced areas. In addition, unreliable public transport or disruptions caused by strikes or crime often prevent low-income workers, such as cleaners, who rely on minibus taxis or trains, from reaching their

workplaces on time or at all. For many, the long distances between their homes and places of employment, combined with high transport costs, further increase the likelihood of absenteeism, especially when wages are low and attendance incentives are lacking (Badubi, 2017). While there are many other possible reasons why people are absent from their work, it is necessary to develop interventions to help low-income workers, such as cleaners, limit the chances of absenteeism and subsequently lower their pay. Based on the dataset obtained, this study investigates which groups of cleaners are statistically more likely to be absent from their jobs. Based on the results, we also provide suggestions for interventions to reduce absenteeism and mitigate subsequent pay cuts.

4. Methodology

The study employed a cross-sectional, retrospective, quantitative research design, utilising data from 5,109 employees working for a national cleaning company in February 2022. The dataset contained entries for each employee, including age, gender, race, geographic region, hours worked, wages paid, and recorded absences (reflected as negative hours paid). This study combined statistical modelling and machine learning (ML) approaches to examine patterns of absenteeism. Our analytical framework comprised three stages: (1) data preparation, (2) hierarchical clustering, and (3) predictive modelling with comparative evaluation of statistical and ML methods.

4.1. Data Preparation

We analysed administrative records extracted from monthly payroll and attendance data in Microsoft Excel format. The gender and race distribution of the dataset is shown in Table 1. Data pre-processing and analysis were conducted using Python (v3.8) and standard libraries including pandas, numpy, scikit-learn, and scipy.

Records about employees identified as "White" or "Indian", as well as those from the internal Human Resources Division (HRD), were excluded due to very low representation. Employees were uniquely identified via their employee code. A derived binary variable (AbsenceBinary) was created to indicate whether the employee had

ever recorded an absence during the observation period. Additionally, we calculated the average hourly wage (AvgHourlyRate) as total pay divided by total wage hours. Missing values in wage-related fields were imputed as zero, thereby preserving all employee records for the clustering process. The final dataset incorporated demographic variables (age, gender, race, and region), wage information, and absenteeism indicators.

Table 1. Gender and Race Distribution of the Workforce in the Final Dataset

Race	Male		Female		Total	
	#	%	#	%	#	%
Black African	1,194	95,4	3,709	96,2	4,903	96,0
Coloured	54	4,3	138	3,5	192	3,7
Indian	-	-	3	0,1	3	0,1
White	4	0,3	7	0,2	11	0,2
Total	**1,252**	**100**	**3,857**	**100**	**5,109**	**100**

4.2. Hierarchical Clustering

To identify distinct employee groupings, we applied Ward's hierarchical agglomerative clustering method. This approach used both standardised continuous features (Age, AvgHourlyRate) and one-hot encoded categorical variables (Gender, Race, and Region). Scaling and encoding were applied to each feature set. The clustering was implemented using the linkage function from the SciPy cluster hierarchy module, employing Ward's minimum variance criterion to minimise within-cluster variance. A dendrogram was generated to visualise the hierarchical structure of the clusters, and the tree was truncated at nine clusters (k = 9). This cut-off was selected based on a balance between analytical tractability and sociological interpretability. To assess whether the identified clusters captured meaningful differences in absenteeism, we conducted a Chi-squared test of independence between cluster membership (Cluster_H) and absenteeism status (Absence: yes/no). A contingency table

was constructed, and the Chi-squared test returned a statistically significant result ($\chi^2 = 210.65$, $p < 0.001$), supporting the construct validity of the clusters. We identified two of the nine clusters (Clusters 2 and 9) as 'high-risk', based on their elevated rates of absenteeism.

4.3. Statistical Modelling

For binary absenteeism prediction, we fitted logistic regression models using the statsmodels library. The baseline model included age, gender, race, region, and average hourly rate as predictors. Model performance was evaluated using Area Under the Curve (AUC), accuracy, and pseudo-R^2 values. We also experimented with interaction effects (e.g., Gender × AvgHourlyRate and Age × AvgHourlyRate) to capture potential socio-economic dynamics. To account for potential regional clustering effects, mixed-effects models were fitted with random intercepts for region, using the MixedLM module in the statsmodels package. Assumptions of linearity, independence, residual distribution and multicollinearity were assessed (e.g. VIF scores, Q–Q plots, and residual analysis).

4.4. Machine Learning

To complement the statistical models, we implemented a Random Forest classifier (RF) and a Gradient Boosting classifier (GB) using scikit-learn. The data were split into training (80%) and testing (20%) subsets, with stratification to preserve class balance. Model hyperparameters were optimised using GridSearchCV with 5-fold cross-validation. Performance metrics included AUC, accuracy, precision and recall. To enhance predictive performance, we engineered interaction features (e.g., age × wage), categorical groupings (e.g., wage quintiles, age brackets), and dummy variables for categorical factors. Feature importance was analysed for RF and GB models to identify the most influential predictors.

We compared the predictive performance of statistical models and ML models using a consistent test set. Logistic regression provided interpretability through coefficients and p-values, while ML models offered higher flexibility and the ability to capture non-linear relationships.

4.5 Limitations

Several limitations of this study should be noted. First, the cross-sectional nature of the data provides only a snapshot of a single month (February 2022), which limits our ability to analyse seasonal patterns, longitudinal trends, or any other changes over time regarding cleaners' absenteeism. Second, there may be unobserved variables influencing negative hours and compensation not captured in our dataset. For example, job roles, workload, family responsibility or health status were not captured in the dataset, limiting the explanatory power of the models. Third, while our analyses reveal correlations and associations, they do not establish causal relationships. Lastly, the results are limited to one national cleaning company in South Africa. They cannot be generalised to other cleaning companies that use different labour practices and standards to record absenteeism among their staff.

4.6 Ethical Considerations

This study adhered to strict ethical guidelines. All personally identifiable information was removed or anonymised to protect employee privacy. Results are presented in aggregate form to prevent the identification of individual employees. We approached the analysis with impartiality, aiming to present an unbiased view of the company's labour practices. Direct informed consent from employees was not feasible due to the secondary use of administrative data. However, internal company data policies governed access to the data, and all analyses were conducted for legitimate organisational research purposes. We have clearly outlined our methodology and acknowledged limitations to ensure transparency in our research process. The study was designed and executed with neutrality, aiming to inform rather than critique or justify any managerial decisions. The use of multiple methods (statistical and ML approaches) ensured methodological triangulation, and limitations were transparently acknowledged to guard against overinterpretation of findings. Given the sensitive nature of employee absenteeism and its potential misuse in disciplinary contexts, the results are presented in a manner that

avoids stigmatisation. The focus remains on identifying systemic patterns to inform fair, equitable, and supportive HR strategies.

5. Results

The analysis revealed substantial heterogeneity in patterns of absenteeism among workers. Using hierarchical clustering based on age, gender, race, and hourly wage, the study identified ten distinct employee clusters. A Chi-squared test confirmed a statistically significant association between cluster membership and absence rates ($\chi^2 = 210.65$, $p < 0.001$), suggesting that the segmentation captures meaningful differences in absenteeism vulnerability.

Clusters 2 and 9 emerged as the most at-risk sub-populations. A summary of their demographic and geographic profiles is presented in Table 2. Cluster 2, referred to as the 'Middle-aged Female Workers', constituted 10.5% of the workforce and consisted almost entirely of Black African women earning minimum wage. The average age in this cluster was 43.5 years. This group was geographically split between semi-rural areas in the North West Province and urban Cape Town, with an absence rate of 24.6% and 39.1%, respectively. Cluster 9, which we refer to as the 'Younger Urban Precariat', comprised 12.3% of employees and was composed of a younger, more gender-balanced cohort (mean age: 31 years) who were also predominantly Black African. This group was concentrated in Cape Town and had an absence rate of 27.6%. While both clusters earned similar low wages, their demographic profile and geographic contexts revealed distinct vulnerabilities.

To explore the underlying drivers of absenteeism, traditional and multilevel logistic regression models were applied. Hourly wage and age were modestly protective factors against absence (Table 3), though the effect sizes were small. Being a Male and Coloured were associated with slightly higher odds of being absent, whereas region was not a statistically significant factor in the model. Although the inclusion of a multilevel structure to account for regional clustering improved model fit, the overall explanatory power of the models remained modest, with an area under the curve (AUC) of approximately 0.60. These results suggest that demographic and

Table 2. Demographic and Geographic Profile of High-risk Clusters

	Cluster Name	% of Workforce (N)	Mean Age (± SD)	Gender	Race	Mean Wage (R/hour ± SD)	Region	Absence Rate
2	Middle-aged Female Workers	10.5% (533)	43.5 ± 4.1 (Range 34–52)	98.9% Female	89.3% Black African	R23.16 ± R1.09	52.5% North West (semi-rural); 47.3% Cape Town	24.6% (NW); 39.1% (CT)
9	Younger Urban Precariat	12.3% (627)	31.0 ± 4.4 (Range: 20–43)	58.7% Female 41.3% Male	89.6% Black African	R23.49 ± R0.99	50.4% Cape Town (urban)	27.6%

Table 3. Multilevel Logistic Regression of Absenteeism Predictors*.

Factor	Coefficient (β)	p-value	Change in Predictor	Effect on Absence
Age	−0.003	< 0.001	+10 years	3% decrease
Hourly wage	−0.004	< 0.001	+R10/hour	4% decrease
Race: Coloured	+0.061	0.036	Coloured (vs Black)	0.6% increase
Gender: Male	+0.026	0.031	Male (vs Female)	2.6% increase
Region	+0.010	0.120	—	Not statistically significant

* Coefficients are from a multilevel logistic regression model with random intercepts by region.

wage characteristics, although relevant, are insufficient to fully explain patterns of absenteeism in this context, highlighting the need for more flexible modelling approaches capable of capturing complex, non-linear relationships.

Negative coefficients indicate a protective effect (lower odds of absence), while positive coefficients indicate increased risk. Age and hourly wage were both statistically significant protective factors, while being male and identifying as Coloured were associated with slightly higher odds of absenteeism. Regional variation was not statistically significant in the fixed effects but was included in the model to account for clustering. To this end, machine learning methods were employed and benchmarked against the statistical models (Table 4).

Table 4. Comparative Performance of Selected Models Predicting Absenteeism

Model	AUC	Accuracy
Random Forest	0.743	0.74
Gradient Boosting	0.768	0.85
Mixed-Effects Linear Model	0.600	0.83

Both Random Forest (RF) and Gradient Boosting (GB) classifiers outperformed logistic regression in terms of predictive accuracy and AUC (Table 4). For example, the Random Forest model achieved an AUC of 0.698 and an accuracy of 75.0%, representing a clear improvement over the statistical model. Moreover, the machine learning models enabled analysis of variable importance, providing insight into which predictors most influenced the model outputs.

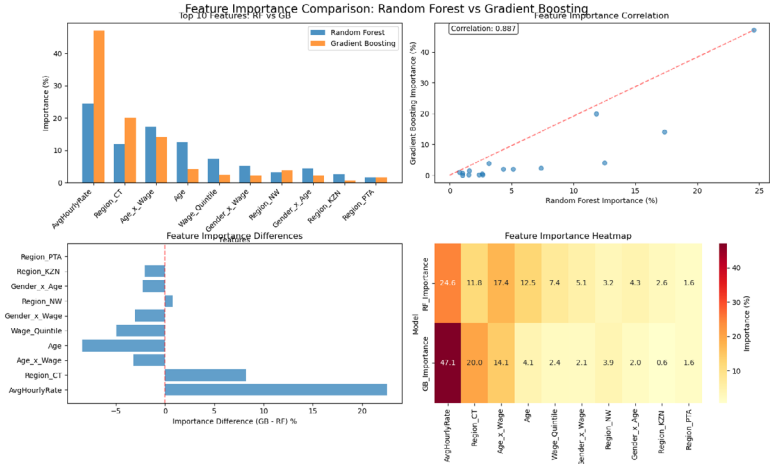

Figure 1: Feature importance in Random Forest and Gradient Boosting models predicting absenteeism

The top predictors of employee absenteeism, based on feature importance scores derived from Random Forest and Gradient Boosting models, are shown. As illustrated in Figure 1, economic factors dominated the feature importance rankings in both the RF and GB models. The hourly wage emerged as the most influential predictor, accounting for 24.6% of the importance in the Random Forest model and 47.1% in the Gradient Boosting model. The interaction between age and wage also featured prominently, as did geographic location, particularly in the Cape Town region. These findings highlight the centrality of economic vulnerability and urban context in shaping absenteeism risk, suggesting that these dimensions carry more predictive weight than demographic identity alone.

6. Discussion and Conclusion

Building on these modelling results, we identified three priority groups for potential intervention. The first priority group comprised middle-aged women, aged between 34 and 52 years, in Cape Town, whose exceptionally high absence rate (39.1%) may reflect compounded vulnerabilities arising from gender, age, wage stagnation, and urban precarity. The second group consisted of younger urban workers,

both male and female, aged 20 to 34 years, who were concentrated in low-wage positions with an elevated risk of absence. The third group consisted of middle-aged women based in the North West Province, who similarly exhibited high rates of absence, but in a more semi-rural setting. The reasons for absenteeism among these three groups are unclear, as the dataset did not include any information on this topic. An investigation of the root causes of absenteeism is beyond the scope of this study, given the limited data available. Nonetheless, our results narrow the focus of possible interventions that could target vulnerable groups.

The first group of cleaners who are statistically at risk of absenteeism is middle-aged female cleaners aged between 34 and 52 years, living in Cape Town. With limited information available from the dataset, qualitative focus groups with a group of women in this age group in Cape Town could provide valuable insights into why they are a high-risk group for absenteeism and inform the development of targeted interventions. For example, the company could collaborate with these women to develop solutions and adapt policies on working hours, flexibility, childcare, and absenteeism.

However, we do not know where cleaners reside in Cape Town, the city is characterised for its stark social and spatial inequality, where low-income people typically live in townships outside Cape Town's CBD region (HSRC, 2023). Townships are Khayelitsha, Langa, and Mitchell's Plain are known for its poor infrastructure, dangerous streets, and dirty sanitation facilities which pose a severe health risk to its residents. For middle-aged women, who often carry the double burden of income generation and caregiving for children, living in a community with limited access to proper healthcare facilities, unreliable public transport, and exposure to gang violence could significantly affect their overall health and well-being. Notably, during the data collection period in February and March 2022, extended taxi violence in Cape Town left thousands of commuters stranded, compounding the challenges faced by working mothers who depend on public transport to balance their employment and childcare responsibilities. Thus, interventions could focus not only on improving the infrastructure of these communities, but also

on investing in community-based projects that target community clean-ups to improve residents' right to dignity and a liveable environment. Cleaning companies could establish partnerships with local clinics to offer discounted healthcare access and alternative transportation providers (e.g., Uber, Bolt) during emergencies for their cleaners.

Interventions could also target caregiving of this at-risk group. While we do not know if this group have children or grandchildren, trends suggest that Black African women from poor socio-economic backgrounds tend to have children at a young age and subsequently, become grandparents at a younger age (Anakpo, & Kollamparambil, 2021). Statistics show that roughly 6,7 million grandparents, the majority being grandmothers, reside and care for children aged 0 to 17 years (StasSA, 2023). Caregiving responsibilities may interfere with work duties and lead to absenteeism. Thus, interventions could focus on childcare support for this group, assisting mothers and grandmothers with childcare duties, and offering them financial assistance to outsource childcare to others.

The second group at risk of absenteeism is the "younger urban workers", who might struggle with job satisfaction or identifying with company goals. Incentives such as Employee of the Month or financial bonuses for good performance could motivate this group of workers to commit to their work schedules and reduce potential absenteeism. Creating a culture of care by acknowledging good work through incentives is linked to employee loyalty and commitment to the organisation (du Toit, 2012, 2013, 2025; Yuliani & Suryani, 2025). Today's digital era also makes it possible to communicate with employees digitally through personalised WhatsApp messages, which could improve commitment and a sense of belonging, thereby reducing absenteeism among a tech-savvy group of workers.

The third group of at-risk workers of absenteeism is the middle-aged women in North-West Province, a semi-rural area in South Africa, where towns and villages are spread out (Motatsa & Mokwena, 2014). Interventions could focus on support systems and organisational presence to reduce isolation. For example, planned social gatherings attended by women cleaners, senior personnel, and

mentors from the cleaning company could improve identification with the company, build solidarity among women, and develop specific coping strategies to reduce absenteeism. Interventions could also focus on solving transportation problems. For example, the company could subsidise shuttle services or partner with local transport providers to help women going to and coming from their workplaces, making commuting safer and more affordable for them.

In conclusion, this study highlights various individual, social and workplace vulnerabilities of cleaners in urban and semi-urban areas in South Africa. Absenteeism not only disrupts the organisation of the company, but it also impacts the individual who is penalised by pay cuts. This deepens poverty and inequality among vulnerable groups of people. Rather than blaming workers for absenteeism, there is a crucial need to advocate for wage adjustments and preventive strategies, such as healthcare support, improved transportation infrastructure and networks, and workplace flexibility, to help vulnerable low-income workers navigate daily challenges and reduce absenteeism, ultimately leading to higher wages.

Future studies could pilot the interventions suggested in this study to investigate their sustainability in reducing absenteeism among cleaners. Participatory action research is also necessary. Researchers could involve workers in developing interventions and solving problems. This study shows that absenteeism is not only a human resource management issue, but a symptom of deeper structural, racial and gender inequalities in South Africa's labour market. Addressing these root causes and solving the problems can support a healthier, more committed, and more resilient cleaning workforce, benefiting both workers and employers alike.

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Improving the Lives of Older Adults in South Korea: Addressing Mandatory and Involuntary Retirement[1]

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Abstract

This article examines mandatory and involuntary retirement in South Korea. Information is first provided about human rights in relation to employment. This is followed by a section with information about Korea and the older adults who may have faced mandatory and involuntary retirement. The next sections are about ageism in Korea and about some of the attempts to improve the employment situation of older adults: a training program for middle-aged adults, the work of the national human rights organization, the national attention given to reform efforts and the initiatives of the organization of retired people. The conclusion provides 11 suggestions about what can be done to improve the employment situation for older adults.

Keywords: Clinical sociology, South Korea, mandatory retirement, involuntary retirement, employment, older adults

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1. Introduction

It is well known that the Republic of Korea (South Korea) faces challenges given the aging population and the very low fertility rate. While a lot of attention and policy developments are directed at improving the low birth rate[2] (e.g., Lee & Yi 2025), there also has been some attention in the last few years to improving the lives of older adults.

The existing research about older adults in South Korea (hereafter "Korea") has often focused on their difficult situation (e.g., Kang et al. 2022; Fritz 2024). This research provides an addition to that research.[3] It discusses the current situation as well as some of the approaches being taken to improve the employment possibilities for older people in Korea.

A qualitative approach is used for this research. Qualitative research begins with general ideas and allows information gained through approaches such as interviews, observation and focus groups to influence further steps in the research process. While quantitative information is included in this analysis, the focus of this research is on information obtained through a review of relevant documents (e.g., published research, newspaper articles, important documents), interviews with the heads as well as other employees of Korean organizations, and observations while in Korea.

Information is first provided about human rights in relation to employment. This is followed by a section about Korea and the older adults who may have faced mandatory and involuntary retirement and then a section about ageism. The next section is about some of the attempts to improve the situation in Korea: a training program

2 According to McCurry (2025), "the conservative administration of the impeached president, Yoon Suk Yeol, has spent billions of dollars on measures to arrest the decline, including financial incentives for newlyweds and expanded child care assistance." Paternity leave was extended, monetary incentives were in place if both parents take parental leave, companies were given monetary incentives to support childbirth bonuses and the government will pay new parents' salaries when they are on leave from small or medium-sized employers (Lee & Yi 2025).

3 There is other research that does not just focus on the difficulties. See, for instance, Kang and Ihara (2025) who discuss "the importance of promoting exercise as a potential strategy to mitigate the detrimental mental health effects of age discrimination."

for middle-aged adults, the work of the national human rights organization, the national attention given to reform efforts and the initiatives of the organization of retired people. The conclusion provides 11 suggestions about what can be done to continue to improve the employment situation for older adults.

2. The Human Rights of Older Adults and Employment

There are a number of human rights documents that might be discussed in relation to aging, but many of them, including the Universal Declaration of Human Rights, only have general statements which might refer to aging. As Fredvang and Biggs (2012, p. 12) have noted, "No treaty offers older persons a tailored, comprehensive and binding protection of their rights."[4]

It should be noted that Article 23 of the Universal Declaration of Human Rights (1948) indicates, in part, that "Everyone has the right to work, to free choice of employment, to just and favourable conditions of work and to protection against unemployment." Also, the United Nations International Covenant on Economic, Social and Cultural Rights (1995) indicates that it is "the right of everyone" to make a living by work which is freely chosen or accepted. And in 2005, the United Nations Committee on Economic, Social and Cultural Rights wrote that "every individual has the right to be able to work, allowing him/her to live in dignity."

Because aging is not dealt with in a specific way, the United Nations General Assembly, in 2010, adopted Resolution 65/182, which established the "Open-Ended Working Group on Ageing for the Purpose of Strengthening the Human Rights of Older Persons." The Group's mandate was to review the existing international documents regarding the human rights of older adults, identify any possible problems and present "**at the earliest possible date"** a proposal with

4 Doran et al. (2018, pp. 306-307) wrote that ¨starting from the 1990s and with increasing momentum in the last decade,¨ age has been mentioned in connection to important documents (e.g., general comments of the Committee supervising the Covenant on Economic and Social and Cultural Rights, a general recommendation of the Committee supervising the Convention on the Elimination of all forms of Discrimination against Women and comments of the UN Independent Expert on the Enjoyment of All Human Rights by Older Persons).

"the main elements that should be included in an international legal instrument to promote and protect the rights and dignity of older persons" (UN General Assembly 2013, p. 3). In 2024, the Open-Ended Working Group was abolished even though no convention – not even a draft – had been developed in the 14 years the Working Group was in operation.

The work for a possible convention has now been taken up by the UN Human Rights Council in Geneva. Many human rights groups and non-governmental organizations as well as a number of countries hope this work will result in a Convention on the Rights of Older Persons. One question, of course, is whether the human right to employment will be included in the document and, if so, whether mandatory retirement and involuntary retirement will be mentioned.

The UN's Independent Expert on the enjoyment of all human rights by older persons prepared a report in 2025 about older persons' right to social protection and their right to work (Mahler 2025). She concluded:

> An internationally legally binding instrument dedicated to the human rights of older persons will offer an opportunity to develop the content of older persons' rights to social security and to work, and to explicitly ban age-based discrimination in all private and public sectors… Practices that are discriminatory on the basis of age, such as age limits in recruitment or mandatory retirement ages, must be abolished, ensuring that older persons can retire at a prescribed age if they wish to do so.

3. Older Adults in Korea

In 2023, Korea had an estimated population of 51.71 million (Statista 2024); that population is 92% urban with half of the population living in or around Seoul, the capital. Korea is one of the most densely populated countries in the world. The population is very homogeneous; in fact, Korea is one of the most homogeneous countries. The age structure in 2023: around 10.9% of the population was from 0-14 years, 70.69% were between 15-64 years and 18.34% were 65 and older. In late 2024, Korea officially became a "super-

aged society"[5] with the oldest category (those 65 and older) being 20% of the population according to Korea's Ministry of the Interior and Safety (Seo & Lau 2024; Ji 2025).[6] In the oldest category, there are more women than men. Life expectancy is estimated to be 81.2 for men and 87.2 for women. Korea has an aging population as well as one of the world's lowest fertility rates.[7]

The Korean government has three branches: executive, judicial and legislative. The National Assembly has 300 members, and they are chosen by direct and indirect election to four-year terms. In the assembly elected in 2024 just 61 (20%) were women while men held 239 seats (Statista 2025). The average age of those elected to the National Assembly was 56.3 years and the oldest member is now 83 (Shin 2024).[8]

According to an OECD country survey about trust (2024a):

> Koreans place more trust in other people (53%), international organizations (52%) and the police (42%) than in the national government (37%). Around a third of the population reports high or moderately high trust in the national civil service (36%), local government (35%) and courts and the judicial system (33%). Political parties (20%), national parliament (21%) and news media (30%) are the least trusted institutions.

Factors that might have affected the thinking about the national parliament could include a lack of action and the very problematic activities of some politicians.

Korea has both mandatory retirement and involuntary retirement. **Mandatory retirement** refers to the age at which individuals who

5 The United Nations "classifies countries with more than 7% of the population 65 or older as an 'aging society,' those with over 14% as an 'aged society' and those with more than 20% as a 'super-aged' society" (Seo & Lau 2024).

6 There are many super-aged countries. See the list provided by Voronoi (n.d.).

7 According to the CIA *World Factbook* estimate (2024), only Taiwan (1.11) has a lower rate than Korea (1.12).

8 According to Ha-Nee Shin (2024), "The oldest among the elected candidates is the Democratic Party (DP)'s big-name politician Park Jie-won, former head of Korea's National Intelligence Service and a four-term lawmaker who will be serving his fifth starting in May." Jie-won Park is now 83. There are many older representatives: eighty between the ages of 61–70 and four between the ages of 71–80 (IPU Parline n.d.)

hold certain jobs or offices are required by business, custom and/or law to leave their work.[9] **Involuntary retirement** is a term that sometimes is used when there is a focus on the custom for workers to be forced to retire by their employers because of their older age

The Korean government introduced the Act on Prohibition of Age Discrimination in Employment and Elderly Employment Promotion (AEPA) in 1991. It is the primary law dealing with age discrimination. It stated that companies must try to provide a retirement age of 60 or above. In May 2013, this law was amended, and the recommended retirement age became an obligatory statute by 2016 (for companies employing 300 or more) and by 2017 (for organizations with fewer than 300 employees). AEPA's Article 4-4(1) "expressly prohibits employers from discriminating, without justifiable grounds, against individuals on the basis of age regarding recruitment and employment; salary, education and training; placement, transfer, or promotion; and retirement or dismissal" (Yulchon 2013). The AEPA "applies to virtually all employers…" (Agediscrimination.info 2023).

In September 2024, the Korean Ministry of the Interior and Safety extended the retirement age for public workers from 60 to 65 (Goover 2024). The Ministry entered a collective bargaining agreement with the public workers' unions, and the retirement age will be phased in based on the year of birth.[10] Lim (2024:2) has made an interesting point about retired government workers:

> Retired government employees in Korea enjoy a relatively advantageous economic lifestyle compared to retired employees in the private sector, as they enjoy job security before retirement and are paid a monthly pension after retirement.

9 Tampubolon (2025) has written: "Often, judicial reasoning is laced with implicit biases that normalize dependency and support restrictive measures, like mandatory retirement… institutionalized ageism is clear in laws that set arbitrary age limits for employment…"

10 According to Goover (2024), "The new structure dictates that workers born in 1964, who would previously retire at 60 years, will now retire at 63 years. Workers born from 1965 to 1968 will retire at 64 years, and those born in 1969 and later will have a retirement age of 65."

There is a debate in Korea about raising the minimum retirement age. Joong-keun Lee, 83, chair of the Korean Senior Citizens Association, thinks the age should be raised to 75 (Jin 2024). Gwak and colleagues (2025) have said raising it to 65 is one of three possibilities being considered. The other two are "maintaining the current retirement threshold but allowing employees to be rehired under new contracts or eliminating the retirement age altogether" (Gwak et al.2025). And ten individuals from organizations representing older adults and academic experts[11] announced at a press conference in May 2025 that they had been meeting for several months and reached a consensus that 70, at this time, is the appropriate age to be considered a senior citizen. They also "called for a new system that continually reviews and adjusts that age, taking into account factors such as health, public perceptions and economic participation rates" (KBS World 2025).

Korea has a **seniority-based wage system**; this system requires the basic salary to rise depending on the number of years one has worked for an organization. Older workers earn more money, and this can encourage an employer to release older workers and save money.[12] According to Kang et al. (2022), "the seniority-oriented wage system should be reorganized into a job-based wage system."

As workers often were let go when they were in their 50s or even their 40s, it was expected that a new policy would extend the retirement age of workers and provide them with "minimum employment up to the age of 60" (Lee & Cho 2022). Lee and Cho (2022) studied the situation and found:

> First, post the introduction of the policy, the probability of workers retiring at the mandatory retirement age has decreased, whereas the probability of workers retiring early for involuntary reasons in their 50s has increased. Second, the workers who were predicted to benefit from

11 According to Hyun-se Cho (2025), participants included representatives of the "Korean Association of Senior Citizens, Korean Gerontological Society, Korean Consumers' Union, Korea Institute for Health and Social Affairs (KIHASA) and several professors… The people who played a key role in this discussion were Professor Soondoni Chung of Ewha Womans University and Researcher Eunna Kang of KIHASA."

12 In 1922, 165 petitions alleging age discrimination were filed.

> the policy had trouble retaining their jobs until the legal retirement age of 60. These results demonstrate the possibility that companies attempted to terminate their senior workers before they reached the mandatory retirement age of 60 by means of recommendations to resign and offers of honourable retirement. In conclusion, we found that it is difficult to provide actual employment protection up to the legal retirement age by making it compulsory through legislation.

It should be noted that many employers who did not like having to keep employees until they were at least 60 put in place a **wage-peak system**. The Korean government "introduced the wage peak system for public institutions, and it also has been adopted by major companies in Korea" (LIN 2023). This system meant that wages were regularly deducted (rather than having raises) from an employee's paycheck until the employee reached the required age of retirement. There have been a number of court cases challenging companies' wage-peak systems.

Hayoung Lee, Haeun Kim and Huyun Shin (2021) wrote the following about the situation of older people in Korea:

> The number of retired people in their late 50s and early 60s is growing fast in South Korea. In 2010, 24 percent, or 1.7 million people between the ages of 58 and 66 retired, compared to 33 percent, or 2.4 million people, in 2019…

The 24 percent who had retired often did not do this voluntarily. A 2019 survey cited by Lee, Kim & Shin (2021) found 76 percent of this early retirement was not voluntary. (Korean authors frequently use the words "involuntary retirement" to describe this situation.) The percentage of involuntary retirement was 83.1 percent for household heads. Almost 60 percent of retirees have been found to hope for reemployment for financial reasons (Lee, Kim & Shin 2021). The authors note, however, that "only a fraction of all retirees aged 55-64 succeed in reemployment, and those who do find new jobs tend to work in low-paying ones (e.g., janitorial, caretaking, and

building security services).[13] Now, "for the first time in history, the employment rate for those 70 and over… has surpassed 30%" (Han et al. 2024), an 11.4% increase from the previous year (Tan 2024).

There are an additional number of interesting points to be made about the labor situation in Korea. First, there is a low rate of unemployment, although it is rising. In 2023, it was 2.3% (Cho K. 2023), in 2024 it was 2.8% (OECD 2024b) and in April 2025 it was 2.9% (Statistics Korea 2025). Second, 86.9% of workers in Korea do not have a labor union organization to represent them[14] (Statista 2025). Third, the pension system needs to continue to be improved. The 2022 Mercer report on global pensions (Mercer CFA Institute 2022, p. 9) gave Korea a C rating. Mercer (p. 54) noted the following about Korea:

> Korea's retirement income system comprises a public earnings-related pension scheme with a progressive formula, based on both individual earnings and the average earnings of the insured as a whole, and statutory private pension plans. (Among the ways South Korea could improve the system:)… Improving the level of support provided to the poorest pensioners… (and by) increasing the level of funded contributions, thereby increasing the level of assets over time…

While Mercer's 2024 report gives no details, it does say that Korea has improved its standing. Its rating now is 52.2 which is just below Taiwan's rating of 53.7 but nowhere near the top ratings which were obtained by countries such as the Netherlands (84.8) and Iceland (83.4).

13 As noted by Tan (2024), "In 2024, individuals aged 70 and above comprised 5.6% of the total workforce, up from 5.1% in January 2023. Among the older workforce, around half of the individuals continuing to work beyond the age of 70 were aged 75 or above… representing 18.8% of the 75 and above age group…. The Ministry of Labour's classification of 'simple labourers', denoting non-specialists requiring minimal training, encompassed 42.1% of the older workforce. Meanwhile, 29.6% were specialists in the agriculture, fisheries, and farming sectors."

14 A number of the unions have made extending the retirement age a priority. These include the unions representing workers at Kia, Hyundai, Samsung Group affiliates, POSCO, HD Hyundai affiliates, and Hanwha Ocean (Park, J. 2023).

Retirees and even those who have not yet retired have mentioned problems regarding preparation for retirement**.** In fact, 52.5% of household heads and their spouses said they were not "well prepared for their old age" (Statistics Korea 2024). One problem certainly is the amount of income. Lee, Kim and Shin (2021) noted that Koreans usually start to receive a pension at age 60, but 49 is the average retirement age; this means that someone might not have sufficient income for 5–15 years.[15]

At one time Korea was what could be called a "family care society." This family system supported parents who were older, and this can decrease the need for a strong national care system. In the last 30 years the family situation has changed. Older adults less frequently live with their children and the number of households of only one or two older people is increasing.

Korea's "senior citizens remain mired in poverty" according to a 2023 article in Yonhap and the poverty of older adults "is always mentioned at one of the most urgent social problems when discussing the issues facing Korean society" (Kang et al., 2022). Households of only one older person are often mentioned as having the highest poverty rate.

According to a 2025 report from Statistics Korea, income inequality in Korea has decreased over the last ten years. By age, however, "the relative poverty rate among those aged 66 and older is the highest at 39.8% (Park, S. 2025). This is a .2% decline since 2020. Kang, Park and Cho (2022) discussed the seriousness of the income problem:

> Korea maintains one of the world's top 10 GDP levels while showing the highest elderly poverty rate among OECD countries. On average, OECD countries do not have much difference in poverty risk by age, but in Korea, poverty risk increases rapidly in old age. The poverty rate of senior citizens in Korea… stood at… more than three times that of the OECD national average of 13.8%. (It also should be noted that) poverty among

15 Kang Park and Cho (2022) wrote that the involuntary retirement at an early age is due to "corporate labor cost avoidance."

> the oldest , those aged 75 and over, is more frequent (55.9%) than among the younger old, those aged 65–75 (35.5%).

A soup kitchen in Dongdaemun, a district in Seoul, provides lunch for some 500 people a day with most of them being older adults. As a worker in the kitchen there is quoted as saying, "They can't work, they can't ask for money from their children and they can't eat… so they come here" (Anonymous 2024)

Kang, Park and Cho (2022) have concluded:

> For the elderly to escape poverty on their own is practically challenging, if not virtually impossible. In order to realize an inclusive society, the government's social security policy and labor structure need to be reformed in concert with individual efforts.

4. Ageism in Korea

Ageism has been defined "as the stereotyping, prejudice about and discrimination against people on the basis of their age" (UNECE 2019). It is seen as "largely implicit, subconscious and unchallenged in our societies" (UNECE 2019). Ageism has been described "as a form of oppression deeply imbedded in social structures¨ (Krekula et al. 2018, p. 33) and Swift and her colleagues (2018, p: 41) stressed that ageism "remains a relatively accepted form of prejudice, deemed to be an inevitable part of the aging process." In fact, a survey of 83,034 participants in 57 countries found that "at least one in every two people… had moderate or high ageist attitudes" (Officer et al. 2020).

Writing in 2025, Kang and Ihara said the following about ageism in Korea:

> Ageism in Korea is on the rise, fueled by intergenerational conflict stemming from competition for resources in an increasingly aging society. The rapid growth of the older adult population is contributing to shifting intergenerational dynamics. This demographic shift creates social and economic pressures that strain relationships between generations, leading to increased prejudice and discrimination against older adults… This includes the perception that older adults are dependent and place

> a greater burden on the next generation. Furthermore, the COVID-19 pandemic has exacerbated ageism in Korea. Media portrayals often focus on the vulnerability and dependency of older adults, reinforcing negative stereotypes and contributing to their social isolation. This has led to a measurable increase in reported experiences of age discrimination… The 2017 Survey on the Human Rights of the elderly found that 86.4 % of young adults believe age discrimination exists in Korean society.

One incident in Korea in 2023 got a lot of national as well as some international attention. A photo was posted online of a Korean café with writing on the café door that said "No-senior zone (no entry for elderly over 60)." The *Korea Herald* article (Lee, J. 2023) about the incident noted that "the post comes amid growing concerns over public displays of intolerance in the South Korean society."

Kang and Ihara (2025) have concluded that "age discrimination is a significant issue in Korea, and in recent years, the level of animosity towards older adults has become increasingly alarming." The authors are concerned not only about attitudes toward older people but also that older people often internalize these problematic views.

5. Employment Initiatives for Older Adults

As one might expect, there are different kinds of programs that are meeting or trying to meet the needs of older adults in Korea. There are, for instance, HelpAge Korea's services for low-income older adults which include activities to organize themselves and reach out to younger people; programs that provide meals for those in need; and initiatives that encourage acceptance and employment (Cho 2023, 2024a). Hyun-se Cho (2025), the president of HelpAge Korea, is very concerned about the very low number of low-income people that benefit from the current retirement system.

There also is Everyoung Korea. Everyoung is a technology firm that employs about 300 people who typically work 4 hours a day for 5 days a week. The company hires people 55 years and older; offers "senior-friendly benefits" (e.g., rewards for your 60th or 70th birthday, job placement training) and "the official retirement age is set at 100" (ASEM Global Ageing Center 2024).

The focus in this section is on four initiatives that are related to employment. They are employment training, human rights initiatives, national efforts including pension reform and the work of KARP, the national organization of retired people.

Sangsanguri's training for employment. There are vocational training centers for older people in Korea. Some have said they focus on "simple work" such as cleaning and janitorial work while many jobs will need advanced training. As Lee, Kim and Shin (2021) have emphasized: "An employment system that effectively matches capable, middle-aged workers with businesses that need their expertise is essential to solving… (employment) issues."

One such initiative has been Good Jobs 5060 which was frequently mentioned as either led by or connected to Hyundai Motor Company. Good Jobs 5060 was a five-year program, aimed at those 50–60 years old, that was put in place by four organizations – Hyundai; Korea's Ministry of Employment and Labor; Seoul 50+ Foundation; and Sangsanguri Company, Ltd., a for-profit company that provides job training (Shin 2024). Good Jobs 5060 aimed to create 1000 jobs for those between 50 and 60 years of age. It did provide some 600 jobs. The five-year program ended in 2022.[16]

According to Lee, Kim and Shin (2021),[17] the program established important partners and was able to achieve "collective impact success." The most important factors: incentivizing potential employers, establishing a hiring intermediary (participants did not need to directly contact potential employers) and aligning skills with expectations (particularly important when dealing with small and medium-size companies).

Sangsanguri Company, Ltd., a partner in Good Jobs 5060, was put in place by Chul-Ho Shin, the CEO, in 2013. In 2024, it had 70 employees and operated in five locations. Sangsanguri (translated by the CEO to mean We Work Together) proposed Good Jobs 5060 and it continues to be one of the programs of his company (Shin 2024).

16 Interestingly, the website was still active in 2024 with its last dated material from 2022.

17 Sangsanguri's CEO Chul-Ho Shin is not the Shin who is a co-author of this article.

Sangsanguri is not the largest job training company operating in Korea. That company would be Ingeus, which is based in Singapore and operates in several countries. Both companies would be aware that "businesses with 1000 or more employees must provide training on life planning to involuntary retirees who are 50 years of age or older" (Shin 2024).

Sangsanguri has received a lot of attention. It was recognized for its social innovation by Hyundai Motor Company in 2015, operated a middle-aged employment academy under the Ministry of Employment and Labor in 2016, co-launched Good Jobs 5060 in 2018 and, in 2021, was discussed in the *Stanford Social Innovation Review* and the Korean edition of Collective Impact Best Cases (http://www.sangsangwoori.com/).

The current aim of the organization's programs is to provide education and job matching services for those in their 40s and 50s. As the organization's website notes:

> Seven out of 10 people are involuntarily retired, and the actual retirement age is getting lower, with an average of 49.1 years old. However, the upper age limit for their desired working age is 73. They want to continue contributing to economic development.

The organization operates a number of programs, but its primary project in 2024 was Second Life, a program begun with the Hana Financial Group for those who are retired. A participant in one of the organization's programs such as Second Life, if paying for the participant's own involvement, agrees to pay the first month's salary to the training organization if the participant does find a job. According to Shin (2024), some 60% of participants do receive jobs.

The National Human Rights Commission of Korea (NHRCK). Korea adopted several specific equality laws that prohibit discrimination in different areas of life and provide a framework for promoting equality for particular groups. Notable among these laws is the 2016 Act on the Prohibition of Age Discrimination in Employment and Employment Promotion for Older People (the AEPA). The act is supplemented by a constitutional equality guarantee, which prohibits "discrimination in political, economic, societal or cultural

life on account of sex, religion or social status". Age is not expressly listed as a protected characteristic in the Constitution, but the term 'social status' is broad in scope and could be interpreted to include protection based on age.

In 2001, Korea adopted the National Human Rights Commission of Korea (NHRCK) Act, which established a national human rights institution mandated to promote and protect the fundamental human rights set out in the Constitution. Age is listed as a ground of discrimination under the Act (Shin 2023). However, according to a HelpAge International 2022 report, the Commission's enforcement powers are limited, creating barriers to justice for older people. To understand this comment, it might help to know a little about the history of the Commission.

The Korean National Human Rights Commission (hereafter "the Commission") has had a very difficult history (Shin 2023). The idea to establish the Commission was brought forward first by civil society in 1993. The idea looked promising during the presidential election in 1997 and the front-runner in the election, Kim Dae Jung, promised to establish the Commission. It took four more years to do so. It was established in 2001, but it "only had a certain level of independence." The Commission needed to be an independent institution, but this was often challenged.[18]

The Commission has regional offices across the country, and, in 2022, it handled 10, 573 cases with the highest number of complaints (about 20%) coming from prisons. The Commission now has an "A" status but, according to the chairperson of the Board of Directors of the Korea Center for United Nations Human Rights Policy, the Commission "has a long way to go until it satisfies all the criteria of the Paris Principles" which include a broad mandate, independence, pluralism and adequate resources (Shin 2023).

18 In the years before the Commission was put in place, it was suggested that it be under the Ministry of Justice and the Commissioners all would be political appointments. Civil society always was active during difficult times (and there have been many) over the 24-year history of the Commission. The Global Alliance of National Human Rights Institutions (n.d.) has an accreditation process that requires institutions to be effective and independent. The Republic of Korea is accredited at the A level.

One of the important contributions of the Commission in 2024 was that it developed a 63-page draft of a Convention on the Rights of Older Persons.[19] Yookyong Park (2024), Assistant Director of the International Human Rights Division, distributed the draft to interested Non-Governmental Organizations while the UN Open-Ended Working Group on Ageing was still in existence and it was discussed at a side event to the Working Group's 2024 meeting (Lee, D. 2024). This draft is particularly important because the UN's Open-Ended Working Group was mandated to develop a draft but never did so in its 14 years of existence.

The Korean draft document says the following about the employment of older people:

> Article 18. Right to Work
>
> 1. State Parties recognize the right of older persons to decent work on an equal basis with others, without discrimination on the basis of age.
> 2. State Parties shall take appropriate measures, including legislation, to protect and promote the realization of the right to work. This includes:
>   a. Prohibiting discrimination on the grounds of age in all matters relating to recruitment, working conditions and social security;
>   b. Promoting flexible, supportive and inclusive work environments that cater to the needs and capabilities of older workers;
>   c. Ensure trade union rights for older workers, even after retirement;
>   d. Protecting domestic and care workers, informal laborers, especially older women and older migrants;
>   e. Protecting older persons from unhealthy working conditions and forced or compulsory labor.

National reform efforts. Cho, Lee and Woo in 2016 noted that older workers in Korea, "with lower educational levels, tended to work

19 The Commission wrote this draft while it was chair of the Working Group on Aging of the Global Alliance of National Human Rights Institutions (National Human Rights Commission of Korea 2023, p; 144-45).

off and on repeatedly because there is no proper security in both the labor market and pension system." The authors wrote that Korea has "a three-tier security system with national pension, corporate pension and personal pension." They said that people who "have a stable position and high income level" are entitled to all of the above pensions while "those with a low income level such as small business owners and irregular workers and the current generation of senior citizens, are not properly protected by any institution." So, what changes have been proposed or made by the government?

It is true that the Korean government in 2023 proposed a plan to increase the cap on working hours each week to 69 from the current limit of 52. It has been said that the government proposed this because of pressure from business groups. Labor unions as well as younger and middle-aged workers strongly objected, and a government representative said it would take a new "direction" after listening to public opinion (Chen et al. 2023). The original plan was not put in place.

In September 2024, the Ministry of Health and Welfare had a campaign to "raise awareness of its efforts to create jobs for older adults and help improve perceptions of those who remain active in the labor market in the later stages of life" (Jung 2024). The one-week campaign was to help those seeking employment by introducing them to possible training opportunities and by offering incentives to firms for hiring them. The Ministry also was planning to "hold various online events to spread positive images of such workers" (Jung 2024).

In March 2025, the National Assembly did vote to reform the national pension system. It had been 18 years since the last reform. According to Kim (2025), this would "pave the way to delay the depletion of the pension fund[20] by nine years."[21] A big problem is that the number of national subscribers continues to decline ("due mainly

20 Other countries can have this problem. The United States, for instance, has an aging population and less workers who pay into the social security system. At this point, the system would not be able to pay full retirement and disability benefits in 2034 (Thomas 2025).

21 A Reuters (2025) piece written the same day as the one by Kim indicated depletion could be delayed 15 years.

to the low birthrate") while the number of recipients (the "aging population") is increasing (Jun 2025). The pension contribution rate "would be raised to 13 percent from the current 9 percent, which would make people 'pay more, and receive more'" (Kim 2025). Kim (2025) wrote that the pension system was designed in 1988 to "address the high poverty rate among elderly people" but now there were concerns that "with the nation rapidly aging and its birth rate plunging" that young people would not receive pension benefits even though they had contributed to the system.

Cho (2024b) has concluded that the Korean government is "in the very early stages of responding to the issues of older people with a rights-based approach." He also noted that the change has been very slow.

The Korean Association of Retired Persons (KARP). The Korean Association of Retired Persons was put in place by Myong-ryong Juch in 1996 while he was working in New York City (Juch 2023, 2024). He was impressed by the work of the American Association of Retired Persons and decided this kind of national organization was needed in Korea. KARP is a not-for-profit, non-governmental organization that serves those 50 and older. It began with 20 original members and has now some 200,000. Juch was successful in having the organization receive ECOSOC standing with the United Nations. He (Juch 2024) describes KARP as an organization that wants "to improve the quality of life of the young and elderly." In fact, the organization gives out a t-shirt that says just that:

> YOU, Young Old United!
> Building an Age-Inclusive
> Multi-Generational Workforce
> Living, Learning & Earning Longer
> www.karpkr.org

According to Juch, "KARP has been active in providing tangible services not only to its members, but also to communities as a whole." It has a number of programs including seminars and workshops. There also are its expert committees and, a main interest of Juch, is the committee that focuses on employment research. He is interested

in "changing the perception of Korean society that forces people to retire permanently rather than engaging in motivated activities once they turn 50." Among KARP's slogans: "Growing with Age – Living, Learning and Earning Longer," "Collective Voice, Collective Purpose," and "Tap the Untapped Senior Workforce."

Juch is an activist. He submits statements regarding government deliberations and actions. For instance, he has spoken against the seniority-based wage system (the policy of having automatic wage increases), and he also has proposed extending the mandatory retirement age by 5 years. (He sees this 5-year proposal as an interim step to increase or remove a mandatory retirement age.) Juch holds monthly seminars regarding issues facing older adults in Korea. The seminars he runs can include a speaker from KARP, academics, researchers and government representatives. He says the seminars are covered by the news media.

Juch is now 77. He has devoted 28 years to this organization. The organization is facing financial difficulties; there is no foundation, government or business support. While KARP charges 100,000 Korean won (about $88) a year for membership, he estimates that only a very small percentage pays the annual dues. Juch provides personal financial support for the organization. In 2024, Juch was looking for a very committed leader who also thinks this is an important initiative and will continue to develop KARP. Juch thought that the lack of consistent financial support had not yet attracted the right someone to take this volunteer position.

6. Conclusion

Kim Ji-yeon, a researcher at the Korea Development Institute, has been quoted as saying: "Workers in their 60s these days are as healthy and capable as younger workers. And education levels among seniors today are much higher than 20 to 30 years ago" (Jung & Lee 2024). While the situation regarding senior employment is improving,[22] it is still not what it needs to be.

22 The city of Daegu's Ministry of the Interior extended the retirement age of "certain public employees – those in roles such as cleaning and facility management – up to 65 years" (and some companies are doing the same). Dongkuk Steel agreed with its

It is true that some of those with adequate pensions may not want to continue their employment and would be happy to be involved in voluntary activities. But many others think they need an adequate income, want the camaraderie[23] that can come with working and/or actually enjoy working and would like to continue their paid employment.[24] It is a human right to be able to work; older adults should not be forced to quit working solely because they have reached a certain age.

What are some of the actions that need to be considered to improve the situation for older adults in Korea?[25] There needs to be (1) more education for young people (and policymakers) to understand that mandatory retirement is a systemic, structural barrier that contributes to people thinking there must be something wrong with people when they have reached a certain age; (2) more training and more kinds of training opportunities (at little or no cost) offered to older people;[26] (3) easy access to job opportunities (full-time, part-time or gradual retirement arrangements); (4) a continuing campaign to create a

labor union to extend the retirement age to 62… (and) Hyundai Motor Company and POSCO… have introduced 'post-retirement rehiring' allowing workers to re-enter on contract after retiring at 60, for up to two years" (Jung et al. 2024).

23 Many older people who no longer work are lonely and depressed. Junsoo Hur (Lee 2023) has suggested that one model for addressing loneliness is having an official position - a loneliness minister - as is the case (since 2018) in the United Kingdom, and I have seen how a community-based communication model works to stay in touch with people in communities in the northern part of Sweden.

24 According to a Statistics Korea survey of older adults who are working, "The main reason for older adults to seek employment is financial necessity. Among those aged 55-79 who plan to work, over half (55.8%) stated they intend to delay retirement to make up for insufficient pension income. Additionally, many cited 'enjoyment of work' (35.6%) and 'boredom' (4.3%)" (Han et al. 2024).

25 Claudia Mahler (2025), the UN Independent Expert on the enjoyment of all human rights by older persons, and Human Rights Watch (2025) also have developed lists of what they think needs to be done. Human Rights Watch makes recommendations for the National Assembly, Ministry of Justice, Ministry of Employment and Labor, as well as the Ministry of Health and Welfare.

26 Lee Seug-hee, a researcher at the Korea Development Institute, said "We need a system that matches seniors with companies where they can utilize the expertise they've built over 20 to 30 years. To do this, the government should expand retraining and job programs for retirees" (Koh 2024). And an OECD (2024c:8) report indicated that Korea should "channel… some of the funds that are currently used for direct job creation programmes to… training, especially for youth and older jobseekers."

general understanding (with enforcement) that age discrimination is not acceptable; (5) elimination of the seniority-based wage system; (6) elimination of the wage-peak approach; (7) sufficient pensions and security for all older people (not just for those who had more education or high-paying, secure positions in large organizations) that are enough to support those who live a long time; (8) forceful statements from organizations representing older people that say the organizations oppose mandatory[27] and involuntary retirement; (9) ways identified to receive continuing direct input from older adults concerning problems as well as opinions about relevant policy development and implementation; (10) remedies for the fact that women's pay is generally less than men's pay[28] particularly given that women will live longer;[29] and (11) mandatory and involuntary retirement need to be eliminated. Politely mentioning that the age of retirement should be raised a few years is not enough. We are dealing with a human rights issue.[30] Mandatory and involuntary retirement need to be called by their names; these discriminatory practices need to be clearly seen as unacceptable policies/practices and revised policies as well as adequate enforcement efforts need to be put in place.

Korea needs to address the issues of poverty and isolation of older citizens, deal with ageism as well as ensure that older adults who want to work can have adequate paid employment. In order to

27 In 2023, the head of HelpAge Korea wrote that his organization "helps low-income older people (and that) the discussion of the mandatory retirement system is not currently our priority" (Cho, H. 2023). And the assistant director of the Human Rights Division of the National Human Rights Commission of the Republic of Korea (Park 2023) wrote that to her knowledge her organization has not made any statement regarding mandatory retirement. She also indicated she did not know of any organization in Korea that has announced it is for abolishing mandatory retirement.

28 According to Choe (2025), the "gender-income gap" in Korea is "the widest among developed countries."

29 A number of these kinds of suggestions and additional ones are in the OECD's *Working Better with Age: Korea* (OECD 2018).

30 According to Pace and Gabel (2025), "Commitment to a human rights-based approach appeared to have a stronger impact when integrated into domestic legislation, result in positive policy and programming outcomes, and potentially contribute to empowerment when incorporated into community action and organization."

do this, the same kind of creative energy is needed that Korea has put into policy development and implementation to try to increase the number of Korean babies.[31]

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31 Yeonggwang-gun County, Jeolianam-do Province, for instance, has some 50 initiatives to increase the number of babies. These include "financial incentives for marriage, subsidized treatment for infertile couples, postpartum and newborn care expenses, gifts to congratulate birth and paternity leave payments" (Misun 2025). And the Korean government's new pension reform gives "pensioners eligibility for a higher postretirement pay rate without contributing to the pension, as a reward for having their first child, through a 12-month 'noncontributory credit period' offered by the NPS. These rewards had previously been extended to families with at least two children only" (Son 2025).

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Exploring the Digital Shift: Factors Influencing the Sustainable Adoption of e-Health Tools for Digital Mental Health Services during the COVID-19 Pandemic

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Abstract

The COVID-19 pandemic accelerated the global adoption of electronic health (e-health) tools for digital mental health services (DMHS) in South African higher education institutions (SA HEIs). However, the long-term sustainability of these innovations remains uncertain. This study employs an integrated Technology-Organisation-Environment (TOE) and Technology Acceptance Model (TAM) framework to investigate determinants of the sustainable adoption of e-health tools. A cross-sectional survey of 348 staff at a selected SA HEI was analysed using descriptive statistics and exploratory factor analysis. Three critical factors emerged: (1) University capacity to deliver DMHS, emphasising the significance of top management support, financial resources, and information and communications technology expertise; (2) Perceived benefits and importance of e-health tools, highlighting user perceptions of usefulness, ease of use, and behavioural intention; and (3) External support to enhance university capacity, including government policies, competitive pressures, and institutional partnerships. The study advances theory by synthesising TOE and TAM in a resource-constrained context, revealing how institutional readiness and user perceptions jointly influence the sustainable adoption of e-health tools for DMHS. Practical implications highlight the need for targeted investments in digital infrastructure, capacity-building, and policy alignment to

strengthen DMHS sustainability. The study results are consistent with Sustainable Development Goal 3 (SDG 3), offering a roadmap for SA HEIs to leverage e-health tools for mental health resilience post-pandemic.

Keywords: e-health tools; digital mental health services; technology adoption; COVID-19; sustainability.

1. Introduction

The World Health Organization (WHO) (2001) posits that mental health is fundamental to overall health, encompassing a state of well-being where individuals can recognise their abilities, manage everyday challenges, work productively, and contribute to their community. The comprehensive concept of health integrates physical, mental, and social well-being, noting that health is incomplete without mental health (WHO, 2013). Varga and Latham (2024) supported this by asserting that health should be viewed as a condition of positive well-being rather than merely the absence of disease. The United Nations (UN) (2020) states that the intrinsic value of mental health impacts how individuals engage, connect, learn, work, and experience life. This highlights the significance of overall health, considering both physical and mental health, and the importance of mental health to an individual's well-being.

It has been observed that mental health has a reciprocal link with the well-being and productivity in workplaces such as higher education institutions (WHO, 2013). This means employees with better mental health are more likely to be more productive, have increased job satisfaction, and show higher levels of engagement in the workplace. In South African higher education institutions (SA HEIs), increased mental health can lead to increased productivity, for example, more research outputs and improved teaching and learning, which can benefit the higher education sector as a whole (Dlamini, 2024). The UN (2020) stressed that during the recent coronavirus disease 2019 (COVID-19) pandemic, sustaining good mental health is crucial to each country's response to, and recovery from, COVID-19 and should thus be prioritised. Mental health issues, such as depression, anxiety, and post-traumatic stress disorder

(PTSD), can harm individuals, societies, and workplaces, such as SA HEIs (Van der Kolk, 2000; Meyer et al., 2019). It follows, therefore, that mental health issues can result in reduced productivity, strained healthcare systems, and an overall increase in social tensions and economic instability.

The COVID-19 pandemic catalysed the rapid emergence of the use of electronic health (e-health) tools, with SA HEIs actively implementing digital mental health services (DMHS) to ensure accessible, confidential, and convenient psychological support for their academic communities (Mbunge et al., 2022; Musakuro & Gie, 2024). Even though this digital shift expanded access during the pandemic, sustaining these tools in the long term remains uncertain, particularly in resource-constrained contexts. In the Global South, challenges extend beyond financial limitations and include persistent digital divides, such as unequal internet access, limited technological expertise, language and cultural barriers, as well as infrastructure instability, such as electricity supply disruptions (Agbeyangi & Lukose, 2025; van Stam, 2022; Zharima et al., 2023). These contextual factors, among others, complicate the sustainable use of DMHS compared to high-income countries. Therefore, this study investigates the factors influencing the sustainable adoption of e-health tools for DMHS in a SA HEI, to inform strategies that can strengthen their long-term implementation.

The significance of this study lies in its positioning of mental health as a strategic priority for SA HEIs, a claim supported by its established links to academic productivity, well-being, and institutional resilience, as demonstrated during the COVID-19 pandemic (UN, 2020; Mbunge et al., 2022; Musakuro & Gie, 2024). Moving beyond the initial pandemic-driven rollout of e-health tools, this study investigates the critical factors influencing their sustainable adoption. The study posits that the identification of these factors could provide a foundational basis for developing targeted institutional strategies and supportive policies that could inform both policy and practice. Consequently, this study contributes to the broader discourse on achieving Sustainable Development Goal (SDG) 3 by outlining a pathway toward equitable and effective long-term

digital mental health support. It aims to ensure these tools transition from emergency implementations to sustainably integrated DMHS within the South African higher education landscape. Furthermore, understanding the factors influencing the sustainability of e-health tools is a critical prerequisite for effectively using these e-health tools to evaluate and improve mental health outcomes within the academic community. This study, therefore, not only identifies the pathways to implementation but also lays the groundwork for future research to assess the impact of digitally-enabled mental health support on staff well-being and productivity.

2. Literature Review

E-health tools, defined in this study as information communication technologies (ICT)-based technologies that electronically process health-related data to support mental health care (Gooding, 2019), played a critical role in delivering DMHS during the COVID-19 pandemic. These tools encompass a wide spectrum, ranging from the use of devices such as computers, smartphones, tablets, to specific applications such as mental health applications, and broader innovations such as mobile health (m-health), telehealth, social media, and artificial intelligence (AI)-driven interventions. Their functions are equally varied, serving purposes such as remote therapy, cognitive behavioural therapy (CBT), mental health promotion, psychoeducation, and real-time monitoring (Asi & Williams, 2018; Schueller et al., 2016). Their rapid integration was particularly vital in the workplace contexts, including SA HEIs, where they became the primary means to ensure the availability, continuity, and accessibility of DMHS during the COVID-19 pandemic, which included lockdowns and social distancing protocols among other measures (Howarth et al., 2018; Musakuro & Gie, 2024).

This section details the implementation of e-health tools for DMHS at a SA HEI, hereafter referred to as University X for anonymity. The literature traces their evolution and implementation from their inception as an emergency response during the COVID-19 pandemic (2020-2022) up to their current state. The South African higher education sector provides a critical context for this study, as

it faces a substantial mental health burden that was exacerbated by the pandemic.

Prior to the COVID-19 pandemic, several factors contributed to mental health issues among university staff, including rising student enrolments, excessive workloads, research pressures, ineffective leadership, and administrative burdens (Kinman & Johnson, 2019; Gie et al., 2017; Barkhuizen et al., 2014; Bezuidenhout & Cilliers, 2010). Moreover, the national context is characterised by a high prevalence of depression, anxiety, and post-traumatic stress disorder (PTSD), which are linked to broader societal challenges such as socioeconomic inequality, violence, and a high prevalence of human immunodeficiency virus (HIV) (Meyer et al., 2019). University staff are not immune to this national burden; studies demonstrate high levels of burnout and stress, which directly impact productivity and institutional resilience (Dlamini, 2024). However, the COVID-19 pandemic acted as a catalyst, compelling a rapid digital transformation to address these severe and pre-existing needs during periods of strict lockdown and social distancing protocols. This abrupt shift necessitated an investigation into the sustainability of the e-health tools adopted during this period.

During the peak phase of the COVID-19 pandemic, University X, in collaboration with national agencies and non-governmental organisations (NGO), rapidly deployed a suite of digital services to support university staff mental health (Musakuro & Gie, 2024). This multi-stakeholder approach was essential to overcome internal resource constraints (Musakuro, 2025).

The main initiatives included tele-counselling and hotlines, which provided immediate, confidential crisis support and ongoing therapy through phone and video conferencing lines operated by mental health experts from the South African Depression and Anxiety Group (SADAG) (Musakuro & Gie, 2024). Furthermore, University X, in partnership with Higher Health (the national agency of the Department of Higher Education and Training for employee well-being), hosted virtual workshops and webinars on topics such as managing pandemic anxiety, remote work-life balance, and grief counselling.

Moreover, University X also established digital resource hubs, which were centralised online portals hosting a library of digital resources, including self-help guides, articles on mental wellness, recorded mindfulness and meditation sessions, and links to reputable external apps such as those providing CBT exercises (Musakuro & Gie, 2024). Supplementary services were provided through partnerships with private entities such as Momentum Wellness, which presented additional general mental health support, including trauma debriefing sessions and access to telemedicine services for general health concerns, thereby indirectly supporting overall mental well-being (Musakuro, 2025). This initial phase was characterised by its reactive nature, where the primary goal was to ensure accessibility and continuity of mental health care using readily available tools, many of which were repurposed from other uses, such as standard video conferencing software for therapeutic purposes (Musakuro & Gie, 2024).

In the post-pandemic period, the provision of DMHS through e-health tools at University X has transitioned from emergency implementation toward a more structured, yet still evolving, hybrid model (University X, 2025). This model blends tele-counselling and in-person DMHS, with a growing emphasis on asynchronous tools such as mental health apps and digital CBT to enhance flexibility (University X, 2025). Moreover, Momentum Wellness, SADAG, and Higher Health continue to play a leading role in the provision of DMHS to the university staff (University X, 2025).

However, literature shows that the sustainable integration of e-health tools faces significant challenges beyond financial constraints. The main barriers include low uptake due to uneven staff awareness and initiatives, as well as structural issues such as the digital divide. This divide manifests through inequitable access to reliable Internet, high data costs, varying levels of digital literacy, and a lack of culturally and linguistically adapted content for the South African context (Agbeyangi & Lukose, 2025; van Stam, 2022; Zharima et al., 2023). This transition accentuates the central research problem: identifying the factors that facilitate the shift from temporary adoption to the sustainable, equitable, and effective

integration of e-health tools within the unique socio-technical landscape of South African higher education.

3. Theoretical Framework for the Study

The study employed a combination of two theories: the Technology-Organisation-Environment (TOE) theoretical framework and the Technology Acceptance Model (TAM) to position the study within the existing body of knowledge. The next section discusses the TOE and TAM frameworks separately and explains how each contributes to the understanding of the research constructs.

4. Technology-Organisation-Environment Framework

The TOE framework offers a comprehensive analytical lens for examining technology adoption processes within organisational contexts (Tornatzky et al., 1990). The framework identifies three core contextual dimensions: technological, organisational, and environmental factors. As illustrated in Figure 1, these interconnected elements collectively shape an organisation's decision-making process regarding new technology implementation.

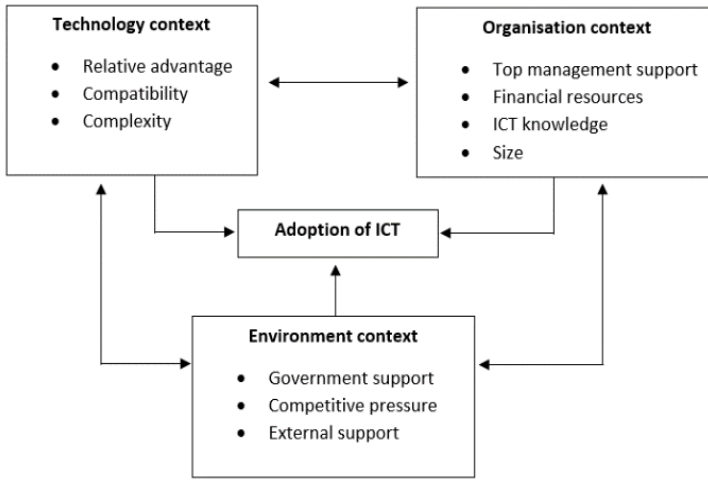

Figure 1: TOE framework. Source: (Tornatzky et al., 1990)

5. Relative Advantage

Relative advantage, a critical technological factor, denotes the perceived superiority of e-health tools over conventional approaches (Hiran & Henten, 2020). This study posits that SA HEIs should assess the potential benefits of e-health tools, including customisation, convenience, accessibility, and enhanced privacy (Bernecker et al., 2017). A thorough understanding and strategic utilisation of these advantages could facilitate the successful adoption of e-health tools in SA HEIs in the foreseeable future.

6. Compatibility

Compatibility refers to the extent to which technological innovations are perceived to align with an organisation's existing technologies, information systems, and prior experiences (Han et al., 2020). Consequently, if university administrators and main stakeholders perceive e-health tools as compatible with current ICT infrastructure, institutional systems, and operational processes, the adoption of such tools in SA HEIs becomes more feasible and streamlined (Jere & Ngidi, 2020). Hiran and Henten (2020) further contend that the Internet has emerged as the dominant medium for global communication. Given this trend, e-health tools, being inherently internet-based, can be leveraged to substantially enhance accessibility to DMHS.

7. Complexity

Jere and Ngidi (2020) assert that when organisations such as SA HEIs perceive ease of use, technology is much more likely to be accepted quickly, whereas complicated technologies are more likely to be adopted slowly. The complexity of technology influences the adoption or non-adoption of technology because stakeholders in organisations believe that complicated ICTs are too difficult to embrace and, if implemented, they would be abandoned quickly (Jere & Ngidi, 2020). The more complicated the technology, the less likely it is to be embraced by organisations such as SA HEIs (Han et al., 2020).

8. Top Management Support

Recent developments in the field of technology adoption have highlighted the critical role of top management support as a determining factor (Walker & Brown, 2020). This finding is consistent with the argument that top management possesses direct influence and authority over financial resource allocation (Johnson & Diman, 2017). Researchers further contend that top management serves as a key advocate for organisational change, implying their capacity to either facilitate or hinder technological implementation (Han et al., 2020). Consequently, the sustainable adoption of e-health tools in SA HEIs may face significant challenges in the absence of such support.

9. Financial Resources

Financial resources constitute a critical determinant in the adoption of technology (Hiran & Henten, 2020). In low-income economies, such as South Africa, inadequate funding presents a significant barrier to the implementation of e-health tools within higher education institutions (Fagherazzi et al., 2020). The substantial costs associated with developing, operating, and maintaining digital platforms, alongside telecommunications expenditures, may deter investment in e-health tools (Johnson & Diman, 2017). Given these financial constraints, it is imperative to assess economic implications and identify cost-effective strategies to facilitate the sustainable integration of e-health technologies.

10. ICT Knowledge

SA HEIs, as established public organisational entities, typically maintain dedicated ICT departments staffed by professionals with specialised technical expertise, a factor shown to significantly enable the adoption and implementation of e-health tools for SA HEIs (Jere & Ngidi, 2020; Johnson & Diman, 2017). Empirical evidence demonstrates a strong correlation between institutional ICT capacity and technology adoption rates, with larger organisations benefiting from in-house technical expertise while smaller entities often face adoption barriers due to limited technical resources (Walker & Brown, 2019; Johnson & Diman, 2017). This existing infrastructure,

combined with potential collaborative opportunities with DMHS providers, positions SA HEIs as particularly suitable environments for the successful integration of e-health solutions within their mental health service frameworks.

11. Size

Organisational size serves as a critical determinant in technology adoption processes (Ramdani et al., 2020), suggesting that institutional scale may significantly influence the sustainable implementation of e-health tools within higher education contexts. Empirical research consistently demonstrates that larger institutions possess distinct advantages in technological adoption when compared to their smaller counterparts (Awa & Ojiabo, 2016; Ramdani et al., 2013). This disparity stems from several institutional advantages: larger organisations typically benefit from greater financial capacity for technology acquisition, enhanced ability to recruit specialised talent, and more robust research and development infrastructure to support implementation efforts (Han et al., 2020). These factors collectively create an organisational ecosystem that is more conducive to successful technology adoption and integration.

12. Government Support

Government support represents a pivotal factor influencing the adoption of e-health technologies within SA HEIs. The policy framework established by governmental bodies, including the DHET and Higher Health, can serve as either an enabling or constraining force in the implementation of DMHS (Han et al., 2020; Fagherazzi et al., 2020). Given their status as public institutions, SA HEIs are particularly susceptible to shifts in government regulations and funding priorities. Consequently, progressive policy interventions can promote and foster an environment conducive to technological innovation, whereas restrictive measures may create substantial barriers to successful implementation.

13. Competitive Pressure

Competitive pressure represents a significant external factor shaping organisational technology adoption decisions. Empirical studies demonstrate that institutional responses to competitive dynamics substantially influence technological innovation uptake (El-Gohary, 2012). This phenomenon manifests particularly through the imperative to enhance operational efficiency, service innovation, and organisational effectiveness (Sligo et al., 2017). Within the South African higher education landscape, these competitive pressures assume particular relevance regarding workforce productivity and institutional performance. The growing emphasis on maintaining optimal staff and student well-being creates compelling incentives for SA HEIs to adopt e-health tools. In this context, the strategic implementation of e-health tools emerges as both a competitive necessity and an enabler of institutional resilience in an increasingly dynamic higher education environment.

14. External Support

External support constitutes a critical enabling factor in technological adoption processes, particularly for complex innovations such as e-health solutions. Empirical evidence suggests that the organisational capacity to implement technological innovations is often constrained without adequate external assistance (Han et al., 2020). Within the South African higher education context, institutional support from entities including the DHET, Higher Health, the SADAG, and Momentum Wellness emerges as particularly pivotal for the successful implementation of e-health tools for DMHS. Even though SA HEIs maintain strong competencies in their core academic functions, they frequently encounter limitations in the specialised technical expertise required for effective e-health deployment (Maphalala & Adigun, 2020). In this regard, strategic partnerships with external organisations thus serve as essential mechanisms for supplementing institutional capabilities, providing both technical knowledge and implementation resources necessary for the sustainable integration of e-health tools.

15. Technology Acceptance Model

TAM provides a theoretical framework for understanding user acceptance or rejection of technological innovations (Davis, 1989). As one of the most widely adopted theories in information systems studies, TAM examines the cognitive factors influencing technology adoption decisions. The primary objective of the model centres on promoting ICT utilisation by identifying and promoting the determinants of technology acceptance. The predictive capacity of the model is enhanced through empirical investigation of the variables shaping user perceptions, particularly when examined through the lens of user experiences and attitudes toward specific technologies. In this regard, this study applies this approach by examining the factors affecting the sustainable adoption of e-health tools in higher education contexts. TAM's foundational constructs, i.e., perceived usefulness and perceived ease of use, serve as key determinants of technology acceptance (Davis, 1989). The model further posits that individual attitudes toward technology mediate the relationship between these perceptions and behavioural intention to adopt. Notably, perceived usefulness exhibits a direct positive relationship with behavioural intention, as illustrated in Figure 2. This theoretical framework provides an additional robust foundation for investigating the factors for the sustainable adoption of e-health tools in SA HEIs.

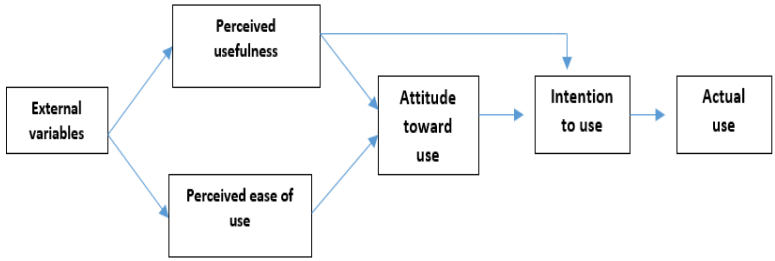

Figure 2: TAM. Source: Davis (1989)

16. Perceived Usefulness

When investigating the sustainable adoption of e-health tools, perceived usefulness emerges as a critical determinant requiring careful consideration. Grounded in Davis's (1989) TAM, this construct represents users' fundamental belief that adopting specific technologies will enhance their task performance. In the context of SA HEIs, perceived usefulness refers to the perception that e-health tools will enhance DMHS effectiveness, convenience, and accessibility. When institutional stakeholders (university staff included) recognise the potential benefits of these technologies, particularly their capacity to address mental health challenges and ensure sustainable service provision, they demonstrate more favourable attitudes and stronger behavioural intentions toward adoption. This positive correlation between perceived utility and adoption likelihood accentuates the importance of effectively communicating the advantages of e-health tools during the implementation phases.

17. Perceived Ease of Use

Perceived ease of use represents a fundamental determinant in the adoption of e-health technologies. As conceptualised by Davis (1989), this construct reflects users' assessment of the mental effort required to operate a particular system. This dimension of technology acceptance is intrinsically related to system usability, and when technologies demonstrate intuitive interfaces and require minimal cognitive load, they are more likely to be adopted (Melzner et al., 2014). Empirical research has consistently demonstrated the significant influence of perceived ease of use on the adoption patterns of e-health tools (Bamufleh et al., 2021). In the context of this study, perceived ease of use refers to the expectations of university staff regarding the ease of using e-health tools in delivering DMHS. When these tools are designed with user experience as a priority, requiring minimal training or technical expertise, adoption rates among academic staff tend to increase substantially. This relationship highlights the importance of human-centred design principles in developing e-health tools in higher education contexts.

18. Attitude Towards Use

The TAM posits that an individual's attitudinal disposition toward technology serves as a critical antecedent to the adoption intention (Davis, 1989). Building on established organisational behaviour theory, attitudes represent cognitive-affective evaluations that shape behavioural responses to specific stimuli (Robbins et al., 2019). Within SA HEIs, cultivating positive attitudinal orientations toward e-health tools emerges as a prerequisite for the successful implementation of e-health tools (Bamufleh et al., 2021). This attitudinal dimension specifically reflects stakeholders' evaluative judgments regarding the value and appropriateness of e-health tools in clinical contexts. Therefore, if institutional actors develop favourable perceptions of these technologies' utility, it is expected that they will demonstrate a greater willingness to integrate them into existing service frameworks. Consequently, strategic interventions targeting attitude formation, through demonstration of benefits, usability testing, and participatory design, may significantly enhance adoption rates. Such approaches can enable SA HEIs to create an organisational climate conducive to digital transformation in mental health service delivery through e-health tools.

19. Behavioural Intention to Use

Within the TAM framework (Davis, 1989), behavioural intention represents a pivotal construct that mediates between user perceptions and actual technology adoption behaviours. This study operationalises behavioural intention as university staff's propensity to utilise e-health tools for mental health support. As the immediate psychological precursor to technology usage behaviour, this construct serves as a critical indicator of adoption potential. Contemporary research substantiates strong behavioural intentions toward e-health adoption in mental health contexts, with recent findings reporting particularly high intention levels among professional user groups (Gbollie et al., 2023). These empirical observations suggest favourable conditions for technology integration in healthcare contexts. Building on this evidence, the current study considers behavioural intention as a fundamental determinant of sustainable

e-health adoption of e-health tools in SA HEIs. Specifically, the study contends that the strength of university staff's adoption intentions will significantly influence the long-term viability of e-health tools within the university ecosystems.

20. Materials and Methods

This study utilised a cross-sectional quantitative design to examine factors influencing the sustainable adoption of e-health tools for DMHS at University X, a public institution in Cape Town, South Africa. Consistent with Bryman and Bell's (2011) positivist epistemology, the research employed scientific methods to objectively measure relationships between theoretical constructs through statistical analysis to ensure methodological rigour.

The study population included all staff members at University X. Using non-probability sampling techniques, participants were recruited through voluntary response sampling via email invitation, where they were self-selected through an online survey (Murairwa, 2015). This approach ensured voluntary participation while adhering to institutional protocols for staff research participation.

The sampling frame consisted of three distinct groups: (1) top management, (2) academic, and (3) non-academic (administrative) staff members. Of the 2840 university staff invited to participate, 348 completed the online survey, resulting in a response rate of 12.3%, as shown in Table 1. The response rate constitutes a statistically robust sample size for quantitative data analysis. Table 1 demonstrates significant demographic heterogeneity across multiple dimensions, including gender, race, age, educational qualifications, occupational roles, employment categories, and years of service at University X.

Table 1: Sample characteristics (N = 348).

Item	Category	Frequency	Percentage
Gender	Male	156	44.8
	Female	192	55.2

Item	Category	Frequency	Percentage
Race	African	161	46.3
	White	44	12.6
	Coloured	89	25.6
	Indian	51	14.7
	Asian	3	0.8
Age group	20 - 29	10	2.9
	30 - 39	83	23.9
	40 - 49	149	42.8
	50 - 59	93	26.7
	60 or older	13	3.7
Highest level of qualification attained	National Senior Certificate	2	0.6
	Diploma	16	4.6
	Undergraduate Degree	47	13.5
	Honours Degree	39	11.2
	Master's Degree	180	51.7
	Doctoral Degree	63	18.1
	Other	1	0.3
Occupation	Academic staff	205	58.9
	Non-academic staff	124	35.6
	Management staff	19	5.5
Employment Category	Permanent employment	242	69.5
	Fixed-term contract employee	106	30.5

Item	Category	Frequency	Percentage
Length of service at the current institution	0 – 5 years	74	21.3
	6 – 10 years	103	29.6
	11 – 15 years	67	19.3
	16 – 20 years	76	21.8
	More than 21 years	28	8.0

21. Data Collection Instrument

The primary data collection method was an online survey administered through Microsoft Forms, which enabled real-time data capture from June to August 2023. The study employed a 5-point Likert scale (1 = strongly agree to 5 = strongly disagree) to measure TOE and TAM framework constructs. The survey instrument was developed through rigorous adaptation of validated items from prior e-health adoption studies (TOE and TAM framework) to ensure strong theoretical grounding and content validity (Tornatzky et al., 1990; Davis, 1989). A pilot study involving 18 non-respondents from University X was conducted to refine the design, clarity, and technical functionality of the measurement instrument. Feedback from this phase addressed issues such as layout, wording, and measurement scale consistency, eventually enhancing the face and construct validity of the research measurement instrument. Further rigour was achieved through a comprehensive review process involving the research supervisor, a statistician, and two academic experts, who evaluated the measurement instrument alignment with the study objectives and methodological soundness.

The survey comprised two distinct sections. The first section collected biographical data through seven items, capturing the demographic characteristics of the respondents. The second section focused on the factors influencing the sustainable adoption of e-health tools, featuring 17 items organised around technological, organisational, environmental, and social dimensions. Each section was preceded by clear instructions and a cover letter outlining the

study objective, ethical considerations, and the voluntary nature of participation.

Ethical compliance was a cornerstone of this research study. Ethical clearance was obtained from the Cape Peninsula University of Technology Faculty of Business and Management Sciences Research Ethics Committee (No. 2021_FBMSREC 083). All respondents provided informed consent before completing the online survey. Confidentiality was maintained through anonymised data collection. All collected data was kept strictly safe and secure through precautionary measures implemented during and after collection. During the online data collection phase, respondents were never compelled to provide their identities. Upon completion of the study, the dataset was stored on a password-protected computer at the researcher's private residence.

22. Data Analysis

The study utilised SPSS version 28 to conduct both descriptive statistics and exploratory factor analysis (EFA). Descriptive analyses included frequency distributions for demographic characterisation, alongside measures of central tendency (means) and dispersion (standard deviations). For EFA, principal axis factoring (PAF) was employed due to its focus on common variance, which was consistent with the objective of the study of identifying latent constructs underlying sustainable adoption of e-health tools. Promax rotation ($\kappa=4$) was applied to account for the anticipated factor correlations.

Data suitability was confirmed through the Kaiser-Meyer-Olkin (KMO=0.912) measure, indicating adequate sampling, and Bartlett's Test of Sphericity ($p<0.001$), confirming significant inter-item correlations for factor analysis (Hair et al., 2014). Factor retention criteria included eigenvalues >1, interpretability, and item loadings ≥0.4 (Ledesma et al., 2021).

Reliability and validity were robustly assessed: internal consistency via Cronbach's alpha ($\alpha\geq0.7$) and composite reliability (CR≥0.7), convergent validity through average variance extracted (AVE≥0.5) (Hair et al., 2021), and discriminant validity via item loadings (≥0.4) exclusively on designated factors without cross-

loadings. This multi-metric approach ensured rigorous evaluation of the factor structure's psychometric properties.

23. Results

Descriptive Statistics

Descriptive statistics (see Table 2) showed that respondents perceived the e-health tools as useful (mean = 1.67, SD = .982), ease of use (mean = 1.99, SD = 1.134), that it promotes positive attitudes towards their adoption (mean = 1.81, SD = 1.117) and that it is a relative advantage (mean = 1.82, SD = 1.087). In addition, the respondents signified a behavioural intention to use e-health tools in the future for DMHS (mean = 1.83, SD = 1.112). Ability to source financial resources (mean = 2.03, SD =1.294), compatibility with existing ICT infrastructure (mean = 1.92, SD = 1.172) and organisational size (mean = 2.00, SD = 1.318) were perceived as enablers by the respondents. However, complexity (mean = 2.61, SD = 1.449), availability of financial resources (mean = 2.24, SD =1.452) and ICT knowledge (mean = 2.29, SD = 1.475) received mixed perceptions and were noted as barriers to sustainable adoption of e-health tools. Government support (mean = 1.95, SD = 1.216) and government policies and regulations (mean = 2.03, SD = 1.214) were perceived positively by respondents. Apart from that, respondents also positively perceived the delivery of e-health tools and DMHS as strategically valuable for University X to remain competitive (mean = 1.77, SD = 1.126). Finally, external support was deemed essential for the sustainable adoption of e-health tools (mean = 1.60, SD = .965).

Table 2: Descriptive statistics results.

Descriptive Statistics	N	Min	Max	Mean	SD
Perceived usefulness	348	1	5	1.67	.982
Relative advantage	348	1	5	1.82	1.087
Perceived ease of use	348	1	5	1.99	1.134
Attitude towards use	348	1	5	1.81	1.117
Behavioural intention	348	1	5	1.83	1.112

Descriptive Statistics	N	Min	Max	Mean	SD
Compatibility	348	1	5	1.92	1.172
Complexity	348	1	5	2.61	1.449
Top management support	348	1	5	2.18	1.421
Availability of financial resources	348	1	5	2.24	1.452
Ability to source financial resources	348	1	5	2.03	1.294
ICT knowledge	348	1	5	2.29	1.475
Technical support	348	1	5	2.38	1.515
HEI size	348	1	5	2.00	1.318
Government support	348	1	5	1.95	1.216
Government policies and regulations	348	1	5	2.03	1.214
Competitive pressure	348	1	5	1.77	1.126
External support	348	1	5	1.60	.965
Valid N (listwise)	348				
Note: SD = Std. Deviation					

24. Data Suitability and Factor Extraction

The KMO measure (0.912) and significant Bartlett's Test of Sphericity (*p* < 0.001) confirmed the sampling adequacy and appropriateness of the data for factor analysis (see Table 3). All communalities exceeded 0.40 (see Table 5), indicating that each item shared substantial variance with its respective factor. These results collectively demonstrated that the extracted factors were both statistically robust and theoretically meaningful.

Table 3: KMO and Bartlett's Test results.

KMO and Bartlett's Test		
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		0.912
Bartlett's Test of Sphericity	Approx. Chi-Square	2974.603
	df	136
	Sig.	<.001

Principal axis factoring with Promax rotation extracted three distinct factors that collectively explained 52.215% of the total variance in the sustainable adoption of e-health tools (see Table 4). Each factor demonstrated robust psychometric properties, as evidenced by reliability and validity metrics, including CR, Cronbach's Alpha, and AVE (see Table 5).

Table 4: Total Variance Explained by extracted factors.

	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings[a]
Factor	**Total**	**% of Variance**	**Cum. %**	**Total**	**% of Variance**	**Cum. %**	**Total**
1	7.252	42.658	42.658	6.812	40.072	40.072	5.312
2	1.911	11.242	53.9	1.476	8.684	48.755	5.047
3	1.08	6.353	60.253	0.588	3.459	52.215	5.605
4	0.942	5.543	65.796				
5	0.773	4.548	70.344				
6	0.706	4,151	74.495				
7	0.603	3.546	78.04				
8	0.576	3.391	81.431				
9	0.494	2.906	84.338				
10	0.464	2.73	87.068				
11	0.428	2.519	89.587				
12	0.365	2.146	91.733				
13	0.336	1.975	93.708				
14	0.3	1.762	95.47				
15	0.285	1.674	97.145				
16	0.26	1.532	98.676				
17	0.225	1.324	100				
Extraction Method: Principal Axis Factoring.							
[a] When factors are correlated, sums of squared loadings cannot be added to obtain a total variance.							

The first factor, *University capacity to deliver DMHS*, accounted for 40.072% of the variance (see Table 4). This factor comprised five key elements: top management support (factor loading = 0.699), availability of financial resources (0.801), ability to source financial resources (0.735), ICT knowledge (0.791), and technical support (0.746) (see Table 5). The construct exhibited excellent internal consistency, with a Cronbach's Alpha of 0.875 and a strong CR of 0.850. The AVE of 0.534 confirmed acceptable convergent validity, indicating that the items collectively captured the latent construct of institutional readiness effectively.

The second factor, *Perceived benefits and importance of e-health tools*, explained an additional 8.684% of the variance (see Table 4). Rooted in the TAM, this factor included perceived usefulness (0.693), relative advantage (0.783), perceived ease of use (0.799), attitude toward use (0.586), and behavioural intention (0.601). The scale reliability was high (α = 0.853; CR = 0.864), and the AVE of 0.560 surpassed the threshold for convergent validity. These results highlight the centrality of user perceptions in driving the adoption of e-health tools, consistent with prior TAM (Davis, 1989).

The third factor, *External support to improve university capacity*, contributed 3.459% of the variance (see Table 4). It involved university size (0.612), government support (0.849), government policies and regulations (0.650), competitive pressure (0.580), and external support (0.573). The construct showed good reliability (α = 0.834; CR = 0.823) and strong convergent validity (AVE = 0.590), affirming the role of environmental enablers in the adoption of e-health tools. Government support emerged as the most influential item (loading = 0.849), showing the importance of policy frameworks in sustaining e-health initiatives.

Table 5: EFA with reliability and validity test results.

Factor solution	Factor loadings	Commu-nalities	Cronbach's Alpha	CR	AVE
Factor 1					
Top management support	0.699	0.540	0.875	0.850	0.534
Availability of financial resources	0.801	0.564			
Ability to source financial resources	0.735	0.640			
ICT knowledge	0.791	0.603			
Technical support	0.746	0.607			
Factor 2					
Perceived usefulness	0.693	0.463	0.853	0.864	0.560
Relative advantage	0.783	0.628			
Perceived ease of use	0.799	0.635			
Attitude toward use	0.586	0.493			
Behavioural intention	0.601	0.520			
Factor 3					
Size	0.612	0.517	0.834	0.823	0.590
Government support	0.849	0.695			
Government policies and regulations	0.650	0.598			
Competitive pressure	0.580	0.491			
External support	0.573	0.400			
Note: AVE = Average Variance Extracted; CR = Composite Reliability					

As depicted (see Table 5), all factors demonstrated strong reliability (CR > 0.7) and convergent validity (AVE > 0.5), supporting the internal consistency of the scales. Furthermore, the Promax-rotated factor solution demonstrated clear discriminant validity, with all items loading strongly (≥ 0.40) on their respective factors and no significant cross-loadings (i.e., no item loaded above 0.40 on more than one factor). This confirmed that the three extracted factors, namely

University capacity to deliver DMHS, *Perceived benefits and importance of e-health tools*, and *External support to improve university capacity,* are statistically and conceptually distinct, supporting their interpretation as independent constructs. This study elucidates the critical factors shaping the sustainable adoption of e-health tools. The following section contextualises these results within existing literature and further discusses their theoretical and practical implications.

25. Discussions

University Capacity to Deliver DMHS

The first and most substantial factor identified in this study was the *University's capacity to deliver DMHS*, which accounted for 40.072% of the total variance explained. This factor comprised five key elements: top management support, availability of financial resources, ability to source financial resources, ICT knowledge, and technical support. Each of these elements is consistent with established literature on organisational readiness for technology adoption.

Top management support emerged as a critical determinant, with a factor loading of 0.699. This result is consistent with prior research, which stresses the role of leadership in driving technological innovation (Walker & Brown, 2020). Top management not only allocates necessary resources but also promotes an organisational culture conducive to change. In the context of e-health tools for mental health support, leadership commitment is particularly vital, as mental health initiatives often require cross-departmental collaboration and sustained investment. The absence of such support, as noted in the literature, can significantly hinder the implementation of e-health tools, particularly in resource-constrained environments such as South Africa (Han et al., 2020).

Financial resources, both in terms of availability (factor loading = 0.801) and the ability to source them (factor loading = 0.735), were also pivotal. These results corroborate the recent literature, which identified funding as a major barrier to the adoption of e-health tools in low- and middle-income countries (Fagherazzi et al., 2020). The high costs associated with digital infrastructure, including software

development, maintenance, and staff training, pose significant challenges for SA HEIs. Therefore, the results of this study suggest that even though financial constraints are perceived as barriers (mean = 2.24 for the availability of financial resources), the ability to secure funding is seen as an enabler (mean = 2.03). This duality highlights the importance of financial planning and resource mobilisation strategies in ensuring the sustainability of e-health tools.

ICT knowledge (factor loading = 0.791) and technical support (factor loading = 0.746) further demonstrated the importance of institutional technical capacity. The presence of skilled ICT workers and robust support systems facilitates the seamless integration of e-health tools into existing workflows. This is consistent with Jere and Ngidi's (2020) assertion that organisations with strong ICT departments are better positioned to adopt and sustain new technologies. However, the study also revealed mixed perceptions regarding technical support (mean = 2.38), indicating potential gaps in service delivery or user training. In light of this, addressing these gaps through targeted capacity-building initiatives could improve the long-term adoption of e-health tools.

26. Perceived Benefits and Importance of E-Health Tools

The second factor, *Perceived benefits and importance of e-health tools*, explained 8.684% of the variance and was rooted in the TAM constructs of perceived usefulness, ease of use, and behavioural intention. This factor highlights the psychological and cognitive dimensions of technology adoption.

Perceived usefulness (factor loading = 0.693) was strongly endorsed by respondents (mean = 1.67), reflecting their belief that e-health tools enhance the efficiency and effectiveness of mental health services. This result is consistent with Davis's (1989) original TAM, which posits that users are more likely to adopt technologies they perceive as beneficial. In the context of e-health tools, the perceived utility of these tools likely stems from their ability to provide accessible, confidential, and convenient mental health support, particularly during crises such as the COVID-19 pandemic (Mbunge et al., 2022).

Perceived ease of use (factor loading = 0.799) also played a significant role, with respondents rating the tools as user-friendly (mean = 1.99). This is consistent with the argument that technologies requiring minimal cognitive effort are more readily adopted (Melzner et al., 2014). However, the relatively higher mean score for complexity (mean = 2.61) means that some users may still find certain aspects of e-health tools challenging. This divergence highlights the need for ongoing usability testing and iterative design improvements to ensure that these tools meet the diverse needs of university staff.

Attitude toward use (factor loading = 0.586) and behavioural intention (factor loading = 0.601) further reinforced the predictive power of the TAM framework. Positive attitudes (mean = 1.81) and strong behavioural intentions (mean = 1.83) indicate a favourable disposition toward e-health adoption, which is critical for long-term sustainability. These results mirror recent studies, which reported high intention levels among professionals using DMHS (Gbollie et al., 2023). Collectively, these results mean that although e-health tools are generally well-received, their sustained use depends on continuous engagement and support.

27. External Support to Improve University Capacity

The third factor, *External support to improve university capacity*, accounted for 3.459% of the variance and confirmed the role of environmental enablers in technology adoption. This factor included university size, government support, government policies and regulations, competitive pressure, and external support.

Government support (factor loading = 0.849) and policies (factor loading = 0.650) were perceived positively by respondents (means = 1.95 and 2.03, respectively). As previous studies indicate, policy frameworks have a significant impact on the adoption of e-health services (Han et al., 2020). In South Africa, government initiatives during the COVID-19 pandemic, such as those led by the DHET, facilitated the rapid deployment of DMHS. However, the slightly higher mean for policies (2.03) demonstrates that while supportive, regulatory frameworks may not be fully optimised for the integration of e-health tools.

Competitive pressure (factor loading = 0.580) also emerged as a significant driver, with respondents acknowledging the strategic value of DMHS for institutional competitiveness (mean = 1.77). This finding supports El-Gohary's (2012) contention that external pressures can incentivise innovation. In the competitive landscape of higher education, institutions that prioritise staff well-being through digital solutions may gain a reputational edge, further motivating the adoption of e-health tools.

External support (factor loading = 0.573) from entities such as Higher Health, SADAG and Momentum Wellness was deemed essential (mean = 1.60), echoing Maphalala and Adigun's (2020) emphasis on partnerships to overcome technical and resource limitations. These collaborations provide institutions with access to expertise and infrastructure that may otherwise be unavailable, thereby enhancing their capacity to deliver DMHS.

Interestingly, compatibility and complexity did not load significantly on the external support to improve the university capacity factor, diverging from some prior research (Han et al., 2020). This means that in this context, external enablers such as government policies and partnerships were more influential than the perceived alignment of e-health tools with existing ICT systems. This result reflects the unique technological landscape of University X, where external support mechanisms overshadowed compatibility concerns.

Similarly, complexity, though identified as a barrier in descriptive statistics (mean = 2.61), did not emerge as a significant factor in the EFA. This could indicate that while users recognise the challenges posed by complex technologies, these challenges are not decisive in their adoption decisions. Instead, factors such as perceived usefulness and external support may mitigate the impact of complexity.

28. Implications for Evaluating Mental Health Outcomes

In light of the research results, it is important to note that the adoption of e-health tools is not an end in itself but a means to achieve improved mental health outcomes. A number of implications can be drawn from the results of this study on how SA HEIs can

use these tools to evaluate and improve the well-being of their academic communities.

Firstly, the university's capacity to deliver DMHS (Factor 1) directly influences the quality and reliability of outcome data. Robust technical support and ICT knowledge ensure data is collected securely and accurately. Furthermore, strong financial resources and top management support are needed not only to adopt the e-health tools, but to fund the analytical expertise required to interpret the data and translate it into practical insights for policy and programme development. The capacity to deliver DMHS, therefore, includes the capacity to evaluate its effectiveness.

Secondly, it is important to note that user perceptions of the usefulness and ease of use of e-health tools (Factor 2) are prerequisites for sustained use, which in turn contributes to the creation of rich, real-time data. In contrast to traditional, episodic methods such as annual surveys, integrated e-health platforms could provide continuous, anonymised data on usage patterns, common concerns, for instance, anxiety, stress peaks during examination periods, and help-seeking behaviours. This allows university management and health professionals to move from reactive to proactive care, identifying trends and evaluating the impact of interventions with unprecedented granularity and speed.

Finally, external support (Factor 3) could extend the outcome evaluation. Partnerships with organisations such as SADAG or Momentum Wellness could provide access to validated assessment frameworks, benchmarking data against national standards, and expert analysis. This would help institutions answer critical questions: Are digital services actually reducing symptoms of depression or anxiety? How do outcomes compare to other institutions? This external validation is crucial for moving beyond simple usage metrics such as the number of logins to evaluating genuine clinical and well-being outcomes.

In essence, the sustainable adoption of e-health tools creates a feedback loop: the tools generate data that evaluates mental health outcomes, which informs better resource allocation (enhancing Factor 1), demonstrates the tools' utility (strengthening Factor 2),

and justifies further investment and partnerships (strengthening Factor 3). This positions SA HEIs to not only provide support but to become better institutions of higher learning that continuously improve their mental health services based on empirical evidence.

29. Theoretical and Practical Implications

The integration of the TOE and TAM frameworks in this study provides several theoretical contributions. First, it demonstrates the interdependence of organisational capacity (TOE) and user perceptions (TAM) in shaping the adoption of e-health tools. For instance, financial resources (an organisational factor) indirectly influence perceived usefulness (a user factor) by enabling the development of more effective tools. Second, it extends the TOE framework by highlighting competitive pressure as a unique environmental driver in higher learning institutions.

From a practical standpoint, the results of this study present several practical strategies for policymakers and institutional leaders. To enhance university capacity, institutions should prioritise leadership and top management commitment, expand funding for e-health initiatives by reaching out to NGOs and other private organisations, and also invest in ICT training. Furthermore, addressing user perceptions requires a focus on user-centric design optimisation to enhance perceived usefulness and usability. Finally, leveraging external support through government partnerships and collaborations with mental health organisations such as SADAG can provide the necessary technical and financial resources to sustain the adoption of e-health tools for DMHS.

30. Limitations and Suggestions for Future Research

This study has limitations that present opportunities for further research. The single-institution design may affect generalisability, warranting multi-institutional future studies and replications across diverse contexts. Self-selection bias in online survey participation could be mitigated through stratified random sampling in future studies. Even though the EFA employed in this study helped to identify the sustainable adoption factors for e-health tools, confirmatory

factor analysis (CFA) is needed to validate the structural model. Furthermore, the cross-sectional design limits causal inferences, suggesting longitudinal assessments of sustainability in future studies. Finally, emerging and continuously evolving technologies such as AI-enhanced tools warrant examination in the long-term adoption of e-health tools. These methodological and contextual extensions would strengthen both theoretical understanding and practical implementation of the sustainable adoption of e-health tools for mental health in higher education contexts.

31. Conclusions

This study advances the understanding of the sustainable adoption of e-health tools for DMHS in SA HEIs by integrating the TOE framework and TAM. Three critical factors emerged: institutional capacity, perceived benefits, and external support, which collectively drive long-term adoption. Theoretically, the study bridges TOE and TAM, demonstrating their synergistic utility in resource-constrained contexts. Critically, the sustainable adoption of these tools provides a foundation for data-driven evaluation of mental health outcomes, enabling institutions to measure the effectiveness of interventions, allocate resources strategically, and, in the end, demonstrate progress toward improved well-being for staff. Empirically, it contributes to the technology adoption literature in developing countries, while contributing a practical roadmap for SA HEIs to enhance post-pandemic DMHS resilience. The study recommends targeted investments in digital infrastructure, capacity-building, and policy alignment, consistent with SDG 3 to promote mental well-being and equitable care. Future research should validate study results through multi-institutional comparisons, CFA, longitudinal studies, and should specifically examine the link between e-health adoption metrics and quantitative mental health outcome data to further improve adoption strategies.

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Resources

Feminist Practices and Experiential Pedagogies

Student Learning at the Commission on the Status of Women's Annual Meeting

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Abstract

This article describes an undergraduate experiential learning course based at the Commission on the Status of Women (CSW). The course introduces students to the evolution of global women's rights movements and gender equality efforts at the United Nations (UN) while simultaneously preparing them to engage with human rights leaders and policymakers during the annual CSW session in early March. Prior to participation in the CSW, students learn about the history of women's rights as human rights campaign alongside essential governing documents, meeting outcomes, and global resolutions on gender equality. Students trace ongoing challenges to human rights mechanisms and consider how feminist leaders and movements have shaped and continue to influence human rights work today. In this article, I explore the ebbs and flows of the course, delivered across five semesters, offering critical insight on the ways in which changes to the CSW environment and student learning outcomes inform pedagogical progressions in course delivery, assessment, and design. I spotlight one scaffolded assignment, as illustrative of experiential learning as feminist praxis, where students collaborate to create and distribute advocacy materials at the CSW. Drawing from student reflections and course evaluations,

the article interweaves discussions of lessons learned with the value experiential education provides to the related interdisciplinary fields of clinical sociology, and women's and gender, or feminist studies.

Keywords: experiential learning course, feminist education, political advocacy, pedagogical progression, human rights, United Nations, clinical sociology

1. Introduction

Higher education institutions across the United States encourage high-impact learning practices to enhance student learning outcomes in college level coursework. Studies show undergraduate students involved in experience-driven courses report increased knowledge acquisition and confidence, improved interpersonal skills, and deeper appreciation for the ways classroom-based learning applies to professional spaces (Moore 2013; Orr 2011; Yamada 2025). This "learning by doing" approach empowers students to practice course concepts in real-world settings, enhancing their problem-solving and critical thinking competencies (Raddon et al. 2008, p. 141). Moore (2013, p. 5) writes, however, that while "most institutions appear to have accepted the premise that experiential learning is a legitimate, valued element of their educational programs," high-impact learning practices demand considerable time, effort, and commitment on the part of faculty and students alike. Experiential learning, for example, requires meaningful connection and exchange both within and outside the classroom or university setting, particularly when the experiential practice involves community-based, nonprofit, or otherwise external organization partners. For students enrolled in courses with off-campus community partners, Boyd and Sandell (2012, p. 260) remark "[it] can feel like it demands more time than other courses." Faculty too describe holding regular meetings with community partners to ensure positive outcomes for students and external partners, adding to the instructor's course preparation and delivery (Yamada 2025, p. 171; Parisi & Thornton 2012).

Clinical sociology and women's and gender studies, as related interdisciplinary fields, offer a valuable set of resources for understanding how to build effective experiential pedagogies in

our coursework. According to Fritz (2022, p. 1), clinical sociology is "a creative, humanistic, rights-based and interdisciplinary specialization that seeks to improve life situations for individuals and groups in a wide variety of settings." Practitioners of clinical sociology assess and interpret existing systems of power with the intention of creating new, more just and equitable structures that benefit us all (Fritz 2022; Vissing 2022; Yamada 2025). The field of women's and gender studies is rooted similarly to an "epistemology of collaborative, community-based, engaged pedagogy" (Costa & Leong 2012, p. 171) with a "mandate for social justice" (Orr 2011, p. 5). These shared commitments surface across feminist coursework urging students to recognize and then transform interlocking systems of local/global power, privilege, and inequality. Feminist pedagogies emphasize experiential reflection grounded in communities of relational solidarity and mutuality across and without borders (Mohanty 2003; Villaverde 2008). It is in these ways the experiential feminist classroom offers students "an opportunity to enact and embody some of the feminist principals and theories with which they have grappled in their other coursework" moving beyond the boundaries of the university, writ large (Boyd & Sandell 2012, p. 252).

This article explores an undergraduate experiential learning course I developed where students participate in the events surrounding the Commission on the Status of Women's (CSW) annual meeting at the United Nations (UN); the course is housed in the Department of Women's and Gender Studies at Pace University in New York City and titled *Gender and Human Rights: An Introduction to Transnational Feminist Activism.* I designed the course to prepare students to conduct political advocacy with human rights leaders, feminist activists, and policymakers across two weeks of diplomacy among UN Member States, intergovernmental agencies, nongovernmental organizations, and civil society leaders at the CSW in early March. In the next section, I offer a short history of the CSW followed by a detailed overview of the course materials, including student learning objectives, instructional design and course delivery, and thematic content organization. I interweave student feedback with my pedagogical observations to offer the reader a deeper understanding

of the challenges and opportunities associated with this form of high-impact learning practice.

2. Experiential Learning Site: A Brief History of the CSW

In June of 1946, the UN's Economic and Social Council (ECOSOC) established the CSW as the "principal global policy-making body" dedicated exclusively to the advancement of women's rights and promotion of gender equality (UN Women 2025a). The Commission prepares recommendations and reports on pressing issues related to the realization of women's human rights in the realm of politics, economics, education, society, and culture. Each year UN Member States gather for two-weeks in March at UN headquarters in New York City to evaluate "progress on gender equality, identify challenges, set global standards and formulate concrete policies to promote gender equality and women's empowerment worldwide" (UNFPA 2012). A total of 45 Member States serve on the Commission at any given time with each member elected to serve for four-year terms. CSW members always represent "equitable geographical distribution" (UN Women 2025c): meaning the Commission consists of 13 members from Africa, 11 from Asia, nine from Latin America and the Caribbean, eight from Western Europe and other states, and four from Eastern Europe. Five members of the Commission serve two-year elected terms as Chair and Vice-Chairs of the CSW Bureau; the primary function of the Bureau is to facilitate preparation for the annual CSW session and ensure its success (UN Women 2025c).

According to Commission mandates, non-governmental organizations (NGOs), as well as individuals and networks may submit recommendations, research data, complaints and appeals, or petitions to CSW members. Members traditionally "consider such communications as part of its annual programme of work in order to identify emerging trends and patterns of injustice and discriminatory practices against women" (UN Women 2025b). Submitted reports from civil society thus assist Commission members in assessing progress made and specifying ongoing challenges to global gender equality. Throughout the Commission gathering, attendees learn from expert group meetings and panels, attend high-level plenary

sessions, government sponsored side-events, and NGO-facilitated parallel events hosted by the NGO Committee on the Status of Women in New York (NGO CSW NY).[1]

Each year the Commission considers one emergent issue known as the CSW primary theme. In addition, attendees reassess the CSW theme from five-years prior; this second component of the session is referred to as the CSW review theme. The goal of the Commission is to reach what Member States call an agreed conclusion or outcome document to help guide state action and implementation across often contentious areas of debate and negotiation that result in a series of recommendations emergent during each annual session. Whereas Commission members endeavor to "accelerate progress and promote women's and girls' enjoyment of their rights in political, economic, social fields," the ECOSOC provides the mechanisms necessary for governmental compliance, tracking individual state progress across all negotiated CSW agreements (UN Women 2025a).

3. Gender and Human Rights: An Introduction to the Course

Course Overview. The *Gender and Human Rights* course describes introducing students to the evolution of women's human rights and gender equality efforts within the international human rights system through a 10-day intensive learning experience at the CSW. The course gives students an understanding of human rights and gender equality mechanisms designed to address systemic inequalities across different identity categories such as gender, race and ethnicity, socioeconomic status, sexuality, nationality, age, and ability, among others. Throughout the semester, we investigate the shifting terrain of human rights thinking and practice while giving added attention to how critical gender analyses and transnational feminist activism has shaped and continues to inform human rights

1 Approximately 13,000 people attended the Commission's annual meeting in March 2025 as representatives from UN Member States, governmental and non-governmental organizations, and civil society leaders. Over 300 official sessions, meetings, and side events were held inside the UN building. NGO CSW NY, additionally, hosted over 750 parallel events related to the primary and review themes both online and in locations surrounding UN headquarters (NGO CSW NY 2025; UN Women 2025a).

policy today. Students gain essential feminist leadership, advocacy, and professional networking skills during their CSW participation. This immersive experience permits them to attend high-level debates, meetings, and events, engage with other CSW delegates and human rights leaders, and learn how to *do* political advocacy inside the UN.

To complete the course, students focus on seven learning objectives. These include: 1. fulfilling 30 to 35 participation hours at the CSW; 2. attending advocacy training and networking sessions organized under NGO CSW NY's Youth Leaders and Young Professional Series; 3. articulating the history of the UN, women's human rights, and gender equality efforts vis-à-vis the CSW; 4. demonstrating intersectional and transnational understandings of gender, culture, and identity as categories of analysis; 5. explaining how transnational feminist advocacy reframes (or can reframe) the boundaries of human rights paradigms; 6. building critical pre-professional skills desired in the social impact sector; and 7. applying feminist ideas and practices to a shared student-led advocacy project. Students receive official CSW delegate badges as registered members of the Commission under Pace University's ECOSOC accreditation. During the semester, students complete assigned readings and online learning modules, participate in class discussions and lectures, attend guest speaker workshops and advocacy trainings, develop individual and team participation schedules, and contribute substantial research and writing to their Advocacy Team project.[2]

Instructional Design. The first time I taught the *Gender and Human Rights* course at Pace University was in spring 2016 with 21 undergraduate students; since the initial term, I have offered the class four additional times with enrollments of 18 – 23 students in spring semesters every other year. Course delivery has been revised often coinciding with changing institutional patterns reflected across social distancing protocols and online learning expectations during the height of COVID-19 pandemic and in the period thereafter. Prior to the pandemic, the course was delivered entirely face-to-face on-campus and at UN headquarters during the 60th Session of the

2 I describe the details of the Advocacy Team assignment later in this article.

CSW in 2016 and 62nd Session in 2018. During the 65th Session of the Commission, I offered the course in a virtual format which mirrored Pace University's COVID-protocols as well as that of the UN and CSW in March of 2021. Then lastly, the course has been available to students with virtual and in-person components for the 67th and 69th Commission sessions in 2023 and 2025. The hybrid model allows me to blend some of the best elements of face-to-face and digital learning where students encounter learning modules designed to enhance their understanding of the course content via the flipped classroom along with in-person instruction, lecture, and workshops to solidify knowledge acquisition. The hybrid version of the course also parallels recent CSW participation practices as Member States, UN agencies, NGOs, and civil society leaders encourage broad scale engagement from all over the world via Zoom. Whereas prior to the pandemic it would have been rare to attend a virtual or hybrid meeting of community leaders and activists, today, the Commission regularly incorporates virtual panels that feature political actors from different parts of the world simultaneously. This practice facilitates increased participation among feminist leaders and organizers located in rural or otherwise marginalized communities and regions, expanding civil society access to the Commission.

For students enrolled in *Gender and Human Rights*, the hybrid CSW model fosters new opportunities for building connection and feminist solidarity across borders as students encounter transnational movement building "in a way that does not [necessarily] reproduce and reinforce current systemic inequalities when participants occupy very diverse social locations" (Parisi and Thornton 2012, p. 215). Technological utilization has expanded global participation, promoting dialogue among attendees irrespective of their location inside the UN building or on a Zoom call. Given this new reality, I revised course expectations for student participation, allowing them to attend up to 10 hours of virtual events in addition to 20-plus-hours of face-to-face meetings. This blended approach provides greater flexibility when scheduling their time at the CSW while maintaining the experiential networking opportunities and learning processes in the course. Lastly, and perhaps most practically, virtual participation hours have made it easier for students to schedule their

time when the CSW schedule overlaps with Pace University's Spring Break where students may have more or less time available to them.

Enrollment. Student enrollment in the course has changed quite a bit since I first offered the class. During the pre-pandemic years, most students held majors in political science, peace and justice studies, international relations, or women and gender studies and tended to be third- and fourth-year students. Most expressed an interest in working for the UN or a politically oriented not-for-profit whereby the course offered an opportunity for them to build their professional network before graduation. Pace University students on the New York City campus represent local, national, and global diversities across race and ethnicity, nationality, and socioeconomic status with one in four being first-generation students (Pace University 2025). Most students enrolled in the course identified as female, non-binary, or gender fluid. Depending on the semester, between fifteen to twenty-five percent of the class were classified as international students from a range of countries including Brazil, Canada, Jordan, Mexico, Peru, Poland, Philippines, Turkey, Sweden, and Uzbekistan among others.

One time I offered the course to first-year students involved with an on-campus women's leadership program exclusively; from my perspective, this iteration of the class was the least effective as the students described feeling overwhelmed, unprepared, and/or too intimidated to engage in the CSW processes beyond basic observation. It was an ironic outcome given that these students sought to develop their leadership skills.

More recently, enrollment has reflected a cross-section of students with interest in global politics, gender equality, and/or human rights coupled with those seeking to complete the civic engagement requirement from Pace University's core curriculum. I have found this enrollment mixture challenging both in terms of students shared interest and preparedness for the course. To address certain knowledge gaps, I started to incorporate supplemental learning modules for students without previous exposure to feminist or women's and gender studies content, or for those seeking a refresher on disciplinary boundaries; modules examine important

terms and concepts like global development, intersectionality, decoloniality, transnationality, and global north/global south, developed/developing, first world/third world, and western/non-western designations. Together, the modules establish baseline knowledge evident in the conversations and tensions throughout the CSW negotiations and in this way serve to clarify global feminist politics and practice for students.

Course Outline and Pedagogical Process. The course is organized to prepare students for CSW participation, which in practice means that their learning is structured across three phases: 1. knowledge acquisition and professional skill development; 2. political advocacy and participation; and 3. critical reflection and assessment. Reading materials include articles and chapter excerpts from feminist scholars about global women's rights (Abu-Lughod 2001; Chesler & McGovern 2016; Patil 2013), gender equality politics and practices at the UN (Engle Merry 2006; Ferree & Tripp 2016; Jain 2016; Snyder 2006), select transnational feminist theories (Anzaldua 1987; Mohanty 2003; Narayan 1998; Sandoval 2000; Schutte 1998), and other literatures that examine political processes and feminist resistance from critical perspectives (Ahmed 2023). I also incorporate materials developed by the UN, UN Women, and NGO CSW NY to support student learning about the CSW; items include guides to intergovernmental negotiations (Sidhu 2007); in-depth histories of the CSW and women's rights negotiations (UN Women 2019); and advocacy guides and toolkits developed by NGO CSW NY (NGO CSW NY 2021; NGO CSW NY 2023). Because each Commission identifies different priority and review themes to guide their annual work, I integrate digital materials and reports compiled by UN Women and NGO CSW NY to familiarize students with chosen thematic issues and their relevant histories.

During the first half of the semester (Weeks 1 – 7), we cover a wide-breadth of information ranging from basic expectations for student engagement and participation, effective political advocacy practices, greater understandings of global feminist movements and debates, and ways to navigate the politics of the CSW. Students often

reflect on the intensity of these first few weeks together; Gabriella[3] for example recalls, "we had a short period of time to learn all of the material, but even in this limited timeframe, I found that I felt prepared when I went to the UN and applied what I had learned in the class." Disha similarly observes, "the beginning of the class felt rushed because the CSW [was] coming so quickly. In some ways, I wish I had taken a class before this one to prepare more for the experience as an individual." High-impact learning courses with external community partners obligate student learning about the ins and outs of their experiential site. For the *Gender and Human Rights* course, this process of understanding CSW politics and related professional practices is indeed a heavy lift for most at the start of the course.

Feminist scholar Engle Merry (2006, p. 37) characterizes the CSW as "a transnational social space where actors come together simultaneously as locally embedded people and as participants in a transnational setting that has its own norms, values, and cultural practices." The complicated dynamics of CSW political culture generates rather stressful experiences for those unfamiliar with the space. As Engle Merry (2006: p. 36) recalls,

> The first time I went to a UN meeting, I was completely lost… I didn't understand the process of drafting documents, nor did I know how to find the documents under discussion. I was puzzled by the apparently tense relationship between NGOs and governments. And I was overwhelmed by all the acronyms – UNDP, WFP, WHO, UNIFEM, CEDAW, CRC, ICCPR, and many more – and the catch phrases, such as gender mainstreaming, capacity building, best practices, gender focal points, and political will, that I heard all around me. Everyone else seemed to know what was going on, how to find her way around, and what all those letters stood for.

3 All student names have been anonymized. Data used in this article includes excerpts from student assignments in the course, course evaluations, and personal email correspondence. Data was approved for use under Pace University's research ethics review board.

Whenever I consider the structure of the *Gender and Human Rights* course, I return habitually to Engle Merry's vivid assessment of her CSW experience. I find it helps me consider what students need to understand to be comfortable in Commission sessions, and it further challenges me to be critical and reflexive about how I scaffold experiential learning in an environment with compellingly complex political obligations. Many years ago, I started to describe the class to students as a domestic study-abroad course. I found the language of study-abroad illustrative of how I approach experiential learning opportunities at the many Commission events; I believe it furthermore assists students to anticipate the wider scope of their learning in the class. Conceptualizing the Commission as a foreign country, in other words, encourages them to consider their willingness to learn new languages, cultures, norms, and practices inside the UN building and to appreciate how or why Commission members might foreground certain gender-based politics and human rights legislation in their work. One of the course materials we develop together, for example, is a shared document of common acronyms, phrases, resolutions, terms, and ideas that students can use during the CSW as a referential cheat sheet. This class document assists students with decoding language which signifies important inflection points and political commitments within the international human rights community. It also supports their sense of being knowledgeable in an otherwise unfamiliar place. Additional pedagogical practices involve incorporating a CSW participation contract with clear guidelines on student expectations, holding regular one-on-one meetings with students during office hours, using in-class quizzes to assess learning, providing dedicated class time for students to build their CSW schedules together, and creating scaffolded assignments that build student confidence, facilitate experiential engagement, and build relational accountability among students in the class.

Throughout January and February, course readings and discussions structure a cohesive narrative about key moments and concepts undergirding global women's rights movements at the UN. Together, we explore the concept of gender equality and campaigns for women's rights as human rights through an examination of significant global gatherings including the UN World Conferences on Women held in

Mexico City (1975), Copenhagen (1980), Nairobi (1985), and Beijing (1995) as well as critical resolutions and agreements such as the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), the Beijing Declaration and Platform for Action, and Security Council Resolution 1325 on Women, Peace, and Security, among others. Students gain appreciation for the historical context and local-global political conditions leading to the establishment of UN Women in 2010, consolidating previous operations of the Office of the Special Advisor on Gender Issues and Advancement of Women, UN Development Fund for Women, Division for the Advancement of Women, and the International Research and Training Institute for the Advancement of Women.

Once students understand the landscape of gender politics at the UN, we shift to discussions of culture, identity, geopolitical location, race and ethnicity, gender, generation, socioeconomic status, nationality, and sexuality and the contestations embedded across neoliberal development regimes that reify Western, orientalist, imperialist, and capitalist empire. These discussions draw from transnational feminist scholarship and serve to challenge normative practice "rooted in a neutral and universalizing language that reinscribes forms of democracy and citizenship that erase difference, conceal power, and perpetuate social injustice" (Costa & Leong 2012, p. 171). Following this intellectual exercise, students shift to concrete professional skills development and networking techniques for effective political advocacy. This point echoes an important pedagogical shift in the semester moving from theory to practice, and "provide [students] with the historical knowledge and theoretical tools necessary to critique local and global systems" of power and then empowering them to facilitate change directly (Costa & Leong 2012, p. 175; Boyd & Sandell 2012; Parisi & Thornton 2012).

To foster student confidence and build advocacy skills, I couple scholarly content with hands-on workshops and trainings led by human rights leaders and feminist activists. Guest speakers lead simulations of CSW negotiations, for instance, to help students follow the diplomatic process in real-time during Commission member debates or in civil society interventions. Students attend

virtual advocacy trainings organized by NGO CSW NY's Young Leaders and Young Professionals Committee gaining exposure to other young activists preparing for the CSW and learning how youth organize during the Commission. I share regular announcements about planning meetings and events hosted by NGOs, Member State representatives, UN agencies, and civil society organizations in the weeks leading up to the CSW. Students will sometimes volunteer with NYC-based NGOs with which I have a longstanding relationship, and each semester, we travel together to conduct a private tour of UN headquarters with a hired guide. Prior to the CSW, students receive business cards from Pace University with the student's contact information, and Career Services meets with the class to share networking and resume preparation tips. These practices collectively encourage students to take full advantage of the CSW experience and of their potential as impactful changemakers. The course scaffolds student learning and professional skill development in the weeks leading up to the CSW; it is then followed by two-weeks of hands-on experiential participation in the CSW, and concludes with individual student journaling, team meetings, self-assessment exercises, and an analysis of session outcomes inclusive of the CSW Outcome Document otherwise known as the Agreed Conclusions. The next section explores the Team Advocacy Project in detail.

4. Building Student Advocacy Teams: A Scaffolded Learning Assignment

In this section, I describe the contours of a scaffolded learning assignment called the Advocacy Team Project, which I developed to better structure student participation in the CSW. The assignment consists of several integrated tasks designed to build upon student learning and encourage their effective political praxis; some elements of the assignment occur prior to the CSW while others happen during and after the session. Students work in teams of three or four to complete each component of the Advocacy Team Project which guides their learning experience. This approach means students are responsible for: 1. selecting a gender equality or women's human rights issue; 2. conducting research on how said issue has or has not been addressed under the Commission or within the UN more

broadly; 3. drafting an advocacy brief to distribute during the CSW; 4. creating a digital impact package which translates their advocacy brief into visual advocacy materials; 5. choosing and attending topic-related CSW events and meetings; 6. tracing changes or revisions to their chosen issue in the CSW outcome document; and 7. doing self- and group-reflexive assessment exercises to evaluate their political advocacy experience. In the following discussion, I offer contextual justification for how I determined to include this scaffolded project in the course. Drawing from student reflections and course evaluations, I illuminate how their experiences of professional growth and personal challenge inspired me to reorient course expectations to better facilitate learning in a charged political environment. As I offer additional details on each element of the assignment, I explore the ways that the Advocacy Team assignment addresses core experiential learning competencies and then conclude with an analysis of the extent to which the assignment proved successful.

Professional Growth. Students demonstrate professional growth across their experience of the Commission. At the start of the CSW, students cite early enthusiasm for the opportunity which is then followed by critical reflexive analyses in the latter half of the session. For example, at the opening of the Commission meetings, students frequently share similar levels of excitement, as exemplified when Christine states,

> Today was the first day that the CSW madness really began and I am so excited! It was the first time I actually enjoyed or felt good about something I was doing… I loved interacting with everyone at the orientation. I could already tell that these next two weeks would challenge the ways I think.

Mira likewise comments,

> Oh my gosh… I am so FREAKING excited! THIS IS THE FIRST DAY OF CSW!!! I am on my way to the United Nations! It is going to be my first time at the UN, and I get to be a geek about all things UN. I think you can say I am one of the most excited people to go to the CSW.

Despite initial enthusiasm during the first few days of the Commission, students often begin to express some sense of disappointment

and/or critique of the political processes with which they begin to witness. Isla for instance starts to question the effectiveness of the Commission to address different forms of global injustice. She remarks, after a few days of attending,

> I am still not sure about my feelings about the CSW… I do know that I am really grateful to have been able to take part in this class and to experience how the UN actually works, but I have mixed feelings about the UN and its effectiveness now.

Josie similarly comments,

> I am very disappointed with the contributions of the UN agencies… [there was] little information on how to address the issues [and] I ended the day feeling disappointed in the work being done at the CSW because of the lack of information on solutions.

Others like Maggie point to the quality of CSW meetings, asking "did we really spend 90-minutes listening to panelists market their non-profit organizations without addressing the issues they advocate for?" Whereas Christine insists, "I understand panelists come to CSW to support a specific cause, but it was very discouraging to have them blatantly disregard any questions from the opposing side. I learned that this occurs during most of the Q & A times" at the end of an event. Isla too shares Christine's assessment of how human rights leaders interact with Commission attendees. She argues,

> Unfortunately, many of the panels consist of only vague words and not words about direct actions that the panelists, their organizations, or the audience could take to create change. These panels were very disappointing and mostly consisted of speakers talking around the subject and being very imprecise… about halfway through the CSW, I started calling this dancing around the subject "UN Speak" and it was surprising how many people did it.

Comments like these reflect students' disenchantment with the CSW process, yet they also signal how students learn to position themselves as civil society participants engaged in the CSW session. Rather than

describing everything at the UN as fantastic and wonderful, students begin to think critically about the UN as an experiential learning site. It is here that I suggest students shift from passive observers to political actors with the capacity to move beyond declarations of uniform celebration to instead demand concrete solutions, complex debate and discussion, and/or greater forms of accountability and representation at the CSW session.

I concurrently interpret students' critiques as evidence of their professional growth and as a pedagogical opportunity from which to provide greater structure to their CSW engagement. From my perspective, the Advocacy Team assignment encourages students to approach their time at the CSW with a specific goal in mind, namely tracing how their topic of interest intersects with the broad gender equality agenda at the CSW. This shift in focus asks students to consider the purpose and quality of the information shared in sessions without getting bogged down by organizational challenges apparent in poor agenda setting, time or resource allocation, or audience participation. Students, in other words, concentrate on gathering data and evidence from each panel, presentation, and speaker to learn more about how different communities, countries, and organizations articulate and/or address their chosen human rights' concern. The Advocacy Team assignment, moreover, urges students to familiarize themselves with the documents and instruments available to human rights leaders and policymakers before entering the CSW. This knowledge acquisition affords greater confidence in their ability to follow conversations and debate during the Commission, making it easier for students to participate in the political process more directly.

Difficult Dialogues. CSW attendees ascribe to a diverse set of global and local politics that do not always align with student expectations of the human rights community. Commission sessions endeavor to build global consensus, encouraging difficult dialogues about longstanding gender inequalities, power, and privilege to move the human rights agenda forward. Yet, for several Pace University students, the process of encountering policymakers and human rights leaders with opposing viewpoints proved challenging.

Students shared feeling shocked, confused, and sometimes paralyzed when pushed outside of their comfort zones. Josie elaborates on her experience, for example, stating,

> Being at Pace University and in the Women's and Gender Studies environment, it is easy to forget that there are people who are homophobic, transphobic, sexist, and many other things. It seemed confusing to me why groups like this would decide to be present at a conference focused on women's and girls' rights. Another important lesson for me was understanding that spaces within the UN are very conservative… by the end of the day, I felt hurt and hopeless because I felt as though I could not change the minds of several people in the room.

Maggie echoes similar expressions of despair, asserting,

> I feel POWERLESSNESS and am left wondering what I was even doing at the UN. I didn't feel that my experience mattered, and I began to question if I had any rights in this 'international safe space.' I face a constant battle of thinking, it is a privilege to be here, but then why does it also feel as if I am wasting my time?

I initially approached the experiential component of the course as an opportunity for students to envisage global women's rights politics through their CSW engagement. Prior to incorporating the Advocacy Team assignment, students were able to customize their CSW schedules based on their own political motivations and self-interests. However, as the student population enrolled in the course changed, and with increasing moments of political polarization, I found that the more structured expectations for student participation proved vitally necessary. Hannah, for example, reflects on this politic when discussing reproductive rights during one CSW session. She explains,

> I was talking about the importance of comprehensive sex education to women in different countries. However, I did not know I was discussing this to a room full of conservative girls and women from Latin America. It was clear within ten-minutes… that my classmates and I were in the lion's den because the majority in the room was conservative women who believed passionately against everything we wanted to advocate for.

In one of our class-reflection meetings after the CSW concluded, we processed several students' feelings of being 'in the lion's den.' For most, it was the first time they had encountered explicit resistance to their ideas and perspectives in what they assumed to be a friendly feminist-space. Students had anticipated the CSW would mirror their educational experience of the Women's and Gender Studies classroom and expressed feeling personally unprepared to meet conservative opposition inside UN headquarters. I took their experiential struggles seriously and in subsequent semesters incorporated the Advocacy Brief to the Advocacy Team assignment to provide students with an effective means from which to learn about and appreciate how human rights leaders and feminist activists negotiate ideas to collaborate with the Commission and inform global policymaking irrespective of political viewpoint.

Advocacy Brief and Other Forms of Assessment. The Advocacy Team assignment, implemented in spring 2025, tries to reinforce for students the democratic processes of consensus building and encourage them to envisage greater purpose to their CSW participation and experiential learning in the course. I task students with creating a shared Advocacy Brief and corresponding digital advocacy materials to advance their capacities for conducting effective political advocacy with Commission attendees. Advocacy briefs offer relevant information about human rights violations with governmental representatives and NGO partners. The one to two-page document provides a short summary of an issue; cites appropriate research data to demonstrate the scope of the problem; directs the reader to pertinent UN documents, resolutions, and/or offices responsible for addressing the problem; and concludes with a specific request or proposed set of solutions that Member States are urged to act upon.

During the 2025 semester, I invited a former student and recent graduate of New York University's Global Affairs program to facilitate an in-class workshop on creating advocacy briefs. Students review several examples of effectuate briefs and describe core elements to their effectiveness. We debate persuasive versus weak language

together, identifying common phrases and organizational structures necessary to the document.

Following the interactive training, students gather in their Advocacy Teams to craft briefs for use at the CSW. I provide several rounds of review before students finalize their advocacy document, and once complete students prepare a visual version of their advocacy brief known as the digital impact package. This portion of the Advocacy Team assignment requires students to develop visual eye-catching versions of their advocacy brief, infusing creative elements to an otherwise text-driven assessment. Student teams, for example, prepare digital fliers which encourage viewers to act and/or seek out additional information about the topic highlighted in their Advocacy Brief.

The first four components of the Advocacy Team assignment (i.e. selecting a topic, researching said topic, crafting an advocacy brief and set of visual fliers) scaffold the latter portions of the project by assisting students with structuring their CSW participation as well as providing an issue-driven focus from which to evaluate challenges and progress in the CSW negotiations. Students utilize their Advocacy Team topic to select events to attend during the Commission; they gather regularly with other members of their team to coordinate schedules, distribute advocacy materials, share notes from events and meetings, and compare experiences across the different facets of the CSW. Students in the Advocacy Team, for instance, might divide their time across the official work of the Commission, Member State hosted side events, and civil society meetings hosted by NGO CSW NY. Because each member of the Advocacy Team participates equitably in the interrelated elements of their collective learning, I propose, this team-driven assignment facilitates relationship building and peer support throughout the course. Students shared learning experience remains an effective pedagogical tool in the feminist classroom. As Jenna attests in a personal email,

> I just really want to say thank you and express how grateful I am to have this experience and be part of the Women's and Gender Studies department… I never felt connected [in other classes] but in this course, I feel part of the community, and… it has inspired me so much and has made me a

> better learner. This experience has made me reflect on my education, and despite how much I still have to learn, it feels surreal to be in these spaces having conversations with peers and such accomplished women.

After the CSW concludes, I ask students in the final components of the Advocacy Team assignment to reflect on their experiences of doing political advocacy at the UN. Student teams complete an outcomes assessment of the CSW taking stock of their team's relative successes and challenges with the advocacy project. Each team meets with me for 30 minutes to explore the learning experience in-depth; teams likewise submit a short report examining the outcomes of the CSW (i.e., CSW Agreed Conclusions) as it relates to their advocacy efforts. Team reports include: a review of their goals for the CSW (i.e., describing what student teams wanted to accomplish); evaluation of how well the team accomplished its stated goals; summary of who shares an interest in their advocacy topic at the CSW (i.e., who are the leaders, Member States, agencies, and/or organizations connected to this work and how do they help us understand the issue in new ways); documentation of new agreements, language, or policy shifts evident in the CSW Agreed Conclusions or Political Declaration; and, lastly, exploration of key lessons learned about the Commission.

Taken together, I suggest the Advocacy Team assignment facilitates experiential learning while simultaneously building student communication and collaboration skills as they seek to affect change. The assignment serves as an example of feminist pedagogy which deepens students' appreciation for changemaking praxis and encourages them to "perceive transnational flows of labor [and] to see the global working within the local" (Boyd & Sandell 2012: p. 261; Parisi & Thornton 2012). Students like Sophie, for instance, comment on how "the passes to the UN showed me a new world that I now want to be part of. It truly inspired me to be in a place where all I do is work toward the promise of human rights." For me, Sophie's stated sense of purpose speaks not only to the effectiveness of the class but to the ways in which assignments can complement and enhance student learning. As Shana affirms, "the course allowed me to pursue my passions in a space that I otherwise would not have had access to. And while difficult at times, it helped me learn how to

communicate more effectively and to be a better activist and leader." Indeed, even for students with little professional interest in women's rights or global politics, April concludes,

> I wouldn't remove any information from the class. It was a lot to unpack alongside things I am not sure I will need moving forward, but it was all still incredibly interesting and, in some ways, could be useful at any given time even if my professional goals and plans don't change. The topics in this class can come up in surprising ways.

5. Pedagogical Progression: Concluding Thoughts on Experiential Learning in the Feminist Classroom

In a study of high impact learning practices, Moore (2013: p. 11) posits whether "the kinds of knowledge encountered in the so-called real world intersect sufficiently with the kinds of knowledge engaged in college studies to render them mutually intelligible and beneficial." For Moore, the benefits of experiential learning remain tethered to the instructor's ability to organize student engagement in ways that make learning possible. My experience leading the *Gender and Human Rights* course affirms this belief in teaching pedagogies which sit at the heart of effective experiential learning praxis. The discipline of Women's and Gender Studies, like that of Clinical Sociology, "demand[s] that students think critically about what they [are] learning in class and how that new knowledge ha[s] applications in the world beyond it" (Orr 2011: p. 18; Fritz 2022; Yamada 2025).

Throughout this article, I have sought to illuminate how I approach engaged student learning at the CSW with attention given to course development, design and revision, and assessment vis-à-vis the Advocacy Team assignment. Feminist teachers "invite students to attend to what feels familiar as well as to what feels different at their [site]" guiding them through "moments where the smooth workings of ideology continue uninterrupted [and] moments where their prior conceptions were dislodged" (Boyd & Sandell 2012: p. 262). It is in this way the Advocacy Team assignment engenders feminist forms of experiential learning that benefit students in their educational and professional lives through building shared

classroom-communities and solidarity across difficult encounters and dialogues which sustain personal growth.

Several concluding observations from students speak to the power and promise of experiential education in the feminist classroom. Clara, for example, remarks, "I am thankful as a hands-on learner for this course, which really contributed to my understanding and helped me gain so much." Whereas Josie reflects,

> I think that I have gained a lot from attending the CSW. It has clarified my professional goals and expectations. For starters, I am more conscious that there are so many different opinions and viewpoints on issues that I need to be more sensitive about… I think that being exposed to the UN in this way made me realize that doing this work is very difficult.

Alternatively, for Isla, the experience of the CSW made her appreciate life as a full-time student. She explains,

> I didn't realize how draining the CSW would be. Every day when I came home, all I wanted to do was sleep, and I usually did… I think it was the atmosphere. I was completely immersed in the adult, professional world, and I wanted to appear as though I belonged there. That meant I had to be constantly on and engaged, which gets very exhausting after a certain point.

Maggie and Mira, conversely, found themselves invigorated by the CSW experience as their professional lives became clearer after completing the course. As Maggie shares,

> I like to keep an open mind about the future because… I often change my mind, and I don't know how the future will unfold. But I think… I see myself staying involved with the UN [and] deciding to work for a non-governmental organization that strays away from 'conservative' UN practices and that would allow me to have a voice in the organization.

Mira too proclaims,

> I always wanted to work for or with the UN and even though it was frustrating, that is why I love it, and it only makes me want to work for the UN even more! I would love to be able to be a delegate [again] and

> take part in many of the different aspects of the UN… I would suggest this class and experience to anyone because it does truly help one realize the different types of people in this world and how to deal with them. It was an educational opportunity that I will always be grateful that I had.

Courses like *Gender and Human Rights* illustrate the pedagogical potential of experiential learning for students. For faculty interested in offering experiential learning courses similar to the class described in this article, I offer the following advice: consider your time commitments and capacity to mentor students effectively; build in regular student–faculty reflection time where you can gather feedback from the students about their experiences, struggles, and successes; practice radical and reflexive honesty with students throughout the course; and, lastly, develop pedagogical flexibility both inside the class itself and across different semesters. Experiential learning demands faculty and students commit fully to the work required, and this collective experience is not always easy or smooth. In this article, I have offered an analysis of how student learning in the *Gender and Human Rights* course challenged me to progress both as an educator and activist-scholar invested in feminist praxis. It is my hope that the content and discussions shared here might do the same for others.

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Book Review: The Untold Story of Zama Zama Miners in South Africa: Unearthing Hope

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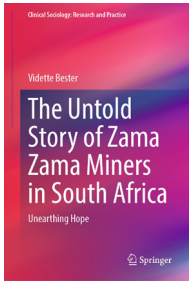

The Untold Story of Zama Zama Miners in South Africa: Unearthing Hope.

By Vidette Bester

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1. The Opening Scene

Bester starts the telling of her story of South Africa's Zama Zama miners at some miserable holes in the ground outside a dusty little town called Stilfontein. It was here, in 2025, that the issue of Zama Zama mining finally erupted forcefully into the consciousness of just about every South African, and indeed, many others the world over. Before this, the issue had kind of bubbled away just beneath the surface of popular consciousness, sometimes showing us a hint of its existence, but never really materialising fully. I return to this choice as an opening scene, the 'scene of the crime' to all but the most critical of observer, a little later in this reflection. But for now, the point I want to make about this is that, while this was where Bester chose to start telling the story, it is quite clear that her engagement with Zama Zama miners and mining started long

before the Stilfontein frenzy. I emphasize this up front so that there can be no confusion that this book might have been an opportunistic response to the media frenzy that 'went down' outside Stilfontein.

2. Bester's Story

And with that out of the way, we can move on from the frenzy that took place around miserable holes outside Stilfontein to Bester's really serious reflection. She uses the first chapter in the book to critically interrogate popular narratives around Zama Zama miners and mining which she does from something of a Foucauldian perspective. She notes how, in these narratives, Zama Zama miners are generally constructed as violent, criminal, illegal, male, and foreign. For her, this dehumanising characterisation of Zama Zama miners lies at the heart of 'the issue' here. Not only does this serve to legitimise the inhumane treatment of Zama Zama miners by the authorities and society at large, but it also, according to Bester, acts to undermine socio-economic opportunities that exist in small scale and artisanal mining.

She uses the rest of the book to work through these suggestions. In Chapters 2 and 3, she begins a process of recasting Zama Zama miners as people by attributing to them a history. And, as she points out, this is not just any history. It is a particularly violent colonial and apartheid history. In this history, hundreds of thousands of African people from across the subcontinent – from Tanzania in the north, to Angola in the west and Mozambique in the East, and everywhere in between – were systematically forced, through every coercive trick in the book, into the rapacious migrant labour market for large scale mining in South Africa. To paraphrase Bester's message in these two chapters: we sit today and say in our stories that Zama Zama miners are violent and foreign and illegal. However, little attention is paid to the fact that these same Zama Zama miners are people who are a direct consequence of a particular violent, *legal* history premised on forced migration. One might easily add rainbowism's rootedness in neoliberalism to this violent yet legal history, although Bester stops short of doing this.

In Chapters 4 and 5, Bester brings her discussion to the present day. These two chapters constitute what might be thought of as the data core of the book. In the case of Chapter 4, although the title is "*Artisanal Mining in the South African Landscape*" the chapter actually covers a lot more ground than this. In attempting to frame Zama Zama miners and mining in South Africa, Bester does her best to weave contextual strands from global perspectives on ASM and the current South African legal and policy environment, together with empirical data from her own field work. Because of this latter element, this chapter is especially rich in first-hand imagery and testimony. In her conclusion to the chapter, Bester uses all of this to emphasise the diversity and nuance that characterises Zama Zama miners in South Africa, both in terms of what motivates their participation, and the actual people involved. But for me personally, whatever else this chapter might set out to achieve, the imagery and testimony force one to take the next logical step in the process of putting a human (as opposed to a violent, criminal, illegal, male, and foreign) face on Zama Zama miners, following Bester's efforts to reconcile them with a history in Chapters 2 and 3.

Chapter 5 is similar to Chapter 4, and yet for me strikingly different at the same time. Here Bester introduces women and children participants into the present day story of Zama Zama mining. Again, this chapter undertakes the task of weaving together global and local discourses with empirical data that Bester has personally gathered. And again, the chapter is rich in imagery and testimony. However, this is a much more difficult chapter, not conceptually, but emotionally. And there is no denying the fact that the subject matter Bester covers here is difficult to reconcile with her apparent general support for Zama Zama mining. As much as Bester tries in the chapter conclusion to 'balance' the violence, exploitation and health risks experienced by women and children in and around Zama Zama mining with a more nuanced story which includes a narrative of economic empowerment, honestly, this is really a difficult balancing claim to pursue. I suspect that Bester knows this herself as is evident from the fact that the heading for the section discussing economic empowerment ends in a question mark: "*A Way Intended for Economic Empowerment?*"

But Bester does not abandon her project of balancing the narrative here. In Chapter 6 she persists with building this as she discusses "*The Bright Side, the Dark Side, and the Ramifications of Mining*". The appalling health and safety standards, child labour (during the Stilfontein frenzy stories of minors being forced to work in mines emerged), violence, gang warfare, protection rackets, and the alarming environmental impacts associated with Zama Zama mining are all presented. But each of these presentations are rounded off with the suggestion of a "backdrop of undeniable complexities" (p. 87). Significantly, Bester moves to put all these ills associated with Zama Zama mining into perspective by comparing them to their equivalents in large scale mining operations. I must say that, while this is indeed telling, I do worry a little that comparing something to the worst in society is not setting a very high bar. In any event, from all of this, in her conclusion to this chapter, Bester circles back to the issues of economic opportunities and livelihoods for Zama Zama miners.

The rest of the book really attempts to think through solutions to problems associated with Zama Zama mining. Although it seems that here too, complexities are the order of the day. Chapter 8 engages with the matter of formalisation primarily by exploring case studies of ASM formalisation initiatives, not just in South Africa, but from around the continent. In doing this, Bester introduces a distinction between what might be labelled 'control formalisation' and 'developmental formalisation'. The former would include things like licensing, regulation of practices, and taxation, while in the latter, ASM is supported in its development, seemingly without too many burdens of control. Bester leans rather strongly towards the latter of these forms for Zama Zama mining based on the argument that Zama Zama miners do not have the means to operate under the constraints of 'normal' controls.

Her final port of call before drawing her conclusions is a consideration of the current and potential relationships between large scale mining and Zama Zama miners and mining. Once again, using case studies, she highlights the uneasy and complex character of these relationships. In trying to pull something constructive out

of her reflections on this, she seems to advance the case for large scale mining stepping up to support Zama Zama miners and mining. She invokes both self-interest and responsibility-based rationales for this proposal.

And finally, in Chapter 9, Bester draws her conclusions. I can see three broad themes which she seems to settle on here. The first really constitutes a direct response to the issue of the popular narrative that she highlighted in her very first chapter. Here she again emphasizes the dehumanising character of this narrative which blanket characterises Zama Zama miners as violent, criminal, illegal, male, and foreign. In response to this, she calls for much more dialogue so that nuances and complexities can be unearthed and made public with a view to "*Changing Mindsets*" (p. 141) as she puts it. The second theme I see her conclusion engaging with, is the complex and contested issue of formalisation of ASM generally, and Zama Zama mining in particular. And whereas in Chapter 7, Bester seemed to lean rather heavily towards a developmental type of formalisation, in her conclusion she appears to partially retreat from this, and to instead emphasise the virtues of the informal sector. I say 'partially', because the third theme that emerges in her conclusion is that of support for Zama Zama miners both in terms of protecting them from the gross exploitations to which they are currently subjected (as highlighted in Chapters 4 and 5 in particular) and in terms of improving health, safety and environmental practices of Zama Zama miners. It is difficult to see how this can really be achieved without some degree of formalisation. Wrapping all of this up in Bester's own words, this chapter brings us to "the crucial point of addressing the historical and social injustices and re-evaluating Zama Zama mining within a developmental framework" (p. 139). That then is the ground that Bester covers in her book.

3. A Different Opening Scene

However, this would not be a scholarly review without some critique. With this in mind, let me start this little critique by saying that, if I had set out to write this book, I would not have prefaced it looking down some miserable holes in the ground outside a dusty little

town in the North West Province of South Africa. The location for my preface, the 'scene of the crime', would have been altogether more luxurious. With the book's strong emphasis on gold mining specifically, I would probably have started it in a country whose per capita GDP is consistently located in the top five in the world; in a country that, by some accounts, is responsible for refining as much as 70% of the world's mined gold; but which, strangely enough, doesn't have a single gold mine – Switzeraland.

4. What Bester's Story Missed

The link between my preferred opening scene and Zama Zama miners is of course far more abstract than the miserable holes outside Stilfontein. In fact, it is possible (given that South Africa has its own significant refining capacity) that there may be no material link at all. But for me Switzerland's mysterious location in the global gold market is emblematic of what I think is critical ground that Bester does not cover in this book. And this is the matter of the broader value chain within which the Zama Zama miners currently operate. The closest that Bester gets to any acknowledgement of this comes in the form of the following excerpt from one of her informants named Tessa which appears in the final chapter:

> *We have discussed this a number of times. Formalizing illegal mining would be ideal, but is it possible? Where do you start? Remember, this is a big syndicate that involves communities. It involves industries, companies, it involves officials, police officials, it involves government, you know, so where do you really start? It would be ideal.* (p. 145)

To understand why I think that this is so important, I think that it is now time to formalise a distinction that I have been carefully trying to maintain throughout this reflection on Bester's work, namely the distinction between Zama Zama *miners* and Zama Zama *mining*. From this distinction, it is safe to say that I agree with Bester that Zama Zama miners are direct descendants of a grossly exploitative colonial and apartheid labour history (although I would add rainbowism's neoliberalism to this too). And I agree with her that this long history of crimes against humanity is conveniently overlooked in the popular

narrative surrounding Zama Zama miners. I also agree with her that the popular narrative around Zama Zama miners is dehumanising in the main, and that this dehumanisation in turn legitimises the inhumane treatment that Zama Zama miners are subjected to at the hands of authorities and society as a whole. In short, I agree with Bester that as a society, we have not done right by our brothers and sisters who happen to be Zama Zama miners.

However, on the issue of Zama Zama *mining* our views diverge. For me, Zama Zama mining ought not to be looked at as this problematic production process involving Zama Zama miners which happens in and around miserable holes in places like Stilfontein. For me, it needs to be looked at as just one part of a global value chain in which miserable poverty and streets paved in gold coexist. Indeed, in this value chain, the miserable lives of dehumanisation and exploitation that Zama Zama miners exist in, both socially and environmentally, are precisely the source of the incredible wealth that gets mysteriously concentrated in places like Switzerland. And I would argue that it is the power that this incredible wealth buys that is instrumental in forging the narratives and politico-economic conditions that lead to the incarceration of Zama Zama miners in narratives of dehumanisation and these lives of exploitation.

Looked at from this vantage point, with Zama Zama miners as the victims not just of history, but as victims of current ruthless exploitation, Bester's argument for light formalisation of Zama Zama mining becomes difficult to sustain in my mind. It seems to me that this would be precisely the sort of call that those living in the Switzerlands of this world would also want to see, because more deliberate regulation would surely represent a very real threat to the sources of their wealth – exploitable labour and unregulated externalization of environmental costs.

5. In the End

In the final analysis then, Bester's book presents a deep and considered reflection on Zama Zama miners, Zama Zama mining and indeed artisanal and small scale mining (ASM) more generally. Her arguments are rich with empirical findings from qualitative

work conducted in South Africa, interlaced with a thorough study of literature (both academic and otherwise) on ASM globally. And her effort to humanise Zama Zama miners by attributing to them a history, and through striking testimony and imagery is absolutely timely. For these rich insights, as well as for its inherent provocation to reflect, I think that this book is well worth a read.

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