THE MINING INDUSTRY IN ZIMBABWE: LABOUR, CAPITAL AND THE STATE

By

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Introduction

In April 1980, the new nation of Zimbabwe received its independence ending some 90 years of colonial rule. Given this new status there were high expectations for the possibility of the generation of independent industrial policies under the rubric of a socialist model (*Mining Journal,* #300, 1983, p. 260). Our paper focuses on the question of the role of the State, its changing relationships with capital and labour and the constraints which have been placed upon it during the first few years of independence. We are especially concerned with the manner in which emerging class forces have moulded the state and the way in which the pre-1980 economic substructure has been transferred almost untouched into the post-independence period. In essence the role of the state has become subordinate to the forces of capital and the government's policies have become articulated with the needs of capital reshaping the socialist programme and modifying any attempts to promote worker control and ownership of the means of production. Today, nearly five years after Independence, the state reflects the needs of big business and transnational capital, to a large degree adopting a social democratic economic, social and labour model to work within the interstices of capital.

Our paper seeks to explain the particular mode of the Zimbabwe state through the medium of industry, especially mining, and its articulation with state policy and transnational policy. We have chosen this sector because it represents a vital part of the indigenous economy in which there are significant levels of foreign ownership. Similarly, there are high levels of government input into the industry both in terms of policies and finances and, perhaps more than any other sector in the economy it reflects the transitional form of the state in which policies have become subordinate to rather than dominant over foreign capital. We have utilized a number of sources in Zimbabwe including government documents, newspapers, interviews and field work surveys conducted in the mining sector in 1984.

The question of the role of the state in post-independent African countries has been approached by several authors. But the case of Zimbabwe is an interesting one because given the long history of infrastructural development, skills, industrial growth, banking and a high level od diversification, we might have expected a higher rate of growth and a more independent role for the state in Zimbabwe. However there were a number of

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constraints placed upon the restructuring of the state in 1980 which militated against the integration of a socialist model at a very early stage in Zimbabwe's birth (Mining in Zimbabwe, 1981, p. 25). The nation's independence was won through popular struggle but the transformation of the state mechanism into a socialist structure was significantly weakened by the conjuncture of class forces an political structures evident at the Lancaster House conference in London in 1980 (Leys, 1981, p. 28). Here it was noticeable that any endeavours to promote indigenous ownership of industry or to transform the conditions of work and production were militated against by the interests of capital. It is interesting to note as well that the political alliances formed within Zimbabwe at that time were favorable toward a status quo economic model which later emerged as a social democratic structure in the 1980's. This was paralleled by frequent excursions into socialist rhetoric by ministers of state and by members of the intelligentsia. But instead of a workers' party transformed by new political alliances, state ownership of industry and worker control and responsibility in the work place, we have seen the emergence of policies designed to accommodate and reinforce the same local capital and foreign transnational companies which existed in the pre-1980 period. This does not lessen the drive toward a socialist model in the long-run ; it does, however indicate that the apparent contradictions evident in the role of the state and in the economy will remain for at least the next five to ten years (Ware, 1984, 46–48).

The state nowadays, like its predecessor, is concerned with limiting labour costs, maximizing efficiency, maintaining labour laws to control unions and adopting managerial policies to appease and accommodate foreign investors. It is not difficult to see the external constraints which have been placed upon the Zimbabwe state in these circumstances which have been partially responsible for this reinforcement of status quo policy. To whit: the depression of the global capitalist system in the late 1970s created a whiplash effect in Zimbabwe's industries that in turn created a sense of urgency felt not only in mining but also in the faltering agricultural and manufacturing sectors (*Mining Journal*, # 301, 1983, p. 262). The strictures of the international funding agencies such as the IMF and World Bank have also been felt as conditions were placed on the sources, locations and uses of international funds and aid. Similarly, the transnational companies operating in the country have been forced to retrench labour, restructure their industries, and find ways of dealing with the recession. In the case of the mining industry this has meant some significant financial losses which the state has attempted to cover by offering soft loans to the companies. In effect, the most recent relationships between state and capital demonstrate quite clearly the growing accommodation between the two arenas.

Yet it would be too simple to allow our analysis to end at such compartmentalization of sub-categories and class interests. The acting out of political exigencies and the interface of economic power and decision makers within a constantly changing fiscal crisis in Zimbabwe suggest that a fluid rather than a static model is required for explanation of the post-1980's situation. Indeed, crisis theory as presently espoused in western economies is probably a more appropriate area to search for explanatory frameworks rather than from strictly within theories of the state (Aglietta, 1979; Wright, 1978). If we accept the parameters of crisis theory it is then possible to recognize the effects of economic, political and military trauma which both the population and the state in Zimbabwe have been subjected to. Given such constraints, it is likely that the state will continue to adopt ad hoc facilitative positions and policies in response to the massive and sometimes overwhelming conditions related to a long list of problem areas including: the internal fiscal crisis; the trauma of deep cyclical events, the restrictions of the IMF; drought conditions; pressures from South Africa, Britain and the United States; the everpresent gaps in external funds and currency traps; and, last but probably not least, the nation's own internal convulsions and upheavals derived from the moves to create a one-party system.

Critics of governmental industrial policy suggest that 65% to 75% of the country's capital assets are still held by foreigners (Ndhela, 1983, p.4). Indeed much of this foreign capital is still concentrated in the primary sector. Companies such as the British South African Company; Anglo-American (SA); the Rhodesian Selection Trust (UK); and Union Carbide (USA) are all in the primary sector but they have also become diversified into finance, agriculture and distribution. Outside this initial participation in the primary sector, foreign companies have also concentrated in import substitution known locally as ISI (Import Substitution Industrialization) aimed at increasing the indigenous content of manufactured goods for the Zimbabwe market. Government policy in this area is aimed at reducing non-essential imports by encouraging the establishment of enterprises able to increase local content in manufacturing with the end result of replacing the input of imported items.

The ISI policy no doubt has good intentions but the industrial profile which has taken shape in the post-1980 period has been a disappointment. The predominance of luxury goods and non-essential items undermines the development of a satisfactory producer goods sector. The production of luxury goods ranging from food items, some textiles, electrical goods and cars was actually intensified in the 1980's after UDI. In an economy with narrow margins for expansion, competition for investment is high and side-tracking of capital into luxuries, especially with high levels of unemployment and continuing rural-urban dependence, saps the energy of growth. However, it is also true that Zimbabwe has a relatively broad manufacturing sector overall compared with other SADCC countries. By 1965, for instance, manufacturing formed 18.9% of GDP compared with 18.7% for agriculture. During the period of UDI a high proportion of investment was channelled into metal products and the light industrial sector increased substantially (Zinyama, 1978). By 1980–81 when economic sanctions were dropped, Zimbabwe had a markedly increased locally manufactured content in imported machinery, equipment and domestic products. Evidence now suggests that some but not all of this industry has been substituted by imports as the need for manufacturing plants collapsed after 1980.

Indeed it now seems that foreign ownership and foreign capital may be on the increase in the wake of this collapse. While there are new guidelines for foreign companies, welcoming investments in rural areas, joint ventures and technology, the pattern of takeovers continues. In October 1982, the Heinz Food Company, based in the United States, purchased 51% of Olivine Industries, a Zimbabwe food producer. The German Company Siemans set up a joint venture with the Industrial Development Corporation (IDC-State Corporation). They plan to start the local manufacture of electrical goods. The Danish Dandy Chewing Gum Company has also recently set up a joint venture for a chewing gum plant ($ 2.30m). Moves such as these serve to consolidate external control in the consumer goods sector (Ndhela, 1983).

There has been little attempt to date to channel foreign investments into the capital goods and producer goods sectors. Nor is there evidence of a satisfactory resolution of the problem of ownership and control of industry in the face of foreign investment entries; whether such solutions match those of the espousal of a socialist model of economic development must remain for future judgement. Whether the private sector with foreign investors will be left to complete the capitalist transition of the consumer goods industries also remains to be seen (Government of Zimbabwe, 1982 B). What is clear, however, is that a mixed formulation of state and private capital, and a restructured form of state industries have become part of the ZANU-PF plan for coping with growth problems. Critics have suggested, however, that there is little sign of concrete development planning whether socialist or otherwise. To quote one source, «the government does not seem to have any notion of what its priorities are if industry should be the lynch pin of a transformation toward socialism» (Ndhela, 1983, p. 5).

In all fairness, there is some evidence of strategy per se but not necessarily towards a socialist model or at least not at this time. What is clear is that the economy is going through a problematic period and the choice of coping mechanisms is limited, namely at the moment the minister of finance is keeping with the requirements of the international financial community. The state in a broad sense is also attempting to cope through cooperation with big foreign firms and through the structuring of state enterprises and facilitative state organs and legislation. A look at the position of both labour and capital in the mining industry should illustrate this point.

Mine Labour in Zimbabwe: Historical and Structural Perspectives

While the overthrow of minority rule in Zimbabwe has changed the lives of some workers more than others, the dispensations of the new government have been disappointing for most. Changes in the national and regional political economy have, moreover, forced virtually all workers to illustrate both general trends in the position of labour in Zimbabwe and the need for specificity in assessing such trends. The mining sector is particularly suited to a study of changing relations of power between labour, capital, and the state in Zimbabwe. The fate of the mining industry exemplifies the way in which the contradictory role of the state is expressed in government policy. It starkly poses the problems of how to bring about the transition to state ownership and of how to increase workers' control over industrial enterprise. Most importantly, the case of the mining industry suggests the extent to which both labour and the state are paralyzed by multinational capital in their efforts to bring about structural change.

Our presentation will attempt to link recent changes in the character of mineworkers' struggles to historical changes in the political economy of mining in Zimbabwe. The central thesis here is that while the political overturning of settler rule is undoubtedly altering the skill structure of the labour force, the fundamentally exploitative relationship established by mining capital over labour is not, and perhaps cannot be changed in the near future.

In reviewing changes in that relationship over the last century, we pay close attention to four aspects of the mining economy in particular: the structure of labour supply; the labour process; the nature of mining products as commodities traded in world markets; and the forms of ownership that predominate in the mining industry. The forms of labour organization and resistance in the mines have been partially determined by each of these aspects of production, circulation and ownership. The changing structural and political position of mine labour will be analyzed as an integral part of the history of colonial domination and capitalist expansion. As a dynamic force in fundamental conflict with capital, labour has dialectically determined the structure of the mining industry in Zimbabwe at every point in time. The capacity of labour to resist exploitation by capital has forced mine owners, often in direct collaboration with the state, to evolve a wide range of strategies and techniques to maintain and increase rates of profit.

Mine Labour in Zimbabwean History

Mining occupies a central place in the historiography of southern African economic development. Many of the structural characteristics of mine production in Zimbabwe today can be traced to mundane peculiarities of geology and geography, as well as to the pattern of imperialist expansion in the sub-continent over the last century.

The form of early colonial development of the mining industry varied, however, in accordance with the production and marketing problems associated with each mineral. Gold, usually found in scattered surface or alluvial deposits, was profitably exploited by a single owner with limited capital and a gang of labourers. It could, moreover, be sold directly to banks. Base minerals such as chrome and asbestos, on the other hand, were found in extensive deposits of low-grade ores. These characteristics, together with their high bulk and isolation from overseas buyers, limited investment to highly capitalized producers. Large enterprises were able to accept delayed payment after production, and could absorb cyclical downswings in base mineral prices. They benefitted as well from linkages with leading producers and traders in foreign markets (Phimister 1975, p. 80). Concentration in the base metal industry was achieved through price-cutting, securing monopoly control over trade, and through vertical integration with manufacturing and marketing operations overseas. Foreign capital was particularly suited to adopt these strategies, and invested heavily in base minerals during and after the Second World War.

Gold outweighed the value of all other minerals combined until 1948 (Zimbabwe Agricultural and Economic Review 1982, p. 55). Thereafter the large-scale production of asbestos, chrome, coal, copper, and, in the late-1960s, nickel, began to rival gold in national economic importance. Foreign capital was attracted not only by increasing demand in world markets, but by the role of the state in guaranteeing the supply of cheap labour, and in stymying the development of a viable African trade union movement (Clarke 1975, p. 177).

What did these variations in scale and in ownership imply for the labour force? In general, one can identify a post-war shift in the structure of labour utilization from a reliance on ephemeral, unskilled, migrant labour of largely foreign origin in relatively small-scale operations, toward a more highly skilled and stable labour force in larger enterprises owned by foreign multinationals. By world standards, however, Zimbabwean mining operations remain highly labour intensive. The reasons for this must be sought in the legacy of cheap labour acquisition that was the hallmark of mine development at the turn of the century (See Van Onselen 1976; Perrings 1979).

Because mining operations in Southern Rhodesia tended to operate on a narrower profit margin than those further south, the viability of the industry depended from the start on the regular supply of cheap African labour. The way in which cheap labour was obtained and utilized, and the possibilities open to workers to subvert the process of exploitation, cannot be separated from the production process itself. Because labour had to be recruited by deception, force, and contract, it was inherently unstable and unskilled. This meant that tasks had to be organized so as to maximize the efficiency of supervision, and to minimize the degree of specialization and the concomitant need for training and experience.

Close cooperation between mining companies and the agencies of state power was maintained in order to recruit workers and in order to maintain discipline within the mine compound. The infamous compound system, comprising methods of surveillance and social control, became a standard feature of mines throughout the colony. Such a system was the direct counterpart of a strategy to minimize labour costs not only through low wages, but through the provision of abysmally poor rations, housing and health care.

Such skilled labour as was required was drawn from experienced European miners who initially had to be attracted by relatively high wages and benefits. This form of segmenting the labour market, so that colour was made to coincide with an ascribed skill-level, set the pattern for working class disunity that was to characterize mining trade-unionism until independence. Yet white working class interests were never quite so well represented in the Rhodesian state as in South Africa, nor were white workers continually in a strong bargaining position. Mine owners were able to sustain divisions within the labour force, while keeping the aggregate cost of labour as low as possible (Phimister 1977).

Labour Organization and Labour Division

The creation of oppressive conditions to ensure the *viability* of mines early in the colony's history was soon used to maximize the *profitability* of mines as they increased in scale and technical sophistication during and after the Second World War. Wages actually declined in real terms between 1901 and 1940, rising only when the markets and profit margins of multinational investors increased in response to war-time demand. But measures of average gains made by African workers disguise the wage stagnation endured by unskilled underground and surface workers, who probably earned the same real wage in 1974 as they had at the turn of the century. A stratum of semi-skilled African workers, paid marginally better wages, was gradually introduced as the industry moved toward more capital intensive techniques in order to remain competitive internationally. Skilled white workers, accustomed to earning wages at least ten times unskilled rates, opposed the fragmentation of skilled jobs and the promotion of blacks. The mineowners responded by shifting the colour bar upward during the 1950s and 1960s. A wide range of new tasks were classified as 'semi-skilled', enabling the companies to hire black labour and keep labour costs low (Clarke 1975, p. 179).

After the war, rising unemployment, the decreasing productivity of agriculture on the reserves, and increasing worker militancy induced the state to pressure mineowners to improve wages and working conditions.

Measures to increase the national component of the labour force, increase post-employment benefits, and remove measures of social control, were an outcome of the changing structure of production on larger, foreign owned mines. These mines tended to require a higher complement of labour experienced in the operation of machinery and complex plant equipment. The choice between importing European workers and training African workers to fill this requirement, was not only determined by the wage differential and the cost of training, but also by the costs of stabilization that attended to training labour in the long-term. In making such a choice, mining capital had to assess the long-term demand for particular categories of labour, to see if the costs of training would indeed be repaid. (Perrings, 1979, pp. 238–242). The option to train black labour was, of course, assessed under the assumption that their acquired skills would be both undervalued and underpaid. (Mandaza, 1983).

On balance, this would account for the ambivalent position of multinational capital with respect to the Unilateral Declaration of Independence (UDI) in 1965. The Smith regime's commitment to maintain the colour bar limited the freedom of companies to determine the composition of the labour force, and hence to minimize the aggregate cost of labour. In 1973, forty-five per cent of the total wage bill in the mining industry accrued to skilled (i.e. white) labouring grades representing only five per cent of the total labour force (Clarke, 1975, p. 209). It thus appears that the state was sufficiently influenced by white working class interests to limit the restructuring process that the mining companies would have liked to see take place. UDI was a thorn in the side of multinational capital. Independence, on the other hand has provided the catalyst for the kind of restructuring envisioned long ago. Given an adequate supply of labour from a low cost market, skills can now be upgraded while increasing the ratio of profits to labour costs, even though costs per man-hour may increase. From the point of view of mining capital, increasing the productivity of labour may take on greater real significance than holding down wages.

Protest and Unionization.

Prior to the development of a good road network in the 1930s, communication between workers at isolated enterprises was difficult. Hence strike action in the early part of the century was confined to individual mines, and whenever labour supplies were sufficient, strikes could usually be resolved through the replacement of unrepentent workers. While organized labour protest was rare under repressive conditions, less obvious forms of labour protest were endemic. Desertions, slow-downs, and company-store boycotts, time and again forced owners to solicit the aid of the state in bringing black workers to heel (Van Onselen, 1976).

The history of unionized labour in Southern Rhodesian mines dates back to the period immediately following the First World War, when skilled white labour was short and hence in a strong position to press its demands. It wasn't until after the passage of the Industrial Conciliation Act (ICA) of 1934, by which white workers gained collective bargaining rights, however, that state-sanctioned unionization efforts could take effect. The recognition of the Associated Mineworkers' Union (now the Associated Mine Workers of Zimbabwe – AMWZ) in 1938 as the industry-wide representative of mine employees (black workers were still not defined as such), initiated a period of close collaboration between the state, employers, and unionized white artisans and staff workers. While the amendments to the ICA in 1959 provided for the recruitment of black workers into the union, provision was made for the control of the union executive by skilled grades.

The 1959 amendments represented an effort by the state to coopt organized labour and nationalist movements in the black working class, and became a vehicle for the incorporation of a stratum of black semi-skilled workers into the conservative bargaining apparatus. (CLARKE 1975, p. 207). The union explicitly pledged its cooperation in diffusing strikes on behalf of management and bargained actively for improvements in wages and benefits for the skilled and semi-skilled grades, often at the expense of labourers. As a result, union membership varied directly with skill level. Moreover, membership was highly concentrated among a few of the larger mines under foreign ownership or control. These were precisely the mines that were willing to engage in an industrial bargaining process while advancing the process of mechanization and altering the distribution of skills in the labour force.

The Position of Mineworkers since Independence

While many substantive elements of the miner's employment contract have been altered since Independence, the basic negotiating framework laid down by the Industrial Conciliation Act remains in force today despite widespread dissatisfaction with many of its provisions by employers and workers alike (Government of Zimbabwe 1981 B). Under the terms of the ICA, labour relations in the mining industry are governed by a National Industrial Council composed of equal numbers of employer and worker representatives selected respectively by the Chamber of Mines and the AMWZ. The parties negotiate a National Industrial Agreement, and after receiving the imprimatur of the Minister of Labour, Manpower Planning, and Social Welfare, the agreement becomes binding on all mining enterprises. The National Industrial Council has a staff supported by union and employer levies whose task it is to ensure the enforcement of the agreement (AMWZ and Commonwealth Trade Union Council 1984). In practice this is difficult to do, especially in the smaller mines, some of which are fly-by-night operations in inaccessible areas of the country.

While minimum wage legislation introduced after Independence temporarily brought the lowest paid mineworkers above the Poverty Datum Line, wages were frozen in the 1982 national budget, and inflation continues to erode gains that have been made. The wage structure itself has been altered to increase cash payments rather than make implicit deductions for rations and accommodation. In 1981, the Government permitted the mine employers to deduct Z$27 from the wage minimum of Z$85/month for unskilled workers in compensation for housing and other social facilities they claimed to provide. In fact many of the smallworkings provide none of these amenities, and the Chamber of Mines itself argued that the deduction was never intended to represent the value of such benefits, but rather the lower cost of living of mineworkers in comparison to those employed in commerce and industry in towns (Government of Zimbabwe 1981 B p. 15). Subsequent negotiation has eliminated the housing deduction and the 1983 Industrial Agreement has established a base rental rate of 12.5 cents/square meter. Electricity, fuel, and above-standard fixtures are charged extra and deductions are made for older units *(National Industrial Council for the Mining Industry, 1983).* The minimum wage rate for the lowest grade workers was increased from Z$105 to Z$110/month in September, 1983, and increased again to Z$120 as of June 30, 1984. Although the larger mines tend to pay above the minimum, on the whole mineworkers remain the most poorly paid industrial employees. The most recent Industrial Agreement (of March, 1983) has not yet been signed, pending the resolutionn of dispute over job classification and housing rentals.

The union is relatively content with the industrial council system and has further benefitted from representation on the Minerals Marketing Board. As a forum where world markets are discussed and the production figures of individual producers revealed, such representation provides vital access to industry data that can be used in bargaining. AMWZ membership has increased rapidly since its first black president was elected in 1981 and the union now boasts a paid up membership of 24,000 out of roughly 60,000 workers, making it the largest single union in Zimbabwe today. Union finance has been strengthened by the adoption of the check-off system, and assistance from the Miners International Federation and the Commonwealth Trade Union Council has enabled the AMWZ to undertake an ambitious workers' education programme (AMWZ and MIF, 1983).

The first year of Independence brought work stoppages at the nation's major nickel, copper, and gold mines, and two strikes at Hwange colliery alone (Astrow, 1983, pp. 178–9). The issues ranged from wage demands to the reinstatement of dismissed workers. Since then, relations between the union and the Chamber of Mines have been described by both sides as workable. The chief executive at Anglo-American Zimbabwe recently lauded his company's «remarkable» record in maintaining industrial harmony during 1983. Commenting on the Bindura

Nickel Corporation, an Anglo subsidiary operating four mines and a smelting-refining complex, he said that, «It is pleasing to report that there were no work stoppages or industrial relations problems, other than of a minor nature, and the various channels of communication between management and workers operated smoothly» *(Anglo News May, 1984, pp. 1–2).* The government has contributed to the control of labour insofar as it has time and again appealed to the workers to maintain «discipline», threatening harsh measures to counter sloth or «irresponsible» forms of collective action.

The growth in the size and maturity of the union may bring with it a tendency toward conservatism in both its strategy and in its demands. As the union acquires a more experienced and professionalized bureaucracy, as labourers compete for training opportunities to upgrade their skill classification, and as the mine companies blackmail the government into bailing them out with loans and setting wage minima at levels they find tolerable, the chances for industry-wide militancy seem more remote. Restrictions on retrenching workers have constrained the flexibility of companies to close up shop at a moment's notice, and worker security has correspondingly increased. But mining houses have responded by inducing the government to subsidize the wage bill with loans, and by making new operations, such as the open cast coal mine at Hwange, more capital intensive.

The long-term strategy of the union is in some ways determined by the severe constraints placed on their ability to negotiate with the Chamber of Mines inbetween Industrial Agreements. The new Labour Bill, when finally approved, is not likely to alleviate these constraints significantly. Workers militancy, where it exists, seems to percolate up from workers' committees, the new democratically constituted bodies introduced to settle shop floor grievance. While at least one observer flatly calls them «organs of class collaboration (Astrow, 1983, p. 176)», this judgement may be premature. Tools were downed at the Kamativi tin mine in March 1984, for example, when the workers' committee demanded the resignation of senior management, accusing them of disloyalty *(Joint Worker's Committee 1984).* The apparent irony is explained by the fact that the government had acquired an 80 per cent shareholding in the company but left the old company management in place. In at least one instance then, a workers' committee has taken the government's socialist rhetoric to heart and acted as if their enterprise ought indeed to be run on behalf of a worker's state. Both management and the union seem to be battling for the allegiance and control of the workers' committees. Given the existence of a history of union representation and shop floor organization, the committees were thought by some to be redundant in the mining industry. Instead, it seems that they benefit from union support, and that union branch representatives often double as workers' committee members.

In the short term, the union is currently battling over substantive issues: health and safety, abolishment of housing rentals, wage parity with other industries, and fair job evaluation and classification. Most of these are issues that the Chamber of Mines is well equipped, and often more than willing to negotiate. The question of job grading, however, may prove more contentious. Ever since blacks were first entitled to recognized semi-skilled jobs after the War, the Chamber of Mines has attempted to circumvent the rate-for-the-job guarantee that served as the cornerstone of racially determined wage differentials. Their tactic has apparently been to create and recreate a bewildering variety of job classifications within the lower-paid, intermediate skill grades, especially as new technologies require the performance of novel tasks. The Patterson grading system adopted in 1975, specifies that grades be established according to the degree of decision-making of the worker; the opportunities for gerrymandering the lines of job demarcation on this basis are obvious enough. The extent to which it will serve as a source of worker frustration and discontent remains to be seen. Government pressure on companies to provide skill-testing and upgrade qualified workers may not, by itself, guarantee significant gains. In the longer-term, the mineworkers are concerned with the precedent set by capital intensive investments in the industry being made by the state, and are anxious to see greater investment in developing internal markets and industrial linkages that will stabilize the volatile demand for the minerals they produce.

Less obvious, but more significant, is the fact that the position of working class (as represented in the mining sector) vis-a-vis capital is in no way being strengthened. While it may be that wages now represent a higher proportion of operating costs than before independence, it is probable that the rate of appropriation of surplus value will only increase as new skills and new technology are applied to new investments.

The possibility of introducing direct workers' control of mining enterprises, even through the 'medium' of the state seems far off on the horizon. State or worker management will undoubtedly require another generation of experience before becoming a viable option. Meanwhile, the multinational mining houses are more than happy to encourage limited state participation in their own operations. This strategy serves to dampen the enthusiasm for legislating in favour of workers, subsidizes investment costs, and reduces company liability for layoffs during periods of crisis. The mining industry strives to establish wage rates and obligations for the provision of amenities during periods of crisis when the quantity of employment maintained, rather than quality of working life, is seen to take precedence. A cost structure biased against labour is thus sustained by the treat of the withdrawal of capital investments. The provision of housing, facilities, and benefits acquired by workers in the industrialized world decades ago are selectively utilized to buy off militancy, and to divide the labour force. The fundamental relations of exploitation that the socialist state is supposed to bring into question are once again being mystified by the beneficient face of multinational capital.

The Captive State: Policy Orientations in Zimbabwe's Mining Industry

In the Zimbabwean mining industry, as elsewhere, the basic conflict is still between capital and labour. Despite some attempts to ameliorate the position of labour, as we have noted, this contradiction still remains. As we have seen, the state's actions toward capital have been generous, while policies toward labour have at times been harsh.

As far as industry is concerned, it was evident by 1981 that the state would be forced into a facilitative role within the interstices of mining and not vice-versa. In a major economic policy statement published in the first year of independence, the government's role vis-a-vis mining was made clear *(Government of Zimbabwe, 1981, C p. 7).* While the general rules laid out were apparently aimed at exploiting the mineral base for the maximum economic and social benefit of the country, the realities of the situation were such that in the early halcyon days of new nation-hood the transfer of social value by mining companies outside the country continued unabated *(Government of Zimbabwe 1982 E).* It was with such a drain-off dilemma in mind that the state instituted plans to create a Minerals Marketing Corporation (MMC) in 1982 *(Government of Zimbabwe 1982 D).* And again in May 1983 the state sought to deepen its influence in this largely private enterprise sector by establishing a Mining Development Corporation *(Government of Zimbabwe, 1983, C Vol. 2, p. 7).*

However, the Minerals Marketing Board has had the most significant impact in the mining industry. Designed primarily as a parastatal to act as a conduit for minerals, it has been able to exercise a degree of control over access to markets and the selling of Zimbabwe's minerals. In performing this action it extracts a small levy on the net value of all exports of just under 1%. Its powers are broad in nature but limited in stature; the sole purpose is to act as the only marketing and selling agent for all minerals produced in the country (Lander, 1984). For the most part this function is fulfilled with the exception of some limited sale and purchases of small quantities of alluvial gold collected by small operators throughout the country. In performing this major buying and selling role, the Mineral Marketing Corporation must carefully investigate both the condition and costs of production within the country and the status of the global market. With both its own levy interests in mind and its caretaker role within the industry, it must seek the best prices for all minerals sold outside the country. Its finances are covered by the purchase of minerals for its own account and the sale or disposal of them in the market place. In this role the corporation is preceded and paralleled by such government marketing agencies as the grain marketing board which for the last 20 years has bought, sold and distributed all grain produced for the market. Indeed the grain agency has provided much of the impetus and ideological structure for a minerals agency *(Government of Rhodesia 1963).*

Within the broad mandate of a marketing function the MMC also seeks to facilitate the beneficiation, utilization and further processing of minerals inside Zimbabwe. This later purpose is limited by the mandate given to the Corporation which is only to encourage and not to require the further processing of minerals inside the national boundaries. It does, however, have teeth which may be utilized to stimulate and control some internal conditions within the mining industry. Any person or company, for instance, who sells or exports any mineral in contravention of the regulations is liable to a fine of $20,000 or x squared the value of the mineral itself, whichever is the greatest *(Government of Zimbabwe 1982 D).* Another more strategic role is performed by the corporation in the prohibition of the stockpiling of minerals. The corporation can, for instance, fix the quantity of any mineral or the size of a stockpile which a company has in its possession or under its control at any one time.

Where it considers it appropriate, the Minerals Marketing Corporation can order any mining company to reduce the quantity of any mineral it posesses to a quantity fixed by the corporation. Furthermore, it can require the company to provide written details of the quantity, type, grade, price, location and sales details of any mineral owned or controlled by the mining company. While such demands may appear perfectly normal to the non-mining community, they do reflect a deep intrusion into what is generally considered as private company information. With such secrecy companies have previously used it as one of a number of strategies to gain control over access to resources, new sites of ore and monopolization of ore regions. However, with the entry of such information into the public arena, under the rubric of the minerals marketing board, the control over such information has become part of a regulated situation; or at least superficially this is so but may not be so in the harsh reality of the minerals extraction and marketing world *(Government of Zimbabwe, 1982 D).*

Similarly, the «opening up» of information on ore bodies also brings to light the pattern of decision making over closures and winding down of operations when ore bodies are depleted to near to it, as appears to be the case in the nickel mines in the Bindura area of N E. Zimbabwe owned and operated by the Anglo-American Corporation of South Africa. This type of closure information has traditionallly been guarded quite jealously, but with the information in the public areas, the domain of decision making takes on an air of state and corporate responsibility. Indeed this is one area in which the state in Zimbabwe has had some degree of success, with several companies forced to disclose information and required to accept some degree of responsability for ley offs and the costs of winding-down mining operations. In reality, however, while the policy of disclosures has operated effectively, some of the costs of maintaining «artificial» levels of employment, as the mining companies are wont to call it, are being borne by the state through the medium of soft loans to the mining company «in distress». While there is some indication of the effectiveness of the closure and disclosure legislation, there is little evidence of the viability of the remaining teeth in the mineral board's repertoire of legislation.

Indeed the evidence suggests that the government is not willing or able to alter the relationships with the foreign mining houses. Statements have been made by government leaders to reassure the companies that no nationalization will take place in the forseeable future (*Sunday Mail 1982).* Furthermore, the government has intimated that state involvement is most likely to be in the form of joint ventures and the provision of loans to companies in financial difficulty. However, what the actual equity and control relationships will be in proposed joint ventures, or indeed the extent to which such activities will intrude upon the domain of private corporations in the production sector, still remains to be seen. To date, most activity has been in a facilitative role rather than in direct state ownership, management and control in productive mines. With global demand for most minerals in decline and production as well as labour costs increasing, the government has indulged in soft loans to tide the companies over and for the most part there is little indication of any suggestion of direct takeovers. The best example of this strategy to date is the Empress Nickel Mine, which, after some six to eight months of negotiation between the owners, Rio Tinto (Zimbabwe) and the government, with loans and assistance amounting to $Z2.7 million, was finally closed down by the company in December 1982 *(Mining Journal April 22, 1983, p. 262).* Evidence suggested at the time that the mine was near the end of active life and the loans really served to soften the blow for the company.

In 1982, MTD (Mangula) Ltd., the country's biggest copper producer, also went to the government for assistance and received $26.0 millions in backed loans. In October of the same year, the government also purchased some 40% of the shares of Mwange Colliery as a form of aid assistance to the company (co-owned by the Anglo-American Corporation). And again in 1983, the government provided soft loans to the Bindura Nickel Company for a total of $Z6.0 million repayable over a five year period *(Mining Journal, June 3, 1983, p. 382).* All this was accomplished in order to bolster the flagging mining industry to preserve jobs and prevent retrenchment or closure. The only failure of this holding policy to date was the closure of the Empress Mine, already noted, in 1982. And while there were some «fears» initially on the part of the mining houses that the wave of «assistance» could turn to nationalization, by 1984 these had been allayed by further assurance from the government and the apparently convival and comfortable arrangement which existed between the two *(Lander 1984, Interview).*

There was a suggestion in 1984, however, that the mandate of the Minerals Marketing Corporation could be expanded in the future to commence its own operations in mining, minerals research, refining, beneficiation and manufacturing. Indeed there is a precedent for this type of operation in the national steel industry which is a joint venture operation between the government and private companies including the Anglo-American Corporation *(Financial Gazette, March 19, 1984, (Special Supplement, ZISCO Steel); Government of Zimbabwe, 1982 D, No. 2: 29, Sec. 21, Sub. Sec. 24).* This suggested procedure for the mining industry was initiated first in an early planning document prepared by the government. To whit: that the government desired foreign investors take on local equity partners to achieve the maximum possible Zimbabwean managerial and technical personnel in all spheres of the mining industry. To date, however, there is little evidence of any widespread joint ventures, the exception being the Hwange Coal fields. And while this is a massive undertaking, it is not a new venture in itself but rather a revamping of the ownership structure of a long established coal mining operation *(Growth With Equity, 1981, p.7).*

Overall, the state operations in the mining sector, mostly through the medium of the MMC, have experienced difficult times since independence in April 1980. The general world recession, for instance, has depressed prices and reduced demands for metals and this was reflected in declining mineral export earnings in 1982 and 1983; prices and incomes rose minimally again in 1984 however *(Harare Herald, April 6, 1984; Financial Gazette, April 6, 1984, p. 24).* Similarly competition from other producers in a period of general recession has placed pressure on the supporting capacities of the state in Zimbabwe: several of the country's most important mineral products, such as chrome and asbestos, compete directly with South Africa in the export market. In the area of wages too the state's activities have, in the terms of the language of the mining companies, complicated the competitive issue: minimum wages, for instance, have more than doubled since independence at a time when prices and demand were falling. This situation, according to the industry, has directly related their falling rate of profit to the increasing marginality of their operations and forced the state to compensate them for losses at a time when both the state and the companies were experiencing declining net incomes *(Mining Journal, April 22, 1983, p. 262).*

For the most part, government aid has been directed toward the large scale mining operations in the country, but recently some attempts to promote and aid small-scale operations have been made. It was incumbent upon the state to support small-scale operations because while they do not account for any large proportion of the GNP, they supply an important although small source of employment. Newer and small mining operations in Zimbabwe suffer from a lack of experience, and finance. Government policy has therefore been aimed at producing basic information on methods of issuing licenses, pegging claims, techniques of mining and ore processing, increasing efficiently, and retention of ownership in small-scale hands preventing the forced sale to large-scale owners (IDRC 1982 pp. 4–6). In addition, the state mining department offers loans to purchase mines to a maximum of $225,000, loans to purchase equipment, marketing assistance, and cheap loans for construction and/or establishment of water or electricity supplies to the mines. Similarly, loans can be obtained for the erection of a plant and bringing a mine into production. In exceptional circumstances, the government will also hire out plant and equipment such as compressors, hoists and mills to enable small-scale operators to become established on a firm footing *(Government of Zimbabwe, 1982 C).*

The state has also attempted to assist small holder workings by installing mining cooperatives specifically to overcome skill and managerial gaps. Some cooperatives now function in panning for alluvial gold. One cooperative is currently working a chromite deposit in the Ngezi area where an older mining operation was taken over by workers after its financial collapses. The mine foreman is now the manager and Chairman of the cooperative. This particular operation was given equipment by the government, and assistance by engineers and state technical experts. The extent to which cooperatives are working in comparison with the large-scale capital intensive sector is, however, quite miniscule (Usheworkunze, 1983, p. 3). And as we will see in the following discussion, there are still substantive economic and political reasons for the mainline direction of state policy toward foreign owned transnationals in Zimbabwe's mining sector *(Government of Zimbabwe, 1982 B).*

Transnational Linkages in the Zimbabwe Mining Industry.

The objective of the transnationals in the mining sector in Zimbabwe is still the process of capital accumulation and the inter-regional transfer of value out of Zimbabwe mostly into South Africa, the UK and the USA, the host sites of the major mining transnationals. This transfer process is still aided and abetted by the specific functions and role of the state largely because no alternative appears possible given the immediate post-independence scenario of fiscal crises and dependence on external sources of capital for investment and survival. Thus the state is faced with a dilemma. It must preserve the «goose that lays the golden egg». At the same time it must pursue a policy of nationalization or less «severe» strategies, in order to retain value generated by mining and to channel this capital into upstream manufacturing to be syphoned into the net social product of Zimbabwe rather than into that of neighboring South Africa *(Harare Herald, April 5, 1984).*

The mining sector as a whole shows a high degree of dependence in the form of market concentration of the sources of external financing and the sources and financing of the means of production in the form of machines, chemicals and technology. The sector as a whole has always been, and still is dependent upon the capitalist world market and as such is subject to the vagaries of cyclical behavior and whiplash effects on external inputs and outputs. For the most part, there is still a low level of consumption and utlization of the minerals mined in the country in indigenously based industries, largely because of a poorly developed capital goods sector. The exception is the ZISCO state/private owned steel company, but even here some 75–80% of all steel produced is designated for export in a semi-finished state *(Financial Gazette March 9, 1984)*. The dependence of the mining sector and its ownership by foreign transnationals also played a major role in making the sanctions against Rhodesia ineffective during the period of UDI up to 1980. Indeed evidence suggests that their hold on the mining sector and the increases in investments during the latter period of UDI may have entrenched them even further prior to the date of independence in April, 1980.

Although the degree of concentration of production in general manufacturing is not significant in Zimbabwe, the level of concentration in mining is still quite high. In manufacturing in 1975, for instance, the largest 125 production units with a workforce of more than 300, produced 75% of the total gross output *(Stoneman, 1981, p. 161)*. There is no reason to suspect that this basic structure has changed although after the cessation of sanctions and UDI, a number of firms were closed or consolidated. The mining sector, however, appears to have remained unscathed although the recession in the post-1980 period has taken its toll on some large as well as small mines –– especially gold in the small size firm. The great majority of the 52 registered 'large scale' mines in 1984 were owned by British, American or South African interests. The 14 largest mines still operating with a workforce over 800 had a total number of 27,450 workers which was 61% of the total number employed in mining per se. These 14 mines along with several other smaller subsidiaries were owned and operated by the big eight foreign corporations, namely: Anglo-American Corporation (SA); Lonhro (UK); Messina Transval (SA); Rio Tinto (UK), Falcon Mines (UK; Johannesburg Cons. Inv. (SA); Turner & Newall (UK); and Union Carbide(USA) *(National Industrial Council for the Mining Industry, January, 1984)*. Operating through a complicated network of South African and Zimbabwean subsidiaries, the UK compagny Lonrho controls ten mines, mostly in copper and gold. Anglo-American, a South African-Oppenheimer family transnational is now the most important and powerful conglomerate operating in Zimbabwe; effectively, it is a finance capital structure with industrial and financial arms in mining, agriculture, banking, food and manufacturing (see table 1). The Rio Tinto Zinc Corporation (UK), like Anglo-American, is a major transnational but in Zimbabwe its practice are restricted to mining mostly in gold and chrome. The Union Carbide Corporation represents the most important American investments in Zimbabwe. The interest here is in chrome and nickel. Falcon mines are owned jointly by British based investments with interests in gold and precious metals. Asbestos holdings are concentrated in a minor way in a South African Company (Asbestos Investments Pty. Ltd.) and in a major way by the British giant Turner and Newall whose mines are responsible for some 90% of the asbestos produced in Zimbabwe.

In general terms, the large foreign owned firms are measurably more productive than smaller and locally owned firms. They have a greater capital intensity than do smaller mines but in comparison with other firms and transnationals operating elsewhere outside of Zimbabwe, they are relatively labour intensive. Indeed the greater relative capital intensity of the foreign owned mines in Zimbabwe is illustrated by a lower wages/net output ratio compared with smaller mines. The large mines are also still marked by their intensive managerial and contractual linkages with their parent firms through traditional transnational ownership and share structures *(Clarke 1980)*.

While estimates vary of the degree to which foreign companies still control mining in Zimbabwe, the most accurate measures based on extrapolations from pre-independence data suggest that most foreign mining investments still derive from the UK or South Africa. Increasingly, however, American firms have shown interest in chromite and rare earth minerals, especially those used in electronics and space technology. Nowadays, approximately 50% of foreign mining capital investment originates from the UK, 40% in South Africa, and 10% in the USA. Overall, the foreign owned companies account for between 73% and 95% of the total output of the industry. The broad picture of mining is thus one in which both the sources of investment, decision making, production and export of minerals are controlled by foreign owned transnationals, most of whom have mining operations, as well as expanded financial activities in a number of other countries, including several in the developing world. As such, the mining scenario in Zimbabwe is exposed to competition from other countries whose commodities can be produced at comparable cost using various mixes of cheap(er) labour and higher or lower grade of minerals. Whichever mix of capital/labour and mineral bases the transnationals choose can serve to undermine the basis and stability of nations like Zimbabwe where, with a newly emerging nation status, the state is susceptible to both internal and external pressures to provide subsidies for companies.

The basis of the linkage between the foreign owned companies and the Zimbabwean mining industry lies in the structural transference of value across national boundaries and in the lack of control over such transfers by the Zimbabwe state. Coupled with this, the companies still find they can carry on operations paying low wages to workers despite the passage of legislation raising the wage level to heights unforeseen in the pre-1980 period.

In Zimbabwe, as we discussed earlier, the mining sector has traditionally been permitted to operate on the basis of low wages and a high rate of exploitation which have been translated into a high rate of profits. The high rate of exploitation here generates high rates of surplus value which is the source of capital accumulation in the home site of each transnational company (Nyathi, 1977). Thus, part of the explanation of profitability for foreign firms in Zimbabwe comes from variations in labour costs, but there are also further levels of abstraction to be considered in this explanation. The differences in labour costs leading to a higher rate of profit are posited as transfers of value; or the transfer of purchasing power over the net social product of one region versus another, in our present case, Zimbabwe versus South Africa, UK, and USA. Whichever way we analyse it, the result is that there is an uneven appropriation of net social product and surplus value by one class over another, represented here by the ownership and control of foreign transnationals aided by the functional, if not structural, role of the state.

However, given our previous analysis of the internal and external constraints placed upon the Zimbabwe state and the structural transfer of class alliances and interests in the early phases of independence, it is probably not suprising to see a continuation of the problem of high rates of exploitation and transfer of value outside of Zimbabwe. Indeed, it seems the concretization of the foreign ownership structure and its apparent infallibility in the face of a changing economic and political climate, supports our earlier contention that the government policy per se has become articulated with and subordinate to the needs of capital, and that various constraints have been placed upon the state which have militated against deeper structural transformations. The weakness of 'captive' state in these circumstances leads to a continuation of previous capital/labour relations. We are faced with a weakened working class and increased antagonism between (mine) workers in developed and developing countries because of the increased pressure placed on 'cheap labour' markets and the increasing tendency for transnationals to rely upon intensified value discrepencies between points of production and consumption and the transfer of purchasing power and control over the net social product from host to home sites.

With the transnational linkages too, we can observe an intensification of the fiscal relationships between the institutional sources of foreign capital and the cyclical nature of the mining industry. And while transnational linkages are currently in vogue in Zimbabwe and providing some jobs and income, these advantages are counterbalanced by the repatriation of profits and the continuation of expatriate control, and ownership. However in early 1984, the government attempted to impose some fiscal controls on investments and repatriation of profits *(Financial Gazette, April, 1984)*, but the success of such controls remains to be seen. Furthermore the structural relations which embrace the global mining system impinge upon the Zimbabwean minerals sector, a factor which is out of the hands of the Zimbabwean people and for the moment beyond the control of the Zimbabwean state. Thus by simply being a member of the international community and being involved in single enterprise extractive industries, the Zimbabwe economy as a whole is subjected to economic whiplash and trauma of global fluctuations in prices, production and consumption.

Production Changes in Mining and Manufacturing: Value Increases and Volume Declines in the Post-1980 Period

The tenor of our comments thus far indicates that the mining industry is in the throes of a recession in Zimbabwe. As we have noted there still is considerable pressure on the working class and on the state to provide corporate as well as social welfare support. It is clear now that during the period of UDI, the mining industry proceeded apace despite United Nations sanctions; and that in the immediate post-independence period some significant restructuring of the industry took place. This was largely due to falling prices and falling demand in the global sphere and not to any overt action on the part of the state. During UDI up to 1980, the status of both mining and manufacturing were concealed by a lack of data and public information. Firms operated in a covert manner in terms of their exports and production figures. Nevertheless, it is evident during the period that manufacturing industry expanded in accordance with internal demand and the external constraints placed upon it by international economic sanctions. Between 1964 and 1980, the net output of value in mining increased six-fold (see Table 2). During that same period employment increased in both the mining and manufacturing sectors. The biggest leaps occured between 1978 and 1981 curing the heights of the war within the country *(Government of Zimbabwe, 1981 A; 1981 D; 1982 A; 1982 F; 1983 B).* Manufacturing in particular took a great leap in numbers employed immediately following the cessation of military activities. However, this initial expansion then slowed down near the end of 1981 because of foreign currency problems and «transportation difficulties» on the railway between Zimbabwe and the port city of Maputo in Mozambique.

Mining, as we have noted, also continued during the war and into its immediate aftermath. As world prices for most minerals plummeted in the global recession, mining in Zimbabwe and in developing countries like it, became exposed to the cyclical and whiplash effect so common to such dependent industrial systems. By mid-1984, the mood in the industry was one of cautious optimism *(Harare Herald, April 6, 1984);* all it seems was dependent upon the recovery of economic momentum in the USA and Europe and how the industry located there would be able to consume stockpiles already accumulated during the recession. But in the lead up to this heightening of the economic picture, there were some dark moments for the industry *(Zimbabwe Agricultural and Economic Review, 1982:*

181–2). In August, 1983, for instance, the government reported that the value of mineral production in Zimbabwe dollars had declined from a record high of $Z414.8 million in 1980 to $Z393.5 million in 1981 and to $Z383.0 million in 1982. A comparison between the first six months of 1982 and the first half year of 1983 showed that the decline in value of mineral production had been reversed largely because of a devaluation in the Zimbabwe dollar followed by significant currency adjustements. However, in the course of devaluation a number of mining operations were able ro report a «profit» in the latter half of 1983 despite a 2.5% decline in volume *(Mining and Engineering Journal October, 1983, p. 17).* Indeed, while there was a gratifying increase in the value of production it was measured in Zimbabwe dollars, which having been floated at the end of 1982, had declined by more than 27% against the US dollar and even more in real currency terms. Thus while the «value» of most minerals increased, especially quoted at their «at mine» value, the actual volume of production continued a slow decline. The only exceptions to this general rule were demonstrated by the Hwange Colliery which started some small exports to Tanzania *(Chamber of Mines Journal, Feb. 1984, p. 15).* In addition, there were some hopes that gold prices would continue to stabilize and that the income of $Z192 million, representing 41.2% of the country's total mineral earnings in 1982, would continue to hold and improve *(Harare Herald, April 6, 1984).* Similarly, there was hope that prices would improve and stabilize for hard-hit nicke industry.

CONCLUSION

The tenacity and strength of multinational capital, the weakness of organized labour, and the ambiguous position of the state, are all features that Zimbabwe shares with other African nations, particularly those that depend upon export enclaves to generate public revenue. Mineral production in Zimbabwe is heavily influenced by international markets, and subject to the rules governing production and trade in a global capitalist system. Any form of integrated industrial development in which minerals might play a part, is limited by the availability of capital, manpower, and markets. These factors are in turn stretched and pressured by exogenous forces: recurrent fiscal crises; the trauma of cyclical recessions; the restrictions imposed by the IMF and foreign donors on fiscal and monetary policy and on planning strategy; and natural hazards such as the current drought. No sector of Zimbabwe's economy is independent of these forces and any one of them is able to precipitate an industrial crisis.

Nevertheless, the immediate factors constraining the transformation of relations of production in mining, as well as other sectors of Zimbabwe's economy, arise out of a specific history of settler colonialism, internal class formation, and regional economic articulation. The Lancaster House constitution constrains the ability of the state to acquire private assets;

skill deficits and organization inexperience retard working class unity; and South Africa, through its control of transport linkages, markets, and capital, and through its constant support of dissident activity, exerts enormous economic and political leverage.

In the long term, socialist transformation in Zimbabwe will depend upon the re-structuring of the state and the re-definition of its functions. At present, however, while the ruling party attempts to alter the logic of the very state structure it controls, the state itself remains «captive» — paralyzed by the need to appease foreign capital, in mining and commercial agriculture. These are the sectors where workers confront the daunting strength of multinationals directly. These may also be the sectors where the patience of workers with the old, but enduring, legal and economic order may soon wear thin.

Table I : *Principal Operating Companies under the Umbrella of the Anglo-American Corporation Services: Zimbabwe, 1980*

Companies	% AAC Group Shareholding	Number Employed
Bindura Nickel & subsidiaries	79.4	3,800
Border Timber Ltd.	81.0	4,200
Hippo Vallev Estates Ltd.	40.2	8,000
Rhodall Ltd.	64.0	3,400
Shangani Mining Corp. Ltd.	29.7	1,200
Hwange Colliery Ltd.	33.5	5,700
Employment Total by Companies		26,300
Others		2,600
TOTAL		28,900

Source: *Anglo-American Corp. Services Ltd, Submission to the Commission of Inquiry into Incomes, Prices and Conditions of Services, Zimbabwe, 12 December, 1980.*

Table 2 :

Derivation of Gross output Zimbabwe Mining Industry	Sales of goods not produced on premises	Sales from own production	Charges for repairs and services	Charges for work on customers materials	Turnover	Capital works by own staff	Changes in stocks of own produced goods	Gross output excluding salesoof goods not produced on ppremises
	$'000	$'000	$'000	$'000	$'000	$'000	$'000	$'000
1972	364	121298	4123	5489	131274	4027	-340	210865
1973	566	143845	4124	6180	154720	4167	5280	259248
1974	564	195889	3384	5554	205392	6934	-384	275514
1975	763	189863	2719	8991	202032	7357	1913	274312
1976	964	227753	3782	14336	257947	17029	1347	259248
1977	500	238989	2737	16228	258474	6376	1015	275514
1978	468	241534	3234	16217	261451	4029	9305	274312
1979	285	311616	1639	16497	330040	3310	2919	336697
1980	477	419147	4231	17157	441010	3130	778	444436
1981	7746	371926	7696	15480	402850	4262	31325	430693

Source: *The Census of Production, 1980–82: Mining, Manufacturing, Construction, Electricity and Water Supply. CSO, Zimbabwe.*

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RESUME

Dans cet article, l'auteur s'est fixé comme objectif d'étudier l'état ainsi que les changements intervenus dans l'industrie minière du Zimbabwé après l'indépendance. L'auteur estime que le rôle que l'Etat y a joué est important et conclut que, dans ce secteur, l'Etat est resté en fin de compte prisonnier du capital. L'Etat s'est efforcé d'attirer le capital en donnant des prêts à des conditions douces aux entreprises minières pendant la crise au début des années 80. Vers le milieu de 1984, il y eut des tentatives de la part de l'Etat de consolider son influence en mettant en place des structures parapubliques, en augmentant la part du gouvernement et en augmentant l'aide financière et technique aux petites entreprises minières locales. D'une manière générale, la main-d'œuvre dans le secteur minier est resté toujours faible dans l'économie régionale et a toujours subi des pressions politiques l'obligeant à se conformer au statu quo de la part à la fois de l'Etat et du capital. La gestion, le contrôle et la structure de la propriété sont restées inchangées par rapport à ce qu'ils étaient avant 1980 sauf pour quelques rares exceptions ; il y eut plusieurs tentatives d'encouragement au contrôle et à la coopération entre ouvriers du secteur minier. Cependant il semble que toutes tentatives de changement vers une voie socialiste de développement dépendra de la restructuration de l'Etat et de la redéfinition de ses fondements de classes ainsi que de la fonction de ces classes – Pour leur part, les ouvriers des mines mènent une lutte difficile pour obtenir la redéfinition de la phase actuelle de contrôle et de propriété par les multinationales travaillant dans le secteur minier.

La tenacité et la force du capital d'origine multinationale, la faiblesse de la structure organisationnelle des travailleurs et la position plutôt ambigüe de l'Etat, ce sont là des caractéristiques que le Zimbabwé partage avec les autres pays africains, plus particulièrement avec ceux d'entre eux qui, pour générer des fonds publics, dépendent de l'exportation de quelques produits seulement. La production minière du Zimbabwé comme la production dans les autres secteurs de l'économie, est tributaire de facteurs à la fois internes et externes, facteurs qui peuvent d'ailleurs à tout moment la précipiter dans une crise.