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РОЗРІЗНЕННЯ МІЖ ІНДИВІДУАЛЬНИМ ТА КОЛЕКТИВНИМ РІВНЯМИ РЕПРЕЗЕНТАЦІЙ В АНАЛІЗІ ПРОЦЕСУ ПЕРЕДАЧІ ЦІННОСТЕЙ

Стаття розглядає процес передачі цінностей і, зокрема, механізм, що забезпечує стабільність їх інтракультурної варіації. Дослідницький дизайн розрізняє цінності, що існують на індивідуальному та колективному рівнях (окремо як концепти дотичні до особистих пріоритетів або культурного самовизначення індивіда). У двох дослідженнях, проведених у Новій Англії (2007–2008), було розглянуто гіпотези щодо можливості існування (1) різних каналів передачі цінностей для кожного з двох рівнів та (2) відмінностей у їх сензитивності до таких чинників соціалізації, як атмосфера у сім'ї та батьківське ставлення. Також розглядаються можливі доповнення до сучасної теорії цінностей та методів їх вивчення кількісними засобами.

Ключові слова: ціннісні орієнтації, передача цінностей між поколіннями, стратегії виховання, шкалювання.

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DIVERGENT TRAJECTORIES OF THE MINERS' MOVEMENTS IN UKRAINE AND SOUTH AFRICA

This paper examines the diverging trajectories of the labor movement in mining industry in Ukraine and South Africa. It compares the economic situation in the two countries, and defines the leading role of the miners' movement in bringing forth social transformations in the early 1990s. Possible explanations for diverging paths in the miners' movement in Ukraine and South Africa in the last decade are discussed in light of miners' structural and associational power, and taking into account socio-economic factors, historical legacies, and the role of trade unions.

Keywords: mining, labor movement, structural and associational workers' power, Ukraine, South Africa.

Introduction

This paper examines the diverging trajectories of the labor movement in mining industry in Ukraine and South Africa during the last decade. Relevance of this research question stems from the fact that

miners in both countries were among the leading social agents in the transition processes in the 1990s (post-apartheid South Africa and post-soviet Ukraine), but while in South Africa miners remain a strong social force, in Ukraine labor protests in the mining sector have become rare in the 2000s. For

instance, just one strike at Marikana near Johannesburg on August 16, 2012 (that drew attention of the international community due to police violence and murder of 34 striking miners) gathered more participants than all of the Ukrainian miners' protests in 2011–2012 combined [5; 12]. The Marikana strike and massacre was followed by a solidarity protest of ten thousand participants, showing great potential of community mobilization [4], while out of 30 miners' protests in Ukraine in 2012–2013 only two had slightly more than a thousand participants, and 13 were held exclusively by workers themselves, without any support from trade unions, political parties or NGOs. Such passivity of Ukrainian miners as compared to their South African counterparts deserves sociological investigation, considering that just some twenty years ago the two movements were of comparable size and political influence.

In this paper divergent trajectories in the miners' movement in Ukraine and South Africa are examined by looking at miners' bargaining power, i. e. their capacity to realize their class interests. E. O. Wright defines two types of workers' power: *structural*, resulting from their position within the economic system; and *associational*, contingent on the ability to form collective organizations – unions, parties, workers' councils or community organizations [19, p. 962]. Beverly Silver observes that at the turn of the twenty-first century workers' structural power has declined, while their associational power increased, and comes to the conclusion that «if the significance of associational bargaining power is growing, then the future trajectory of labor movements will be strongly conditioned by the broader political context of which they are a part» [16, p. 173]. In line with this conclusion, I argue that the divergent paths are primarily due to different political processes of which miners' movements in Ukraine and South Africa were part in the 1980s and the 1990s, and the different political associations formed during this time.

The aim of this paper is therefore to examine and explain possible causes for these divergent paths in miners' movements despite their seemingly similar experience in struggles for social transformations in the 1980s and 1990s, by looking at miners' power in each of the countries. The tasks that logically follow out from this aim are to (1) compare miners' structural power in the two countries by looking at the economic situation, and in particular – situation in the mining sector; (2) compare miners' associational power in the two countries, taking into account socio-political factors, historical legacies, and the role of trade unions; and (3) show how the differing

socio-political associations formed by Ukrainian and South African miners' during the so-called «democratic transitions» in the 1980s and 1990s led to diverging paths in the miners' movements in these two countries in the last decade.

Structural power of Ukrainian and South African miners

If divergent trajectories in the miners' movement in Ukraine and South Africa are to be explained by workers' structural power, then we must look at the perspectives of mining in both countries, development of mining industry in historical retrospective, demographic situation, level of unemployment and the structural position miners occupy in the economy of each of the two countries. Both Ukraine and South Africa are semi-peripheral countries of the global economy. World Bank classifies them both as «middle income countries». Their economies are largely dependent on raw material extraction [6; 14], and informal economy according to various estimates amounts to at least a third of gross national product. Their population of roughly 50 million in each of the two countries lives predominantly in cities. And they have both been undergoing transformations of their political and economic systems since the 1990s (post-apartheid South Africa and post-soviet Ukraine).

A more specific relevant similarity is the role of strong miners' movements in both countries in bringing forth social transformations (for example, the 1989 miners' strike in Ukraine that demanded greater autonomy from Moscow and the 1987 miners' strike in South Africa strongly associated with the African National Congress – ANC) and in actively criticizing the flaws of transition in the mid-1990s. Yet, despite numerous similarities between Ukraine and the Republic of South Africa (RSA), we are unaware of any comparative studies of labor and the labor movement in these two countries (whether in general, or in any given industry). Ukraine [18] and South Africa [9] are either compared to other countries in their respective regions, or to the more developed Western societies that are taken as cases to look up to.

There are, of course, significant differences, as seen in Table 1 with selected socio-economic indicators. Ukraine's population is ageing and decreasing (a drop from 52 million in 1989 to 45 in 2012), while South Africa's population is on the increase (an increase from 51 to 53 million during the last two years). Ukraine's HDI is significantly higher (78th position compared to 121st for the RSA), due to almost total literacy (99,7 % compared to 86,4 % in

the RSA) and longer life expectancy (68 years compared to 51 in RSA), but South Africa's GDP per capita is 50 % higher than Ukraine's, even when adjusted by purchasing power parity (\$11750 in RSA compared to \$7600 in Ukraine in 2012).

close down the mine and sell of the assets. However, there are many profitable privatized mines (especially in iron-ore extraction, where Ukraine is the sixth producer globally, followed by South Africa on the seventh position, or in extraction of manga-

Table 1. Selected socio-economic indicators on Ukraine and South Africa in 2012–2013

	Ukraine	South Africa
Population	44,85 million (2012 estimate)	52,98 million (2013 estimate)
Human development index	0,740 (high, 78th)	0,629 (medium, 121st)
GDP per capita (PPP, 2013 estimate)	\$7598	\$11750
Life expectancy	68 years	51 years
Literacy	99,7 %	86,4 %
Urbanization	69 %	62,00 %

Source: World Bank, IMF and UN data, official state statistics.

While in South Africa the mineral-energy complex is controlled by private capital and is highly profitable [6], in Ukraine many of the mines remain state-owned due to their low profitability and lack of interest from private investors. This is especially so with regard to coal, where many mines were officially closed down in the late 1990s, and now pro-

nese, where Ukraine is among the three world leaders) but these mines don't experience significant labor unrest either. And although Ukraine unlike South Africa did indeed witness a decrease in raw material extraction in the 1990s, extraction of coal, iron ore and other minerals has been on the rise since 2003 (with a drop in 2009, see Table 2).

Table 2. Mineral extraction in Ukraine between 2003 and 2011

	2003	2004	2005	2006	2007	2008	2009	2010	2011
Coal, mln tons	59,8	59,4	60,4	61,7	58,9	59,5	55,0	55,0	62,7
Oil, mln tons	2,8	3,0	3,1	3,3	3,3	3,2	2,9	2,6	2,4
Natural gas, billion cubic meters	18,6	19,6	19,9	20,1	20,2	20,6	20,8	19,9	19,9
Iron ore and iron concentrates	121,9	129,1	134,5	142,8	150,7	136,8	122,4	140,3	145,5
Gypsum, thousand tons	325	338	381	376	743	1161	711	679	676
Limestone, mln tons	20,4	23,2	25,1	27,8	30,0	26,7	18,0	20,6	22,8
Sand and stone, mln cubic meters	41,7	47,4	48,5	58,6	75,4	78,2	48,7	56,9	67,4
Kaolinite, thousand tons	1176	1468	1566	1731	2172	1775	1119	1391	1892
Salt and pure NaCl, thousand tons	3863	4393	4811	5996	5548	4425	5395	4908	593

Source: State Statistic Service of Ukraine [3].

duction there is clandestine with cases of unregistered child and female labor (as witnessed in two documentary films – «Workingman's death» by Austrian filmmaker Michael Gallagher and «Mine No.8» by Estonian producer Marianna Kaat, as well as in the documentary photographic report «Donbass: land of dreams» by a Ukrainian photographer Viktor Marushchneko). Striking may not be an option for those Ukrainian miners, whose employers are not interested in production and would rather

A second possible explanation which relates to the first one, deals with the development of mining industry in historical retrospective. Although both Ukraine and South Africa are semi-peripheral countries, the history of mining in Ukraine is similar to that of Western countries, where mineral extraction was historically part of the urbanization and industrialization process, while in South Africa it is more similar to that of the peripheral African countries, where a significant percentage of extracted minerals

was being exported to Western Europe. Mykhnenko points to the similarities in initial development of the Donbass region to the Ruhrgebiet in Germany and Upper Silesia in Poland. He points to the fact that at the beginning of the XIX century Donbass was producing 87 % of the Russian Empire's coal and throughout the Soviet period it remained one of the major heavy-industrial complexes in the world [14].

After the break-up of the USSR Ukraine has been undergoing a period of de-industrialization. Ukrainian workers see a deterioration of their working and living conditions and perceive the Soviet period as the «golden age» of their factories and mines. Their protests are usually defensive (reacting to increasing exploitation rather than posing pro-active demands to improve their situation) and they hope at best to keep their jobs until they retire, but not to secure better working conditions for their children.

On the contrary, in South Africa, many of the miners (and workers more generally) have only recently migrated from the countryside or from neighboring countries [13], and having formal employment is an improvement in their living standards. In fact, as Seekings suggests, formally employed workers constitute a privileged category within the working class of South Africa, and are less likely to experience poverty and social exclusion compared to those who are working informally in the shadow economy, or who live in rural areas of former bantustans [15]. The workforce in South Africa seems to be younger and protests more future-oriented and more pro-active. Average age of miners and the time of migration to the cities may be an additional factor contributing to differences between two countries. However, these differences in structural power of miners' in Ukraine and South Africa can explain only partially the differences in these two movements, and associational power must also be considered.

Associational power of Ukrainian and South African miners

If we look at associational power for explanation of divergent trajectories in Ukrainian and South African miners' movement, then the history of trade unions, as well as their collaboration with other social agents, and links to broader political projects should be taken into account. In Soviet Ukraine unions were administrative, affiliated with the state and plant management, and fulfilling social tasks (distributing trips to summer resorts and children camps, organizing tours to museums and theatres, covering sick leaves), instead of being directly engaged in bargaining for better working conditions. Workers' protests that did take place were spontaneous and not led by

unions, and were often met with state repression. In fact, on many occasions they were anti-union, especially during perestroika, as witnessed in Daniel Walkowitz's documentary on miners' protests in 1989–1991 «Perestroika from below» and in a collection of interviews «Workers of the Donbass speak» [2]. On the contrary, in South Africa, trade unions were part of the anti-apartheid struggle and were truly independent of state institutions (although today the situation has changed and there are also numerous cases of bureaucratization and corruption in unions, closely linked to the ruling ANC party and ambivalent with regard to grassroots workers' protests). A tradition of labor protest was thus formed together with the broader societal acknowledgement that the labor movement is an important component of democratic struggle. Cases of bureaucratization of the National Union of Miners and its links with ANC are criticized both by labor activists and academics [12]. Scholars of social movements point to the need for greater workplace-community alliances, thus acknowledging the role of workers in broader struggles for social justice [8].

In contemporary Ukraine, unions are treated with distrust as Soviet legacy and often excluded from scholarly research of civil society organizations. Ukrainians' membership in trade unions is quite high – at 15 % of population (about 7 million members) in 2002 according to the European Social Survey [11], but it is largely due to formal membership in the Federation of trade-unions of Ukraine, inherited from the Soviet times and not adequately reflecting people's readiness to organize and defend their labor rights. A scholarly tradition of analyzing post-soviet transition «from communism to democracy» (sic!) contributes to the perception of trade unions as «soviet remnants» that are holding the country back in its transition. Varga's content analysis of sociological publications in recent years confirms that scholarly research of labor and trade unions has occupied a marginal place in Ukrainian social sciences [18]. In South Africa the similar vague discourse of «transition to democracy» nevertheless has a different focus – anti-apartheid rather than anti-communist. This may partially explain differing level of sympathy for labor struggles among intellectuals and the wider public.

Preliminary search of miners' protests using the database of Ukrainian protest and coercion data monitoring, carried out by the independent Center for Society Research reveals that out of a total of 5913 protest events that took place in Ukraine during the last two years (2011–2012) only 486 (8 %) were workers' protests, and only thirty of them addressed miners' concerns. Thus, miners' protests constituted just half a percent of all protest events, and just one percent of all

the events that addressed socio-economic issues (2920 protests in two years). Most of them had fewer than a hundred participants and were led by the miners themselves, without support of trade unions, parties, NGOs or any other social agents. All of them took place in the Donbass and Kryvyi Rih mining regions or in the capital where central authorities were targeted.

The most common cause of protest was related to wage arrears (12 protests or 40 % of all cases), and other defensive demands (against a company closure – 8 protests, against budget cuts in social payments – 6 protests, against privatization, corruption and officials' illegal actions – 5 protests). Pro-active protests constituted a small minority: only two protests demanded a wage increase, and another two – better working conditions. In the ten cases where protests involved trade unions (one third of all miners' protests), eight out of ten were independent trade unions, created after Ukraine's independence. These data are based on regular monitoring of over 150 national, regional and local online media since fall 2009 (about 150 in 2011, 180 in 2012), and includes all protest events mentioned in media, including number of protesters, their demands, targets, outcome, and detailed accounts from all media, where the event was mentioned. It offers the most complete and reliable data on protest events available in Ukraine [5].

One clearly articulated case of class antagonism in the Ukrainian mining sector could be seen in a strike at the iron-ore mine of «Ferrexpo» group in August 2010, to protest against work intensification measures and to demand a pay raise. Left-wing and trade union activists from other parts of Ukraine took part in protests and solidarity campaigns. It was also one of the few strikes in the «offensive» rather than a «defensive» mood. Ferrexpo participates at the London stock exchange and has an English-language website, where, interestingly (but quite expectedly) one finds no mention of the strikes. On the contrary, we read that «[t] here has been no major industrial action or labour dispute at Poltava since its privatization in 1995». The conflicting interests of the owner, whose website is dedicated almost exclusively to growth of output and of the value of its shares at the stock-exchange, and of the workers, who resist work intensification are obvious. However, it is an exception to the more widespread types of workers' protests against the «corrupt state» or the «immoral owner» [1].

Contrary to Ukraine, South Africa has witnessed some major miners' strikes in the last five years. In December 2007 about 240000 miners went on strike at sixty different locations across the country to protest against unsafe working conditions after 3200 workers got trapped at Elandskraal mine. August 2012 witnessed a series of strikes at Lonmin platinum

mine in Marikana, the most violent of which took the lives of 34 miners, shot by the police [12]. Just as this paper is being written, on July 8, 2013, more than five thousand miners of Anglo American Platinum Ltd are on strike. Union rivalry aggravated these strikes, but nevertheless unions' presence in miners' protests is much more visible than in Ukraine.

The unions in South Africa have historically spread out over neighborhood institutions and today keep a strong link with the left flank of the ANC and the Communist party. This has helped union leaders in mobilizing not only the workers concerned, but also their family members and entire communities [10], although some skepticism on South African social movements ability to «scale up» and engage in transactional activism was recently voiced by Bond, Desai and Ngwane, who complain about the «lack of contagion from workplace to community» [8, p. 233] in social movement sector that is «extraordinarily militant in its actions and profoundly moderate in its politics» [8, p. 244].

From a Ukrainian location, where unions also used to be more than just workplace-based organizations, this community component seems to be a drawback. As mentioned above, main function of unions in the USSR was provision of social services to working-class communities. Many workers continue to perceive union functions as providing children with sweets for New Year's or organizing free May day concerts. Such union-organized events are deprived of any mention of class antagonism and are often supported and attended by owners of the factories and mines. Therefore it is important to explore not only associational power in every particular instance, but also the type of associations formed and the broader political context.

Miners and «democratic transformations»

The above-mentioned list of possible explanations for divergent trajectories in the miners' movements in Ukraine and South Africa point to the prevalence of those explanations that are related to associational rather than structural power of miners' in two countries. In fact, the success of these movements was due to their close links to broader political projects of the 1990s. As Mykhnenko notes, the Donbas miners' movement can be considered «one of the most militant and prolonged cases of protest in Eastern Europe», successful in influencing the state through contentious collective action [14]. In 1989 half a million miners participated in the strike, and Walkowitz explains their role in the collapse of the USSR through their importance both for the Soviet economy and for the ideological legitimization of the

Soviet system: «The fall of the Soviet Union was to a large extent the legacy of that strike, because miners and the steelworkers in Donetsk were not only the backbone of two of the major industries in the Soviet Union, but were at that time a privileged strata [...] that ensured support to the Soviet state. So their opposition to the regime and demands for autonomy at their workplaces also led to demands of autonomy from the Soviet Union» [2, p. 130].

In South Africa, 330000 miners went on strike in 1987, demanding higher wages and better working conditions. Although (unlike their Ukrainian counterparts) they failed to immediately achieve their goals, this strike became part of the anti-apartheid struggle. ANC incorporated workers' demands into its political agenda, and as Barchiesi notes, «the rise of ANC to power following the first democratic elections of April 1994 announced that work, emancipated from the shame and violations of the past, could now contribute to democratic nation-building as the formerly oppressed rightfully reclaimed their land and an equitable share of the wealth they produce» [7, p. 3].

However, the vague discourse of «democratic transformations» is only superficially similar in the two contexts, for transformations were of a different nature and in the different directions. Beverly Silver's thoughtful remark on the advantages and perils of associational bargaining power of workers is applicable to the two cases under consideration in this paper. Ukrainian miners formed cross-class alliances with local authorities of the Donbass region and with the administration of their mines in protests for greater autonomy from Moscow; many of the miners' were hoping for an introduction of free market relations and wanted to become private entrepreneurs and thus improve their socio-economic position. Miners were a useful ally for national-democratic dissident intellectuals as far as critique of the Soviet system was concerned (Viacheslav Chornovil, the leader of the Rukh national-democratic movement has visited Donbass miners on several occasions and promised support), but after independence was achieved, miners became a burden for these forces that had quite different goals [17]. The Free confederation of trade unions of Ukraine, formed during these miners' protests, soon became incorporated into Yulia Tymoshenko's block that represents the interests of large capital (for instance, owner of Ferrexpo Kostiantyn Zhevago is member of this political block). And post-soviet transformations from the beginning were following a neo-liberal agenda, and main concerns were with political liberties and privatization of the economy, even at a great social cost (GDP decline in post-soviet countries was the greatest decline in the XX century witnessed in peaceful times – Ukrai-

nian GDP reached its lowest in 1999 when it was just 40 % of 1989 GDP).

On the contrary, South African miners' movement was shaped in light of anti-apartheid struggle, forming strong alliances with the Communist party and other social movements representing a leftist political agenda of social justice, nationalization of the economy, improvement of working conditions and anti-racist struggle. And today they may continue to build on these former alliances and on their experiences of community mobilization and cooperation with other social justice groups – an experience that is lacking in Ukrainian mining sector. This explains why is it that although both movements were able to mobilize large numbers of striking miners, and to contribute to important social transformations, in South Africa miners remain a visible and politically active social force, while in Ukraine miners' contribution to social movements is nowadays negligible.

Conclusion

Ukraine and South Africa are semi-peripheral countries of the global economy, largely dependent on mineral extraction. Miners in both countries have historically played an important role in social transformations of the 1980s–1990s. However, in the last decades, while South African miners' movement continues to mobilize hundreds of thousands of workers, the Ukrainian miners' movement has failed to organize protests with much more than local-scale defensive demands of less than a hundred participants. This paper explored possible explanations for diverging paths in the miners' movement in Ukraine and South Africa in the last decade.

Different economic perspectives of mining in two countries were discussed as the first, although insufficient cause. While South African mining offers high profits to private owners, many of the Ukrainian mines remain state-owned for lack of interest of private investors, or were closed down and coal extraction became clandestine. The history of mining was analyzed as a second possible explanation: while Ukraine underwent similar industrialization processes in the XIXth century as European mining regions of Ruhr and Silesia, South African mining was developing in the colonial context with a significant share of extracted minerals being exported to the West. Furthermore, while for Ukrainian miners the «golden age» of their mines is seen in the past and demands are mostly defensive, South African miners have to struggle for their socio-economic rights for the first time, many of them coming from rural areas or neighbouring Mozambique. While Ukrainian workers witnessed a deterioration in their

status over the last two decades, in South Africa formally employed workers constitute a privileged stratum within the working class. Finally, the history of trade unions and of labor struggles in two countries was taken into account: while in Soviet Ukraine unions were administrative, providing social goods or services, strongly affiliated with the state and mine management, and not engaging in class antagonisms, in South Africa, unions were historically in opposition to the apartheid-state and cooperating with the ANC, which allowed them to frame their struggles as part of the anti-apartheid and anti-authoritarian tendencies in the country, and form workplace-community coalitions. By looking at miners' structural

and associational power in each of the countries, I showed that the divergent paths are primarily due to different political processes of which miners' movements in Ukraine and South Africa were part in the 1980s and the 1990s, and the different political associations formed during this time.

Although the above-mentioned socio-economic factors, historical legacies, and the role of trade unions in light of structural and associational power of miners do not offer an exhaustive explanation of divergent paths in the miners' movement, they may be taken as a starting point for more in-depth future analysis, in particular – identifying the relative explanatory power of each of these factors.

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ВІДМІННІ ТРАЄКТОРІЇ ШАХТАРСЬКИХ РУХІВ В УКРАЇНІ І ПІВДЕННІЙ АФРИЦІ

У статті досліджуються відмінні траєкторії шахтарського руху в Україні і Південній Африці за останні десять років. Порівнюється економічна ситуація в обох країнах і визначається провідна роль шахтарського руху у сприянні демократичним трансформаціям 90-х років XX століття. Розглянуто можливі пояснення відмінних траєкторій шахтарського руху в Україні і ПАР у світлі структурної та асоціативної сили шахтарів, беручи до уваги соціоекономічні чинники, історичний спадок і роль профспілок.

Ключові слова: шахтарі, робітничий рух, структурна та асоціативна сила робітників, Україна, ПАР.

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