

WORKING FOR OIL

COMPARATIVE
SOCIAL HISTORIES
OF LABOR IN
THE GLOBAL OIL
INDUSTRY

*Touraj Atabaki,
Elisabetta Bini
and Kaveh Ehsani*



Working for Oil

“It is astonishing how little is said currently about those millions of people who toil for oil—the colossal industry that anchors the whole of the global political economy. This important volume gives a new life to the field by bringing together valuable studies from different regions of the world. It is a must-read for those who want to understand the changing fortune of life and labor in the world’s most strategic energy sector.”

—Asef Bayat, *Professor of Sociology and Bastian Professor of Global Studies at the University of Illinois, Urbana-Champaign*

“*Working for Oil* offers a valuable compendium of social relations across the most vital industry of the twentieth century. Stretching from Iran to Mexico and the U.S. Gulf Coast to Norway and Siberia, these studies highlight both the integrating discipline of the capitalist marketplace and the extraordinary diversity with which workers and their communities have adapted to a technological imperative.”

—Leon Fink, *Distinguished Professor of History at the University of Illinois in Chicago, and the editor of the journal Labor: Studies in Working-Class History of the Americas*

“While the literature on the petroleum industry is vast, research about oil workers is anything but. This collection addresses that gap, bringing together scholarship about labor from all oil regions of the world. The global and multidisciplinary approach is rich and complex, setting a high standard for future scholars and inviting them to follow suit.”

—Myrna Santiago, *Professor of History at the Saint Mary’s College of California*

“By attending to the complex role played by workers in the fossil fuel industries, this splendid book fills a major gap in contemporary analyses of the oil industry. The essays included in *Working for Oil* examine labor at important moments in the history of oil and at key sites around the world, while introducing us to the distinct experiences of organized labor, women, and migrant workers. Superbly researched, this collection promises to reshape debates and discussions in both labor studies and energy studies for years to come. Essential.”

—Imre Szeman, *Professor of English and Canada Research Chair of Cultural Studies at University of Alberta, and co-director of the Petrocultures Research Group*

“Without oil the world economy would grind to a halt. Petroleum not only fuels cars and airplanes, it is also used to produce plastics, fertilizers, and cosmetics. We all know about the multinational corporations dominating the oil market, but we never hear much about the people who actually do the work, and produce the world’s major commercial energy source. The present volume offers a completely new perspective. It is a pioneering exploration of the oil proletariat, covering the history of major production sites on five continents, and the daily lives and struggles of oil workers in these places. The book is indispensable reading for all those interested in the global history of labor.”

—Marcel van der Linden, *Senior Researcher at the International Institute of Social History, Amsterdam*

“There is no convincing answer to the question why historians of the oil industry have ignored its workers nor why working class historians have ignored the oil sector, but this collection clarifies why both kinds of histories are the worse for it. *Working for Oil* is a game changer.”

—Robert Vitalis, *Professor of Political Science, University of Pennsylvania*

Touraj Atabaki · Elisabetta Bini
Kaveh Ehsani
Editors

Working for Oil

Comparative Social Histories of Labor
in the Global Oil Industry

palgrave
macmillan

Editors

Touraj Atabaki
International Institute for Social
History
Royal Netherlands Academy of Arts
and Sciences
Amsterdam, The Netherlands

Kaveh Ehsani
DePaul University
Chicago, IL, USA

Elisabetta Bini
University of Naples
Federico II
Naples, Italy

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Introduction

Touraj Atabaki, Elisabetta Bini, and Kaveh Ehsani

This book brings together the works of scholars who situate oil workers and the social, political, economic, spatial, and cultural dimensions of labor relations at the center of their analysis. The contributions are cross-disciplinary, and based on historical archival investigation, or anthropological and sociological field research. While the role of oil workers and class and labor relations in the global oil industry was a major focus of scholarly attention during much of the twentieth century,¹ the period since the 1980s has witnessed a marked decline of interest in the topic, to the extent that at present the analysis of the vital role of labor in all aspects of the global oil complex is either overlooked, or dismissed as of little significance. The contributors to this volume aim to reopen this

T. Atabaki (✉)

International Institute for Social History, Royal Netherlands
Academy of Arts and Sciences, Amsterdam, The Netherlands

E. Bini

University of Naples Federico II, Naples, Italy

K. Ehsani

DePaul University, Chicago, IL, USA

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important but neglected dimension of the social history of oil, by shedding light on the historical and contemporary experiences of people working in a wide range of jobs to produce oil and its byproducts in a number of major petroleum-producing regions that include Latin America, the Middle East, Central Asia, the Caucasus, Europe, the United States, and Africa.

When the editors began to conceptualize this volume, they quickly realized how little attention was being paid to the role of labor relations in the global oil complex, despite the fact that oil and its byproducts underpin the entire global political economy. Our invitation to a number of established scholars in various disciplines to contribute to this volume soon revealed the extent to which the topic had fallen out of favor. This collection aims to help reignite interest in the analysis of the various dimensions of labor in the global oil industry by adopting a number of different approaches.

First, the essays offer a multi-scalar approach to their subject matter, by intersecting various geographic scales of analysis—local, regional, national, and transnational. The contributions address the study of a wide range of those working in the global oil industry, including women, migrant laborers, and expatriates who move constantly between various sites, as well as the political and strategic impact that institutions and political actors have had on labor dynamics at local production sites. The historical contexts of shifting international geopolitics and the variegated logics of national governments, and national and multinational oil companies have affected local labor relations differently. At the same time, changes in labor relations at the local level have had important consequences on oil policies internationally. As this collection shows, the story of oil politics in several producing regions went hand in hand with that of labor policies in countries such as the United States. As oil workers organized collective forms of resistance, firms moved abroad and established their presence in areas with less stringent labor regulations, using a range of management tactics aimed at undermining labor activism. With the new wave of nationalization of oil in many countries in the 1970s, it became more difficult for the major international oil companies to move around as freely as they had from the 1920s onwards.

As a result, the oil industries of advanced economies had to become more aggressively competitive in search of access to reserves and market shares. They had to focus more rigorously on balance sheets, paying dividends, and control costs, while accelerating the introduction of new technologies. These technical advances both facilitated extraction from more

geographically challenging but less politically restricting fields, and allowed the reduction of labor costs and the creation of more flexible labor markets. New technologies and work organizations had led to the employment of fewer workers and hiring of more temporary employees who were often not unionized, but came with more specialized skills and a greater willingness to move around between the work sites. The more flexible and mobile workforce tended to be less embedded in local societies, and less organized and steeped in the history of trade unions and collective bargaining and strikes. Today the oil industry is characterized by a prevalence of contractors and contingent labor. Workers often work for several companies at a time, they are more precarious and vulnerable, and usually find themselves in unsafe working conditions, as was clear in the Deepwater Horizon disaster.

Second, our contributors show that while there are significant similarities in the historical and specific experiences of those working in oil, there can be no universal history of labor in oil. While the category of “oil worker” comprised—and still comprises—a bewildering variety of skills, expertise, and tasks that has formed a highly intricate industrial and technical division of labor, encompassing pilots, deep sea divers, roustabouts, drillers, machinists, caterers, drivers, etc.; there have also been major differences in working for different employers. Employers in the oil business range from international oil companies to national oil companies, service companies, smaller independent producers, and a wide range of subcontractors that perform various technical tasks and provide vital services. They have been historically subject to various local and international constraints, and their relationship with workers and employees has been dependent on highly sensitive and shifting political and legal dynamics.

Third, this volume does not limit “labor” to manual or blue-collar labor, nor do contributors focus exclusively on work experiences within the sphere of production (oil fields, offshore platforms, refineries, along pipelines, etc.), or on relations with employees. It is assumed that the social lives of those working in various domains of oil production are not limited to their working time, but include their everyday experiences of leisure and reproductive activities (housing and domestic life, family dynamics, urban experiences, modes of consumption, etc.). Furthermore, it does not confine the politics of labor to its moments of confrontation with employers (strikes, labor negotiations) and political militancy. Relations of power permeate social relations, and even the absence of formal collective modes of labor organizing and activism are a state of political being that requires

analysis and explanation. Thus, the relative (and momentary?) decline of collective organization and representation are as integral to the analysis of labor relations in oil, as are the moments of spectacular militancy and successful bargaining with employers or confrontation with national governments.

In this collection, relations of power are not treated only in terms of class dynamics, but concern the handling of culturally imposed differentiations of gender, race, and ethnicity as well. The difficult experiences of migrant workers, the alienating and rootless conditions facing expatriate experts clustered in isolated enclaves, the double discriminations facing women working in various sectors of the oil complex, and the manipulation by employers of the tensions among workers and employees of different skin color or national and ethnic background, have been an integral dimension of the work experience in the oil complex, and continue to be so. The essays aim to engage the variegated social histories and lived experiences of labor in the global oil industry from these diverse and intertwined perspectives.

Last, this book attempts to situate its topic—the role and experiences of those working to produce petroleum and its byproducts—within the wider global, social, and political history of the long twentieth century. The histories of labor in oil cannot be envisaged in isolation from wider shifts and changes—cultural, political, economic, spatial, technical, social, and environmental—taking place worldwide. Oil underlies the contemporary civilization of global industrial and consumer capitalism, and the histories and experiences of those working to produce this commodity are embedded within the larger histories that include the transformations of international capitalism and finance, of colonialism, decolonization and nationalism, of global geopolitical conflicts, the Cold War, post-communism, and the rise and decline of the welfare state and the modes of regulation associated with it. In brief, the histories of labor in oil are embedded within the wider global histories of labor and the working classes.

ORGANIZATION OF THE BOOK

The essays in this book are organized around a series of interrelated themes, and divided into three sections:

The first part, *The Political Life of Labor*, examines relations of power within the workforce, or between the workforce and employers, and the political institutions of the state. This theme embraces the organization of

various forms of collective representation, such as trade unions and associations, as well as the involvement of the oil sector and workers and employees in larger political changes.

Part two, *The Productive Life of Labor*, investigates labor relations in oilfields, refineries, petrochemical complexes, shipping ports, pipeline building companies, etc. The essays analyze the dynamics of various forms of skills, practical knowledge and expertise and their implications for the professional lives of those working within the oil complex.

Part three, *The Urban and Social Life of Labor*, addresses the reproduction of labor outside the workplace. The essays examine the dynamics of life in company towns and urban and other communities, gender relations, cultural dynamics and tensions, and the everyday frictions and negotiations between those working in various sectors of the oil complex and the larger local, national and transnational societies.

In the introductory chapter of the volume, Kaveh Ehsani draws attention to the recent decline of scholarly interest in labor studies among those who investigate the impact of oil on society. He argues that this important and disturbing development is not so much a reflection of the actual insignificance of labor in oil, as it is an indication of discursive and tactical shifts within the industry, and in the framing of its internal labor relations. What is of greater concern is the lack of interest or attention in the topic from critical scholars whose investigations of the impact of oil on society and nature has been increasing considerably in recent decades. Ehsani puts forward some provisional explanations regarding this trend, and frames this book as a fresh attempt to remedy this oversight.

The first section, on “The Political Life of Labor,” addresses a variety of cases in which oil workers challenged and redefined national and international oil politics. In his essay, Stefano Tijerina investigates the early history of oil production in Colombia. By analyzing the incursions of American oil companies there during the 1920s and 1930s, the author relates his specific case study to the transformation of the global oil industry in the interwar period and after, characterized by US’ imperial expansion in Latin America, and by increased forms of labor activism and resistance. Through a study of the efforts carried out by oil workers against foreign multinationals, Tijerina’s essay argues that the Columbian government and Tropical Oil Company were effective in using violence against Colombian citizens to protect American oil interests, thus undermining the relationship between the state and civil society.

Focusing on a major political event of the twentieth century, Peyman Jafari highlights the significant role the oil workers had in the Iranian

Revolution of 1977–1979. His essay opens with an examination of the social and political transformations of the 1970s that prepared the ground for the popular upheaval against the monarchy. These included a drastic increase in oil production and revenues that threw the economy into disarray and stirred popular discontent. In the oil sector, these changes brought about significant political and institutional transformation in management structures, as well as in employees' living and working conditions. The author provides a detailed analysis of the ways in which oil workers engaged in the general strike, which brought them to the forefront of the labor movement and of anti-regime activism.

Helge Ryggvik's essay brings the reader to a different context, by investigating the turbulent and shifting politics of labor within the Norwegian oil industry. Norway's management of its oil sector is generally held as an exception to the prevailing notion that the abundance of oil resources leads to political corruption and poor economic performance. Ryggvik provides a more nuanced and less rosy picture, showing that labor relations in the Norwegian oil sector went through several phases that also had a significant impact on wider national relations of power. Initially, Norway's nascent oil sector was subject to the harsh labor regimes imposed by international oil companies whose expertise and investments were necessary to get the country's oil production up and running. However, Norway's wartime and postwar experiences of labor activism, and the establishment of a welfare state and a tripartite accord between corporations, the state, and labor unions, had created a space for Norwegian oil workers to press ahead with successful collective bargaining despite the government's reticence. As the industry became consolidated and the state more directly involved in managing the country's oil resources, this arrangement has weakened and Norwegian oil workers have been increasingly subjected to confrontational policies by a state that prioritizes commercial interests above inclusive social policies.

Andrew Lawrence's essay on the role played by Nigerian oil trade unionists in influencing national politics is a welcome departure from the prevailing trend in the literature that almost exclusively emphasizes the violence, corruption, and conflicts surrounding oil extraction from the country's Niger Delta. While acknowledging the disturbing consequences and the widely recognized negative aspects of Nigeria's oil industry, Lawrence points out that oil workers' trade unions have played a significant political role in shaping Nigerian politics during key moments of national crises.

Gabriela Valdivia and Marcela Benavides, in their essay on the recent history of the labor movement in Ecuador's oil industry, compare and contrast two periods in organized labor's reaction to the government's neoliberalization policy. While by the turn of the century, Ecuadorian oil workers forced the state to retreat from its intended scheme of privatizing the oil industry; in 2015, oil workers were absent when the large anti-neoliberal demonstrators poured into the street of Quito. Through multiple in-depth interviews with former workers of the Ecuador oil industry, the authors trace the roots of this more recent absence of labor politics within the oil sector. The authors highlight the consequences of grinding coercive policies against organized oil workers as one of the reasons behind their declining political presence and agency.

The second section of the book, "The Productive Life of Oil," explores a range of labor experiences within the workplace. Touraj Atabaki's essay examines some of the global shifts that took place in the oil industry on the eve of the First World War, leading to the rise of petroleum as a strategic commodity of vital importance. His essay focuses on transnational labor relations within the emerging Iranian oil industry, and its acute need and dependence on importing skilled and semiskilled labor to work in oilfields and refinery. Atabaki examines the complex relations between the nominally private Anglo-Persian Oil Company, and the various arms of the sprawling British Empire, especially the colonial Government of India. His essay highlights the life and time of Indian migrant workers in the Iranian oil industry prior to the nationalization of the oil industry in 1951.

In their essays, Tyler Priest and Betsy Beasley relate the history of oil in the US South to the wider history of post-Second World War American corporate capitalism and labor relations. By focusing on the refining industry in the US Gulf Coast, Priest challenges the idea that after the war oil workers experienced a period of decline in their ability to organize, and highlights the continued forms of activism carried out from the 1930s to the 1970s. He argues that the Oil Workers International Union (OWIU) and its successor, the Oil, Chemical, and Atomic Workers (OCAW) union, were able to obtain important concessions, until management started using a tool that was difficult to contrast: the contracting out of jobs and the introduction of other forms of manpower reductions, made possible by advances in technology.

Beasley's essay covers a similar territory, albeit more locally focused on the ways in which oilfield service companies challenged Houston's labor movement in the decades following the Second World War. Hers is not

only a local case study, but has larger implications for the history of postwar American imperialism and for an understanding of the ways in which the US used oil to establish its global power. As labor activism increased in postwar Houston, oilfield services' executives outsourced oil refineries abroad, or to subcontractors, and introduced various forms of automation. These undermined workers' ability to strike and redefine labor relations on the floor, by transforming blue-collar workers into a non-politicized white-collar workforce. At the same time, they promoted a new ideology of American imperialism that imagined the US as a manager of integrated global production rather than as a producer or exporter in its own right.

Both Priest's and Beasley's essays remind the reader that in the US, as elsewhere, oil companies have often used race to divide oil workers and undermine labor movements. In Gulf Coast refineries, despite the fact that workplaces remained segregated and were characterized by racial tensions, trade unions were able to introduce forms of racial equality that were not present in other industries in the American South. In the case of the oilfield services companies examined by Beasley, the effort to undermine blue-collar workers went hand in hand with management's opposition to African American and Latino oil workers, and civil rights gains.

The history that emerges from this collection does not deal only with capitalist countries or with global capitalism, but addresses the Soviet Union as well. Drawing on newly opened archives, Dunja Krempin's essay contributes to our understanding of life in the late Soviet period. By examining the Western Siberian oil and gas complex in the 1960s and the 1970s, the essay examines the forms of mobilization of workers in the late Soviet planned economy under Brezhnev. It relates the changes taking place in the 1970s to a longer history of modernization projects dating back to the interwar period, and to the employment of migrant communities in the early Soviet oil industry. Krempin does not deal only with the media campaigns carried out by the Soviet regime, but also with the working and living conditions of the oil workers who moved to Western Siberia. By doing so, she sheds light on some of the pitfalls of the Soviet planned economy that led to its demise a decade later.

The third section of this book, "The Urban and Social Life of Labor," examines the experiences of oil workers and local communities in and around company towns and enclaves, and highlights the importance gender has had in the history of labor in the oil industry. Elisabetta Bini in her essay examines the ways in which US oil companies transformed labor policies in Libya between the mid 1950s and the late 1970s. By analyzing the labor relations

introduced by American oil companies in oil camps and company towns, Bini argues that through expatriates US oil companies reproduced the gender, class and racial hierarchies that characterized other American camps across the world, based on racial and ethnic segregation, and on the elevation of white women to symbols and agents of America's corporate mission. Furthermore, she points out that after the establishment of Muammar Gaddafi's regime, gender played a crucial part in transforming labor relations in oil towns, as Libyans often considered American women as sexual objects.

Zachary Cuyler's essay focuses on another aspect of American labor policies in oil-producing countries, namely the role Lebanese workers had in operating the Trans-Arabian Pipeline, or Tapline, between the early 1950s and the early 1960s. It argues that, despite Tapline's effort to contain labor activism through forms of welfare capitalism, Lebanese workers organized trade unions and strikes that allowed them greater control over a crucial oil infrastructure and over their own work conditions. While workers adopted an anti-colonial nationalist discourse, Cuyler points out their demands were in many ways also shaped by the language and practice of Tapline's management.

The last two essays examine more contemporary issues, and adopt particularly original approaches to the study of their subject matter. Saulesh Yessenova highlights a little-known aspect of the history of the oil industry in Kazakhstan in the early twenty-first century, and examines the formation of the *munayshilar* (oil workers), a class formed in the local herding communities. Using an anthropological approach, she sheds light on the interactions—and conflicts—between the local traditions and the oil industry. Yessenova's essay shows the deep historical roots that lie behind what became one of the Soviet Union's largest oil fields, Tengiz, and points to the importance of examining the subjectivities that emerge around oil enclaves.

Finally, Diane Austin's contribution highlights the importance the category of gender has for the history of oil, an issue that has been long overlooked by scholars. By focusing on the US offshore oil and gas industry from the 1940s to the 1990s, Austin argues that men have greatly outnumbered women, despite the introduction of equal opportunity employment and civil rights laws from the 1970s onwards. By carrying out a range of interviews with women working in various sectors of offshore oil extraction in the Gulf of Mexico, the essay highlights the complexity and variety of women's experiences in the oil and gas industry, their background, and the challenges they face in juggling their working life with their family lives, and their expectations.

The collection of essays in this volume is largely derived from two international conferences, the first held in Amsterdam in June 2013 at the International Institute of Social History on the *Comparative Social Histories of Labor in the Oil Industry*, and the second held at the University of Padua in October 2014 on *Labor Politics in the Oil Industry: New Historical Perspectives*.

The editors are very grateful to all contributors to this volume as well as to the other speakers and the audience present at the June 2013 and the October 2014 conferences. The 2013 conference was part of a larger project at the International Institute of Social History, on the *Hundred Years Social History of Oil in the Iranian Oil Industry*. We would like to thank the Netherlands Organization of Scientific Research (NWO) for its generous support of the social history of oil grand project encompassing the June 2013 conference. We would also like to thank the Fund for Investment in Basic Research (FIRB) project *The Engines of Growth: for a Global History of the Conflict between Renewable, Fossil, and Fissile Energies (1972–1992)* of the Universities of Padua and Venice Ca' Foscari for their support in organizing the October 2014 conference.²

We hope the publication of this volume paves the way for others to explore and contribute to the analysis of the global social histories and experiences of labor in the oil industry.

NOTES

1. Peter Nore and Terisa Turner, eds., *Oil and Class Struggle* (New York: Zed Books, 1980) was probably one of the last major works dedicated to the comparative overview of the topic.
2. Fondo per gli Investimenti della Ricerca di Base (Fund for Investment in Basic Research, FIRB) project number RBF10JOTQ.

Disappearing the Workers: How Labor in the Oil Complex Has Been Made Invisible

Kaveh Ehsani

The long twentieth century has been rightly defined as the century of oil, and despite ongoing market upheavals and the awareness of the planetary ecological crisis caused by the expanding consumption of hydrocarbons, the worrying fact remains that there are no realistic alternatives to crude oil and natural gas on the immediate horizon. They are the most valuable and widely traded commodities in the global economy, and crude oil remains the single largest item of international exchange. Revenues from oil exports form a major contribution to the current budgets of at least 90 governments, while the procurement of petroleum and its numerous derivatives are major budgetary outlays for many other countries.¹ In addition to fueling transportation and power generation, oil and gas provide the building blocks for a bewildering array of essential consumer products that underlie the contemporary global industrial capitalist civilization of mass production and consumption.²

Although petroleum's material, economic, and strategic significance is simply staggering,³ it is all too often overlooked that the extraction and processing of oil and its byproducts rely on the labor and expertise of men and women working across the numerous sectors of this industry. While oil

K. Ehsani (✉)
DePaul University, Chicago, USA

and gas production and processing are capital intensive, labor and class relations within the industry have always been contentious due to their geopolitical importance, market pressure to minimize costs, and the technically challenging, hazardous, and harsh working conditions. The size of employment in oil and gas varies considerably depending on location and context. In the UK, 454,000 people were employed, directly and indirectly, in the oil and gas industry in 2014, before the collapse in oil prices reduced their number to 330,000. In the US 180,000 people work in “oil and gas extraction,” but once other related fields are taken into account, the figure is significantly higher.⁴ However, it is puzzling that, with a few notable exceptions, in recent decades the attention of historians and social scientists who investigate the social, spatial, political-economic, and environmental impact of oil has unmistakably shifted away from taking into consideration the agency and role of labor in oil.⁵ As a result, much of the present day scholarly work on the social impact of petroleum has gravitated toward framing “oil” as a form of landed property and asset owned by corporations or appropriated by governments, a questionable source of revenue (or rent), a strategic resource, or a forbidding tangle of technological infrastructures.

Two visual examples of this occlusion are the brilliant photographic books by the Canadian photographer Edward Burtynsky, and the edited volume by the American photographer Ed Kashi and English Geographer Michael Watts.⁶ Burtynsky offers a graphic record of the various global landscapes created by petroleum. His book is organized in sections that portray the visual impact of oil extraction (wells, drilling rigs, tar sands), processing (refineries and petrochemical plants), consumption (networks of highways, motorbike racing, shopping malls), and disposal (auto junkyards, ship graveyards where tankers are dismantled). What stands out in these portrayals is that human beings only appear in the latter two sections, as consumers, or as precarious and destitute Bangladeshi workers laboring to dismantle decaying ships amidst devastated landscapes of pollution and abject poverty. In these disturbing photographs, the production and processing of oil appear as the work of vast industrial machines, without any living human contribution.

The second book, by Kashi and Watts is subtitled “50 years of oil in the Niger Delta,” and is a haunting record of the social and environmental desolations caused by oil extraction among the diverse communities of this ecologically unique region of Nigeria. Outlining the scale of extractions and its consequences, Watts concludes that “oil has brought only misery,

violence, and a dying ecosystem” (43). While the book’s contributing Nigerian authors highlight various aspects of the experiences of local populations living in the shadow of oil installations and pipelines, but aside from a few photographs with minimal caption (52–61), the identity and roles played by those working to produce the cursed black gold remain unexplored or irrelevant to the narrative. In a rare passage, Watts refers to the organized kidnappings of expatriate oil workers by desperate local vigilante groups fighting against the national state and the multinationals (38), but otherwise the question of who works on the extraction and export of petroleum remains unclear. The relevant subtext here is the presence and active maintenance of systematic spatial and socio-cultural separation between those working on the extraction side of the industry (often offshore, and always barricaded within fortified enclaves), and the local communities who suffer the consequences of oil extraction, and are no longer willing to accept false promises of illusory wealth and fast modernization. How and why this separation and alienation has been constructed and maintained, and its relevance to the dirty politics of oil extraction in the Delta, beg to be acknowledged and further explored.⁷ This silence and oversight has characterized the general trend in the more recent analytic social science literature on oil.

WHY AND HOW HAVE LABOR STUDIES IN OIL BECOME IRRELEVANT? SOME PRELIMINARY REMARKS

This volume of essays places labor at the center of analysis of the “oil complex”⁸ rather than the more conventional “oil industry” or “oil sector,” both of which tend to exclude the wider web of social, spatial, cultural, and political economic relations that underline and make possible the global system of oil provision. “Oil industry” refers to the institutions and firms directly involved in procuring oil and its byproducts as a substance and commodity, while “oil sector” refers to the place of oil operations within a national economy, as a natural resource or a source of employment and revenue. Harriet Friedmann first coined the term “food complex” as a conceptual framework to help identify the social and political-economic networks that underlie the provision of strategic and industrialized food crops to the world system, such as the “wheat complex,” the “meat complex” and the “durable food complex.” For Friedmann, each complex has its own specific dynamics, defined by the crop and its numerous

physical and contextual particularities, even though all these crops are equally integral to the functioning of the world system. But more specifically, Friedmann's analytical framework took as self-evident that the analysis of various labor regimes (the productive work of women, households, peasants, wage laborers working for agribusinesses, independent farmers, etc.) is integral to understanding any of these global food complexes.

By contrast, raising concern over the impact of oil on the environment and society has not been accompanied by a similar interest in analyzing the labor and class relations attendant upon it. On the contrary, since the late 1970s we have witnessed a noticeable loss of interest in the topic, which nowadays seems to be considered as of little consequence, with a few noticeable exceptions (see footnote 5). The editors of this volume became aware of this conspicuous omission when we encountered more difficulty than we had anticipated in identifying and assembling historians and social scientists who work on the topic to participate in the conferences on which this collection of essays is based.⁹ In this introductory chapter, I aim to raise a number of questions regarding this apparent lack of interest in investigating the impact and role of labor in the oil complex.

The most conventional explanation is that the implementation of labor-saving technologies have led to a sharp decline in the number of people working across various sectors of the oil and gas industry. Oil and gas production and processing have always been capital intensive. Initial operations require heavy labor inputs for the building of extensive infrastructure (wells, offshore platforms, pipelines, pumping stations, work camps and the amenities needed for permanent living facilities, ports, access roads, airfields, refineries, etc.). Subsequent operations tend to require fewer and more specialized employees, highly trained to work in harsh, dangerous, and technically complex environments. Market forces and cut throat competition can bring further pressure on reducing labor costs. While several contributors to this volume take these technological considerations into account, the fact remains that demand for oil has expanded exponentially since the First World War, and with it the need for ever more complex range of workers and employees with various skills and expertise. The relative capital intensiveness of oil is not a sufficient explanation for the lack of scholarship on labor in the oil complex.

Another, related explanation emphasizes the increasing flexibilization of labor markets in the globalized economy, and the consequences of new international divisions of labor.¹⁰ Relentless casualization of labor markets, changes in stable and long-term labor contracts in favor of temporary jobs

and outsourcing, continued and ever increasing reliance on expatriate employees or migrant laborers moving between sites and unable to establish long-term local roots, increased pressures against collective bargaining and unionization, and the unraveling of the postwar welfare pact between corporations, states, and organized labor, have all acted as major factors in reducing the collective solidarities and the voice of labor across industrial sectors. While these drastic changes in labor markets have become commonplace in the neoliberal era, the effacing of labor in the oil industry cannot be explained by reference to these structural changes alone. In fact, most of these tactics have always been part of the repertoire of oil companies. After all, similar shifts have occurred in other manufacturing and extractive industries, but it is difficult to imagine entire scholarly fields dedicated to analyzing the social and political relations in auto industry, steel, or copper mining to ignore the place and role of miners or factory workers. Yet, time and again, we witness that the significance of labor is overlooked or even dismissed by scholars working on oil.

The spatial isolation of many oil and gas fields and installations has acted as another justification for overlooking the role of labor. Like many other mining operations, oil and gas fields are often located in remote areas or offshore, turning them into enclaves that appear to be disconnected from the rest of the national economy and society. The highly demanding and often harsh working and living conditions tend to attract outsiders, mainly migrants and expatriates. Maintaining this spatial isolation and encouraging internal stratification and fomenting racial, ethnic, and class friction among employees has long served as a strategy of labor control by oil companies. The combination of these factors can give the impression that those working in oil are a tiny labor aristocracy with no real attachment to affected local communities or the national society. However, as several chapters in this volume demonstrate, the built environment of oil and the labor practices of oil companies within enclaves have a significant impact on local communities and the wider national politics and social relationships, and ought to be integral to the analysis of the oil complex.¹¹

A notable example of the trend to overlook the role of labor and class relations within the oil complex is Timothy Mitchell's *Carbon Democracy*.¹² Mitchell provides important insights into how the modern industrial economy based on hydrocarbons has made possible the emergence of liberal democracy and capitalist mass consumer economy, but at the same time he dismisses the political agency of oil workers by pointing out that technology and automation replace workers once crude production has

come online. He further argues that the concentration and employment of oil workers and employees is drastically reduced once the initial building of the physical infrastructure of extraction and transportation is completed. This dispersal and redundancies in turn undermines the formation of lasting collective agency and the ability of oil workers to intervene effectively in the wider corporate, social, and political domains. By contrast, for Mitchell, the geography of coal extraction and distribution (at least in the twentieth century) allowed coal miners to exert an influence that is simply not matched by the spatial characteristics of the modern day oil complex.

This rather oversimplified argument could be true only if the geography of oil is reduced to upstream extraction (mainly fields, offshore platforms, and pipelines), to the exclusion of midstream and downstream industrial operations (refineries, petrochemicals, ports) that do require sustained concentrations of substantial and variegated workforces in dedicated built environments, over extended periods of time. In fact, oil production and refining have historically been significant sites of labor activism and agency, as demonstrated by a few examples in chronological order: The 1905 labor clashes in the Baku refinery and oil fields played a major role in the first Russian Revolution; the Bayonne-NJ refinery strikes of 1915–1916 involved thousands of workers, and forced the Standard Oil of New Jersey to develop a nonunion employee representation plan which served as a model for corporate welfare capitalist schemes of the 1920s; in 1938 the refinery workers of Aguila Tempico played a critical role in the nationalization of Mexican oil industry; the Venezuelan oil workers strike of 1936 set the stage for the passage of the country's landmark 1943 Hydrocarbon Law redefining the relationship between host governments and foreign oil firms; the 1945 strike in the US by 43,000 refinery workers across 20 states inspired a general wave of strikes by workers in other industries, but also provoked the drastic backlash of the 1947 anti union Taft-Hartley Act; the 1946 general strike of Iranian oil workers sparked the oil nationalization movement that was eventually crushed by the CIA led coup d'état of 1953; in 1979 another general strike of oil workers played a crucial role in the Iranian revolution; the defeat of the 2002–2003 Venezuelan oil workers' strike by the populist government of Hugo Chavez was followed by the firing of 18,000 oil workers, and disabled what was once a functioning oil company.

Thus, the conventional arguments about the irrelevance of labor and class relations in oil are neither convincing, nor historically accurate. As contributors to this volume show, the reasons behind the relative recent decline in the collective presence of oil workers in the larger political and

social life of oil producing nations cannot be presented as only the byproduct of the technological or logistic and geographic characteristics of the oil sector itself. Rather, it has been equally the consequence of policies and strategies adopted by corporate employers and national governments concerned with maximizing revenues and minimizing the potential of labor unrest to actively fragment, isolate, and reduce the possibilities of more radical and collective engagements by those working in the sector. In the next section I will use a more detailed case study of the Iranian oil industry to demonstrate these points.

OIL WORKERS IN POST-REVOLUTION IRAN: A CASE STUDY OF MAKING LABOR INVISIBLE

The case of developments in the Iranian oil industry after the 1979 revolution is instructive in presenting a more nuanced and historically substantiated analysis of the disappearing role of labor. Iranian oil workers have played a major role in Iran's turbulent political history since the turn of the twentieth century. In terms of ownership and control of oil and gas resources, the history of oil in Iran can be divided into three distinct periods: From 1908–1951 the Anglo Iranian Oil Company (AIOC, now BP) had monopoly control over Iranian oil; after the defeat of oil nationalization movement (1949–1953) a consortium of multinational oil companies took control, with the National Iranian Oil Company (NIOC) acting as the intermediary between the Consortium and Iranian employees. In 1973 Iran formally nationalized its oil industry, but international oil companies continued to maintain a high presence and exert considerable influence. This arrangement lasted until the 1979 revolution when a general strike of oil workers and employees led to the expulsion of foreign oil companies and the full nationalization of the oil industry.

As long as the oil sector was controlled by foreigners there were strong nationalist sentiments to force the AIOC and later the Consortium to train and employ more Iranian workers and cadres. On occasions, Iranian political elites and the professional middle classes voiced support for workers' demands for improvements in wages, living conditions, training, and workplace safety. But, throughout the twentieth century, it was the nationalist demand for the greater Iranianization of the workforce and especially of the management that was a recurring theme in negotiations with foreign oil companies, and not the modification of the repressive labor practices. In fact, whenever labor activists or political organizers

attempted to establish independent trade unions, foreign oil companies and Iranian political elites united in treating them as a subversive and communist inspired threat to national security during the Cold War.

Thus, labor issues were always part of the frictions and bargaining between foreign oil companies and the Iranian political elites, but only in a limited and paternalistic manner. Their aim was to make the oil industry more “Iranian,” without making any concessions to workers’ legal and political rights. As I will argue below, once the oil sector was completely nationalized in 1979, the postrevolutionary Khomeinist state began to treat oil workers’ demands for autonomous self-representation in much the same way as the previous regime and the international oil companies had, namely as a political threat to national security and the commercial profitability of the oil sector. The experience of labor in the Iranian oil industry indicates that oil workers appear as significant social actors when they engage in spectacular collective actions (such as the labor strikes of 1929, 1946, and 1979), but they become “invisible” to scholars, policymakers, and the general public, once these spectacular interventions during rare moments of political openness are passed. Without independent unions and representative associations, the voice of labor in oil is silenced and its presence is rendered invisible.¹³

The impact of oil workers and employees on modern Iranian society goes well beyond those scattered moments of labor protest. From its inception at the turn of the twentieth century, oil and its related fields have been one of the largest and most significant industrial sectors, with its highly trained workers and employees coveted by other branches of the economy, especially the booming sectors of energy, transportation, and manufacturing. They carried with them the work habits, technical skills, organizational experiences, and political cultures accumulated in the oil complex. Although labor militancy in Iran predated the emergence of the oil industry in 1908, oil workers nevertheless had moved to the forefront of the labor movement in the interwar years, and spearheaded the attempts to establish independent trade unions and workers’ representation.¹⁴

Oil cities and company towns, such as Abadan and Masjed Suleiman, originally started as isolated enclaves where thousands of destitute migrants lived and worked in abject poverty, in the vicinity of oil facilities and fortified living quarters of European expatriates. However, by the 1930s these enclaves had been transformed into major urban industrial cities. These were migrant cities, where living and working conditions were harsh, but economic opportunities attracted all sorts of people. In these cities, oil and refinery workers and their families intermingled with soldiers, housewives,

peasants and tribesmen, bureaucrats, expatriates, itinerant laborers, merchants, students, political activists, artists, prostitutes, smugglers, and people of various ethnic, regional, religious, and national backgrounds. As a result, the built environment of oil created a habitus where the everyday life of oil workers became embedded within the urban life of these booming oil towns,¹⁵ creating a political dynamic where labor struggles over work conditions often mingled and overlapped with urban protests over living conditions and collective demands for what Henri Lefebvre calls “the right to the city.”¹⁶ Thus, when in 1979 oil workers succeeded in playing a pivotal role against the monarchy by going on a mass strike, their eventual success relied heavily on these networks of urban solidarity.¹⁷

When internal strife in postrevolutionary Iran led to violent conflict, oil cities such as Abadan became important nodes of resistance against the attempts by Khomeinist forces to impose their hegemony on political rivals. But soon, internal clashes were compounded by international sanctions and the onset of the Iran–Iraq War (1980–1988). The Iraqi invasion led to the physical destruction of some of Iran’s main oil cities and undermined these nascent forms of urban and labor politics. During the war the refinery city of Abadan and the adjacent port city of Khoramshahr, both situated on the border with Iraq, were destroyed and their population of half a million were scattered as refugees. The war led to the consolidation of the Khomeinist new regime, which relied on a combination of nationalist-Islamist mobilization and repression. While some refinery workers maintained a nominal level of production in Abadan throughout the war, the forced dispersal of the urban population effectively ended the possibility of any alternative politics emerging there.

Throughout the war, state propaganda exalted the heroic role of oil workers and employees who had expelled the foreign multinationals, taken over the operations of the oil and gas industry, regulated and ensured that exports continued, and supplied the country with fuel and energy. The prevalent discourse of the 1980s, a decade defined by revolution and war, was to use oil (its revenues and its material possibilities) to ensure social justice, defined as more equitable distribution of goods and services. The oil and gas company towns built during this decade reflected this political attitude, exemplified by the newly built gas refinery town of Kangan designed with the explicit goal of integrating the local community into the urban amenities and labor market.¹⁸

The end of the war and the period of reconstruction witnessed a drastic shift in state priorities, from populist redistribution to emphasizing the

need for the commercial viability of all branches of the economy.¹⁹ Subsequently, since the 1990s the energy and oil and gas sectors have been subject to creeping privatization of midstream and downstream operations by dozens of subcontracting companies notorious for their predatory labor practices.²⁰ Having repressed independent trade unions, the state began to target workers' job security by gradually replacing permanent work contracts with temporary and increasingly precarious ones.²¹ The Majles (parliament) authorized significant changes in labor laws in the name of creating a more flexible and competitive labor market that did away with contractual protections and welfare benefits for workers and employees. As a result, private subcontractors can now dismiss their employees at will, avoid offering adequate wages and salaries, as well as the benefits and protections that are no longer mandated by law.²²

In 1997, there were approximately 150,000 employees in the Iranian oil and gas sector, although the exact numbers are unclear and treated as sensitive state secrets.²³ Subsequently, the Ministry of Petroleum announced that it had reduced the formal workforce by nearly 40%.²⁴ However, this figure was disputed by investigative journalists, critical scholars, and labor activists who revealed that actual employment in the sector, especially of blue collar workers, had continued to increase, although this new working class of oil now fell within the category of "invisible workers." Many were no longer formally registered so as not to appear on the records and balance sheets of the National Iranian Oil Company, its many subsidiaries, or the private subcontractors that had proliferated in the sector. These invisible workers included migrants recruited through subcontracting human resources companies, and bused in and out from distant provinces such as Sistan or Azarbaijan to work for long hours in extreme conditions, without any assurance of renewed employment; unpaid military conscripts; or undocumented refugees (mainly from Afghanistan), whose wages are well below the official minimum wage. Others are experienced and skilled workers who are now removed from the public-sector roster, hired by private subcontractors on short-term contracts, often off the books, without paying benefits, or seldom adhering to the watered down labor laws. Labor protests and strikes against these changes have been quickly and ruthlessly quashed. As a result, the period after the Iran–Iraq war has witnessed an effective erasure of the visible presence of oil workers in national politics and awareness.

Another major factor contributing to the erasure of the role of oil workers is the discursive shift that has taken place in public perceptions, and

within a number of influential academic fields. In recent years, an increasing number of economists, journalists, policymakers, and public intellectuals across the political spectrum have lined up to emphasize the negative impact of oil revenues on the economy and political institutions.²⁵ Effectively they agitate for the depoliticization of the oil sector, implying although not explicitly advocating, its full privatization as a solution. Given the history of oil in Iranian politics, and the symbolic significance of the role played in it by oil workers, this attempt to reduce the understanding of the oil complex to its purely commercial aspects is contraversial, and can be advocated only if the presence and significance of those laboring across the industry is overlooked, silenced, and presented as irrelevant.²⁶

The experiences of labor in post-revolution Iran indicate that rather than becoming insignificant, oil workers have lost the ability to make their presence felt, because they are actively made invisible. This development is the result of a number of interconnected maneuvers that include the repression of independent trade unions and political parties, and the drastic postwar shifts in state policies from populist redistribution to market rationality. It continued with the revamping of labor laws in favor of employers, and the implementation of structural changes within the public petroleum and gas sectors that paved the way for creeping privatization and the refusal by employers and the state to protect and defend workers' rights. In a highly politicized country where, until quite recently, oil workers had been lionized for their role during the revolution and the war, these controversial changes would not have been acceptable without the relentless interventions by economists, pro-market policymakers, and liberal journalists who shape public perceptions and the terms of debate by condemning oil revenues accruing to the public sector as a "resource curse," while systematically overlooking the agency and lived experiences of those laboring in the oil and gas sectors.

Oil Scholarship Without The Workers

Of course, each case study has its own story to tell, but similar trends can be detected elsewhere in how the role and agency of labor is not taken into consideration in other oil producing countries. For example, three major studies of Venezuelan oil demonstrate the intriguing contrasts in how scholars variously approach the social and political impact of oil, and the role of labor and oil workers in a major producer country.²⁷ Fernando Coronil's *Magical State* is among the most influential and insightful studies of the pivotal role played by oil in shaping Venezuela's modern political

culture and national identity. Oddly, Coronil discusses extensively the political impact and the cultural influence of labor relations in auto and tractor factories during Venezuela's oil fueled modernization, but not in the oil industry itself. In the end, it is oil as financial wealth and the disappointments of the disappearing mirage of fast modernization that become the focus of the book. Similarly, in his *Global Oil and the Nation State*, Bernard Mommer, a major figure in OPEC and Venezuela's oil policymaking circles, explicitly excludes the significance of the labor politics and the larger agency of oil workers in his analysis of the interplay of petroleum and national politics. By contrast, historian Miguel Tinker Salas' *Enduring Legacy* covers similar grounds as the previous two books, analyzing the impact of oil in shaping contemporary Venezuela, its political dynamics and the formation of its contemporary institutions and political culture. However, in contrast to Coronil and Mommer, Tinker Salas situates the historical role and experiences of oil workers at the center of his analysis by focusing, in part, on the built environments of oil (company towns, camps, enclaves), and the manners in which class, race, and cross-national tensions and interactions within the oil sector helped shape the contemporary Venezuelan society.

These contrasting examples show that the erasure of the analysis of labor studies in the more recent scholarship of oil studies is not so much reflection of changing reality and the irrelevance of the topic as is a choice made by scholars (deliberate or by default), and the prevailing trends within the academic scholarship of oil.²⁸ Ironically, critical scholarly attention to the wider impact of petroleum on society, nature, culture, and political economy has never been as intense and high as present. But, it is noticeable that this literature predominantly treats the oil sector as a black box that has a significant impact (often negative) on the world around it, yet excludes its internal tensions and dynamics from the story. Michael Watts, for example, provides an insightful analysis of "the oil complex" in Nigeria as a fraught interaction between international oil companies, local communities (mainly in the Niger Delta), and the federal state. It should be noted that Watts' reference to an "oil complex" is different from Friedmann's original conceptualization, which has labor relations situated at the center of her analysis. On other occasions, Watts includes NGOs, insurgents, and other prominent international and national actors in his prolific and insightful investigations of the devastating violence and corruption characterizing Nigeria's oil production. But who is actually producing the crude that is extracted and exported from Nigeria rarely if ever

figures in the narrative.²⁹ Likewise, the dispossession of indigenous groups and violent territorial expropriations by national states and multinational oil companies,³⁰ or the politics of property and the ensuing corruption in post-communist states,³¹ are among the major themes explored in some of the most important recent literature on oil's wider impact. But again, this literature fails to take into consideration the internal dynamics and the tensions and interactions between employer–employee in the production, processing, and eventual distribution of oil as part of this analysis.

Elsewhere, there has been an upsurge of critical interest in the cultural impact of hydrocarbons, mainly by anthropologists and cultural and literary theorists who populate the emerging field of “energy humanities.”³² These “petrocritics” are most concerned with how systems of energy provision have shaped public culture and the collective imaginaries of everyday life, yet they show surprising little interest in the people who work, or have worked in the oil and gas industry. Stephanie LeMenager’s *Living Oil*, a notable example of this literature, at one point even disdains the work of ethnographers to reconstruct the lives of oil field workers in Louisiana as a sorry effort “to offer an epic oil-made-by-hand, of petroleum extraction as craft and embodied memory.” Christopher Jones’ *Routes of Power*, a history of early fossil fuel development in the US, only mentions workers when discussing their muscular exertions in the service of the modern “mineral energy regime.” Workers in his book are rendered in a way that is little different from pack animals.³³ Trying to understand the complex experience of people working in oil and gas industry, it appears, would undercut the moral condemnation of oil as a social and environmental evil that is essential to petrocriticism. Critical geographers and social scientists have focused on the spatial (including property relations) and material characteristics of petroleum and hydrocarbons and the manners in which they have reshaped social institutions, political economies, and relations to the environment.³⁴ Marxist scholars have challenged the depoliticized framing of contemporary ecological crises and global warming as somehow being the responsibility of human beings in general (the Age of Anthropocene) rather than the consequence of the regulation of social life by capitalism and in the service of accumulation of capital.³⁵ They have also explored the connections between oil and the forms of politics and cultural production under capitalism and their consequences.³⁶ However, even for these Marxist scholars the class relations within the oil complex, and the agency and experiences of labor is not a focus of investigation.

This tendency is present even in studies that emphasize the impact of hydrocarbons on human labor relations. For example, a provocative book by the journalist and environmental activist Andrew Nikiforuk titled *Energy of Slaves*, argues that oil (and other fossil fuels) have had a revolutionary impact on human society by replacing the need for coerced forms of labor through providing unprecedented and cheap sources of energy, while paradoxically creating new forms of servitude and widespread inequality. Yet, Nikiforuk fails to take into consideration the labor of people who actually produce this new labor-saving energy, or how they are affected by the subsequent modern day forms of servitude.³⁷

This brings us to a fourth explanation for this decline of interest in the investigation of labor relations in oil, which is the discursive rise of various versions of the “resource curse” theory (rentier state, Dutch Disease, petrostate).³⁸ These theories argue that the abundance of hydrocarbons and mineral wealth paradoxically lead to malevolent forms of state intervention in the economy, which are disruptive, corrupt, and restrict economic growth. Various versions of this theory have proliferated since the 1970s, and indeed there seems to be enough empirical evidence of a connection between resource abundance and political and economic distortions. However, a number of important issues should be addressed, especially as it pertains to oil revenues as a resource curse plaguing producer countries.

At the risk of generalizing, it must be emphasized that the primary focus of this criticism has been on oil producing countries of the global south and post-communist states where natural resources are nationalized and under state control and ownership. The main objection has been directed against the public ownership of oil resources and the revenues accruing to governments from this ownership. When natural resources are privately owned by corporations, and the management of oil operations are conducted along commercial priorities alone there seems to be little appetite for similar criticism. This indicates a major shift of attitude from the mid twentieth century when multinational oil companies were the focus of criticism, and fledgling national oil companies in post-colonial states were seen as champions of national independence. The emergence of these theories coincided with a turn away from the postwar ideas of welfare states and the notion of government obligations to enhance and support economic and social rights. What came to be known as the neoliberal turn in mainstream disciplines of economics, international political economy, and comparative politics tend to frame any attempt at interfering or regulating free markets

(such as lobbying, tariffs, subsidies, even taxes, as well as bribes) as undermining the natural functioning and self-regulation of free markets.³⁹

The aim of this chapter has not been to offer a comprehensive literature review. Rather, I have attempted to analyze how policies, historical circumstances, and discursive maneuvers have reshaped the understanding of oil as a complex of social, spatial, and political relationships, and what effect they have had on the awareness and scholarly attention to labor studies. Without ignoring the very real problems of corruption, violence, environmental, and political-economic inequalities besetting many nation states that rely heavily on extractive industries, we must emphasize that the nature of the state itself cannot be determined by the source of its monetary revenues alone. Many oil producing states were authoritarian well before oil revenues became part of their political economies. On the other hand, despite the prevalence of clientelism in many oil-rich states, revenues from hydrocarbons have allowed the development of social infrastructures that are the material foundation for exercising citizenship. Norway has managed to better control the effects of oil capitalism because of the social history of labor struggles and organization, dating to anti-colonial struggles against its Scandinavian neighbors and Nazi occupiers. On the other hand, there are many examples of successful resource states, including the US, Canada, and Australia. Defining states as “rentier” or “petrostates,” claiming that “oil” and revenues accruing from its sale are a “curse” that lead to inevitable outcomes by corrupting politics and distorting civil societies into “petro-societies,” is both ahistorical and misleading if this branding is not accompanied by situating the changing political economy of oil within a rigorous analysis of specific social and political histories, and taking into account the geopolitical context in which national governments operate.⁴⁰

Such framing has often resulted in over-generalized accounts that ignore the need for actual rigorous historical analysis of the complex internal and transnational geopolitical dynamics of the oil industry, and their impact on society, institutions, and politics.⁴¹ In this rendering, it is no longer necessary to investigate the class relations at the heart of the oil complex, because oil is presented in purely financial and economic terms, and not as networks of extractive and industrial activities that are based on social coordination and contested relations of power. Resource curse theories overlook the fact that oil is a substance that becomes a commodity and turns into money only after it has been produced through the interplay of negotiated forms of labor, professional expertise, technical organization, and contested institutional and spatial arrangements. Instead, they reify oil

by presenting it simply as money or finance that flows smoothly into the coffers of national governments, without anyone working to produce it. These so-called “rents” benefit parasitic states whose only claim to this windfall is their monopoly ownership over natural resources. Subsequently, this rent is wasted through conspicuous consumption, or distributed by unaccountable political elites in exchange for political docility, or for maintaining the apparatus of state repression. The aim of this collection is to shift the focus back from this ahistorical economic determinism, onto how relations of labor are integral to the critical analysis of the oil complex.

CONCLUSION

James Ferguson has made the astute observation that in the neoliberal global order, extractive and industrial complexes have become disembedded from their social and geographic context.⁴² In the aftermath of decolonization newly independent states and their citizens viewed mines, refineries, oilfields, company towns, and ports as nodes of social and national development. In the era of nationalization and import substitution industrialization, commercial priorities were not paramount and the surplus produced in these enterprises tended to spill into interconnected (if uneven) social and spatial developments, creating cities, housing projects, industries, public educational institutions and social services. This approach was fueled by popular expectations, and generated its own forms of built environments and collective political cultures. By contrast, the neoliberal era of globalization has seen a turn toward the prioritization of commercial profitability, the free movement of capital, and the ever more unhindered integration of these enterprises into the world economy. As a result, national oil companies (and the governments in charge of them) have increasingly adopted the perspectives of multinational corporations, turning oil enterprises into enclaves that operate mainly according to commercial priorities and profit making for their investors. In Ferguson’s words, capital now leaps across national space and borders, linking isolated oil enclaves to corporate headquarters of multinational corporations in distant global cities, instead of flowing across the landscape, connecting localities to their surrounding region and populations.

What Ferguson fails to take into account is that many of the changes brought about by neoliberalism resemble the dynamics of pre-Depression and World War II *laissez faire* capitalism and colonial extractive capitalism.⁴³ The brief postwar interlude to which he refers, when extractive

industries became relatively embedded in more distributive social projects, was the outcome of popular mobilizations, including labor movements. Oil workers across the world played a prominent role in these social movements, as shown by the contributions in this volume.

The transformations of the neoliberal era have had a significant impact on those working in the oil sector. On the one hand, reliance on expatriate, migrant, temporary, and transient labor forces have increased to keep up with the insatiable demand for oil and gas. On the other hand, representation through independent labor unions and dedicated political parties have become more difficult due to the loss of permanent contractual positions, increasingly precarious labor markets, stacked labor laws, and the use of repressive measures by states and corporate employers. The discursive maneuvers that frame oil as purely a source of revenue (or disparagingly as unearned “rent”) have curtailed interest in looking beyond oil as mere finance. Under these circumstances, it is important for engaged scholars, activists, and intellectuals investigating the social and environmental impact of oil and hydrocarbons to reincorporate class and labor relations as integral and fundamental to understand the significance and dynamics of the global oil complex.

NOTES

1. See Dara O'Rourke and Sarah Connolly, “Just Oil? The Distribution of Environmental and Social Impacts of Oil Production and Consumption,” *Annual Review of Environment and Resources* 28, no. 1 (2003): 587–617; International Energy Agency (IEA), *World Energy Statistics* (annual), http://www.iea.org/bookshop/723-World_Energy_Statistics_2016.
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It should be noted that many people who work in oil and gas extraction in the US are not directly employed by oil companies, but by companies classified under “support activities for oil and gas operations,” providing services such as geophysical surveys, well services, drilling services, catering, supply and transportation, etc. Employment in this segment of the industry in January 2017 was 196,000. There were also 120,000 employed in “oil and gas pipeline construction,” and another 63,000 who work in “mining and oil and gas field machinery.” One could even count the 936,000 who work in “gasoline stations.” According to one oil industry propaganda website, the industry creates 9.8 million jobs in the US. See *What is Fracking*, available at <http://www.what-is-fracking.com/how-many-jobs-has-the-oil-and-natural-gas-industry-created/>, accessed January 20, 2017.

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PART I

The Political Life of Oil

The Zero-Sum Game of Early Oil Extraction Relations in Colombia: Workers, Tropical Oil, and the Police State, 1918–1938

Stefano Tijerina

INTRODUCTION

The history of early oil extraction operations in Colombia resonates with the experiences of other Latin American nations that found themselves in the middle of an imperial struggle for the control of the precious resource. In the early twentieth century, British and US multinational oil corporations, and to a lesser extent Canadian and Dutch companies, came face to face in Mexico, Colombia, Perú, Venezuela, Argentina, Bolivia, Ecuador, Brazil, and Chile over the control of oil extraction, export operations, and the development of domestic markets, forcing federal governments to reevaluate nationalist land use policies at the expense of local political interests.¹ The implementation and promotion of the Monroe Doctrine would ultimately leave the future of the Western Hemisphere in the hands of the USA, allowing their corporations to take over the control of the majority of the supply of oil in the region by the 1920s, as the outcomes of World War I forced British companies to abandon their interests in the Americas. Companies such as Standard Oil of New Jersey and Canadian subsidiaries such as the International Petroleum Corporation would reengineer the oil extraction business across the hemisphere, in order to implement

S. Tijerina (✉)
University of Maine, Orono, ME, USA

“self-contained solutions” that allowed them to circumvent the threats that emanated from the internationalization and radicalization of labor; solutions learned from the corporate experiences with oil labor strikes back in Canada and the USA in the early 1910s.² This historical research will center on the social and political dynamics that developed between Colombia’s civil society, workers, local politicians, national policymakers, foreign workers and managers, and corporate leadership, as oil extraction operations were set in motion during the early 1920s. The political life of oil workers will be at the forefront of this analysis, and particularly how they reacted to the “self-contained solutions” imported and implemented by Standard Oil of New Jersey through its Canadian subsidiary, Tropical Oil, and in compliance with the permissive and unregulated oil policy structures established by the Colombian government.

In Colombia, the beginning of the United Fruit Company’s banana export operations in 1899 marked the incremental growing presence of US business interests.³ This was further advanced by the implementation of vertical integration strategies that increased the presence of US interests, capitalizing on the pro-business policies and foreign business incentives designed and implemented by the administration of President Rafael Reyes (1904–1909). Nevertheless, the outreach of the United Fruit Company’s operation would not compare to the magnitude and impact of Standard Oil of New Jersey’s oil operation in Colombia. The vertical integration between Tropical Oil and Standard Oil of New Jersey’s Canadian subsidiary, Andian National Corporation, allowed the US company not only to monopolize the extraction but the transportation and final export of crude oil throughout the first half of the twentieth century.⁴

Before the emergence of nationalist policies that followed the Mexican Revolution, large oil corporations had experienced the privileges of assuming “de facto control of national resources” overseas.⁵ The incidents and policies that followed the 1910 revolution made it clear that free market competition in Latin American markets was not an effective business strategy, that there was a need for effective government-business cooperation in order to guarantee the defense of business interests abroad, that there was a need for preserving business-friendly governments in the region, that these governments should be willing to use the power of the state in order to control local workers and guarantee free market policies, and that domestic refining capabilities to satisfy local demand should be tightly regulated and controlled by the foreign business interest.

The most significant lesson of US corporations after the Mexico experience was that effective government-business cooperation had to be

constructed around the idea of national security. The policies implemented in the 1920s for the management of national reserves were instrumental in keeping prices high back home while keeping them low abroad. In the name of national security, US oil corporations agreed to control the production of their local supply in accordance with federal policies, compensating it with aggressive “investments in overseas areas.”⁶ By 1929, US direct investment in oil production zones across the Western Hemisphere had increased 250%, thanks to the government-business partnerships that set the tone in places like Colombia, Peru, and Venezuela.⁷ These partnerships would set the foundations for the further expansion of the definition of national security. In efforts to protect their investments in South America, and in order to avoid the mistakes made in Mexico, US oil corporations were able to define their investments and foreign capital as part of the idea of national security. From that point forward, any nationalist movement overseas or any physical threat to US foreign interests became a matter of national security. In the case of oil, labor upheaval became the biggest concern, emphasizing even more the importance of strong government-business partnerships across the region.

Founded in 1918, the National Association for the Protection of American Rights in Mexico (NAPARM) would become the institutional pillar for future government-business partnerships.⁸ The lobby organization funded exclusively by US oil companies initially pressured the US government to “take whatever steps were necessary” in order to protect US interests, and although they failed to stop the nationalization of the oil industry in Mexico, they did set the tone in South America. There was resonant support “for vigorous protection of American property rights against ‘radical’ policies” across the Washington circles, and the idea that any nationalist initiative represented an attack against US interests became the norm.⁹ The challenge was convincing foreign government to share the same vision.

The effectiveness of the initiative would be tested after the 1920s when US oil companies made their way into the region in order to implement their business strategy. This included transplanting Fordist ideas, capitalizing on the deregulated nature of labor and land use policies, drafting and designing petroleum policies to their liking, securing pro-business normative systems that benefited them as well as the political elites in power, and convincing the local government to favor foreign corporate interests over local worker’s rights. Government needed to buy in on the Fordist principles that breaking oil work into small deskilled tasks was good policy,

and that the minimization of labor costs at the expense of constructing a blue collar middle class while maximizing profits for the foreign company was good for nation building and long-term economic development.

Labor uprising remained the biggest threat to corporate interests in South America. The Bayonne strike that had taken place in New Jersey in July 1915 against Standard Oil of New Jersey had prepared management for similar events in South America.¹⁰ In efforts to solve the problems of labor dispute and mitigate the threats, dangers, and destruction experienced that summer, executives from the oil corporation opted to “devise a self-contained solution” that would not only distance workers from unionizing but also allow management to deal directly with workers’ issues, isolating them from the national and international debates that challenged capitalism.¹¹ These self-contained solutions would then be exported to South American oil fields in the 1920s as part of their business strategy.

Standard Oil of New Jersey and its Canadian subsidiaries transplanted the legislative, judicial, and extralegal means that they enjoyed back in the USA and instituted those same privileges in South America. The same autocratic management strategies that prevailed during the pre-Bayonne era would be replicated across the region, where they found the same “political will” among the local elites.

The frontier-type settlement characteristic of oil operations back in the USA would be replicated. Company towns were constructed with the same intentions of isolating workers from middle and upper management, and exposing them to the same miserable conditions to which American workers were once exposed. With the sweat and hard work of local grunt workers, oil company towns in South America would be constructed in order to create an artificial space between foreigners and locals, a distinctive separation that would also be evident in the worker-management relations that would evolve in places like Barrancabermeja, Colombia.¹²

In 1920, while Standard Oil of New Jersey was instituting an unprecedented labor contract that included no discrimination, collective bargaining via the management-worker internal dispute system, grievance resolution, increased wages, and an Eight-hour work day among other benefits, in Colombia they were working out a deal with the local government in order to replicate the inhumane labor conditions that had led to violent confrontations in places like New Jersey, Colorado, and Oklahoma.¹³ The effectiveness of the government-business partnership in Colombia would set the tone for further capitalist expansionists efforts across the region.

THE COLOMBIAN EXPERIMENT

By 1905, it was evident that there was crude oil beneath Colombian territory. Colombian policymakers had heard the rumors, *Caudillos* in the Santander region had seen the crude bubble effortlessly from beneath the earth, and local entrepreneurs were beginning to piece together the lucrative business opportunity behind this new industrial endeavor. British, American, and Canadian investors were also well aware of some of the deposits, but they held the right end of the stick; they had the capital, technology, market, and the “know how” behind the extraction, transportation, refining, and commercialization of oil. This advantage manifested itself during the initial oil concession negotiations. The De Mares concession would be awarded to Tropical Oil Company.¹⁴ Negotiations between the Canadian subsidiary and the Colombian government would unfold in the absence of a petroleum code, a modern land use policy, and labor regulation. The foreign corporation would eventually become instrumental in the definition and design of the Petroleum Code of 1919, the same legislation that would set the parameters for future oil policy in Colombia. By the early 1920s, an initial energy policy would begin its implementation stage, revealing the social and labor implications behind its biases. Opposition to the 1919 Code and the unfavorable labor conditions established by Tropical Oil would find an initial voice in labor organizing and soon after in the nationalist left. Conflict would unfold between Tropical Oil and the nationalist-labor coalition throughout the interwar years, forcing the national government to take a position on the issue. Government’s use of police force against civilians during the 1924, 1927, 1935, and 1938 labor strikes sent a clear message to the international community that Colombia was a defender of classic liberal ideals. As in the case of gold, petroleum business development and policy eventually favored the interests of foreign investors, limiting the capacity of Colombian nationals to capitalize on the commercialization of their national resources. Labor and populist leader Jorge Eliécer Gaitán would mount a strong opposition against the corporatist initiative, but this would come to an end with his assassination in 1948. From that moment onward Colombian oil workers were left politically defenseless against the transnational petroleum forces.

Tropical Oil encountered a force to reckon with, as Colombian nationalists mounted opposition against foreign interventionism that could result in greater loss of sovereignty. There was a strong anti-American sentiment in the air as a result of Washington’s previous participation in aiding Panamanians gain independence from Colombia in 1903, and more

particularly as the revenues from the Panamá Canal began to flow northward. Nationalists gained even greater ground as they found in urban labor groups an ally to oppose the internationalization of Colombia's economy, an issue that threatened the interests of native artisans and producers, and that allowed the left-leaning liberals to challenge the conservatives politically.¹⁵ The government's efforts to establish closer relations with the international system eventually resulted in the outbreak of labor strikes throughout 1918 and the violent incidents of March 1919, which resulted in the death of twenty protesters shot by Colombian soldiers, marking the beginning of the government's reprisal against workers.¹⁶ Liberal activist, Enrique Olaya Herrera, joined the voices of the numerous labor groups that criticized the government for its brutal use of force and the open door policy, calling for social revolution and government accountability.¹⁷

Petroleum policy, part of president Marco Fidel Suárez's vision of the internationalization and modernization of Colombia's economy, was negotiated under ideological pressure from the left.¹⁸ Activists, leftist liberals, and labor organizers had joined a global socialist movement against this new international political economy initiative that left power and control of national resources in the hands of private corporations.¹⁹ In February of 1919, Barcelona's industry was interrupted by labor strikes that targeted Canadian owned Riegos y Fuerzas del Ebro from which an eight-hour working day was gained.²⁰ In Canada, the Winnipeg General Strike of March 1919 had paved the way for labor reforms and in the USA numerous strikes unfolded from coast to coast, including the Great Steel Strike of September 1919 that followed the oil uprisings in Bayonne and Oklahoma.²¹

Colombian society had reached an ideological quagmire that transcended the traditional debates of Liberal and Conservative politics. The working class was beginning to carve out its own political space, together with the Socialist and Communist intellectuals that found an ally in the working class and the socially disenfranchised.²² Sectors of the Conservative Party had branched out into radical isolationists that opposed the internationalization of the national economy. Meanwhile, the Liberals had polarized into mainstream and radical factions.

The internationalization of Colombia's economy, favored by the political status quo, found opposition from both the Left and the radical Right. It was under these social and political realities that the design and development of oil policy unfolded. Such was the juxtaposition of these contradictory realities that the consolidation of the two largest labor unions was finalized while oil concession negotiations between Standard Oil of New Jersey and Marco

Fidel Suárez's administration unfolded. In 1919, the Colombian government would lead the nation into a new era of economic liberalism, awarding the subsidiary Tropical Oil control of subsoil resources in Colombia, and the response would come from below through the consolidation of the *Sindicato Central de Obreros* (Central Worker's Syndicate) and the *Confederación de Acción Social* (Social Action Confederation).²³

As part of the united voice, the *Asamblea Obrera* (Workers' Assembly) "announced their commitment to social, moral, and economic unity and their inclusion in the international workers' movement," as well as their rejection of traditional partisan politics.²⁴ This did not detract the Colombian government from awarding the De Mares concession to Tropical Oil. The stage was set, Colombian labor unions would play the role of checks and balances against the foreign corporation in the absence of government institutions or laws that forced the oil company to comply with issues of national sovereignty.

Marco Fidel Suárez's administration was forced to deal with the social and nationalist demands emanating from the left-leaning Liberals and the leftist syndicates, and an inherited nationalist comprehensive oil policy, while at the same time moving forward with the modernization of the state.²⁵ Moreover, it was forced to negotiate a totally different oil deal than the ones previously negotiated in Mexico, knowing well that the impact of the Mexican Revolution had resonated across the Western Hemisphere. The 1917 Mexican Constitution had become a model to emulate, something that did not favor the interests of Tropical Oil.²⁶

This pressure would be reflected in the Petroleum Law of 1919, which was regarded by foreign oil executives as "restrictive."²⁷ Contrary to the deals obtained by foreign oil companies in México prior to the Revolution, the De Mares deal was taxed at a higher rate and royalties were less generous.²⁸ Foreign corporations interested in exploiting oil in Colombia were now forced to give up some of their autonomy and face legislative limitations that forced them to be more strategic and efficient in their operation. Perhaps, the most problematic of the constraints imposed by the Marco Fidel Suárez administration was limiting concessions to twenty years, "and providing for state takeover at the end of the term...an innovation favorable to the national government and one that oilmen had not yet encountered on entry into a Latin American country."²⁹

It was evident that Colombian nationalists had learned from the lessons of the Mexican Revolution. In essence, the "free exploitation of oil lands" to which transnational corporations were accustomed ceased to exist, at

least on paper. The 1919 policy challenged the status quo of international petroleum businesses.

Nationalists and the working class responded positively to executive decree No. 1255 of June 20, 1919. The decree limited subsoil ownership exclusively to Colombian nationals, and directed newly created government institutions such as the Bureau of Statistics for Petroleum Mines and the Ministry of Public Works to regulate and manage oil exploration across the country.³⁰ Properly implemented, this decree could subject foreign corporations to Colombian laws, and would regulate their power and influence. The oil boom was hyped by the local media, and the increasing presence of foreign engineers and oil company executives led policymakers and Colombians in general to believe that oil was their ticket to growth, prosperity, and economic development. Colombian media echoed the reports of Canadian and American press reports that the high-grade oil found under the De Mares concession was, according to “trade men,” an industrial and extractive field of great promise waiting to be developed since “great quantities” of oil had been identified across the national territory.³¹ Oil was the gateway to modernity.

In December 1919, a watered-down deal from the one initially inherited from the Vicente Concha administration was signed between the Colombian government and Standard Oil of New Jersey, just a month after Congress had approved legislation that awarded Colombian workers the right to strike. The nationalist character of the initial decree, inspired by the Mexican Revolution, was declared unconstitutional by sectors of the Colombian Supreme Court, reversing the nationalization of the subsoil, and awarding Tropical Oil greater power. The Supreme Court would issue a statement that backed the corporatist idea that the development of an oil industry in the hands of foreign interests was healthy for the national economy and that it did not go against the interests of Colombian society.³²

The Supreme Court’s decision and its pro-foreign business statement represented a direct attack on the nationalists, socialists, and the working class. This legal decision set forth the confrontation between labor and foreign capital in Colombia.

Labor Realities at Barrancabermeja

The initiation of Tropical Oil’s operations in Colombia sheds light on the internal social conflict between agrarian and industrial societies, capitalist business leaders and traditional elites, federal and regional governments, modernization and tradition, secularism and the Catholic Church,

nationalism and internationalism, socialism and capitalism, and conservative paternalist structures that opposed the forces that wanted to break away from cultural, economic, political, economic and social isolationism. Colombian entrepreneurs, professionals, investors, pro laissez-faire politicians, and even sectors of the merchant class favored the internationalization of the economy and welcomed the establishment of foreign-controlled oil extraction operations in the name of modernity. Sectors of the industrial labor force also welcomed the presence of Tropical Oil because it represented jobs and possibly higher incomes. Even rural laborers from the Magdalena Medio region welcomed the new extractive operation because it represented job opportunities and indirect economic development for a region that had always been abandoned by the state.

Conservatives with nationalist and isolationist inclinations rejected the presence of Tropical Oil, paralleling the protectionist argument of Socialists, left-leaning Liberals, and labor unions across the country. Clearly, the country was divided over the issue, however that did not stop the Company from moving forward with their operation since they had the support of the government.

The voice of opposition had no resonance on the final decision to move forward with oil extraction and was silenced by the pressure mounted by oil executives and Colombian advocates interested in capitalizing from this new business initiative. The aftermath of the concession negotiations would reveal that there was enormous pressure from Colombia's business class to finalize negotiations in favor of Tropical Oil.³³

Foreign investors and engineers were not the only ones interested in the development of an oil industry. Domestic investors were also committed to the development of a business-friendly oil policy that would allow them to take risks on a proven lucrative business. Colombian entrepreneurs were well aware of the wealth-generating machine behind oil drilling in the USA and Mexico, and more recently in Peru, Argentina, Ecuador, and Venezuela.³⁴ Colombian investors had tried to develop the industry earlier but they lacked the capital and the will to establish joint ventures, plus they did not possess the "know how," industrial capacity, infrastructure, and technology to develop an industry from scratch. Instead, they opted to make money by buying and selling land concessions to foreign investors as in the case of Roberto de Mares and Virgilio de Barco, and in other instances large land owners and regional *Caudillos* opted to sell or rent their land or partnered with foreign investors.³⁵

An emerging professional and educated class was also in favor of the presence of the foreign company. In addition to the other contractual requisites previously mentioned, Tropical Oil was obliged to secure at least a quarter of the supervisory jobs for Colombian natives.³⁶ However, the educated professionals did not have the skill set demanded by the oil industry. Engineers, business, and personnel managers had to be imported from the USA and Canada. Some management jobs did favor native born such as Francisco Escobar, one of the three officers for Tropical Oil chosen by Standard Oil New Jersey in 1916.³⁷

Initially, Tropical Oil made an executive decision to import all skilled labor from the USA and Canada. Drillers, tool men, and other trained personnel were hired under very favorable 1-year contract that surpassed any of the labor benefits seen by workers in Colombia or even back in North America.³⁸ They were paid in dollars at the American pay scale of the time that averaged US\$1407 per year.³⁹ In addition, the foreign labor force received free health care, the comforts of the company towns constructed for foreigners, “plus transportation to and from the country under at least a one-year contract.”⁴⁰

Colombian workers were not protected by legislation, although they did have the legal right to strike under very strict parameters established under Law 21 of 1920.⁴¹ On paper, workers were also protected by contractual agreements within the concession that demanded that Tropical Oil offer hospital care and medical treatment to all workers.⁴² Clause six of the agreement obligated the company to implement oil extractive methods and other scientific and technical procedures that assured the efficiency of the operation and the protection of all workers against explosions and other industrial accidents.⁴³

Oil executives, with the help of local authorities, took advantage of workers' lack of organization and awareness of their legal rights, and refused to provide the technical training, benefits, and wage scales to which workers were entitled according to prevailing industry standards. These executives grasped the power and influence of paternalistic social relations in the Barrancabermeja region, and took full advantage of it. The majority of the workers in the region were not unionized and lacked industrial skills, as a result of the nation's low levels of industrialization and the natural geographical dispersion.⁴⁴

Local workers were indispensable because they could deal with the harsh conditions of the Barrancabermeja region, something that could be intolerable for imported unskilled workers.⁴⁵ The concession was located

560 km up the Magdalena River, and it lied in an area covered by “dense tropical growth” that lacked housing and transportation amenities.⁴⁶ Its riverbank location lacked infrastructure, limiting its access to dirt roads, ferry services, and the sporadic small engine airplane. The region was isolated and distant from urban centers, and constantly bombarded by oppressive heat, humidity, and an unending cloud of mosquitoes. Nevertheless, it would become the epicenter of oil production in Colombia.

Once work got started, it became evident that it was impossible to rely solely on local workers. By 1920, Colombia’s unskilled labor force was therefore in high demand, as the company began to clear the land and construct the infrastructure for subsequent drilling, management, and transportation of the final product.⁴⁷

Colombians were hired as “packers, canoe men, machete and ax men for cutting trails and building roads,” and other semi-skilled workers were hired as carpenters, blacksmiths, and later on as pipe layers and welders.⁴⁸ As in the case of Mexico, Venezuela and Peru, oil executives systematically demerited the local worker, just like they had done in Canada and the USA.⁴⁹ The locals were “uncivilized” and needed to be tamed; as indicated by company management, Colombian semi-skilled workers were “slow and required a great deal of supervision.”⁵⁰ The worker, as part of the untamed wilderness, needed to be civilized by the modern pioneer, the American civil engineer.⁵¹

Tropical Oil executives decided early on that unskilled workers would not be hired on an annual contract like their imported counterparts, but instead contracted on a piecework basis, since this was culturally acceptable under common labor agreements to compensate for the harsh local conditions.⁵² Nevertheless, salaries needed to be higher than the Colombian standards in order to attract workers to the harsh and inhospitable Barrancabermeja region. Higher than average national salaries for unskilled workers, recruitment of labor from multiple national regions, and the ability to market the myth of hope and prosperity behind the black gold, allowed the company to recruit plenty of labor and develop a disjointed workforce that would find it culturally difficult to organize collectively.⁵³ Moreover, the company took advantage of the “absence of laws and a judicial apparatus to resolve labor conflict” and the Conservative’s desire to please foreign investors.⁵⁴ The government’s permissiveness would become the foundation for the replication of the government-business partnerships that at one point had been established in the USA. Although less intimate then back home, the partnership would allow the company to abuse the Colombian worker at their discretion with no accountability whatsoever.

Medellín, the closest urban center, became one of the best options for the supply of unskilled and semi-skilled labor. The Colombian Caribbean coast was also a good recruiting center, particularly since the black population, according to the company, was resilient to the tropical conditions of Barrancabermeja.⁵⁵ Together with workers from the Santander region, they joined the local workforce that had settled in the area after the Thousand Days' War (1898–1902), attracted by the “availability of public or unclaimed arable land.”⁵⁶

The threat posed by the independent and radical *colonos* who had cleared, worked, and claimed the unsettled territory and who “viewed the encroachment by foreign or absentee investors with suspicion,” was watered down by the regionalization of the workforce, thus resolving any other threats to the interests of Tropical Oil.⁵⁷ But the key to the problem of labor organizing and anti-American sentiment relied on higher salaries.

In 1920, the company calculated that a common laborer should be paid an average of US\$0.60 per day, cargo handlers and other semi-skilled work was set at an average of US\$1.20 per day, and carpenters, blacksmiths, masons, and similar workmen were contracted at an average of US\$2.5 per day.⁵⁸ Initially, the company planned to offer a food allowance and housing, and in some instances transportation and lodging, as additional benefits added to the labor agreement in efforts to maintain a steady workforce and avoid turnovers among temporary workers.⁵⁹

These high wages that guaranteed worker's willingness “to go into the jungles of the interior and stay on the job for any length of time” while constantly exposed to malaria, were no match to the US\$3.85 to US\$4.00 per day being earned by the American and Canadian labor force which would eventually enjoy the comforts of a company town inside the Barrancabermeja complex, erected by the sweat and labor of the native worker.⁶⁰ Initial benefit plans were revised downwards once the ground was broken and a vast pool of workers was imported, as the managers quickly accommodated to the idiosyncrasy of the local worker.⁶¹

Tropical Oil's policies marked a clear-cut line between Colombian and foreign workers. Their interpretations of the social, cultural, and intellectual characteristics of local workers justified their labor policies, and the Colombian authorities stood behind these misconceptions. The government did explicitly demand middle management jobs for Colombians under oil legislation, but never any benefits or protections for unskilled or semi-skilled workers. The passiveness of the local and federal government

in matters of labor relations was a clear indication that the government favored corporate interests.

A 1921 report from the United States Department of Commerce indicated that even though it would be difficult “to collect a fairly efficient crew of natives for all classes of work necessary,” their “exacting” character generated a more manageable labor environment for Tropical Oil.⁶² Colombian workers, assumed the Department of Commerce, were passive and conformist. They did not demand livable wages, accommodations, meal plans, or any other type of benefits.⁶³ The company had entered the Colombian market with the idea of replicating the Fordist model of welfare capitalist strategies introduced by Clarence J. Hicks and William Mackenzie King, but they quickly moved away from the self-contained solutions, switching to an autocratic management model tainted by racism and social Darwinism.⁶⁴

It was assumed that feeding arrangements and accommodations only had to be provided to “foreign drill crews” since local workers were usually followed by their women who cooked for them; in fact, the peons, as they were referred to by the foreign personnel, were expected “to put up their own shelters, made of the ever-present bamboo poles and palm thatches.”⁶⁵ Why provide them with housing and food, if with a machete they could build their own dwelling in a couple of hours, and with cow hooves, corn, yucca, and plantain their wife could fix a meal.⁶⁶

Drilling camps and even the company town in Barrancabermeja would be segregated between foreigners and locals.⁶⁷ In South America, it was the corporative way of establishing a barrier between the civilized and uncivilized. By the mid 1920s, foreign drill crews lived together with managers and engineers, where some of the Colombian supervisory personnel also lived. Next to them, separated by a gated community, were the laborers and semi-skilled workers living in their bamboo and palm-thatched homes.

In the absence of labor legislation, Tropical Oil managers centered their efforts on the construction of infrastructure and facilities that suited the needs of foreign workers unaccustomed to the demands and hardships of tropical climates.⁶⁸ In addition to electrification, the construction of housing, entertainment facilities, food stores, and other amenities to which the foreign worker was used to, Tropical Oil established health facilities including the supply of a medical outfit and special equipment to combat malaria fevers, dysentery, and other tropical diseases in each of the camp sites.⁶⁹

There were, however, no preventive policies or safety measures implemented by the company in order to protect local workers from dangerous tasks and accidental risks. Some of the risky jobs included cleaning up the navigational routes of the Magdalena River in order to facilitate the transportation of heavy machinery and the mobilization of personnel, where the worker was exposed to malaria, the occasional venomous snake or deadly alligator.⁷⁰ The construction of roads and trails that connected the different oil wells was also dangerous, particularly since these connectors depended on the construction of bridges and embankments across steep mountainous terrain, with no protection or safety measures.⁷¹ Tearing down the jungle with ax and machete in order to facilitate the construction of camps and roads, and the actual exploration and exploitation oil, combined with the exposure to tropical diseases and typical explosions and other accidents of the time made it an unsafe and life-threatening environment.⁷²

There was no need for sanitation or safety policies because foreign workers were not exposed to these elements. Geologists, engineers, and managers were, for the most part, protected from the elements and unexposed to dangers, and the same could be said about foreign workers who were limited to exploration, drilling, wildcatting, and the construction of wooden towers.⁷³ Malaria prevention and treatment was also geared toward foreign personnel, while local workers were left to their own device. The discrimination against the Colombian worker was evident; they were denied sanitary services and facilities, protection against the elements, and safe labor conditions. Colombian workers were defenseless, carrying out their daily work in a region that initially lacked federal or regional state presence, completely at the mercy of the foreign employer.

Tropical Oil's unscrupulous labor policies even generated conflict between local labor and Caribbean and Antillean immigrant labor, because even these black workers were given better benefits and more advantageous labor packages.⁷⁴ *Yumecas*, as they were called, were considered reliant workers due to their experience in similar labor conditions, working with banana, sugar, and other commodities in the Caribbean.⁷⁵ They were hired full-time, and were offered housing, health, and other benefits that were denied to the Colombian worker.⁷⁶ In the majority of cases, they carried out the same tasks assigned to local workers but in some instances, based on their previous experience, they landed skilled jobs in carpentry and welding. They were part of the labor elite and they had the advantage of speaking English, thus allowing them to "easily and directly

communicate with foremen, manager, and engineers.”⁷⁷ In response to the labor problems generated from the workers’ complaints, managers even contemplated the idea of resolving the issue by replacing the thousands of Colombian workers with *Yumecas* but the initiative was rejected by Colombian authorities that wanted to avoid a greater inflow of blacks into the country.⁷⁸

Their segregationist policies included importing a Protestant minister from Johnston, Pennsylvania, to tailor to the spiritual needs of the foreign oil workers. Marking a clear-cut line between the company and the local Catholic culture, company executives recruited Reverend A.R. Sweet and his wife, offering him a lucrative deal that paralleled the salary of the “most skilled workmen in the outfit.”⁷⁹ Asked by local Pennsylvania media if he considered the new task “intriguing” and “unique,” Reverend Sweet responded that not only was the position a novelty but also the financial reward as well.⁸⁰ He explained that he would be working exclusively for the close to 500 Canadian and American workers established in Barrancabermeja.⁸¹ Reverend Sweet would receive for his spiritual services “an increase in salary of about 100% over his Johnston position,” in addition to “a fine home furnished free together with all the up-to-date equipment,” as well all paid relocation costs and “three months leave of absence with all expenses paid to the States after two years on the job.”⁸²

Managers and middle management enjoyed the comforts and luxuries, including access to top of the line amenities, all imported into the Barrancabermeja complex to fill the needs of American and Canadian workers. Reverend Sweet’s labor package was common among the foreign workers but uncommon for those residing in North America. Many incentives were offered by Tropical Oil to lure foreign workers. Electrical engineer Roy J. Jones benefited from all paid relocation costs and was able to bring his wife and three sons with him.⁸³ The company also covered the costs of relocation of the wife of superintendent of drilling Vern C. Petty; it seemed to be a common labor incentive among North American workers.⁸⁴ Professionals also received a completely furnished home located within the company town that included a club “and all the unusual amusements, a tennis court, an orchestra, and bungalows with the wealth of fruits and flowers that surpassed northern understanding.”⁸⁵

It was a privilege to be part of a foreign operation like the one managed by Tropical Oil as long as one was foreign. Locals could see the disparities and injustice with their own eyes, watching from their candle-lit somber

homes the electric lit homes of the foreigners resting and entertaining themselves inside their gated community.

While local workers were exposed to drinking untreated drinking water from the Magdalena River that was more like drinking “cyanide, from all the garbage, sewage, and corpses” dumped in it, foreigners enjoyed the benefits of a top of the line filtering plant that provided 16,000 gallons of pure water per day.⁸⁶ The thousands of “rough-necks” imported to work in oil camps faced chronic malnutrition, relentless heat and humidity, and “air so foul that it would rot metal and poison food,” while foreigners were nurtured with “fresh refrigerated vegetables and live cattle” regularly shipped to the company town by boat and twin-motored airplanes.⁸⁷ Outside the company town prostitution and alcoholism flourished while inside, Fordist discipline prevailed. No foreigner was allowed to “venture outside after dark without his mosquito netting,” all were to “lie down for half an hour before meals and sip hot tea,” all had to consume salt tablets, “alcohol was prohibited,” and so was “fraternizing with anyone outside camp.”⁸⁸

Foreigners had electricity, sanitation, hospitals, and good salaries, while the locals had no amenities; it was night and day, light and darkness. But even under these inhuman conditions, it was hard for workers to react because they were recruited from numerous geographical areas, they were not integrated to the local community, and had no leadership to rely on for guidance except for the Catholic church that interceded on behalf of Conservative interests, favoring the patriarchal system to social control. The rural labor force targeted by Tropical Oil recruiters were initially not in tune with their urban counterparts, they were marginalized, and for the most part disconnected from the ideas of labor organizing and social revolution.

This would slowly change throughout the 1920s as organized labor began to indoctrinate the Barrancabermeja workers on the virtues of Socialism and the rights to organize and demand workers’ rights. After 1921, when the Municipality of Barrancabermeja was created, thus legitimizing the presence of regional and federal authorities, local Tropical Oil workers also petitioned local authorities and the Catholic prefecture of Zapatoca, demanding the fulfillment of concessional labor clauses that required the company to provide all workers with hospital services, drugs, and medical treatment.⁸⁹

A year after breaking ground at Barrancabermeja, Colombian workers were already vociferous about their mistreatment. A 1921 press release spoke on behalf of the workers, indicating that they were dying because of

the company's carelessness, the abandonment of the Colombian worker, and the unlivable conditions to which they were exposed, including housing and sanitation.⁹⁰ The report indicated that close to 100 workers had died within a period of 3 months, that many others were suffering from tropical diseases, and that they were being denied medical attention and hospital space.⁹¹

The sick, and those suffering from work-related injuries were fired after the petition was issued. The hiring process of unskilled and semi-skilled labor became a rotating door. Tropical Oil's reliance on a private hiring agency to carry out labor recruitment removed accountability away from the company.⁹² Within the first five years of operation (1920–1925), more than 2000 workers passed through the Barrancabermeja complex and by 1928 that number had reached close to 5000 workers.⁹³ Tensions between local workers and the Tropical Oil executives escalated throughout the 1920s, as the workers' petitions and demands for greater government intervention failed to change the attitude of their employer. These outcomes inevitably led to the clandestine organization of La Unión Sindical Obrera (USO) in February 1923 and the first labor strike in October 1924.⁹⁴

The Reaction of Workers

For foreigners, Barrancabermeja was a dangerous and untamed jungle but for locals it was home and a place to make a living. Colombian workers saw a very different world than the foreigners; one of injustice, discrimination, and social marginalization. The oil strike of 1924 was focused on demands for improved housing, sanitation, health, safety, and to a lesser degree on increase in wages. It marked the beginning of a history of confrontations between labor and capital that continues to this day.⁹⁵ Government's use of force to oppress the Colombian workers revealed that for the state, foreign interests represented the national interest. This incident set the tone for the ongoing confrontation between the radical left and the capitalist government-business partnership in Barrancabermeja.

The marginalized workers found in Raúl Eduardo Mahecha the leadership and cohesion necessary to confront *La Troco* (Tropical Oil). Mahecha became the heart of the October 7, 1924 strike, however, his objective went beyond the advancement of worker's grievances, he was pushing for a greater cause, social revolution.⁹⁶ Mahecha was a revolutionary communist activist who had moved to the Barrancabermeja region to help organize the first industrial workers in Colombia. Through his

newspaper *Vanguardia Obrera* that he began to shed light on the abusive practices and injustices of *La Troco*. Soon after his arrival, he became the workers' lawyer and it was through him that oil workers initially reached a labor agreement with the company in January of that year.

Raúl Eduardo Mahecha had called the strike early in September after the company refused to fulfill any of the terms of the agreement. The Minister of Industry, General Diógenes A. Reyes, accepted the terms of the strike after workers had fully complied with the parameters stipulated by Law 21, 1920 regarding conciliation and arbitration.⁹⁷ The government requested the workers to extend the deadline of the strike while they negotiated with *La Troco*, but the company refused to negotiate. Minister Reyes reported on October 9 that the company did not comply with the agreement that included increase in salaries, improvement of meals and living conditions at camps, removal of abusive personnel, and more humane treatment of employees.⁹⁸ The government was forced to accept the peaceful strike in the hope that the company would fulfill its promises.

According to the company, the strike that began on October 7 when 300 rail and oil workers refused to work was illegal because it did not comply with the laws regarding labor strikes.⁹⁹ The company also indicated that oil workers were paid higher than the average Colombian wages (\$1.50 for 8.5 hours work per day) and their well being was being looked after by the company that was generous to the local workers; that the pact established between Minister Reyes and the labor union was merely a proposal that had never been accepted by the company, which dismissed it as political posturing and propaganda.¹⁰⁰ Since there was no pact and the labor union did not officially represent company workers, the foreman had no other choice but to fire them on the spot.

What followed later that afternoon was a demonstration lead by a Venezuelan organizer known as Villeta.¹⁰¹ About 150 men proceeded to the Infanta camp where they tampered with the water and electrical plants throughout the night.¹⁰² According to company executives, many of the workers were forced to join the strike the next morning including some who were physically abused by labor organizers, nevertheless more than six hundred men gathered in Barrancabermeja.¹⁰³

On October 10, at the request of the company, Minister Reyes called in troops from Medellín to preserve the peace.¹⁰⁴ Meanwhile, the company argued that the strike was illegal because it violated Law 21. Workers had violated the self-contained solutions imported by Standard Oil of New Jersey and implemented by the Conservative administration of Marco Fidel

Suárez, which allowed for arbitration but not strikes. Although the workers did approach the company with their notification of the strike through a three-member delegation as requested by the law, the company did not accept the legitimacy of the strike or the petition of the workers.¹⁰⁵ Moreover, the company denied that they had ever signed any type of agreement with the workers earlier that year and that the claims were all part of Minister Reyes' efforts to gain popularity and advance his political career.¹⁰⁶

By the time the military arrived, the workers had seized Barrancabermeja, organizing themselves in military fashion. Luckily for the foreigners in the company town, the police force, under the command of Coronel Evaristo Aldana, had established a perimeter between the strikers and the company town.¹⁰⁷ On October 11, the conflict escalated further. As the number of demonstrators increased to 3000, the police reported that they could no longer contain the situation. This prompted local officials to urge the company to accept a settlement.¹⁰⁸

The following morning the strikers impeded other workers from returning to work, blocking the streets and the entrance to the company.¹⁰⁹ Meanwhile, Geo C. Schweickert, representative of the company, pressured the authorities to buy some time while a tank and an additional 100 men arrived.¹¹⁰ That evening government representative Bernardo de J. Caicedo, working on behalf of Minister Reyes, told Schweickert that the strikers were willing to stop all violence if Mr. Schlesinger and Mr. Meek were fired; with no other choice *La Troco* accepted their resignation.¹¹¹ Nevertheless, the company refused to legitimize the strike by not meeting with the workers' representatives, escalating the conflict one more time. Minister Reyes, on his way to Barrancabermeja, demanded that the company negotiate but company executives refused, claiming this would set a bad precedent by depriving the company of resorting to forced arbitration, and trigger future uprisings.

Minister Reyes arrived in Barrancabermeja accompanied by Isidoro Molina, a representative of the Federación Laboral Central (Central Labor Federation), something that irritated the company executives. However, an agreement was reached between Mr. Lehan, manager of the company, and Minister Reyes.¹¹² The agreement included all the petitions that had been discussed earlier that year; better quantity and quality of food supplied to workers as supervised by a Colombian employee, the replacement of old housing camps, hospital beds and care for the lowest paid workers, the right to annual paid vacation, English and Spanish classes offered to

workers, and overtime paid at 60% higher than the normal wage.¹¹³ The company, on the other hand, did not accept an increase in wages until headquarters back in Canada reviewed the issue.¹¹⁴ They also demanded that all workers pass through the hiring company before returning to work and that all would be allowed to return to work unless there was legal evidence against them for disrupting the company's operation.¹¹⁵ The government complied with this petition, emphasizing that agitators and promoters of revolution and violence should be punished by the strictest laws because they represented the worse enemies of the workers, and if allowed to continue with the initiatives in Barrancabermeja, social chaos and clamor for social revolution could easily spread across the nation.¹¹⁶

Workers were not pleased with this outcome as hundreds had been dismissed as a result of its implementation. On October 17 they went back on strike, once again under the leadership of Raúl Eduardo Mahecha and two Venezuelan organizers, Reyes and Villate. Strikers confiscated supply trucks that were getting ready to distribute provisions to the different camps, forcing an emergency meeting between Caicedo, Cornel Evaristo Aldana, chief of the National Policy, and Captain García, chief of the Army Brigade that arrived from Medellín.¹¹⁷ The security officials decided that the use of force was necessary and made plans to arrest the agitators. Mahecha announced that if the government refused to protect the Colombian workers he and other leaders could be assassinated. Soon after he and six other workers were arrested, along with the Venezuelan leftists.¹¹⁸ Armed with guns, machetes, and sticks, workers confronted the authorities to impede the arrests but these were no match for the military and police authorities. The blood of civilians and workers was shed under the pretext that Mahecha and the 3000 men were marching toward a social revolution, threatening to damage company property, an act that could lead to dire consequences and that threatened national interests.¹¹⁹ The safeguard of Tropical Oil's interests was an issue of national security as indicated by Minister Reyes, and therefore more military equipment and personnel were sent to the region.¹²⁰

The company had finally convinced the authorities to escalate the military presence to contain the "criminal acts," accusing the police of being "inefficient" and the Mayor of being "useless."¹²¹ Meanwhile, the government took advantage of the opportunity to declare a propaganda war against socialist and other leftist movements. According to the national newspaper *El Tiempo*, 1924 had seen an escalating fervor for working class uprisings, signs of an alarming situation that needed to be dealt with before

it was too late.¹²² Company executives claimed that leaders like Mahecha who were using labor strikes to spark a social revolution needed to remain behind bars insisted the company executives.¹²³ Minister Reyes went as far as saying that the protection of Colombian workers was a humanitarian duty but “the defense of property and security of nationals and foreigners was a patriotic duty.”¹²⁴

Calm returned to Barrancabermeja on October 29 after the company agreed to revise their hiring policy and fulfill the other previously agreed demands. Ignacio Molina, delegate from the recently created Federación Obrera Colombiana, an anarcho-syndicalist organization, arrived in Barrancabermeja to make sure that the company complied with the agreements and to pressure for the release of Mahecha, “the tireless disciple, father of the workers.”¹²⁵ With the approval of the workers and the company, Molina established a Federación Obrera claims office in Barrancabermeja that would serve as an intermediary between workers and *La Troco*.¹²⁶ Mahecha and the others would remain behind bars in Medellín for the next six months, while close to 1200 would be fired and deported from the Barrancabermeja region.¹²⁷

Operations at Tropical Oil were back to normal by November 1, however, the clash between workers and foreign management would continue until the end of the concession in 1948.¹²⁸ More violent strikes would follow in 1927, 1935, 1938, and 1948, replicating the incidents and dynamics of October 1924. Tropical Oil continued to capitalize on the partnership they had established with Colombia’s political elites, converting their extractive operation into an issue of national security that demanded the protection of the State. The use of force and intimidation by Colombian authorities continued as well, while the radicalization of labor escalated in response to the inhumane treatment.

Contrary to the self-contained solutions implemented by Standard Oil of New Jersey after the Bayonne strike of 1915 and their desire to negotiate with workers in order to avoid further violence, in Colombia they continued to rely on the government’s use of force and the criminalization of labor movements. In Colombia as well as in other parts of South America, Standard Oil of New Jersey’s labor practices remained exploitative, inhumane, and tainted with racism and social Darwinism that was fueled by the shared values of the local political and economic elites that ruled these countries. In Barrancabermeja as in Bayonne, the “flagrant alliance of government officials and business interests that promoted profits at all costs

and used force to silence dissent,” eventually radicalized the worker who saw in violent confrontations the only way out from systemic oppression and marginalization.¹²⁹

This struggle continues today, but against Canadian and other transnational oil companies that have followed the footsteps of Standard Oil of New Jersey. Similar clashes between labor and foreign corporations have emerged over the years as the nation further opens its border for the extraction of gold, coal, precious metals, oil, and natural gas. The conflict escalated even more with the implementation of neoliberal policies that intensified the government-business partnership after the 1980s. Now, under the pressures of globalization, policies such as Plan Colombia, have completely legitimized this partnership while delegitimizing the voice of workers. Organized labor continues to be a threat for those in government today as they were almost one hundred years ago, but the struggle continues.

NOTES

1. For more on oil business expansion in South America see Mira Wilkins, “Multinational Oil Companies in South America in the 1920s: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, and Peru,” *The Business History Review* 48, no. 3 (1974): 415.
2. The idea of “self-contained solution” comes from a 1946 labor relations report published by Standard Oil Company of New Jersey; for more detail on the report, see Stuart Chase, *A Generation of Industrial Peace: Thirty Years of Labor Relations at Standard Oil Company (N.J.)* (New Jersey: Standard Oil Company, 1947), 14.
3. Marcelo Bucheli, *Bananas and Business: The United Fruit Company in Colombia, 1899–2000* (New York: New York University Press, 2005), 14.
4. Tropical Oil, in charged of the extraction part of the operation, was a subsidiary of Canada’s International Petroleum Corporation, a subsidiary of Standard Oil of New Jersey; Andian National Corporation, in charged of pipeline construction, was another subsidiary of International Petroleum Corporation. For more information on the operation of the Standard Oil of New Jersey subsidiaries in Colombia, see Stefano Tijerina, “A ‘Clear Cut Line’: Canada and Colombia, 1892–1979” (Ph.D. diss., University of Maine, 2011).
5. Jonathan C. Brown, “Why Foreign Oil Companies Shifted Their Production from Mexico to Venezuela During the 1920s,” *The American Historical Review* 90, no. 2 (1985): 362.

6. Stephen Kane, "Corporate Power and Foreign Policy: Efforts of American Oil Companies to Influence United States Relations With Mexico, 1921–1928," in *Antitrust and Regulation During World War I and the Republican Era, 1917–1932*, ed. Robert F. Himmelberg (New York & London: Garland Publishing, 1994), 288; for more on the expansionist efforts of US oil companies, see John A. Denovo, "The Movement for an Aggressive American Oil Policy Abroad, 1918–1920," *American Historical Review* 61, no. 4 (1956): 854–876.
7. US foreign direct investment in places like Colombia, Peru, and Venezuela had increased "from approximately \$400,000,000 to \$1,400,000,000 between 1919 and 1929." Kane, "Corporate Power and Foreign Policy," 288.
8. *Ibid.*, 291.
9. *Ibid.*, 292.
10. For more detail on the oil worker's strike, see "5000 Standard Men May Join in Strike," *New York Times*, July 20, 1915, 5.
11. Chase, *A Generation of Industrial Peace*, 14.
12. Described by American media in the 1920s as the uncivilized and jungle-like, Barrancabermeja is a city in Colombia, located on the shore of the Magdalena River, 114 km west of Bucaramanga in the department of Santander. Back in the 1920s, it was a village surrounded by dense tropical jungle with all its native fauna and flora; oil explorers described it as "weird and wild," infested with alligators, snakes, monkeys, and insects. "The Oil Jungles of Colombia, South America," *Titusville Herald*, May 19, 1920, 4; see also "Lima Man in World Wide War for Oil," *The Lima Sunday News*, June 21, 1925, 1.
13. Chase, *A Generation of Industrial Peace*, 20.
14. In order not to "antagonize" the anti-American sentiment in Colombia, Standard Oil of New Jersey strategically entered Colombia with a Canadian flag, taking advantage of that nation's "goodwill" in the international system. John D. Wirth, ed., *The Oil Business in Latin America: The Early Years* (Lincoln: University of Nebraska Press, 1985), 28.
15. David Sowell, *The Early Colombian Labor Movement: Artisan and Politics in Bogotá, 1832–1919* (Philadelphia: Temple University Press, 1992), 149.
16. Colombian artisans and tailor guilds protested on front of the presidential palace, arguing against a procurement decision carried out by Marco Fidel Suárez's administration. In essence, the government had opted to purchase new military uniforms from United States' manufacturers as part of the 100th Independence Day anniversary, and Colombian workers demanded that these were made domestically. For more detail, see Sowell, *The Early Colombian Labor Movement*, 149.
17. The incidents left 20 dead, 18 injured, and approximately 300 people arrested. Nullvalue, "Sastres iniciaron huelga," *El Tiempo*, November 13, 2010, Bogotá Section.

18. Marco Fidel Suárez was one of the first Conservative Party leaders to move away from regionalism and toward a more holistic and federalist approach to nation building. His administration was hostile toward labor unions and welcoming of the classic liberal agenda.
19. Colombia's socialist movements were more in tune with the ideas of the Industrial Workers of the World and very distant from the Wilsonian ideas of the International Labor Organization that emerged after World War I.
20. Joel Sans, "La huelga de La Canadencia: un ejemplo de lucha y Sindacalismo," *En Lucha: Anticapitalismo y Revolución*, June/July 2009, accessed May 1, 2013, <http://www.enlucha.org/site/?q=node/1438>.
21. For more on these strikes, see Nigel Anthony Sellars, *Oil, Wheat, and Wobblies: The Industrial Workers of the World in Oklahoma, 1905–1930* (Norman: University of Oklahoma Press, 1998); Stuart Chase, *A Generation of Industrial Peace*; Steven L. Danver, ed., *Revolts, Protests, Demonstrations, and Rebellions in American History: An Encyclopedia* (Santa Barbara: ABC-CLIO, LLC, 2011); and Jonathan H. Rees, *Representation and Rebellion: The Rockefeller Plan at the Colorado Fuel and Iron Company, 1914–1942* (Boulder: University Press of Colorado, 2010).
22. For more information on Colombia's early labor movements, see Sowell, *The Early Colombian Labor Movement*.
23. *Ibid.*, 150.
24. *Ibid.*, 146.
25. In 1918, the José Vicente Concha administration had taken advantage of the De Mares concession negotiations to develop a comprehensive oil policy that included higher than normal tariffs, royalties, time limits on concessions, and that declared "the subsoil the property of the state for both public and private lands;" Marcelo Bucheli, "Canadian Multinational Corporations and Economic Nationalism: The Case of Imperial Oil Limited in Alberta (Canada) and Colombia, 1899–1938," *Enterprises et Histoire* 54, no. 1 (2009): 76; see also Sowell, *The Early Colombian Labor Movement*, 150.
26. Labor groups were also inspired by the 1917 Soviet Revolution, the 1918 Córdoba student manifest in Argentina, the penetration of Marxist thought through local and foreign fiction, nationalist and anti imperialist movements. Jorge Enrique Elías Caro, "Influencias de la Revolución Mexicana en los Movimientos Obreros y Sindicales en Colombia (III Parte)," *Los Nuestramericanos: Su Historia*, November 2004, accessed May 9, 2013, <http://www.centrocultural.coop/blogs/nuestramericanos/etiquetas/movimientos-obreros/>.
27. Wirth, *The Oil Business in Latin America: The Early Years*, 28.

28. For more information on the De Mares concession, see; United States, Department of Commerce, Bureau of Foreign and Domestic Commerce, *Special Agents Series No. 206: Colombia, a Commercial and Industrial Handbook*, comp. P.L Bell, Trade Commissioner (Washington, DC: Government Printing Office, 1921), 135.
29. Wirth, *The Oil Business in Latin America: The Early Years*, 28.
30. Department of Commerce, *Special Agents Series No. 206*, 134.
31. "Tropical Oil's sale to Standard Oil is closed: Details of deal not fully disclosed, but consideration is placed at \$40,000,000," *Titusville Herald*, January 22, 1920, 8.
32. Caro, *Los Nuestramericanos*, <http://www.centrocultural.coop/blogs/nuestramericanos/etiquetas/movimientos-obreros/>. For more information on the modification of decree No. 1255 of 1919, see Jorge Villegas, *Petróleo, Oligarquía e Imperio* (Bogotá: Editorial Iris, 1975); *Petróleo Colombiano, Ganancia Gringa* (Bogotá: Ediciones Peñaloza, 1976).
33. For more information on the De Mares concession, see Marcelo Bucheli, "Negotiating under the Monroe Doctrine: Weetman Pearson and the Origins of U.S. Control of Colombian Oil," *Business History Review* 82, no. 3 (2008): 529–553.
34. For more on the lucrative South American oil operations, see Wilkins, "Multinational Oil Companies," 422–426.
35. Although centered on the Venezuelan experience, T.S. Stribling's novel *Strange Moon* describes the intricacies of local land owners, peasant farmers, and the representatives of the foreign oil corporations as they dealt with the corrupt legal system, land use policies, and the local bureaucracy. The fictional story speaks to the realities in other South American countries, including Colombia; for more information, see T.S. Stribling, *Strange Moon* (New York: Doubleday, Doran and Company, 1929).
36. Wirth, *The Oil Business in Latin America: The Early Years*, 28.
37. The other officers were M.C. Treat, F.W. Crawford, M.L. Benedam, and J. S. Weller. Mr. C. Trees was president, George W. Crawford was vice president, and H.C. Reeser was the treasurer. "Tropical Oil Co. has taken big territory," *The Titusville Herald*, June 10, 1916, 7.
38. A few Colombians were hired as skilled labor, particularly "donkey-boiler men" that had already been trained in the river steamer service that operated along the Magdalena River by British and American interests. Department of Commerce, *Special Agents Series No. 206*, 136.
39. *Ibid.*, 136. In 1915, the average oil worker was earning between \$2.50 and \$4.00 dollars per day's work which was less than the money offered for working in places like Colombia; for more detail, see Sellars, *Oil, Wheat*,

- and Wobblies*, 73. For more information on US wages in the 1920s, see *The Value of a Dollar* (New York: Grey House Publishing, 2009), 150.
40. Department of Commerce, *Special Agents Series No. 206*, 136.
 41. The legislation on conciliation and arbitration required the submission of an official memorandum to the Ministry of Industry, indicating the grievances of petitions, the worker's intentions, and the official date of the planned strike. Such policies eliminated the element of surprise from the strike, one of the few strengths held by the workers. "Huelga de Barrancabermeja: Situación de Anoche," *El Tiempo*, October 9, 1924, 3.
 42. Jairo E. Luna-García, "La salud de los trabajadores y la Tropical Oil Company: Barrancabermeja, 1916–1940," *Revista Salud Pública* 12, no. 1 (2010): 147.
 43. *Ibid.*, 148.
 44. For more on the theory of Colombia's economic development and the impact of geography and dispersion, see Frank Safford and Marco Palacios, *Colombia: Fragmented Land, Divided Society* (New York: Oxford University Press, 2002).
 45. Department of Commerce, *Special Agents Series No. 206*, 136.
 46. Wirth, *The Oil Business in Latin America: The Early Years*, 29.
 47. *Ibid.*, 29.
 48. Department of Commerce, *Special Agents Series No. 206*, 136.
 49. Myrna Santiago's *The Ecology of Oil* describes this same reality in the establishment of the oil extractive industry in Huasteca, Mexico; for more information, see Myrna Santiago, *The Ecology of Oil: Environment, Labor, and the Mexican Revolution, 1900–1938* (New York: Cambridge University Press, 2006). A similar case of social Darwinism is described by B.S. McBeth's research on the early development of oil extraction operations in Venezuela, including the abuse of local workers; for more information, see B.S. McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela, 1908–1935* (New York: Cambridge University Press, 1983).
 50. Department of Commerce, *Special Agents Series No. 206*, 136. Another example of the racism ingrained in the minds of American and Canadian managers is evident in the article "Our New Pioneers in the Wilderness" that talks about the civilizing mission of American civil engineers across the world; for more detail, see C.P.P., "Our New Pioneers in the Wilderness: As Their Ancestor Tames this Continent, so American Engineers Today are Conquering Strange Lands," *New York Times*, December 11, 1927, 7. Santiago in *The Ecology of Oil* also points out this same reality in Mexico, where locals were seen as "less-developed" and "weaker;" see Santiago, *The Ecology of Oil*, 164.
 51. Santiago, 7.
 52. Department of Commerce, *Special Agents Series No. 206*, 136.

53. Nigel Sellars describes how the marketing of high wages and new opportunities attracted a pool of imported oil labor force during the oil boom in Oklahoma during the early 1900s, Myrna Santiago describes how migration of labor became “essential to the enterprise,” and B.S. McBeth also illustrates how high wages attracted black workers from the West Indies and local immigrant workers that abandoned rural work in exchange for higher wages; for more detail, see Sellars, *Oil, Wheat, and Wobblies*, 57–77; Santiago, *The Ecology of Oil*, 148–205; and McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela*, 131–143.
54. Frank Safford and Marco Palacios, *Colombia: Fragmented Land, Divided Society* (New York: Oxford University Press, 2002), 280.
55. Renán Vega Cantor, “90 años después, 10 de febrero de 1923: Fundación de la Unión Sindical Obrera (USO),” in *Petróleo y protesta obrera. La USO y los trabajadores petroleros en Colombia*, ed. Renán Vega, Angela Núñez, and Alexander Pereira (Bogotá: Ediciones Aury Sará, 2009), 4.
56. Luis van Isschot, “The Social Origins of Human Rights: Popular Responses to Political Violence in a Colombian Oil Refinery Town, 1919–1993” (Ph.D. diss., McGill University, 2010), 44.
57. *Ibid.*, 45.
58. Department of Commerce, *Special Agents Series No. 206*, 136.
59. *Ibid.*
60. All wages referred to 1920 US dollars; *Ibid.*
61. The higher than average wage strategy implemented by oil corporations followed the same pattern from Canada all the way to Argentina. For more on the impact of oil wages, see Sellars, *Oil, Wheat, and Wobblies*, 57–77; Santiago, *The Ecology of Oil*, 148–205; and McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela*, 131–143.
62. Department of Commerce, *Special Agents Series No. 206*, 137.
63. *Ibid.*
64. William Mackenzie King, who would later become Prime Minister of Canada (1935–1948), was hired by John D. Rockefeller as a labor expert responsible for the investigation of the Ludlow Massacre in Colorado. King and Clarence J. Hicks would develop the Colorado Industrial Plan based on King’s *Industry and Humanity*, for more information, see Danver, ed. *Revolt, Protests, Demonstrations and Rebellions in American History*, 710.
65. Department of Commerce, *Special Agents Series No. 206*, 137.
66. *Ibid.*
67. The development of company towns became a common management strategy among oil corporations around the world, for more on the dynamics of company towns, see Sellars, *Oil, Wheat, and Wobblies*,

- Santiago, *The Ecology of Oil*, and McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela*.
68. Construction included port infrastructure and roads, as well as the transformation of the landscape, removing the jungle in order to facilitate the edification of camps, shops, warehouses, pipeline, railway lines, and infrastructure facilities. Jairo E. Luna-García, “La salud de los trabajadores y la Tropical Oil Company: Barrancabermeja, 1916–1940,” *Revista Salud Pública* 12, no. 1 (2010): 147.
 69. Department of Commerce, *Special Agents Series No. 206*, 137.
 70. An article describes the region as infested with snakes, tigers, and alligators, where the 8-year-old son of an American worker in Barrancabermeja had been “swallowed by an alligator,” while playing next to the Magdalena River. “The Oil Jungles of Colombia,” 4.
 71. Luna-García, “La salud de los trabajadores y la Tropical Oil Company,” 147.
 72. Santiago describes in *The Ecology of Oil* similar situations as Barrancabermeja, where workers were not only victims of racial segregation but also victims of an unsafe environment, where “workers and their families lived in toxic neighborhoods, exposed not only to fire but also to dangerous emissions and effluents from the petroleum plants next door.” Santiago, *The Ecology of Oil*, 6–7. B.S. McBeth also makes reference to the constant fires at Lake Maracaibo caused by oil spill overs, the contamination of fresh water that lead to the spread of diseases among the local communities, and the foreign company’s constant refusal to pay damages to workers “maimed in industrial accidents or to dependents of those killed in similar circumstances.” McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela*, 141–143.
 73. Luna-García, “La salud de los trabajadores y la Tropical Oil Company,” 147.
 74. Cantor, “90 años después, 10 de febrero de 1923,” 2.
 75. *Ibid.*, 2.
 76. *Ibid.*, 3.
 77. *Ibid.*
 78. *Ibid.*
 79. Special to Tribune, “Johnstown Pastor to be Chaplain of Tropical Oil Firm,” *The Tribune Republican*, January 13, 1920, 2.
 80. *Ibid.*, 2.
 81. *Ibid.*
 82. *Ibid.*

83. "Roy Jones Plans to go to South American Job," *Joplin Globe*, July 24, 1923, 3.
84. "Leaves for New Home," *The Daily Ardmoreite*, April 5, 1923, 5.
85. "Railroad through Colombian Jungle to Obtain Oil," *The Bradford Era*, November 15, 1923, 7.
86. "Battling the Jungles for Oil," *Popular Mechanics Magazine*, May 1941, 734.
87. *Ibid.*, 732–734.
88. *Ibid.*, 735. B.S. McBeth in *Juan Vicente Gomez and the Oil Companies in Venezuela* mentions a different scenario at the oil towns where social conflicts developed as locals and foreigners clashed over disorderly and drunken behavior. McBeth, *Juan Vicente Gomez and the Oil Companies in Venezuela*, 141.
89. Luna-García, "La salud de los trabajadores y la Tropical Oil Company" 147.
90. *Ibid.*
91. *Ibid.* While hundreds of local lives were lost in the early stages of the pipeline construction, only one foreign life was sacrificed, considering that each foreign worker represented an investment of \$700 to the company. "Battling the Jungles for Oil," 121A.
92. Workers at Tropical Oil were hired through an in-house contractor, removing all accountability from the oil company. The use of hiring agencies continues to be an effective management strategy today.
93. Luna-García, "La salud de los trabajadores y la Tropical Oil Company" 149.
94. Cantor, "90 años después, 10 de febrero de 1923," 13.
95. In April 2014, USO led yet another strike against ECOPETROL, the national oil company that took over the operations of Tropical Oil after 1948 as agreed in the DeMares concession agreement.
96. "La Grave Situación en Barrancabermeja," *El Tiempo*, October 17, 1924, 1.
97. The law limited worker's ability to spontaneously strike, forcing them to procedures of arbitration that assigned the state as the mediator between workers and private interests. It was a legal way to remove the power from the worker while at the same time providing them the space to negotiate with the private actor.
98. "Huelga de Barrancabermeja: Situación de Anoche," *El Tiempo*, October 9, 1924, 2.
99. Universidad Nacional de Colombia. "Informe de un Funcionario Norteamericano Sobre la Huelga de Barrancabermeja 1924," *Bdigital*

- Portal de Revista UN*, 2014, accessed April 10, 2015, <http://www.revistas.unal.edu.co/index.php/achsc/article/view/36156>.
100. Ibid.
 101. “Huelga de Barrancabermeja,” 2.
 102. Ibid.
 103. Ibid.
 104. “Ejercito para Barranca,” *El Tiempo*, October 11, 1924, 3.
 105. Law 21 demanded mandatory arbitration for corporations in the areas of transportation (railway and maritime), public aqueducts, public energy, public trash collection, and mining. The company claimed that they were covered under mining and therefore any strike was illegal; for more information, see Universidad Nacional de Colombia. “Informe de un Funcionario Norteamericano Sobre la Huelga de Barrancabermeja 1924,” *Digital Portal de Revista UN*, 2014, accessed April 10, 2015, <http://www.revistas.unal.edu.co/index.php/achsc/article/view/36156>.
 106. Ibid.
 107. Ibid.
 108. “La Situación en Barrancabermeja,” *El Tiempo*, October 15, 1924, 8.
 109. Mauricio Archila Neira and Margarita González, “Informe de un funcionario norteamericano sobre la huelga de Barrancabermeja 1924,” *Anuario Colombiano de Historia Social y de la Cultura*, no. 13–14 (1986): 319–333.
 110. Ibid.
 111. Ibid.
 112. Ibid.
 113. “La Situación en Barrancabermeja,” 3.
 114. Archila Neira and González, “Informe de un funcionario norteamericano sobre la huelga de Barrancabermeja 1924.”
 115. Ibid.
 116. “La Situación en Barrancabermeja,” 3.
 117. “La Grave Situación en Barrancabermeja,” *El Tiempo*, October 17, 1924, 1.
 118. Ibid.
 119. Ibid.
 120. Ibid.
 121. Archila Neira and González, “Informe de un funcionario norteamericano sobre la huelga de Barrancabermeja 1924.”
 122. “Liberalismo y Socialismo,” *El Tiempo*, October 24, 1924, 1.
 123. Archila Neira and González, “Informe de un funcionario norteamericano sobre la huelga de Barrancabermeja 1924.”
 124. “Liberalismo y Socialismo,” 1.
 125. “Se Excita a los Obreros de Barranca a Continuar la Huelga,” *El Tiempo*, October 26, 1924, 3.
 126. Ibid.

127. Archila Neira and González, “Informe de un funcionario norteamericano sobre la huelga de Barrancabermeja 1924.”
128. Another strike would be set in motion by the workers at *La Troco* in order to pressure both government and the foreign corporation to comply with the contract. From that point forward, the concession was nationalized, yet the conflict remained intact, this time between workers and government.
129. Sellars, *Oil, Wheat, and Wobblies*, 8–9.

Fluid History: Oil Workers and the Iranian Revolution

Peyman Jafari

INTRODUCTION

“We are melting away,” laments the Shah (Mohammad Reza Pahlavi) on December 26, 1978 in a phone tap of a conversation with his adviser and former Prime Minister Ali Amini.¹ Although mass demonstrations were causing havoc at the time, his desperation was caused by the strikes in the oil industry. Less than 7 weeks later, the monarchy was gone. Although there are other historical examples of mass mobilizations among oil workers, the oil strikes from September 1978 to February 1979 in Iran are, to my knowledge, the only case that heavily determined the outcome of a revolution. Therefore, this episode provides a particularly interesting opportunity to explore the politics of labor in the oil industry in two moves. One puts *politics* back into the study of labor in general and into the study of labor in the oil industry in particular, as it has been often left out after the “cultural turn” in labor studies. The second refers to the importance of putting *labor* back into politics, as most political science studies have

P. Jafari (✉)
Leiden University, Leiden, The Netherlands

P. Jafari
University of Amsterdam, Amsterdam, The Netherlands

tended to attribute the mediation between oil and national politics solely to the nexus between finance and elites, ignoring the agency of labor.

The first part of the chapter provides a brief summary of the development of the oil strikes and demonstrates their paralyzing impact on the state apparatus. The second part argues that the oil strikes were a key link in the developments that created or authorized revolutionary centers of power that emerged in parallel to the existing state in early 1979, a situation known as “dual power.” A detailed history of this episode is provided in order to explain the mechanisms through which the forces around Ayatollah Khomeini took control of the oil strikes, a strategic move that allowed them to steer the revolutionary movement and determine its outcome. This latter aspect has received much less attention in the historiography of the Iranian revolution, which has focused more on its causes than its dynamics. Moreover, the outcome of the revolution is often discussed in mere ideological terms—the resonance of Khomeini’s discourse through Shi’a symbolism²—and focuses on the “consolidation” period following the fall of the monarchy in February 1979. Arguing that the political strategies of the preceding months and the role of the oil strikes in the emergence of dual power were crucial, this chapter makes a novel contribution to the historiography of the Iranian revolution.

OIL STRIKES: FUELING THE REVOLUTION

On the eve of the revolution, the oil industry was organized around the National Iranian Oil Company (NIOC) and its subsidiaries, the Oil Services Company of Iran (OSCO) owned by foreign companies, and a number of private subcontractors. The oil industry employed relatively few workers compared to its production of five-to-six million barrels a day, but their numbers were still considerable according to Iran’s Statistical Centre. Having dropped to about 40,000 by 1970, the number of employees increased to 67,000 in early 1978 as Iran expanded its oil facilities and increased production. This number rose to almost 80,000 when we added the roughly 12,000 employees of the distribution organization of the oil industry and the few hundred employees of its Cooperative Consumptive Organization of the oil industry.³ Moreover, the oil industry had dozens of subcontractors that employed at least the same number. Its distribution organization alone employed about 50,000 people.⁴ Thus, around 2.3% of the 3.54 million Iranian workers—4.5% when those working for subcontractors are included—worked for the oil industry.⁵ A final point to

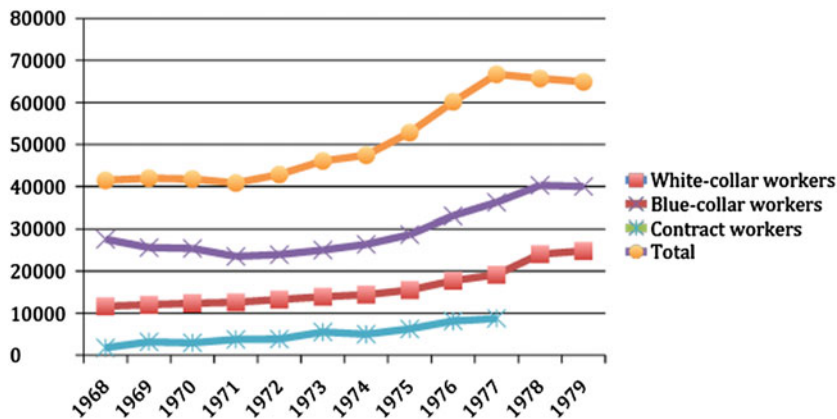


Fig. 1 Number of workers in the Iranian oil industry. *Source* Statistical Centre of Iran (SCI), *Statistical Yearbook 1969–1982* (Tehran: SCI). Online version, retrievable from <http://www.amar.org.ir/> *سالنامه آماری*. *Note* the total number includes foreign white-collar workers. The number of white-collar and blue-collar workers in 1978 and 1979 includes contract workers.

consider is that most of the oil workers were concentrated in the south-western part of Iran, and in a number of refineries in the rest of the country (Kermanshah, Tehran, Shiraz, and Tabriz) (Fig. 1).

When the first oil strikes took place in September 1978, a revolutionary movement had already developed since January, mainly in the form of mass demonstrations. By June, however, the demonstrations had receded, and when they resurfaced in late August during the holy month of Ramadan, they were violently repressed on Bloody Friday (September 8, 1978). By then, it looked as if the regime would survive the political crisis, as it had on other occasions. As late as September 28, the prognosis of the American Defence Intelligence Agency was that the Shah “is expected to remain actively in power over the next ten years.”⁶ In the next 2 months, however, the revolutionary movement acquired a qualitatively different character as protests spread to workplaces and mass strikes erupted in the major economic sectors.

In the oil industry, the strikes developed in four phases. The first strikes started on September 8 in the Tehran Refinery and spread to other refineries and the oil fields of Ahwaz, Gachsaran, and Aqajari. This prompted the SAVAK, the Shah’s secret police, to report that the oil strikes “have no precedent in recent years; the strikes must have developed among

workers in the national oil company very quickly.”⁷ By early October 1978, however, the oil strikes had subsided after officials made concessions. However, a second wave started when oil workers in Abadan staged a sit-in on October 16. Two days later, the white-collar workers (*karmands*) in the oil company offices of Ahwaz started a strike that lasted for 33 days. At the same time, the blue-collar workers (*kargars*) in the oil fields near Ahwaz went on strike as well. These strikes, which were mainly over economic issues like housing and wages, faded in the last 2 weeks of November, but in the meantime, oil workers had become better organized.

At Abadan Refinery, the blue-collar workers formed a 13-member strike committee (*komiteh-ye hamahangi va nezarat*) in late October and the demands politicized.⁸ They were in contact with the strike committee of the white-collar workers in Ahwaz, the Association of Oil Industry Staff Employees that consisted of 60 representatives elected from the different offices of the oil company in Ahwaz. A founding member explained the process: “The representatives were not elected by secret ballot. The vote took place in front of everyone. We put up a list on the wall. People came and signed their names next to the name of their preferred candidate. There were usually five or six candidates per position. The first duty of these representatives was to organize the association of professional and office workers. Therefore, we called this body the Organizing Committee of Oil Industry Employees.”⁹ The Association was further formalized in the last week of November with the election of a Coordinating Committee. In the Tehran Refinery, a secret strike committee of blue-collar workers had been active since September, but a new committee including white-collar workers was established in the second week of November. Its 12 representatives were elected from the various refinery departments.¹⁰ In late November, the Common Syndicate of the Employees of the Iranian Oil Industry was established to represent the blue-collar and white-collar workers in the oil, gas, and petrochemical industries, but despite its name, it mainly operated in Tehran.

The composition of the strike committees differed from place to place, but often, the leading members belonged to or sympathized with the organizations of the secular left, including the Fada’iyan and, to a lesser degree, the Tudeh party, or the Islamist leftist Mojahedin. Others were independent, or they followed Khomeini. It is notable, however, that when the strikes erupted, the presence of the organized left was very weak among the oil workers as state repression had diminished the space for open political activities, which was reinforced and exacerbated by the guerrilla strategy of

the main current of the left. During the strikes, however, the left recruited new members and increased its influence. In Ahwaz, 35% of the delegates of the strike committee that oil workers had elected in November 1978 were “Marxists.” However, after the fall of the monarchy, the supporters of Khomeini, in coalition with liberal Islamic figures like Mehdi Bazargan who headed the Provisional Government, maneuvered to marginalize the left and organized new elections, in which the left gained 15%. According to the same report, only five of the 40 members of the Abadan refinery strike committee were leftists at this stage.¹¹ It is important to note, however, that most of the Islamist members of the strike committees and, later, the Islamic *shoras* (councils) belonged to the “leftist” faction that supported workers’ self-management. Soon after the revolution in 1979–1981, these strike committees clashed with the newly state-appointed managers, a conflict that led to the repression and dissolution of the *shoras*.

Having established a stronger organizational structure, the oil workers resumed their strike in early December 1978, this time with explicitly political demands that focused on the departure of the Shah. Following Khomeini’s call for a general strike on December 2—to coincide with the beginning of the holy month Moharram—the Common Syndicate issued a call for a general strike in the oil industry. The Abadan Refinery took the lead once again, but the strikes spread to the offshore oil platforms and the Ahwaz and Marun oil fields in the following days.¹² Gachsaran and Aghajari workers were forced to work at bayonet point, but they went on strike at the end of the second week of December. The government’s increased repression in December backfired, as over 6000 oil workers quit their jobs when officials threatened to dismiss striking workers.¹³

The fourth and final phase of the oil strikes that started in the last days of 1978 was not marked by an interlude, but by a qualitative change. While the strike committees of the oil workers had taken control of oil production at the local level, Khomeini set up a committee that took over the national coordination of the oil strikes. I will return to discuss in detail this phase, which lasted until the strikes officially ended on February 17, 1979, but let us first turn to the oil workers’ demands during the strike.

The oil strikes, like any other class-based protest, involved an uneven and complex process of social mobilization and articulation of demands that depended on various factors such as one’s position within the labor process, traditions of activism, as well as political, ethnic, and religious affinities. The willingness to support the strike varied among different segments of oil workers, but disagreements were generally overcome

through persuasion or social pressure.¹⁴ As far as violence was involved, the targets were foreign and Iranian managers, and the perpetrators were political activists.¹⁵

Oil workers had different demands, which shifted from economic to political ones in the context of the revolution and due to the fact that the state was both their employer, as well as the target of the revolutionary upheaval. The claim that oil workers in Iran, as in the rest of the developing world, constituted a “labor aristocracy” ignored the great differences among white-collar and blue-collar workers, the permanent and contract workers, their harsh working conditions, and their connections to the wider working-class communities. As I have explained elsewhere, oil workers did not have any acute socioeconomic grievances except for the rising housing costs. What all workers shared was an intense resentment against the rigid and humiliating hierarchies and structured workplace discriminations that set blue-collar workers beneath the Iranian employees beneath the foreign staff, whose share in the total white-collar staff had increased from 4% in 1968 to 13% in 1977. Opposition against political repression in the workplace and in the wider society, as well as against the foreign domination of Iran, motivated oil workers as well.¹⁶ By late October 1978, oil workers were demanding among other things an end to martial law, the release of all political prisoners, Iranianization of the oil industry, an end to discrimination against female employees, and the dissolution of SAVAK.¹⁷

As the oil strikes politicized and intensified, they became a force to be reckoned with. As a journalist predicted at the time, “the survival of the government may well depend on the Shah’s ability to put an end to the oil strike before the loss of export oil revenue combines with the effect of other labor disruption to put Iran’s economy in total disarray.”¹⁸ Figure 2 shows oil production dropping considerably after the strikes became solid in December 1978, reducing Iran’s income by 65–68 million dollars per day.¹⁹ As the strikes continued, military vehicles and ministries were increasingly confronted with fuel shortages.

As the oil strikes severely undermined the state’s administrative, financial, and repressive capacity, they had the opposite impact on the revolutionary movement. While the media were strictly censored until November 1978 and did not report on the demonstrations, the oil strikes created fuel shortages that could not remain unnoticed. Most importantly, after the national radio announced the strike of workers in the oil depots near Tehran on October 21, 1978, thousands rushed to the gas stations. “The shortage of fuel creates havoc in Tehran traffic,” printed the widely read

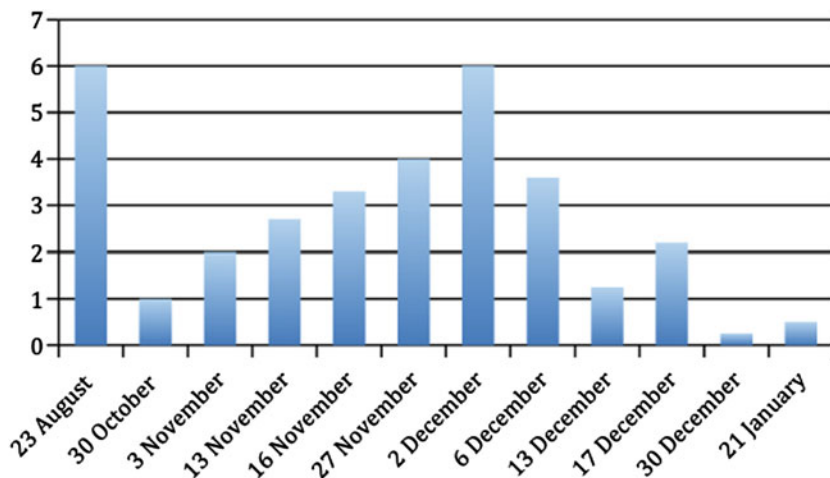


Fig. 2 Oil production in million b/d, August 1978–January 1979. *Source* collected from various issues of Persian and English newspapers.

daily *Ettela'at* on its front page the next day. For the first time, the official media gave a broad coverage to the oil strikes, which helped them to take a center stage in the revolutionary discourse and increased the self-confidence of the oil workers.

The fuel shortages intensified in the last weeks of 1978 and in early 1979, creating an acute awareness of the gravity of the crisis that engulfed the state. Ordinary people began to directly experience the impact of the oil strike and the resulting shortages as they queued for fuel (see Picture 1). Thus, by targeting a commodity that everyone in Iran considered to be the lifeblood of the monarchy and something they depended on in their own everyday life, the oil workers helped to create the sense of what Charles Kurzman has called a “viable” movement, a movement that was perceived as a viable challenger of the status quo in the consciousness of a broad layer of the population.²⁰ Given its impact on the everyday material life of ordinary people, oil became a key transmitter of revolutionary consciousness, which flowed from the sites of production and refining into the households.



Picture 1 Iranians queuing for fuel in Tehran. The small print Persian text reads: “Queues that are few kilometres long emerged in the streets for gasoline and kerosene. Bagh-e Shah gas station, Sepah Street.” The large print states: “Shortage of kerosene, gasoline, and diesel.” *Source Ettela’at*, January 6, 1979.

OIL STRIKES AND DUAL POWER

As we saw earlier, the oil strikes had become more organized and effective by December 1978, causing a massive shortage of fuel by early January 1979. “Tehran and most of the provinces are confronted with a shortage of petroleum, gasoline and diesel. More than half of the cars are not used, most houses can’t be warmed while the weather is cold, and there are long queues for petrol and gasoline in the streets,” *Ettela’at* reported on January 6, 1979, adding that domestic consumption of fuel in the winter was estimated to be around 960,000 barrels per day—almost four times higher than oil production at that time.²¹ At this crucial stage of the revolution, the oil strikes became a launching pad for the establishment of revolutionary institutions: the Oil Strikes Coordinating Committee (OSCC), the neighborhood committees (later the Committees of the Islamic Revolution), and the secret Council of the Islamic Revolution. All three, I argue, are closely linked to the dynamic of the oil strikes—a connection that has received little attention in the historiography of the Iranian revolution.²² The nucleus of an alternative political pole had already emerged in September 1978 when Khomeini appointed a small number of clerical

leaders to act on his behalf in Tehran. Khomeini then asked Mehdi Bazargan, leader of the religious-liberal Freedom Movement of Iran (FMI), to propose the inclusion of new members who could lead the transition of power in the post-Shah era. This group of 18 people regularly met to discuss strategies and advised Khomeini, forming the core of the future Council of the Islamic Revolution that was established in January 1979.²³ The transfer of power into the hands of the Council of the Islamic Revolution went through the establishment of the Oil Strikes Coordinating Committee, which was created to prevent the autonomy of the strike committees in the oil industry.

THE OIL STRIKES COORDINATING COMMITTEE

As the oil strikes were becoming more organized and effective in December 1978, the idea of establishing a committee for their supervision was floated in the group of 18 discussed above. Bazargan then asked Ebrahim Yazdi, another prominent FMI member, to propose the creation of this committee to Khomeini, as both were in Paris at the time.²⁴ On December 29, 1978, Khomeini wrote a letter to Bazargan, the text of which was mainly written by Bazargan himself, requesting him to lead a committee, to which I will refer as the Oil Strikes Coordinating Committee (OSCC).²⁵ As the letter made clear, Khomeini was worried that the Shah would use the fuel shortage to legitimize the crackdown on the revolutionary movement, and at the same time, he tried to win the oil workers' support by demanding that the military leave the oil fields and installations.²⁶

In the letter, Khomeini asked Bazargan to lead a committee of five people, which should include Hojjatoleslam Ali Akbar Hashemi Rafsanjani and the engineer Mostafa Katira'i. The remaining two members were to be selected by Bazargan in consultation with the other two members, who then appointed the engineer Kazem Hasibi, a veteran of the oil nationalization movement and a leading figure in the National Front and the FMI, and the engineer Hashem Sabaghian, another prominent member of the FMI. Two other engineers, Abolfazl Hakimi and Hossein Bani-Assadi, played an important role in organizing the practical activities of the committee, highlighting the critical role that the university-trained religious members of the new middle class would come to play in building the postrevolutionary institutions. After praising the oil workers in his letter, Khomeini tasks the OSCC to visit oil fields and installations and convince the workers to resume at least partial production for domestic consumption. This was not

an easy task, as oil workers blamed the fuel shortages on the military government. The Common Syndicate, for instance, issued a statement on December 31, 1978: “Compatriots, there is a variety of fuel present in depots to serve domestic consumption for a year, but the regime, which is installed by foreigners, is not distributing it in order to change the direction of the holy struggle of the people and to sow discord in the rows of the militants.”²⁷ In other statements, the strike leaders also blamed the fuel shortage on the continuation of oil exports to Israel and South Africa.

Bazargan started his activities as head of the OSCC on December 29, 1978, meeting with the new director of NIOC, ‘Abdollah Entezam, who agreed to the following measures: (1) the departure of the military from all oil fields and installations; (2) the departure of all military personnel who had been assigned to work in the oil industry; (3) the restatement of the strikers who had been sacked and the right of return for those workers who had been thrown out of their company houses; (4) the release of all arrested oil workers; and (5) the payment to oil employees of wages and salaries not received since November 22, 1978. Having won these concessions, Bazargan and Rafsanjani traveled to the oil workers in the south, calling on them to resume work.²⁸ Khomeini and more than 200 clerics threw in their weight, urging oil workers to negotiate with Bazargan and NIOC head Entezam.²⁹ In the following weeks, OSCC issued a number of internal reports, public communiqués, and decrees that provide an overview of its activities and decisions, establishing its authority as an administrative organ. These documents illustrate how OSCC was gradually taking over the organization of the oil strikes and related activities. Its first decree on January 5, 1979, for instance, called on the security guards to guarantee the safety of the oil installation,³⁰ followed by a second decree calling on the pipeline workers to resume work and conduct the necessary maintenance work in order to enable the transport of oil (products) from the Abadan Refinery to Tehran.³¹ Further statements called on the workers in the refineries of Tabriz, Shiraz, Kermanshah, and Tehran to resume production.³²

Following the negotiations with Bazargan during the first week of January, the “striking employees of the oil industry in the south” issued their first communiqué, stating their “willingness to implement the edict of Imam Khomeini,” because it served “the welfare of the defiant nation of Iran and the consolidation of his [Khomeini’s] holy struggle for the overthrow of the illegal government.” They also announced the following

decisions: (1) the distribution of gas to the entire city of Ahwaz from production unit number 2 from January 4, 1979; (2) the selection of a group of blue-collar and white-collar workers for unit number 2 (in Ahwaz), so that crude oil could be delivered to the refineries in Abadan and Tehran; (3) the appointment of a number of workers to continue work in the telecommunication office in order to guarantee communication between oil fields and other places in case of an emergency; (4) the establishment of a number of committees for the practical and technical implementations of the production of oil and gas; (5) the return of the security personnel of the oil industry to their positions, which had been taken over by the military; and (6) contact between the oil representatives of the oil workers in the south with those in other places, e.g., the refineries, was to run through the Committee for the Coordination of the Oil Strikes.

The final point, of course, seriously limited the oil workers' ability to collectively and independently coordinate, take decisions, and implement them. The communiqué also stated that "It is necessary to bring to the attention of the defiant nation of Iran that the blue-collar and white-collar workers who are responsible for effecting the Imam's directive, are pious strikers who are working in the production units and the refineries for the welfare of the defiant nation and have no intention to gain anything for themselves." Hence, the statement continued, the workers will stop production whenever the government violates the points mentioned in the Imam's directive.³³ On January 18, Bazargan's committee issued its 14th decree, calling on the Abadan Refinery employees to return to work in order to increase production from 240,000 to 360,000 b/d.³⁴ By late January, the committee was overseeing almost the entire activities of the oil industry, including issuing permits for exports.³⁵

As these developments illustrate, the establishment of OSCC signified a crucial turning point in the revolution, as it involved two power struggles. First, it represented the attempt by the Islamist forces—both the radicals around Khomeini and the liberals around Bazargan—to take control of the oil strikes at the expense of the autonomy of oil workers. Bazargan was very clear that his objective was to take "control of the oil strikes." In order to do this, the OSCC realized that it had to bypass and marginalize the leftist oil workers, who, despite their small numbers, played a leading role in the oil strikes. As Hakimi explained:

The main issue confronting us was that we had to deal with different groups of oil workers... We treated them well but we also tried to find out the level of their influence and popularity among the oil workers and in discussions we tried to understand whether they were committed and Islamic or leftist... The labor troubles in Tehran were mostly in the pipelines and depots of Rey..., but the Tehran Refinery was in our total control, especially [because] there was a very faithful and intelligent brother among the refinery workers, called [Assadollah] Amininian, who was enormously popular and influential... The committee of the Tehran Refinery travelled for a number of times to Abadan, Tabriz and Shiraz and had various talks with them... through the workers of the Tehran Refinery we could discipline them as well.³⁶

The methods by which the pro-Khomeini forces became hegemonic in the oil strikes need more scrutiny, but an important factor was the lack of a strong independent national organization among oil workers. Every workplace had one or more strike committees, but there was no single organization capable of representing all strikers and coordinating their activities at the national level. The Common Syndicate of the Employees of the Oil Industry was established in the third week of November 1978, but it was mainly rooted among the workers of the Tehran Refinery.

The material and social conditions of the oil industry certainly did not pose an obstacle to national coordination. The specific history of the oil industry's expansion, the spatial construction of urban networks, and social relations based on kinship and ethnicity potentially provided the basis for establishing solidarities and organizations.³⁷ The internal telephone network of the oil industry enabled communication between different locations and oil workers' delegates could also travel to these locations. There were also social networks among oil workers that created an esprit to corp. Some oil workers, particularly the more experienced, had come to know each other through official trade union activities before the revolution, and more importantly through the overhaul procedures in the refineries and the training schools. However, there were a number of obstacles too. First, political events unfolded very rapidly, leaving little time for oil workers to strategize and react to the new situation. Second, the militant oil workers were not politically prepared for this situation. Some experienced oil workers had a background in the Tudeh party, which steered them away from any move that could challenge the leadership of Khomeini within the revolutionary movement. The younger generation of leftist oil workers, who often sympathized with the more militant guerrilla

organizations, lacked the network, experience, and the strategic perspective that could help them to unite the struggles in the working-class communities around the strikes in the oil industry. Third, generational and regional divisions among oil workers exacerbated their political and ideological differences. In the Tehran Refinery, for instance, there was an active group around the leftist trade unionist Yadollah Khosroshahi. These were mostly from Abadan, but they lacked organic links to the younger workers who had been recruited from the small workshops of Tehran and had stronger religious dispositions. None of these obstacles, however, were insurmountable if the required *political* and *organizational* steps had been taken prior to and during the revolution in order to increase the coordination among oil workers.

More concretely, the existence of a leadership among oil workers was indispensable for the independent coordination of the oil strikes.³⁸ Surveillance and repression in large workplaces made this task daunting, but not impossible. If it was possible to print banned leftist publications in the Tehran Refinery and smuggle them out, for instance, or to distribute pro-guerrilla pamphlets in the Abadan refinery before the revolution,³⁹ then it also must have been possible to organize a network of militants around industrial issues. The strikes in the 1970s in the oil industry provided an opportunity to do this, but at that time, the new organizations of the left, with which some oil workers were sympathizing, had committed themselves to clandestine armed struggle, rather than workplace and community activism.

The establishment of the OSCC did not only involve an internal power struggle within the oil strikes and by extension within the overall revolutionary movement; it was also a precondition for the external struggle waged against the monarchy. The oil strikes and the establishment of OSCC facilitated the creation of two other institutions: the Council of the Islamic Revolution and the neighborhood committees.

Council of the Islamic Revolution

On January 12, 1979, 2 weeks after the OSCC started its activities, Khomeini ordered the establishment of the Council of the Islamic Revolution, which reconstituted the existing group of 18 people with some changes. Khomeini declared that the Council of the Islamic Revolution “included competent and committed Muslims” who had to “study and explore the conditions for a transitional government and take the first

preparations for its establishment form a constitutive assembly and hold elections.”⁴⁰ Without the OSCC taking over one of the state’s key functions—oil production—the Council of the Islamic Revolution would have lacked the authority to function as an alternative pole of power. This was made quite explicit by Bazargan, when he advised Khomeini to call on the management of the oil company to cooperate with the OSCC so that Khomeini, “despite the Shah and his government would seize control over the state apparatus and order state employees.”⁴¹

Neighborhood Committees

The management of the oil strikes played a much more organic role in the emergence of the third institution of revolutionary power, i.e., the neighborhood committees that were later transformed into the Committees of the Islamic Revolution. Given a shortage of kerosene, which was widely used for heating and cooking, the need to organize the distribution of fuel among the population was an urgent task that gave rise to the neighborhood committees. While Tehran’s domestic consumption had been 9–10.5 million liters per day in the winter of 1977–1978, the capital was only receiving 5–5.5 million liters per day in late December 1978 and early January 1979.

Following a week of intense negotiations between the OSCC and the strikers, oil started to flow from the depots of Abadan Refinery to Tehran on January 6, 1979. Two weeks later, the refinery’s production increased from 240,000 to 360,000 b/d, and crude oil production in Khuzestan stood at 500,000 b/d.⁴² The shortages continued, however, and the engineer Abolfazl Hakimi was sent to the distribution organization of NIOC to take care of fuel distribution. In mid-January, the “employees of the distribution organization of NIOC” called on “clerics” and “patriotic groups” to help organize “fuel distribution committees.”⁴³ This was another missed opportunity to establish—through the existing infrastructure of the oil industry—a national organization that could have linked the oil strikes and the working-class communities. At the time of the revolution, the oil industry had 2358 fuel outlets in the cities and more than 10,000 in the rural areas. These were strategic points, around which the distribution of fuel and other activities in particularly Tehran could have been organized by the workers of NIOC’s distribution organization. However, in the absence of an independent national organization and strategy, the distribution organization played a subordinated role, taking

their orders from the OSCC. Hakimi asked the local clerics to come up with a list of “active and trustworthy young people,” who were subsequently gathered in a mosque and received instructions. Within 2 weeks, almost all neighborhoods in Tehran had established their “distribution committees,” which distributed the available fuel through coupons or waiting lists. Hakimi also helped to organize a group of volunteers who managed the distribution of fuel at gas stations from 9 am to 10 pm.⁴⁴

The creation of the fuel distribution committees was not always initiated by the OSCC. In some locations, it facilitated their creation, but in other places, it merely connected the local initiatives that were already emerging. During the winter, the distribution of oil became the central point around which everyday forms of solidarity were formed, as locals helped the needy and the youth queued for the elderly. Others took the initiative to coordinate the oil distribution, but quickly gravitated toward the mosques as there were no alternative centers of coordination. A SAVAK telegraph on January 3, 1979, for instance, reported that the head of NIOC in Hamedan was refusing to provide oil to the SAVAK.⁴⁵ Confirming this report, *Ayandegan* wrote that the distribution of oil coupons in Hamedan was in the hands of a committee led by Hojjatoleslam Seyyed Ahmad Madani and Hojjatoleslam Mohammad-Taqi ‘Alami.⁴⁶ However, as Farhad Khosrokhavar wrote at the time, the Hamedan committee was from its inception directed by clerics, while in Tehran and most other places, the committees expressed “a popular will” and were not initially dominated by clerics.⁴⁷ “From the day that the fuel shortages started,” a young man told a *Kayhan* reporter in Tehran, “we, the youth of the neighbourhood got together to do something about it so this problem wouldn’t be added to those we already had. We made some carts and went to the houses and asked for their containers and we also convinced the fuel seller that it was better to delegate the distribution to us rather than have long queues.”⁴⁸

On 4 January, a stunned SAVAK agent in Tehran telephoned the following report to his commander: “A number of Khomeini supporters have taken initiatives to distribute fuel among needy people of the neighbourhood. A number of these distribution [teams] have been observed and they claim that the distribution of fuel has been ordered by Khomeini.”⁴⁹ Similar reports poured in other cities. In Isfahan, a SAVAK agent reported that ordinary people were protecting the gas stations and distributing fuel.⁵⁰ In his memoirs, ‘Emadaldin Baqi provides another example when describing his reaction to the tensions that arose among people queuing for fuel: “I went to the mosque, thought a bit and concluded that we should

gather the kids in the mosque and create an organization to take the distribution of fuel in our own hands.” After their plan to distribute coupons failed, they decided to form couples to bring the fuel to the houses.⁵¹ By 14 January, the queues for fuel had almost disappeared, as the neighborhood youth had organized, with the guidance of the local clerics, the door-to-door distribution of fuel, giving it away for free to those who had been identified as low-income families. As an offshoot of fuel distribution, some local youth developed other activities, such as the control of prices, the provision of urgent health care, and armed defense in a neighborhood committee.⁵²

Another report explicitly mentions the Islamic neighborhood committees and “cooperatives” that started distributing fuel in eight poor neighborhoods, from where they spread to other places.⁵³ The youth in Narmak, for instance, divided the neighborhood into districts with a radius of 300 m around a fuel distribution center. Each district issued to every household a coupon that had the stamp of the district, and mentioned the number of times and the dates on which they could collect their share. In other places, the fuel was taken door-to-door.⁵⁴

For many Islamist activists, the neighborhood committees that were organized around fuel distribution had an explicit aim: to counter the leftist influence in the oil industry. Saeed Jalili, now a leading politician among Iran’s Islamist hardliners, recalls that “At the height of the revolution and also afterwards, the neighbourhood committees played an important role in serving the people’s needs... Revolutionaries gathered in mosques and created coupons.... At that time, Marxism had many followers and, just as liberalism is defined by civil society, the slogan of Marxism was based on the *shoras* [councils]. This slogan was everywhere; there were students *shoras*, workers’ *shoras*, etc.... In this situation, the neighbourhood committee, with at its centre the mosque, was a ‘slap in the face’ [*tudahani*] and a harsh reply to them [the Marxists].”⁵⁵ The Committees of the Islamic Revolution that were established after February 1979 drew their members from the pool of volunteers who coalesced around the fuel distributing neighborhood committees.⁵⁶ Bringing together Islamist activists at neighborhood level, these Committees of the Islamic Revolution were an essential step in consolidating the political power of the supporters of Khomeini.

As political control over the production and distribution of oil was increasingly taken over by Khomeini and his allies, practical control over oil production was still in the hands of the oil workers. Confronted with the attempts of Khomeini and Bazargan to take control of the strikes, the oil

strike leaders continued publishing statements and tried to gain a stronger position. On January 16, they announced, “Oil workers are a part of Iranian working class and the greatest ally of progressive, anti-despotic, and anti-imperialistic strata,” and added, “Considering the decisive role of workers, especially workers in the oil industry, throughout the anti-despotic struggles, the future government is obligated to consider the interests of the working class.” Less than 2 weeks before the fall of the regime, a group of oil workers declared that a workers’ representative should be included on the Council of the Islamic Revolution, whose membership had not yet been disclosed by Khomeini. They stated:

Just as workers have played a crucial role in the current revolutionary situation, they should participate the day after the revolution when it is time for the genuine construction; this is only possible by workers’ participation in the political affairs of the country. The first step would be taken by participation of a workers’ representative in the revolutionary council.⁵⁷

Without an independent national organization, however, oil workers lacked the political weight to put pressure on their demand. As the pro-Khomeini forces gradually took over the oil strikes, the tensions with the left increased. In Ahwaz, a number of clerics intervened to restrict the independence of the strike committee and the role of secular oil workers’ representatives, prompting the resignation of Mohammad Javad Khatami, the leading representative of the production units. In an open letter (January 21, 1979), he accused “reactionary” clerics of making death threats against him and other representatives who didn’t agree with their “reactionary ideology.” He also criticized the OSCC for acting beyond its duties of “inspection and supervision” of the oil strikes and sidelining the strike committee, leaving local affairs to a number of “not progressive” clerics instead of appointing a group to mediate between the oil strikers and the OSCC, as was originally called for.⁵⁸

The fact that, despite increasing repression after February 1979, the committees in the oil industry continued to operate is testimony to the organization and class consciousness that oil workers had developed during their strikes. A few months after the fall of the Shah, the journalist and future Pulitzer Prize winner Kai Bird, who interviewed oil workers wrote, “The oil industry is virtually controlled by dozens of independent worker komitehs which, though loyal to the central Government, are nevertheless participating in all the decisions related to the production and marketing of

Iranian oil to the Western industrial world. Perhaps even more significant, the worker komitehs have unquestionably demonstrated that they can run the oil fields and refineries without their top-rank Iranian managers and without the expertise of some 800 foreign technicians...⁵⁹ This situation was not tolerated by the postrevolutionary leaders as they consolidated their power. The committees in the oil industry and elsewhere were repressed and weakened after Iraq invaded southwestern Iran in August 1980, and were officially banned early in 1982.

POPULISM AND CLASS CONSCIOUSNESS

The fate of the oil strikes poses an important question: why oil workers did not create a national network with political autonomy and the organizational capacity to project their power beyond the workplace, but instead accepted a subordinate role to that of Khomeini and the OSCC? This question can best be answered by looking at the development of class consciousness within the triangular relationship between the oil workers, the wider labor struggles, and the revolutionary movement.

To begin with labor struggles in general, it should be noted that these were significantly hindered by the predominance of small-sized enterprises. In 1976, Iran had an employed workforce of 8.8 million, of whom 3.5 million were classified as working class. Another 1 million were unpaid family workers. Some 719,000 worked in manufacturing, as wage earners and unpaid family workers. Of these, some 43% were mostly unskilled workers, employed in small establishments (1–9 employees).⁶⁰ While taking part in demonstrations, most of these workers did not participate in the revolution as a distinct collective. However, “at the same time there was a significant portion of the working class that was skilled and concentrated in large enterprises of the private sector and particularly the state sector,” which did have a greater capacity for collective action.⁶¹ In 1976, 793 of the private manufacturing units (11%) were larger enterprises that employed more than 100 workers. Moreover, the majority of the 566,000 workers employed by the state were concentrated in a few major cities and in a number of large enterprises. Thus, as in many other developing countries, on one end of the working class, there were a large number of workers merging into the petty bourgeoisie who were mainly active in retail and petty production, while at the other end, there was a concentration of industrial workers.

Oil workers, in particular, exhibited a significant capacity for collective action, as we saw above, and hence, they took a leading position within the strike movement that developed in the fall of 1978.⁶² While initially no significant solidarity networks existed among the workers of the oil industry and other sectors, these started to develop during the strikes. In Ahwaz and Abadan, oil workers organized in solidarity with striking teachers.⁶³ The solidarity actions were reciprocal as teachers in Abadan and Khoramshahr joined workers' demonstrations a few weeks later. The Society of the Employees of the Planning and Budget Organization issued solidarity statements thanking oil workers for "blocking the extraction of the nation's wealth towards imperialism and for achieving freedom for us."⁶⁴ Particularly in Tehran, striking workers in other industries looked to oil workers for leadership, shouting "our oil worker, our determined leader" at various demonstrations. However, it was not until a week before the fall of the monarchy that striking workers started to meet in order to "strengthen their organization, increase solidarity, and promote workers' consciousness in order to serve their class interests." More than one hundred workers representing auto, oil, and electrical unions gathered on February 3, 1979 in Ghand Riz Syndicate in Tehran, denouncing the dismissal of factory workers, demanding the inclusion of a workers' representative in the Council of the Islamic Revolution, and discussing the formation of a workers' solidarity council.⁶⁵

Thus, oil workers were well positioned to play a more independent—and leading—role within the labor struggles and the wider revolutionary movement, but the question is why this possibility did not materialize. Pointing to "objective" conditions is not sufficient, as both the oil workers' position within the class structure and the physical characteristics of the oil industry enabled them to launch mass strikes and develop organizations of their own. The real issue was the lack of *political independence*, which leads us to look at the oil workers' subjectivity. As E.P. Thompson argued, "class consciousness" is shaped by "class experience," a process that is culturally mediated. Moreover, working-class formation is an "active process, which owes as much to agency as to conditioning."⁶⁶

From this perspective, there is no teleological development from working-class experience to a specific form of working-class consciousness, which is contingent on the mediating role of culture and human agency. For the same reason, the expectation that oil workers should have developed a (secular or socialist) class consciousness leading them to challenge the monarchy while maintaining their independence from the clerical and

bazaari opposition is based on a flawed premise. What I argue instead is the *possibility* of this trajectory. My strategy for developing this argument is a critical dialogue with Asef Bayat's "Historiography, Class and Iranian Workers," which provides the most sophisticated account of the development of class consciousness in Iran before and during the Iranian revolution.

Bayat argues that "we must start not from the structure and 'objective interests' to arrive at class consciousness, but from the language of the class to characterize its political movement."⁶⁷ From this perspective, he analyzes the Iranian revolution: "Islam serves as a central element in articulating working-class consciousness in Iran" by spreading a "populist ideology... that works against the development of *class* consciousness and the idea of class division in society." This could happen, because "the ruling clergy shared an Islamic language with the workers, albeit with a populist content."⁶⁸

Although this is a welcome corrective to the Eurocentric and structuralist analyses of class, it bends too much toward the reified notion of language advocated by Gareth Stedman Jones and other critics of E. P. Thompson, and privileges too much the Islamic discourse in the Iranian revolution. Acknowledging the importance of language, Marc Steinberg argues that class consciousness is not a discourse but emerges "through the friction of discourses produced in struggle."⁶⁹ From this perspective, the populist discourse in the Iranian revolution was not simply present in Islamic culture or texts, but was crafted within the context of concrete struggles, and in competition with other discourses. These discourses do not simply reflect different "class experiences"—they are constitutive to the formation of class consciousness. "Working class formation is," as Zachary Lockman summarizes, "as much a discursive as a material process."⁷⁰ Applying this approach, and focusing on the process of representation and recognition in class formation, Touraj Atabaki has shown how a distinct class identity took form among oil workers in the aftermath of the WWI, expressed in the use of "kargar" instead of "amaleh" by both workers, and company and state officials.⁷¹ The formation of a working class (consciousness), with the oil workers at its core, matured during the 1940s. In the following two decades, however, shifts in the economy, politics, and culture led to a significant class reformation. As Bayat argues, the massive rural–urban migration of the 1960s created a new generation of workers who lacked industrial and urban experience, "Yet from the 1970s things started to change. By this time, the new workers of the 1960s had acquired a fair amount of experience in industrial work and urbanism... The result

was the development of an ‘industrial consciousness’ that derived its elements from an industrial setting, an urban lifestyle, and industrial work. This industrial consciousness manifested itself in a series of demands and covert strikes in the mid-1970s... Beyond industrial awareness, the workers also developed a more general form of class consciousness in terms of the expression of identity and differentiation.”⁷² A few pages later, however, Bayat argues that the diversity of workers did not lead to “common non-work experiences among them.” However, “whatever their differences,” he continues, they “do share a common religion: Islam.” Even if we discard the fact that the experience of religious practices varied among Iranian workers, it remains a fact that both their industrial and urban experiences and the Islamic culture shaped workers’ consciousness. The dominance of the populist Islamic discourse, however, must be explained through an approach that sees language both as a constitutive element as well as an outcome of class struggle inside and outside the workplace.

“Islam,” Bayat correctly argues, “was reinterpreted by the industrial workers to express their own immediate and class interests.” However, this statement underestimates the importance of the distinction between individuals’ immediate awareness of action and their more general worldviews, or in Bakhtinian terms, the distinction between primary and secondary speech genres that create a tension between unmediated communication and mediated ideology.⁷³ The role of ideology, its intellectual producers, and organizational expression are, therefore, essential in the formation of class consciousness. Islamic populism was crafted by figures, such as Ali Shariati, who articulated grievances against social inequality, repressive domestic politics, and foreign domination through a language that mixed Islamic and Marxist vocabulary. Many of the oil workers I have interviewed referred to the influence of his ideas, which they knew through publications or the talks he gave at the Abadan Technical Institute in the late 1960s and early 1970s. While Shariati was anticlerical, Khomeini formulated a populist version of Islam that assigned a revolutionary role to the clerics. Both men formulated their populist discourse in reaction and competition with leftist discourses.

While anticapitalist and anti-imperialist, the dominant leftist discourse of this period, however, was not geared toward the articulation and political translation of “class experience,” but rather focused on notions of individual sacrifice and courage connected to guerrilla warfare. This discourse, therefore, did not help workers to articulate a worldview and a practice that linked their day-to-day conditions and struggles with those in society at large. In reaction to repression and surveillance the radical left had adopted guerrilla

warfare and armed struggle, but this had been a strategic decision, rather than an unavoidable choice. This is illustrated, for instance, by the alternative path taken by the Revolutionary Workers' Organization of Iran, which managed to organize a few hundred members and sympathizers and create a few chapters in a number of important workplaces in the late 1960s, until it was rounded up by SAVAK after the Fada'iyān attack on the Siyahkal police station in 1971.⁷⁴

Once oil strikes erupted in 1978, all these different discourses could be detected among the oil workers. Interviewing Abadan oil workers, one journalist observed, "Most of the oil workers are devout, practising Moslems but of the anti-clerical kind that believe that a religious movement which began with the uncompromising demand for the removal of the Shah will not end until the religion itself undergoes radical change." "We give Khomeini due respect for so stubbornly refusing to compromise with the Shah," said a boilermaker in the Abadan refinery. "But after all, Dr. Shariati wrote this revolution. Khomeini only led it"... "We are not going to be slaves to these machines," says a young welder. "...in an Islamic Republic, the community and not consumption is the goal."⁷⁵ Most oil workers who supported Khomeini were not so much attracted to his theology but to his uncompromising political strategy. Khomeini's establishment of the OSCC gave him even more credit in this respect.

Thus, for many oil workers who sympathized with Shariati's or Khomeini's Islamic populism, political independence did not seem necessary at first, although some clashed with the postrevolutionary state when it started to attack the workers' committees. Along these groups, "a minority of workers who embraced some form of socialism emerged in the final stage of the revolutionary struggles and played a leading role."⁷⁶ This was particularly the case in the oil industry, where more than a third of the members of the elected Ahwaz strike committee were leftists, and nine of the 14 members of the council of the Common Syndicate of the Employees of the Oil Industry were secular leftists (four others were Islamic leftists). However, even among them, the idea of independent organization and strategy was not a priority for ideological reasons.

Oil workers' political sympathies covered a wide spectrum, from Islamist populists to those who saw themselves as part of an industrial proletariat that should base its politics on working-class solidarity. Adherence to rival ideological and political outlooks kept shifting with circumstances, but increasingly the populist Islamist trend took the upper hand. The dialectics between

the struggles outside and inside the workplace was decisive here. Before and during the strikes, many oil workers participated or were influenced by the street demonstrations dominated by the slogans of Islamic populism. In Tehran, for instance, oil workers started to march to the Behesht Zahra cemetery, where the martyrs of the revolution were taken to be buried. During these charged and politicized rituals, the oil workers' slogans began to merge with those of Islamists. However, the influence of Islamic populism did not come only from the outside. In the Tehran refinery, many of the workers had been recruited from the nearby maintenance and petty production shops. These were recent migrants from rural areas and had worked and lived in the neighborhoods around the grand bazaar of Tehran and its mosques. However, it is important to note that the mosque-bazaar network was not an organizational resource in the hands of Khomeini and his supporters from the outset. As Kurzman has argued, the pro-Khomeini forces fought a political battle for hegemony within this network, and only after they had achieved it, could they use it as a lever to mobilize the mass demonstrations?⁷⁷

To use the same analogy, the oil industry provided a potentially valuable resource for mass mobilizations that could have given direction to the whole revolutionary movement as the establishment of the OSCC demonstrated. If before the revolution, the left had developed a discourse that articulated workers' experiences in terms of class, and if it had created a stronger organizational presence that could have steered the oil strikes toward political autonomy, the oil workers might have influenced the outcome of the Iranian revolution. Despite a weak organization, the secular left had a reasonably strong *potential* for playing a much bigger role in the coordination of the oil strikes. This was rooted in the left's historical ties to oil workers (especially the Tudeh party), the guerrilla movement resurrecting the left's popularity and prestige, and the left-leaning university graduates joining the ranks of white-collar workers. However, mainly for ideological reasons, this potential failed to be realized.

Far from speculative, such an approach acknowledges the "inadequacy of confining our inquiry to the immediate and present world of the people interacting... Otherwise, we would be bound to deterministic explanations of interaction relying on initial resources and game-theoretic algorithms that rob interaction of its specific content. If, however, we accept that interactions are contingent, that how they turn out is not the only way they could have turned out, or that their effects might spill over the boundaries of people obviously interacting, we need a way to understand the real potential of interactions. Further, the space of interactions is itself shaped

by larger, historical institutional developments, which cannot, in turn, be understood without reference to political projects and attempts to form hegemonic coherence.”⁷⁸

CONCLUSION

The salient role of oil workers in the Iranian revolution invites us to revise a number of dominant interpretations of the relationship between oil and politics, and of the outcome of the Iranian revolution. Our understanding of the former was enormously advanced with the publication of Timothy Mitchell’s *Carbon Democracy*, which focuses on the mediating role of labor between oil and politics and argues that the oil industry’s material characteristics deprive oil workers of the potential for large-scale mobilizations that can successfully challenge authoritarian rule. The general applicability of this claim, I believe, should be nuanced in light of the experience of the Iranian revolution.⁷⁹

A second revision concerns the influential reading of the Iranian revolution itself, which stressed the role of Shi’a Islam among the subaltern classes as an important factor explaining the ability of Khomeini and his supporters to become hegemonic within the revolutionary movement. Without ignoring the role of religion, my account of this process demonstrates the role of political strategizing and organizing as a key factor. The creation of the OSCC had little to do with religion; rather, it was a political and strategic intervention in the oil strikes that enabled Khomeini and his allies to get hold of a key link in the chain of events, through which they could steer the entire revolutionary movement into their desired direction. In contrast to Khomeini’s bold initiative, the oil workers failed to create a strong national organization that could coordinate the local strikes and represent them effectively in negotiations.

As a result, the Khomeinists along with their liberal religious allies succeeded in taking advantage of this vacuum and effectively took control of the direction of oil strikes by launching the OSCC. In turn, this helped them establish the Council of the Islamic Revolution as an authoritative alternative to the old state. Without a national organization through which they could coordinate with other strikers, the oil workers did not have the leverage to demand a bigger role in the emerging political structures, let alone vie for political power. Finally, the popular committees that emerged in the neighborhoods were not linked to the workplace struggles, but instead became incorporated by the mosques and clerics. Here,

again, oil workers were well positioned to initiate, guide, or influence the neighborhood committees because of the role of fuel in everyday life. But once again, as we saw, Khomeinists proved more successful in taking control of these grassroots organizations of local self-rule.” The physical structures of oil production, distribution, and consumption could function as the veins and capillaries that reached deep into society, allowing the oil workers to exert organizational and ideological influence well beyond their numbers.

Thus, the history of the relationship between oil and politics, and its role in the Iranian revolution appears to be more contingent or fluid than we might expect. The Islamist forces around Khomeini might have failed to take full control of the oil strikes if their ideological discourse and political organization had been challenged more effectively by alternative discourses and organizations that stressed the autonomy of workers’ organizations. As Eric Selbin observes, “what was so revolutionary about the Iranian revolution... was the palpable sense of possibility, the opportunity to create a new world or perhaps a return to a (g)old(en) one, regardless of whether there had ever been just such an age before.”⁸⁰ He rightly stresses, “revolutions, as with history, are made by people, notwithstanding, as Karl Marx suggests, not necessarily under the circumstances of their own choosing.” The Iranian revolution was made by what its protagonists deemed possible, but also by the choices they did not make.

NOTES

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13. Misagh Parsa, *Social Origins of the Iranian Revolution*, Studies in Political Economy (New Brunswick; London: Rutgers University Press, 1989), 160.
14. For a number of examples, see Yadollah Khosrowshahi, "Bar Ma Cheh Gozasht? [What happened to us?]," in *Goriz-e Nagozir. Si Ravayat-e Goriz az Jomhuri-ye Islami*, ed. Mihan Roosta, et al. (Germany: Noqtch, 1387/2008).
15. On 23 December 1979, for instance, three gunmen from the Islamist guerrilla organization Movahedin ambushed and killed the American director of OSCO in Ahwaz. Malek Borujerdi, an Iranian oil official was assassinated on the same day by Mansurun, another Islamist guerrilla organization.
16. Peyman Jafari, "Reasons to Revolt: Iranian Oil Workers in the 1970s," *International Labor and Working-Class History* 84, no. 3 (2013): 195–217.
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20. Charles Kurzman, *The Unthinkable Revolution in Iran* (Cambridge, MA: Harvard University Press, 2004).

21. "Qahti-ye Naft, Benzin va Gazo'il [Shortage of Petroleum, Gasoline and Diesel]," *Ettela'at*, 16 Dey 1357/6 January 1979.
22. "Although Misagh Parsa notes that "these classes" [blue- and white-collar workers] brought about a situation of dual power," he doesn't explain its concrete mechanisms and manifestations. See Parsa, *Social Origins of the Iranian Revolution*, 166.
23. Shaul Bakhash, *The Reign of the Ayatollahs* (London: I.B. Tauris, 1985), 51.
24. Manuचेhr Razmahang, "Goftogu ba Mostafa Katira'i [Interview with Mostafa Katira'i]," *Iran-e Farda*, 18.
25. In its own communication, the committee called itself the *Hey'at-e E'zami-ye Imam* (Delegation Appointed by the Imam). Ayatollah Khomeini took a similar initiative to gain control over the strikes in the transport and the customs sector appointing a committee headed by Ezzatollah Sahabi.
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29. Parsa, *Social Origins of the Iranian Revolution*, 161.
30. Hey'at-e E'zami-ye Imam Khomeini, "Statement no. 2," 14331007 (11 Dey 1357/1 January 1978), Islamic Revolution Document Centre (IRDC) archives, Tehran.
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60. Nomani and Behdad, *Class and Labor in Iran*, 218.
61. Ibid., 101.
62. A discussion of the reasons for the oil workers’ capacity to strike requires another article, but useful insights can be found in Ashraf, “Anatomy of the Revolution”; Jafari, “Reasons to Revolt.”
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Norwegian Oil Workers: From Rebels to Parters in the Tripartite System

Helge Ryggvik

In June 1966, the American drilling company Odeco placed a small advertisement in a local Stavanger newspaper. Stavanger, which faces the North Sea in south-western Norway, was then mostly known for its sardine industry and a couple of rich shipping firms. Odeco was looking for Norwegian oil workers, and the response was overwhelming. About 2000 people applied for the 36 advertised posts.¹ A few weeks later, a small group of Norwegian oil workers found themselves at the bottom of the job hierarchy when the floating oil rig *Ocean Traveler* began the first exploration for oil on the Norwegian continental shelf in the North Sea in the autumn the same year. At the time, drilling for oil in the harsh conditions of the North Sea stood at the very edge of what was technologically possible. However, the first Norwegian oil workers faced the double challenge of difficult work along with the unfamiliar approach to labor relations adopted by American oil companies with a background of operating in the US South.

Over the years, Norway has often been held as a model of how a country can successfully manage the potential dangers of an economy, where revenues from oil and gas play a dominant role.² The perception of what in the Norwegian oil experience is viewed as a model varies from the creation of the

H. Ryggvik (✉)
Centre for Technology, Innovation and Culture (TIK),
University of Oslo, Oslo, Norway

Oil Fund as a preventive mechanism against the “oil curse” and the “Dutch Disease” to the fact that after decades of oil extraction, Norway can still be considered as a relatively egalitarian society. Norway appears to have avoided being riddled by corruption and the kind of excessive rent-seeking that is often associated with oil-rich countries. The country’s apparent success in mastering the considerable safety and environmental challenges of operating offshore oil installations under harsh conditions is another indication of its relative achievements in dealing with the dangers of oil extraction. Not least, whenever Norwegian politicians tout the accomplishments of the country’s oil experience, the claim of tight and cozy relationships between workers, oil companies, and the state (the tripartite system), is often an integral part of their narrative. The tripartite system is not unique to Norway, but is part of what is referred to as the Scandinavian Nordic model.³ Its historical roots go back to the Great Depression of the 1930s when a compromise was struck between the growing labor movement and industrial employers, who came to accept collective bargaining with elected shop stewards and established trade unions. The unions, for their part, had to accept certain restrictions on how and when they could strike. The role of the state in this compromise varied from country to country. In Norway, it played a mediating role by implementing an egalitarian policy aimed at ensuring industrial competitiveness and improving workers’ share of income.

The tripartite system has been integral to the development of Norway’s oil industry since the 1960s. However, this was in no way a harmonious process. First, Norwegian oil workers had to struggle hard to establish themselves as a collective and thereafter to force the major international oil companies to accept them as negotiation counterparts. Ironically, with the ascendancy of Norwegian oil companies as major operators and employers, a majority of oil workers came to consider the tripartite system as the main obstacle to obtaining the improved working conditions they had struggled for. Finally, after a period of relatively harmonious relations within this corporatist model, the internationalization of the Norwegian oil industry challenged this system of cooperation, by adopting management policies that undermined the very base of the tripartite arrangement.

WORKING OFFSHORE

In contrast to other countries, where the term “oil worker” can be used for anyone whose work relates to the oil industry, including refinery workers; in Norwegian, “oil worker” has always been synonymous with offshore

work. From the late 1960s through the early 1990s, Norwegian offshore exploration and extraction was almost exclusively carried out in the North Sea. Thereafter, operations expanded to rigs further north in the Norwegian Sea and the Arctic Barents Sea. In 2012, an estimated 24,000 people worked offshore on the Norwegian Continental shelf.⁴ One third of these were directly employed by oil companies and the rest by different types of supply and service companies. In addition, offshore operations are supported and maintained by a wide range of staff onshore, and there is the extensive large industry that is somehow related to oil activities. Once all the supply, service, processing, and export-related activities are included, the total number of petroleum-related employees in 2014 was estimated to be around 240,000.⁵ Given its size, this onshore based group of employees has been crucial in shaping labor relations in Norway. Nevertheless, the role and activities of offshore workers are of particular interest, because it was offshore that the contrast between the international oil industry and the traditional local labor relations was most striking.

Technically and organizationally, North Sea oil activities were an outgrowth and continuation of activities that had begun earlier off the coast of southern US states, such as Louisiana, Alabama, and Texas—where offshore drilling had started in the interwar years, but had really taken off in the 1950s. When drilling started on the Norwegian continental shelf in the late 1960s, the American company Odeco, which was drilling for several of the major oil companies, was the largest employer. The initial drilling and explorations involved a number of diving companies and outfits specializing in other support activities. Newly hired Norwegian workers met a well-established work organization that included unfamiliar specialized roles, such as roustabouts, roughnecks, derickmen, drillers, and tool pushers. In this new and unfamiliar work environment, Norwegians had to start at the bottom of the working hierarchy. It was in these firms that Norwegian workers first experienced the prevailing working culture of the oil industry. However, what in hindsight is now considered to have been important pioneering work, at the time was minuscule in scale, and was a marginal economic activity, employing no more than 300 workers.

The discovery of the Ekofisk field in December 1969 was the start of a phase of explosive development, accompanied by a substantial increase in drilling. Within a few years, production facilities at Ekofisk led to the construction of a small town 300 km offshore in the southwestern part of the Norwegian sector. Most of the installations on the Ekofisk field were built abroad. When operations began, there were still a large number of

foreigners in managerial positions, but the new production platforms were to a large degree staffed with Norwegian workers. The responsible operative oil company Phillips would employ workers in key functions, such as process operators. Other groups, such as production drillers, divers, and special services staff would be employed by contractors.

In the following years, a series of major new fields were discovered. The large gas field Frigg, on the border of the British sector, was developed partly in parallel with the Ekofisk field. From the end of the 1970s, the giant platforms that would produce oil from the major Statfjord field were installed at sea. The Statfjord field differed insofar as the newly established Norwegian state oil company Statoil held a controlling ownership position. However, the working organization was still American, with the oil company Mobil as operator and, therefore, the major employer. From the mid-1970s on, a significant proportion of the construction work onshore was carried out in Norway. Nevertheless, up to the mid-1980s, in the Norwegian oil sectors' decisive pioneering years, foreign companies remained the dominating employers. An exception here was floating semi submersible drilling rigs, where Norwegian shipowners dominated the market from the early 1970s. However, without the necessary technological expertise, it was American drilling firms that carried out the actual drilling on these platforms.

The striking dominance of foreign employers in the Norwegian offshore oil sector up until the mid-1980s stands out in contrast to the political perception of the time, which tended to laud Norway for its ability to secure national governance and control over its oil activities. A thoroughgoing Norwegianization of the industry was formulated as a political objective by both parliament and different governments when the size of the new oil finds was known.⁶ However, even with open protectionist measures, this took time to achieve. As long as foreign oil companies dominated operations, regulation was the main way of securing national governance and control over activities in the oil sector. As early as in 1966, before the first well had been drilled, the parliament boasted that Norway had the best safety regulation in the world.⁷ A few months later, a safety framework for prospecting drilling was established.⁸ Large portions of this framework, though, were proposals from the companies themselves. The regulations had little effect on their existing practices. Furthermore, it would take many years, even after oil was discovered, before Norwegian authorities had a regulatory system in place which could actually enforce the regulations. After a thorough debate, in 1974, Norwegian

parliamentarians agreed that the best way to enforce a “Norwegianization” of the oil sector and avoid potential negative aspects of the related activities was to undertake a “moderate” rate of extraction.⁹ However, what on paper looked like strict regulations and a moderate pace of development of the oil sector appeared very different to the first Norwegian oil workers in the North Sea. When it came to the actual work process, this national control was limited.

HIGH RISKS AND FATALITIES

The work regime in these early years was dangerous, as safety was often sacrificed to get the job done within tight deadlines. The activities during the construction phase of Ekofisk, Frigg, and Statfjord were so intensive that all the personnel involved and resources were pushed to the limit. The pressure on oil workers did not only come from foreign companies, but also come from the Norwegian state and other private Norwegian interests with an economic stake in the new sector. While other Western countries were struggling with high unemployment and tightening public expenditure, Norway was continuing to enlarge its welfare state. The oil money had been spent in advance. Furthermore, as the main owner of the Statfjord field, the state had to bear large construction costs, which could not be recovered until the oil was in full production. As a result, both the Norwegian trade balance and the state budget were running record deficits.

The oil workers had to pay a high price for the relentless work pressure to bring oil revenue flows as quickly as possible. Between 1965 and 1978, 82 workers were killed in connection with activities in the Norwegian sector. In proportion to the number of hours worked, this was a very high fatality rate. During the development of Ekofisk alone (between 1971 and 1977), 45 workers died, 16 of whom were killed in helicopter crashes. Some accidents made headlines, such as the wreck of the Deep Sea Driller platform on March 1, 1976 when six workers died and a fire on the Alpha platform on Ekofisk the same year when three workers lost their lives. The high fatalities were not caused by major catastrophes, but caused by numerous smaller work accidents. In the close-knit communities of the oil installations, all accidents were felt personally.

In Easter 1977, Phillips lost control during drilling from the Bravo platform on Ekofisk. The oil spill lasted 8 days before control could be restored, although luckily, there was no explosion. This could have set

similar events in motion to the blowout on the Deepwater Horizon in 2010 in the US, where the platform melted as a result of the fire and the underwater well had to be sealed with great difficulty.

On March 27, 1980, the most traumatic episode in Norwegian oil history occurred, also on Ekofisk. One of the support pillars of the semi-submersible accommodation rig Alexander L. Kielland broke in stormy weather. The platform immediately lurched. The crew desperately tried to evacuate the platform, but only a handful managed to reach their life vests. Three lifeboats were crushed against the platform, which then capsized after 20 minutes, taking many people with it. Others struggled in the ice-cold water, surrounded by wreckage, to get onto the two lifeboats that had made it onto the water undamaged. A few managed to swim to a neighboring platform. Eighty-one people were rescued in all, but 123 lost their lives.

These fatal accidents changed the public image of the North Sea oil industry, and tarnished the dream of a Norway awash with oil money. The Alexander Kielland accident added fuel to the fire of oil workers' dissatisfaction. They were no longer willing to be guinea pigs in hazardous working environments, which appeared to be out of control. When the Norwegian oil workers finally revolted, the rebellion was not only against foreign oil companies, but also against the Norwegian state, which was responsible for the basic framework and acquired most of the revenues.

BACKLASH, THE FIRST TRADE UNION INITIATIVES

Norwegian oil workers eventually established strong and independent collective institutions; the shape these took must be seen as a response to the rather dramatic circumstances in which they were formed. The complex forms of opposition that developed were also influenced by the social backgrounds of different oil workers, who were a melting pot of different groups with their own traditions and relationship to work.

The city of Stavanger, which was both the starting point for recruiting the first oil workers and later became Norway's oil capital, had like other coastal towns a shipyard. The shipyard workers were organized in the Metalworkers Union, the strongest body in the main Norwegian trade union federation Landsorganisasjonen (LO). However, Stavanger had never been a particular stronghold for the trade union movement or for Norwegian social democracy. A significant proportion of the oil workers

came from the rural districts surrounding Stavanger.¹⁰ These were rural communities of individualistic farmers, often with a strong evangelical religious orientation. The social background and cultural attitude of these early Norwegian oil workers were not so different from those of the American oil drillers who were just above them in the job hierarchy. Others had previously been construction workers, and many of them had worked on building major dams and had a trade union background. This contributed to the fact that a group of Norwegian oil workers managed to establish a collective wage agreement with Odeco as early as 1967. The workers joined the construction workers' traditional organization, Arbeidsmandsforbundet, a union affiliated with LO.¹¹ Despite this early agreement, the oil workers on the first rigs never managed to forge a strong collective stance vis-à-vis their employers.

After the discovery of the Ekofisk the question of how to organize oil workers suddenly acquired greater political significance. As expected, many of the foreign companies that came in did their best to resist union organization. Norwegian oil workers could be fired immediately, for being disliked by the management or opposing their decision. Workers active at the time recall that they sometimes had the feeling of being a subordinate group in the way they imagined the companies treated people when they operated in the Third World.¹² However, the greater challenge facing the first unionized Norwegian oil workers came from Norwegian shipowners, who had been a bastion of economic liberalism in Norwegian society since the eighteenth century and had entered the market for floating drilling rigs. They remained steadfast during the decades after the Second World War; long after planning and regulations had been widely accepted as a fact of life by most of Norway's business elite. In the 1960s, Norway was the world's third largest seafaring nation by tonnage.

The shipowners were not opposed to union organizing as such, but worked to ensure that the moderate Sjømannsforbundet (Norwegian Seafarers' Union), rather than more militant unions, would get the responsibility for organizing the oil workers. Both the Arbeidsmandsforbundet and the Sjømannsforbundet were members of LO. However, while the former was reckoned a radical organization (with Communists among the leadership), the Seafarers' Union was comparatively moderate. A public inquiry in the 1990s discovered that the Norwegian secret police, together with shipowners and some key officials in the Labor Party, had carried out a thorough purge of radical shop stewards in the Norwegian fleet.¹³ Norway

was a member of NATO, and during the Cold War, great strategic and military importance was ascribed to its large fleet.

The first Norwegian oil workers knew nothing about the activities of the secret police, but the Seafarers' Union was unpopular. When in 1973, LO's leadership decided that organizing responsibility should be transferred to the Seafarers' Union, many left in protest. This was the case, among others, of the workers on the first floating rig that had been turned into a production rig, and where the workers formed the core of the oil company Phillips' operational organization on Ekofisk. LO had made itself unpopular at a key moment. When Phillips on the Ekofisk field, Mobil on the Statfjord field, and Elf on the Frigg gas field in the following years hired their first production workers, they managed to keep out LO affiliates by setting up their own company unions. All the three fields contained a large number of platforms. Understandably, LO was unhappy with this. However, LO did not get very much support from the predominantly Social Democratic state authorities of the time. The most important authority, the Ministry of Industry, was unwilling to offend foreign companies by setting conditions that could delay the construction phase.

In the years that followed, the Seafarers' Union did not manage to secure members and agreements outside the floating rigs, where the shipowners could give direct assistance. When a new rig was to be manned, shipowners could set up a trade union office on the vessel and strike an agreement with the Seafarers' Union ahead of recruitment. Nevertheless, the Seafarers' Union and LO continued to find it difficult to recruit members among drilling personnel and other workers on production platforms. As a result, in 1977, the LO decided to set up a dedicated oil workers' union (NOPEF),¹⁴ with the aim of recruiting operators and other contractor employees who were working on the platforms. Meanwhile, what had initially started as a pure "company union" by Phillips began to behave more autonomously. Leaders in the company union could mobilize a large number of workers to create pressure in connection with negotiations. This led to them to be ejected from the office, which Phillips had provided for them. In 1977, workers on the three largest Norwegian oil fields formed the operators employees association (OFS).

Despite these initiatives, most of the 1970s' oil workers remained in a weak position vis-à-vis the oil companies and their management. When union activists engaged with serious issues over working conditions, they

often resorted to anonymously contacting investigative journalists to get them to cover the conditions in the newspapers. Many feared that any public criticism of the industry would mean being fired. Media exposes had some impact in highlighting many accidents and fatalities in the industry, and contributed to an impression that the major technological activities in the North Sea were out of control. The ensuing disquiet helped to ensure that when the newly passed radical Norwegian Working Environment Act came into force in 1977, it was also applied to the oil installations.¹⁵ Norwegian shipowners were initially successful in preventing the new law from being applied to floating rigs. However, foreign companies, which were the main employers on fixed platforms, were obligated to implement the new Act. It was still hard for workers to criticize management without reprisals, nevertheless the law gradually began to have some effect.

THE REVOLT

By the late 1970s, tensions between workers and employers and management over working conditions had reached a boiling point. On May 20, 1978, the workers on the Eldfisk platform on Ekofisk went on a wildcat strike, after a British foreman struck a Norwegian.¹⁶ Land-based management immediately flew in a representative by helicopter to calm the situation. Instead, the action backfired as 400 workers mostly from Spain, partly from Portugal and Latin America, joined the protest in solidarity. They slowed work and refused to carry out the work of the striking Norwegians. The guilty foreman was eventually transferred, but the incident was the straw that broke the camel's back.

In August of the same year, a similar strike broke out among construction workers on Mobil's Statfjord A platform. The construction workers previously worked at shipyards and had a solid experience of trade union activism. In the wake of the 1973–1974 crises in the international shipping industry, former seamen had become one of the most important groups from which oil workers were recruited. By the late 1970s, workers from the shipyards and onshore mechanical industries had become a more significant group. The 1978 strike on Statfjord started, because workers were refused access to a connection platform bridge, where previously, they could take their breaks and have a smoke in a safe area. Although this was the incident that sparked the protest, workers' grievances were broader and included many other health and safety issues. Among other things, workers

demanded proper doors on the toilets. The supervisors had cut doors in half to discourage workers from taking long breaks. However, despite these workers having backgrounds as LO members, the strikes showed how quickly LO could lose its influence on offshore workers. Because the strike was technically illegal, LO sent a large negotiation team offshore, which upon arrival on the platform was promptly locked in a room by the striking workers.¹⁷ The union officials returned to shore humiliated. After 7 days, Mobil was forced to give in.

In September 1978, Spanish-speaking construction workers employed by Brown and Root went on strike on the Statfjord A platform. The intensive use of low-paid Latin American immigrant workers for some of the heaviest offshore tasks was another side of the prevalent labor practices in the Gulf of Mexico that American companies brought with them to the North Sea. The strike became dramatic when a part of the newly established Norwegian anti-terror police force was sent out to Statfjord A to join private security personnel there. Such coercive tactics had not been used on strikes in Norway since the 1930s. However, some of the strikers were experienced union activists, hardened by struggles against dictatorship in Spain. In the end, the Norwegian “SWAT” police team returned in its helicopter without any confrontation. One Spanish worker summarized his experience shortly afterwards as follows: “At first I believed Norway was a socialist country, but we were treated in a way that was astonishingly similar to the methods of Franco.”¹⁸ The strike did not come to an end until the leader of the newly established LO union NOPEF struck a deal. The migrant workers got a pay raise. However, a few months later, the subcontracting company that used to hire Spanish-speaking workers lost its contract. American, British, and some other groups of experienced skilled oil workers continued to work together with Norwegian workers on the platforms. The 1978 deal and the following loss of contract of the involved firms marked the abrupt end of Spanish, Portuguese, and Latin American migrant workers in the Norwegian oil industry.

Many of the strikes in the wave of conflict that followed focused on the implementation of rights granted by the Working Environment Act. The oil workers’ strategic position in what rapidly became Norway’s highest income industry represented a challenge for the income policy that was an important part of the tripartite system. The oil workers’ demands for higher pay could potentially threaten the negotiated limits agreed upon between the LO and the Norwegian Employers’ Confederation (NAF). This placed the LO in an awkward position. On the one hand, its

continued recruitment of oil workers and the establishment of further branches were predicated on demanding better pay and working conditions. On the other hand, it had to make sure that oil workers' agreements did not become too good in comparison with those of other Norwegian workers. As soon as Norwegian oil workers achieved a certain strength, pressure developed to break out of the box of establishing different deals than workers in other industries onshore. The LO leadership accepted the employers' argument that Norwegian income levels were becoming too high compared to other countries. While the economic crisis in Europe was creating downwards pressure on income, the effect of the major oil investments in Norway was the reverse.

In the summer of 1978, catering employees went on strike for higher salaries. Contract employees on the floating rigs and drilling personnel on the fixed installations carried out successful actions over pay raises in the autumn of 1978, in defiance of the wage freeze policy adopted by the government. This, in turn, brought about strikes for similar salary increases among other groups in the winter of 1979. In 1980, finally, it was the operator personnel's turn to go on the offensive. Operator employees, organized in OFS, were potentially the most influential group of oil workers in the sense that their industrial action could easily block production across the industry. During the period that followed, production on the Norwegian shelf was stopped several times.

When oil workers were struggling for higher salaries, the Norwegian media often portrayed them as greedy. In 1974, Norway had adopted a tax regime based on the idea that as much as possible of the "economic rent" or oil rent belonged to the nation and, therefore, should be acquired by the government.¹⁹ From such reasoning, it could be argued that oil workers were in a position to acquire "rent" that otherwise belonged to the nation as a whole. However, with their access to large oil fields and the accounting loophole of deducting costs from their tax bill, the oil companies' net profits were consistently above the average for other industries, allowing them to pay their workers well. Oil workers could also argue that the extreme, harsh conditions under which they were working required compensation. By the end of the decade, discontent and restlessness among oil workers had reached such intensity that they became a major political issue. The increasingly more radical OFS association that stood outside the traditional tripartite system wanted to become part of the nation wide annual

negotiation process. With the support of key civil servants in the ministry responsible for labor relations, the LO worked hard to prevent this. Eventually, the OFS managed to obtain the right to collective agreements, and in the summer of 1981, the union used these agreements to initiate strikes for higher wages. When the ruling Labor government used compulsory arbitration to stop the strike, workers employed by Mobil on the Statfjordfield went on an illegal strike. There were only a few days left to the general election. Mobil gave in and accepted the workers' demands, which led to salaries increasing 30%.

In this rebellious atmosphere, there was a trend towards breaking down the barriers between different trade unions and occupations offshore. Now, members of the Seamen's Union on semisubmersible rigs and drillers on production platforms organized NOPEF, both unions part of the LO, also went on strike. After the strikes, many of the involved workers broke away from the LO and began talks with production personnel in the OFS. As a result, the OFS opened the organization to all oil workers, thus becoming an industry-wide union. For some time, it appeared as if the LO might completely lose its hegemony among oil workers, as now, the majority were organized outside the traditional tripartite system. Ironically, the OFS had originally started as an American company union, but now it had become radicalized by strikes, and was situating itself in strong opposition to dominating foreign oil companies, as well as the traditional social democratic class collaboration. The LO unions were eventually rescued from an unexpected quarter.

A JOINT COUNTEROFFENSIVE BY THE STATE AND THE COMPANIES

In the run-up to the general election in 1981, several of the political parties in the center-right opposition repeatedly supported independent oil workers' unions in an effort to establish themselves as a recognized part of the negotiation system outside the LO.²⁰ This was a way to undermine the union, which was a staunch supporter of the Labor government. At the same time, it was a way to broaden their social base for winning the election. Unsurprisingly, their support for rebellious sections of the oil workers changed as soon as the same parties took power. On December

11, 1981, representatives of all the foreign oil companies operating on the Norwegian shelf were summoned to a meeting with the newly elected conservative Prime Minister Kåre Willoch. Like the previous Labor government, the new government shared the view that the foreign oil companies' behavior had been instrumental in provoking the conflicts. At the same time, there was frustration that some companies were giving in too easily to the workers' wage demands. The message to the companies was clear²¹: they were all asked to harmonize their wage systems in a way that did not deviate from income policies in other parts of the Norwegian industry. To achieve this, they were asked to immediately join the Norwegian employers' association (NAF, later NHO). This in turn meant that they had to accept the LO as a legitimate counterpart. The consequence for companies who did not comply was explicit: they would have no future on the Norwegian Shelf. In other words, the foreign companies were asked to accept and take part in the existing tripartite system. At the same time, a clear signal was given to both the companies and the state administration that the rebellious oil workers' unions should be if not smashed then at least weakened.

The unrest among oil workers has no equivalent in Norwegian labor relations after the Second World War. A study shows that on average between 1978 and 1985, oil workers went on strike 26 times as often as workers in all the other land-based industries combined.²² The degree of militancy was particularly strong between 1978 and 1981. Most strikes were thoroughly controlled from the grassroots. At the helicopter terminals, where workers and management were shipped in and out, there were always significant groups of oil workers who were on their breaks when the strikes broke out. The platforms were often in practice occupied by the workers. If helicopters with managers or other staff whom strikers did not want on board attempted to land, large groups of workers would lie down on the helipad so as to block landing. This all-encompassing and lengthy involvement, and the fact that most strikes ended in victory for the workers, left not only a strong workers' collective but also a series of well-trained, self-confident shop stewards.

The most visible and lasting expression of this was the oil workers' involvement in health and safety issues. Prior to the Working Environment Act, workplace conditions had been exclusively regulated between the state

and the employer.²³ With the Act, from 1977, co-decision was extended to the workers. Employees gained the right to elect safety delegates, who had rights that directly affected management practices. At the time, this was not unique to Norway. What distinguished labor unrest in Norway's oil industry was the degree to which health and safety representatives got enforceable rights and how they were linked, via training and otherwise, to the trade unions.²⁴ It was not until after the strikes that oil workers started to use the law. From the early 1980s, however, no other group of Norwegian workers utilized the possibilities that were built into the law. On all oil installations, Health, Safety, and Environment (HSE) committees were established, where both workers and employers were represented. The text of the Act itself was shaped by a philosophy which can be summed up thus: in contrast to previous health and safety practices, it was no longer the human being (the employees) who were to adapt themselves to existing technology. Employers were required to ensure that the technology was adapted to human beings. This was very different from the behaviorist stimuli-response approach that had dominated much of the industrial safety regulation in the 1950s and 1960s.

The oil workers' influence on improving safety conditions and regulations was also reflected in the responsible regulatory authorities. The Norwegian Petroleum Directorate (NPD) (from 2005 the Petroleum Safety Authority, PSA) developed a regulatory system, where strong labor safety delegates became an important element. For example, since the approach was one of building robust technology with high safety margins and workplaces that adapted to workers' needs, from the mid-1980s, safety representatives had the opportunity to give advice in the design process itself when new large platforms were to be built. With large living accommodations and working quarters situated on top of dangerous oil and gas wells, the potential for catastrophes on large oil platforms was indeed very present for those spending most of their work life there. In the beginning, workers, with the support of the NPD, demanded that accommodation platforms should be separate from production platforms. A compromise was reached, with a total redesign of platforms, where accommodation areas were separate from production facilities, often with firewalls and sometimes open space in between.

THE INDEPENDENT UNION ON THE DEFENSIVE

While the 1980s represented huge gains for workers in the form of improvements in safety, higher wages, better accommodations, shorter working hours etc., in the same period, oil companies often supported by the Norwegian state went on a counteroffensive, trying to weaken the unions. In several instances, oil workers reacted with new strikes, although now of a more defensive character. What also followed was a long drawn out period of infighting among different oil workers' unions.

The creation of OFS was an expression of the many contradictory forces at play in the Norwegian oil sector. Its members had been forged together by the same kind of grassroots collective struggle from below that had laid the foundation of social democracy as a political force earlier in the century. One of the unions' main political tools was the Working Environment Act, possibly the most "Social democratic" of all laws implemented in Norway. However, both OFS' origin (as a company union), its membership base (a large number recruited from areas lacking strong labor traditions) and its actual experience (workers who were involved in industrial action repeatedly met people and structures linked to the Labor Party on the other side of the negotiating table), made it a strong counterforce to the Norwegian social democratic state. Skepticism towards the Labor Party was not unique to OFS, the most rebellious of the oil workers' unions. At the same time, the LO union NOPEF also marked itself out within the LO confederation by its demand to act more independently of the Labor Party. Both in the strikes and in the leadership of OFS and NOPEF, there were a significant proportion of individuals whose political affiliations were to the left of the Labor Party, people who had come to political awareness through the youth radicalization of the late 1960s and the 1970s. However, on average and in comparison with other traditional industrial workers, oil workers tended to vote considerably to the right of the other traditional industrial workers.

In the years that followed after the climax in 1981, OFS went on (legal) strike several times. However, again and again, the government intervened with compulsory arbitration, and the best outcome was a copy of the agreement made by industrial unions in other industries onshore. On some occasions, competing LO-organized unions received better agreements without having taken industrial action. Many in the OFS felt that this was part of a conscious attempt by employers and the state to undermine their union. At the same time, there was a real danger that the solidarity across

different occupational groups that had marked the uprising would be undermined by more particularistic/sectionalist interests. In particular, some oil workers in key positions directed their discontent towards workers lower down the hierarchy.

Some of this discontent came to the surface in 1986, when the Norwegian Employer's Confederation, partly inspired by the waves of international attacks on labor movements, in particular British Prime Minister Margaret Thatcher's assault on the unions in Britain, undertook a major lockout in connection with the main agreement on non-oil-related activities on land. The initiative was fiercely repelled. It soon transpired that during the Norwegian version of the "Yuppi" boom years (1983–1987), the enthusiasm for confrontational action was weak among the employers themselves. After only a few days of full-scale trade union mobilization, the lockout fell apart. However, a corresponding lockout in the oil industry lasted considerably longer.²⁵ Here, the employers had broken off negotiations that had started with demands from the catering workers in OFS. Other oil workers had not even started negotiations. While all the other conflicts that had crippled or restricted oil production after 1981 had ended by compulsory arbitration, this time around the government avoided intervention as it found industrial action to suit its interests. In the spring of 1986 the price of oil was at a historic low of under \$10. With all production blocked, Norway could contribute to the Organization of the Petroleum Exporting Countries (OPEC)'s attempt to raise prices, without being accused of taking part in a cartel.²⁶ However, insofar as the lockout contributed to emptying the strike funds of all the oil workers' unions, this was also an attack on the strength of the oil workers. By attacking catering workers, it also contributed to strengthening internal conflicts between different groups of oil workers. The lockout was lifted after 3 weeks. Shortly, after a significant group of employees working in key positions in the production process broke out of OFS and joined a union for managers.

NORWEGIAN OIL COMPANIES TAKE OVER

In the space of only 2 years, from the end of 1986 up to 1988, Norwegian oil companies took over as major employers on the Norwegian sector of the North Sea. In December 1986, Statoil started production on the major Gullfaks field, and soon after, it acquired Mobil's organization on the three giant platforms on the Statfjord field. In 1988, Norsk Hydro, the second partly state-owned Norwegian oil company, started production on the

Oseberg field. If, initially, it had been foreign oil companies that had provoked the intense conflicts around 1980, now that Norwegian companies had taken over a more harmonious relationship between the companies and employees might have been expected. This was certainly not the case, especially not initially. In 1990, with the state-owned Statoil as the dominant company on the employers' side for the first time, the Norwegian continental shelf experienced its most polarized period of labor conflict ever.

Many years of repeated state interventions on the employers' side had led to a considerable build-up of frustration among OFS' members. The OFS submitted complaints about these interferences to the ILO and had secured a ruling against the government, on the ground that they constituted biased and unreasonable interventions against labors the right to collective action and strikes.²⁷ However, the Norwegian government, which otherwise emphasized loyalty to UN-linked institutions, chose to ignore the ruling. In 1990, if onshore refineries and petrochemical plants were included, the LO union NOPEF had become the largest oil workers union. However, OFS' members could still block more or less all productions of oil and gas in the Norwegian sector. Many at the grassroots thought that they should do what they had done earlier in the 1980s: strike for better conditions, even if it was illegal. One of the demands that were raised was for an improved pension agreement. In the summer of 1990, OFS went on a (legal) strike once again. Then, the Minister for Local Government warned after only 36 hours that he would stop the conflict, but assemblies on Ekofisk, Statfjord, and Gullfaks decided to continue regardless, and workers from several smaller oil fields joined in.

Unlike the early 1980s, this time the oil workers were facing an employers' side that already had plans for how to deal with illegal industrial action. Around 1980, the striking workers had always been a clear majority on the rigs. Before the 1990 conflict, employers, with Statoil in the lead, had ensured that the number of ordinary workers was minimal. By contrast, many foremen and others in management positions were on the rigs. On most rigs, employees' communications to land were cut. On the employers' side, Phillips and its Ekofisk organization played an important role, but the nerve center of the employers' operation and tactics was Statoil's personnel department outside Stavanger. Statoil's leader Harald Norvik was directly involved. Among other things, he read out an announcement, which was repeatedly played on the loudspeakers on Gullfaks and Statfjord.²⁸ He pointed out that the conflict was a breach of Norwegian law, that Statoil would not enter negotiations under any

conditions, and that those who took part risked being fired. The fact that it was management and not the workers that controlled the loudspeakers was itself an expression of how the balance of forces had shifted. Many line managers were also forced to confront employees with whom they otherwise had good relationships in the close-knit milieu of the oilrigs. The possibility of loosing their job added to the pressure on workers. It took some time before the low oil price from 1986 was felt in the rest of the Norwegian economy. However, a crack in the property market from 1988 lead to a total banking collapse, from 1989. This again lead to increased unemployment. The psychological pressure was intense, and many wound up in the infirmaries.²⁹ There were cases of heart attacks and nervous breakdowns on both sides. The strikers on the Ekofisk field were the first to cave in. After a week on illegal strike, isolated on the large ocean rigs, the last Statoil employees finally gave up.

Statoil proved to be at least as ruthless an opponent as the foreign companies. This was also shown by the events that followed the strike. All 28 workers were sacked. Phillips, which did not want to further polarize the conflict once the strike was over, accepted that their workers could get their jobs back. BP and Elf also came to amicable agreements with their employees. However, Statoil's personnel management, which had sacked a total of 20 workers, was far more recalcitrant. Those who had been sacked were popular rank and file workers who had loyally taken part in the strike. However, none of them were the real strike leaders. When Statoil offered to give them their jobs back in return for OFS taking disciplinary proceedings against the real strike leaders, many felt that they were being held hostage to the company's ruthless tactics. The union nearly broke apart as a result of internal conflicts.

For a long period after, the relationship between Statoil's personnel department and its largest group of operator employees remained tense. The strike's defeat was real in the sense that the membership's resolve to take part in new, divisive conflicts were considerably dampened. The strong collective which had existed in the early 1980s had been undermined. However, after a few years, Statoil visibly abandoned its attempt to break the once-unruly trade union. The state company was continuing its expansion as an operator. There were constantly new platforms and fields to staff, preferably with experienced oil workers. Many of those who had been active in the strike were skilled, professional workers that the company needed both on its new rigs and on the old ones. Eventually, a more business-like relationship was established between the unions and the company.

On platforms with equally large unions competing for the same members, branch meetings took on more the character of factional meetings and were no longer a political expression of collective workers. As long as the oil industry as a whole was expanding, the battle over recruiting members did not completely damage and permanently undermine the oil workers' strength vis-a-vis the employers. Although it was started as a "responsible" alternative to the rebellious OFS, NOPEF also proved to be willing to challenge the employers. In 1993, the two unions carried out a joint political strike for the first time, in protest against proposals linked to Norway's incorporation into the European Economic Area (EEA).³⁰ As a result of the strike, parliament explicitly decided that Norwegian regulations and employment conditions should apply to the oil industry, even if it was to become easier for foreign companies to gain access.

FROM YOUNG REBELS TO MODERATE FAMILY MEN?

The Norwegian oil workers' militant actions from the late 1970s had many parallels to the radical breakthrough in the Norwegian workers' movement around the First World War when foreign investment had led to industrialization around Norway's hydropower resources. Similar to that earlier period, the economic starting point in the latter twentieth century was a rapidly expanding new industry, where new barriers were constantly being broken through the interaction between humans, nature, and technology. A generation of mostly young workers had set their mark on this new situation through direct action, grassroots-directed activism, and a critique of bureaucratisation in the traditional and established trade unions. The pioneer discussion of this radical period of the Norwegian workers' movement's history came from the historian Edvard Bull Sr.³¹ His son, Edvard Bull Jr., describes the institutional adaptation that took place after the great rebellion.³² Bull Sr. identifies the shift from a "noisy" period marked by a hectic pace of new initiatives towards a far more stable state of normality. Young migrant workers (mostly Swedes) set roots in the new industrial towns and started families. With new institutions, there was a kind of natural adaptation.

The adaptation that took place among the oil workers in the 1990s had clear similarities to that earlier era. As younger generations of workers matured and became more established, the average age rose, the young started families, and an apprehension about the punitive consequences of militantism began to blunt their willingness for radical collective action.

If one compares the oil workers' strikes in the 1980s with those that took place in the following decade, it is clear that concerns over possible terminations and their impact on their home life had become far more salient in many workers' consciousness. The earlier militancy underwent some changes as labor became more unionized during these two decades, and had very different political expressions. While the disruption in the Norwegian labor movement around and after the First World War had laid the basis for the relatively radical Norwegian social democracy, the oil workers' rebellion in the latter part of the twentieth century was in many respects a reaction against the social democratic state itself.

At the dawn of the oil industry in the 1970s, the Norwegian oil workers' collective actions and political attitudes were still shaped by their diverse social backgrounds. By the 1990s, they had established themselves as a distinct social group, although there were still many subgroups depending on whether one was working in an operative company or for a contractor company. Furthermore, workers in the contractor sector could be divided into different subgroups. Some, like drillers, experts on well services, support services such as catering, or various groups which carried out continuous maintenance work, might work closely with operator employees in the oil firms. Others, like the ever-growing group which worked on various types of specialized supply ships, had less direct contact to other oil workers. From the 1980s, all diving activities were also moved from the platforms to specialized diving ships. Workers in the supply fleet might muster in coastal harbors, while other oil worker groups usually flew out on an ever-busier helicopter network.

In connection with the hectic construction phase at the end of the 1970s and the beginning of the 1980s, there was a significant sense of community among oil workers, also during offshore leave. The average age of Norwegian oil workers was low at this point. Nearly all were men. In between intense offshore work periods, many oil workers met in particular pubs and nightclubs in Stavanger, which at times could also act as unofficial recruitment offices.³³ In Stavanger, one can to this day hear stories about cocky, young, and uneducated oil workers, doing the town and showing off their Rolex watches.³⁴ However, many victories in the union struggles, and a gradual professionalization of various occupational categories, also contributed to changing oil workers' social life and collective culture. Most Norwegian oil workers went from a work schedule of 2 weeks on and 2 off to 2 weeks on and 3 off. By the turn of the twenty-first century, some were even working 2 on 4 off. The companies also pledged to pay for individual

workers' trips home, irrespective of where they lived in the country. This expressed the concept of equality and Norwegian society's strong regional orientation. An oil worker's job was seen as a privilege which ought to benefit all Norwegian regions. Gradually, more women were recruited as offshore workers. From the outset, women had been hired in catering services, but now, there were women being employed for skilled positions ranging from process operators to engineers and managers.

In the 1990s, some geographical patterns could still be detected in the oil workers' origins. The regions linked to the most important helicopter terminals in Western Norway were over-represented. Established eastern industrial towns far from the oilrigs were also well represented. Otherwise, there were oil workers from and across the country. The long periods of leave between hard work shifts made it possible to establish social lives which were almost completely disconnected from one's working life as an oil worker. While on leave, many oil workers ran small farms. Even in the regions with most oil workers, they did not cluster together in residential neighborhoods. The life of an oil worker was bifurcated, and this had effects on union struggles.

In the course of the 1990s, technological change contributed to this break down and exacerbated some of the divisions between the offshore and onshore activities. When the platform for the giant Troll gas field was ready for production in 1996, it was equipped with a computer system that was supposed to make it possible to carry out all production functions from a remote control station on land. In practice, this proved far more difficult than expected, and in 2016, the platform still had a significant crew. Nonetheless, for oil workers, the prospect that oilrigs could be remotely operated from land was a signal of what was to come, and the realization had immediate consequences for the strategies they chose. For the large gas fields, Ormen Lange and Snøhvit, which were developed in the early 2000s, all the offshore functions seafloor installations operated without offshore platforms and offshore workers. They were operated with remote control systems that were directed from land stations outside Molde and the Arctic town Hammerfest, respectively.

LO, which already had a good foothold in the oil-related workplaces, was well placed to tackle this combination of offshore and onshore functions, whereas for OFS the question of achieving agreements, onshore became a question of survival. Furthermore, the pressure on OFS increased when it became known that a government-appointed commission discussing workplace issues had proposed that only unions with over 10,000 members would have the right to enter national-level agreements.³⁵

If the proposal were accepted, OFS would lose its right to existence. In April 1996, OFS went on strike to get an agreement onshore. The strike lost, and once again, it looked as the union could fall apart. OFS survived by joining Yrkesorganisasjonenes Sentralforbund (YS), a large federation of various professional groups outside LO. The occupational backgrounds were in some cases very different from the oil workers who were now joining, but YS had members both in the oil company's onshore staff and in several refineries. However, YS was involved in Norway's institutionalized income policy cooperation in the same way as LO. From the employers' perspective, they had thus largely achieved the goal of taming the organization that in many ways organizational expression of the oil workers' revolt in the late 1970s and early 1980s. In the years that followed, there were no attempts by oil workers to gain benefits through strike action outside the framework of the tripartite system.

INTERNATIONALIZATION AND INDIVIDUALIZATION

What at the end of the 1990s might have appeared as the new normal, with oil workers acting as disciplined counterparts in the traditional tripartite cooperation, never turned out to be an "end of history" moment. After a temporary decline around 2000, there was a new and powerful growth in offshore employment. Norwegian oil production reached its peak in 2001. A rise in gas production contributed to keep the fall in overall production less pronounced for some years. Higher oil prices and the fact that a range of extra investments were needed to maintain activity on fields which were in a so-called tail production phase contributed to the growth in employment. This meant that both OFS (which had changed its name to SAFE) and NOPEF (which following a merger within LO also changed its name to Industri Energi, IE) could continue to grow numerically. Among offshore workers, the two unions were equally large. Negotiations over wages continued, as in the 1980s and 1990s, with various forms of state intervention, which meant that the possibility of legal strikes remained limited. However, overall, the oil workers' unions maintained considerable strength, as the vast majority of workers offshore in the Norwegian sector remained organized. The challenge to the traditional tripartite cooperation now no longer came from trade unions using their strength to break out, but rather from the employers' side, an employers' side where a partially privatized and increasingly internationalizes Statoil took the lead.

STATOIL, AN OIL COMPANY LIKE ANY OTHER?

During the widespread unrest at the end of the 1970s and the start of the 1980s, Statoil distanced itself on several occasions from the foreign oil companies' lack of acknowledgement of what were described as the traditional Norwegian workplace relations. When Statoil as employer took such a hard line, particularly with the OFS, it could be interpreted as a desire to discipline the most radical oil workers and lay the basis for a more harmonious cooperation, albeit from a position of strength. However, closer analysis suggests that Statoil's support for the traditional tripartite cooperation gradually became more a matter of opportunism than principle. In LO too, many oil workers experienced Statoil as being a more aggressive employer than foreign companies in the 1990s. While foreign companies felt forced to adapt to the Norwegian system in order to have continued access to lucrative oil and gas concessions, Statoil was automatically assured of such concessions. From the agonizing conflict in 1990, and on it was Statoil which took the lead when employers wanted change.

The oil workers' dissatisfaction with Statoil was made amply clear when the company's board presented a proposal for partial privatization at the end of the 1990s.³⁶ In many oil-producing countries, struggles against the privatization of state-owned oil companies were a major political issue at the turn of the century. OFS made its opposition public with a political resolution against privatization.³⁷ However, there was little enthusiasm among the union membership for engagement in a campaign to maintain the company as it had been. The LO union NOPEF eventually supported the demand for privatization. Compared to other oil workers union around the world, this was a unique position to take. In many oil-producing countries, struggle against privatization was the main priority in the late 1990s and early 2000s. The union's support for privatization was decisive for the Labor Party government, which after a significant battle with the left wing at the party's congress, could start privatization process. From summer 2001, the state started a sell-off process to reach the goal of 33% private ownership. The state made assurances to the new private owners that it would not use its majority share to interfere in the company's operations, and would allow signals from the market to guide company strategies.

Naturally, there were significant aspects of Statoil that distinguished it from many of the foreign oil companies operating in Norway. Although Arve Johnsen, Statoil's first general director (1972–1988), was a Labor Party member, he was not overly concerned with workplace relations, and never

tried to hide the fact that he took the large international oil companies as his model. Although Statoil recruited and trained many managers in the same cultural and social mold as other large Norwegian firms; nevertheless, it was also deeply influenced by global models and was at odds with the more corporatist practices prevalent among other large companies in Norway.

When Statoil took over Mobil's Statfjord organization (from December 1986), the company inherited a middle-management stratum which had been trained in an American management tradition. Most managers were Norwegian, and in keeping with official requirements, Norwegian had been introduced as the *lingua franca*. Statoil's organization for the Gullfaks field, which was almost as large, had been built up with Exxon's technical assistance. In both places, many staff members had been trained and molded by the management traditions of the overseas companies. It was typical of the latter that they related to employees as individuals, rather than as a collective with democratically elected representatives chosen to speak for and to negotiate on behalf of their constituents.

Immediately after the 1990 divisive strike, Statoil announced that the company had entered a strategic alliance with BP for exploration and production in various regions around the world.³⁸ The alliance with BP, which was maintained until 1999, was to have great significance for the development of Statoil's internal workplace regime. BP saw itself benefiting from the collaboration, partly because Statoil had good access to capital (many oil companies were struggling in the late 1980s) and partly because Statoil as a Norwegian company could expect certain goodwill and a warmer welcome in the countries where joint investments and operations were planned. On the other hand, Statoil, as the junior partner, needed a mentor with long experience on the international oil scene. In all the countries where the alliance operated, joint offices were created where employees from both companies worked together. It was John Browne, then head of BP Exploration and later the company's CEO, who worked out the alliance deal with his counterpart Harald Norvik. At the time, Browne was behind the far-reaching reorganization and downsizing that fundamentally changed BP's workplace culture.³⁹ Although BP was a former state company, international financial markets perceived it as a corporate pioneer in the international oil industry. The differences between working conditions in BP and Statoil were significant enough to cause major frictions and internal conflicts within the joint work groups. A 1993 internal Statoil report discussing these problems listed the elements that highlighted the perceived cultural differences between the two companies.

The attitudes and work practices of BP's employees were described as: individual initiative, information hoarding, individual empowerment, less rigid procedures, result-oriented, self-promotion, long working hours, and sense of insecurity and anxiety. In contrast, the working culture of Statoil employees is described as: teamwork, information-sharing, authority retained by management, rigid procedures, a focus on processes, self-deprecation, fixed working hours, security, and sense of confidence.⁴⁰

The Statoil employees who were involved in the alliance at this point were often highly trained personnel, often engineers and geologists. Only a few would have their background in the union OFS/Safe or the LO unions. Part of these differences can be ascribed to the particular situation employees in the two companies found themselves in: BP was experiencing dramatic downsizing, while Statoil was in the midst of an expansion. These diverging circumstances affected the attitudes of workers and employers. Nevertheless, on a more general level, the above mentioned assessment reveals that a typical Statoil employee in 1993 had a far more collective attitude than a comparable BP employee.⁴¹

In the years that followed, it became clear that it was BP's organization and corporate culture, and not Statoil's that was meant to be adopted as a model. The collaboration with BP had direct consequences in the Norwegian sector insofar as BP took part in benchmarking projects comparing the productivity of BP and Statoil installations in the British and Norwegian sector of the North Sea, respectively. When Statoil merged with Amoco in 1998 and the alliance was dissolved, Statoil had to manage abroad on its own, but the BP influence continued. In 2000, a manager from BP was recruited to lead Statoil's international department. Thus, by the turn of the new century, through their close collaboration with BP, after overcoming the union resistance of the 1990s, and after partial privatization, Statoil managers came to adopt new corporate management and labor practices that were more in line with those of international oil companies and other multinational corporations.

FROM RESPECT FOR THE WORKERS' COLLECTIVE TO COMPETITIVE AND ATOMISTIC INDIVIDUALISM

Many of the management systems used by BP and other major oil companies in the early 2000s were based on an underlying ideology whose keywords were the individualisation of incentive and responsibilities. This

was also the case in the industry's approach to safety. We have seen how the Norwegian offshore oil sector from the 1980s was based on a system where oil companies had a clear responsibility to constantly improve safety. The focus was on improving technology by designing robust installation and creating barriers that would make sure that smaller incidents did not escalate to catastrophic events. In addition, in relation to safety, the tripartite system played an important role. Even if the Norwegian model is based on cooperation, it always operates with the assumption that employees and employers (because of competition) have different interests. There are openings, both through the system of safety representatives, and through the unions, for employees to make safety demands on the firm's management.

In contrast to the Norwegian safety approach, oil companies and large oil suppliers and service firms, from the late 1990s through the 2000s, relied heavily on a new wave of behavior-based safety systems (BBS) in their work. The conceptual basis of this orientation can be traced back to the American H.W. Heinrich's 1931 book *Industrial accident prevention*,⁴² where he claimed that 88% of accidents could be traced to workers' unsafe acts. Ten percent could be traced to mechanical and physical conditions and 2% would be unpreventable. The approach and the formula have been heavily criticized ever since.⁴³ Nevertheless, it still survives as a mantra in many multinational companies' safety approach. This theory shifts the focus on the behavior of individual workers. A typical approach in most BBS programs would be various forms of stimulus based on rewards and punishment. Using prizes and bonuses for periods without any reported time lost due to accidents was common. This turned into a form of collective punishment as a single reported accident would be enough to take away everyone's bonuses.

BBS campaigns from the early 2000s often used revivalist-style meetings to point out every individual's responsibility. Statoil used similar measures when it ran its BBS-inspired "colleague programme." More than 20,000 workers, including Statoil contractors, took part in the programme's opening seminars between 2002 and 2005.⁴⁴ A highlight of the seminar was an emotional film about the reactions of survivors to a fatal accident in one of the company oilfields. More a piece of propaganda than an impartial and informative documentary, this story was given an ideological twist, as with comparable films in BBS campaigns in the USA, in that it emphasized that the accident could have been avoided if employees had paid more

attention, without really exploring the wider context of the workplace safety hazards.

Many newer BBS systems emphasized employee involvement, for example, in correcting and reporting the mistakes of others. Employees are involved, but as an extended and decentralized arm of management's own control activity. This activation has little in common with the kind of grassroots participation which had been available through the Norwegian safety representative regulations. The Norwegian oil workers union OFS/SAFE criticized BBS for leading to under-reporting and a one-sided focus on lost time accident statistics instead of training in process safety. The main focus of the Norwegian safety system was, as we have seen, the development of robust technology and the elimination of risks. There was also a focus on individual behavior and responsibility by ensuring that workers actually wore hard hats and other protective gear, follow procedures and so on. However, the assumption was that improvements are best achieved through training, not stimulus and response. The different orientation of the Norwegian safety system became even clearer when a regulation directed at management system in 1995 and later in 2001 specified that: "collective precautions are to be preferred over precautions directed towards individuals."⁴⁵

The clearest expression of Statoil's shift towards a more individualistic approach to its own employees can be found in its income policy. Here too, the influence of its time in alliance with BP is noticeable. As early as the 1990s, Statoil introduced aspects of a reward system for part of the company's upper management reminiscent of what was in use in BP. After privatization in 2001, this form of individualized reward was further developed when about 400 Statoil managers entered a personal bonus.

Parts of the Norwegian trade union movement had experience with result-oriented wage system through agreements which were widespread both in the iron and metal industry and in construction up to the 1960s. These agreements, however, were not bonus systems in the sense that these were previously negotiated targets and rates where union members had substantial control. Bonus systems operated quite outside of established wage agreements, and management controlled who should receive them and how much. In other words, these were not collectively negotiated wages.

When in 2002, Statoil's CIO announced that ordinary oil workers would also be paid bonuses, various trade unions had difficulties in responding. Could they reject an offer which involved giving many

employees significant extra payments? Statoil was in a unique position as rising oil prices allowed it to record surpluses greater than all other Norwegian companies. In the years which followed, large new bonuses were paid. Statoil, which in the early 1980s had criticized Mobil for giving large increments outside the framework of income policy cooperation, and which in 1990 went on the offensive against unions that had led this breakthrough, was now itself operating in an income gray zone. None of the Statoil unions recommended that their members reject the offer of bonuses.

In 2007, Statoil went a step further in individualization when a large part of the company's administration was put under a system where pay determination was linked to grades awarded in different areas. These were grades as in Norwegian school, from 1 to 5. The areas covered included not just concrete outcomes, such as financial results, cost control, and safety outcomes, but also on how these outcomes were achieved. Statoil's director of information pointed out that alongside simple goal achievement, the new system also aimed to evaluate how much individuals carried out their job in keeping with the company's values.⁴⁶ In practice, this could mean being evaluated in terms of whether one was seen to be loyal to superiors. The system first became the focus of public attention in 2010, when Statoil indicated that it would now also apply to employees in ordinary wage situations. However, this time, there were loud protests. All unions came out in clear opposition to the proposal. LO leader Roar Flåthen announced that he saw the system as unjust and that he feared it would create frustration and suspicion.⁴⁷ Terje Nustad, then leader of SAFE (former OFS), felt that the system created a culture of obedience and fear which meant that employees would be reluctant to speak up about conditions which might have safety risks.⁴⁸

If the tripartite cooperation discussed above had still been functioning, one might have expected that if the top leadership of Norway's two main trade union federations came out so strongly against a particular system, Statoil would hear the signals and shelve the project. However, Statoil decided to ignore the signals.

CONCLUSION

With an economy awash with oil money and a surplus in the form of a giant petroleum fund, it had for many years appeared that Norway would stand outside the whirlwind of austerity packages, economic constraints, and

neo-liberalist reforms which were sweeping through Europe, often with the result of weakening unions position in society. At the moment of writing, there is no strong indication that Norwegian employers in general are aiming to break with tripartite cooperation. When Statoil operates in Norway, it must still observe traditional wage agreements, negotiate with trade unions on pay increments, pension arrangements, and working time. Alongside the attempts to individualize responsibility for safety, using elements from behaviorist conceptions of health and safety, and the use of concepts like results-based management, the company is still legally obliged to create the conditions for workers to elect safety representatives and chief safety representatives. If we only look at the tripartite cooperation as a channel for high-level communication between the main employment partners, developments in Statoil do not represent a great danger for unions. However, if we see tripartite cooperation as a social compromise based on the relative strengths of the parties, which for trade unions rests on the sense of community and workplace solidarity, the shift in Statoil and many other Norwegian and foreign companies operating offshore in the Norwegian oil sector from the collective to the individual level is a treat to the strength of oil worker unions. An example of what such a threat might mean was seen in the 2012, when the employers, with Statoil in the lead, responded to a limited strike by oil workers with a total lock-out. Employers speculated that the government might intervene, and that they would achieve their goals. But unlike the 1986 lockout or the 1990 and 1996 strikes, the employers were now faced with unions working together. Since oil workers now felt that the threat lay in employers' overriding the whole collective-based system which had been key to improving their safety, raising their wages and ensuring their security, they had everything to win by standing together. An even stronger test to for the tripartite system occurred after summer of 2014 when oil prices entered a seeming free fall. After decades of steady growth, Norwegian workers are now facing the looming threat of job insecurity and widespread layoffs.

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The Role of Labor in Transforming Nigerian Oil Politics

Andrew Lawrence

INTRODUCTION

Nigeria is often taken as the paradigmatic “oil curse” exemplar; that is, the very existence of its oil industry is often taken as a necessary and sufficient explanation for the extreme poverty, inequality, corruption, and lack of transparency that have plagued the country for decades. As is often the case, however, the conventional wisdom occludes more than it clarifies. This sweeping view assumes that oil’s influence on a country’s political economy is always negative across historical periods, always the same for major oil producers the world over, and thus somehow beyond the reach of popular democratic forces. A closer look at Nigeria’s political history shows that during its initial phase of extraction, oil exacerbated, but did not create the state fragmentation and chronic societal mistrust rooted in the country’s colonial past. These factors contribute to a broader political culture of clientelism and corruption from which virtually no organized interest, including the labor movement, is entirely immune. But the country’s political culture is neither monolithic nor unchanging. Moreover, on occasion oil workers played a decisive role in supporting and sometimes leading the

A. Lawrence (✉)

Vienna School of International Studies, Vienna, Austria

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pro-democracy movements. Indeed, precisely because oil has colonized such a major segment of Nigeria's political economy, at key junctures oil workers are able to exercise leverage far beyond their numbers. These oil workers were able to exercise this power not despite inadequate institutions, but through the creative appropriation of the informalization of politics. These successes can inform different challenges concerning outsources and casualization characterizing the past two decades of democratic transition.

The chapter proceeds as follows. After providing a brief overview and critique of "oil curse" literature, it sketches the specific nature of the oil industry's political and social history, and the place of oil workers within it. It then describes how these workers moved from a position of numerical and political weakness to one of increased political and social strength. Although they are far from being the only important popular actors in the industry or in society more broadly, they have assumed a leading role in pro-democracy struggles—paradoxically making use of the country's dependence on oil for maximum social benefit. They remain part of the coalition of actors with the greatest potential to articulate oil's "moral economy," and thereby help to promote the continued consolidation of the country's democracy. The chapter concludes with a reflection upon the importance of taking the social history of oil workers seriously, as a useful corrective to overly sweeping—and pessimistic—political economy narratives, such as that of the "oil curse."

GOING BEYOND THE "OIL CURSE"

What power can oil workers exercise in oil-rich states, what power have they exercised, and can this power promote goals of broader democratization? Most discussions regarding oil politics and democracy have neglected these questions, focusing either on elite strategies in power distribution or, more broadly, on the political economy of oil wealth.¹ Other research on contentious politics in extractive industries has examined other civil society actors—for example, challenges from organized coalitions or indigenous populations to export-oriented development policies.² This essay analyzes the paradoxical yet vital role of Nigeria's oil workers played, and continue to play, in the country's democratization processes.

The "oil curse" literature, by contrast, in sweepingly associating oil economies with undemocratic outcomes, presents a distorted picture of the oil-democracy relation in several respects. It does not adequately disaggregate specificities of political culture, geography, and history from resource endowment.³ To be sure, oil's high level of energy density,

together with its comparatively simple extraction and transportability, underlies its enormous revenue-generation potential that has often yielded violent conflicts over its control. Oil companies have often responded to this threat by locating oil production and distribution in physically and politically remote sites so as to reduce their vulnerability to political pressure and attempt to keep workers isolated, divided, and powerless in the workplace and broader political arena.⁴

Yet, neither geography nor geology is destiny, and popular contention around oil can yield—and has yielded—more democratic outcomes. This remains the case for some of the world’s largest producers. According to IEA data, Nigeria belongs to the world’s top 15 oil producers, which together account for over 75% of total output: in 2013, Nigeria was the world’s 13th largest (2.5 m bbl/day, 2.6% of world total). More politically salient, perhaps, is the fact that Nigeria is among the top ten major producers with the above average oil revenues as percentage of GDP—a common measure of a country’s dependence on oil.⁵ As shown in Chart 1, Nigeria’s oil dependence has reached or exceeded 25% for most of the past four decades, on occasion exceeding 50%.⁶

Indeed, it is precisely immense revenue-generating potential that informs the similarly immense potential power of oil workers, positioned, as they are, at points of production of what is the country’s (and arguably the world’s) pivotal resource of the past several decades.⁷ This power is

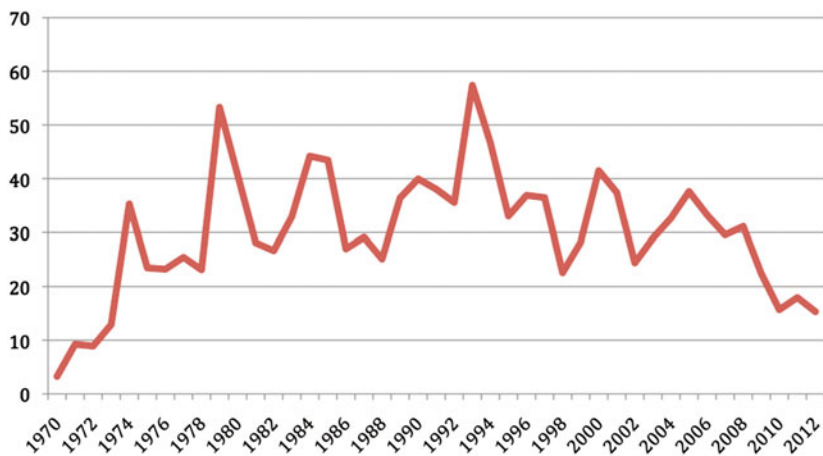


Chart 1 Nigerian oil revenues as a percentage of GDP.

found not only in their organizational capacity and their bargaining power, but more fundamentally, in their capacity to combine these advantages through *translations* of power into critiques of the status quo.⁸ In this regard, oil workers' power is broadly comparable to that of coal miners in older industrialized economies during the Industrial Revolution.⁹ The basic mechanisms are intuitively obvious: a vital resource is vulnerable to expressions of contention. Given the sector's high capital intensity, even minor attempts at disrupting oil's production, distribution, and consumption—from go-slows, absenteeism, and contractual disputes to bunkering and infrastructural sabotage—will have extensive economic and political effects. Nonetheless, the translation of power is an ever-shifting challenge, dependent upon creative responses to changing circumstances—a point the essay returns to in its conclusion.

This insistence upon oil workers' power goes against the thrust of not only the "oil curse" literature, but that of several of its prominent critics, as well. Timothy Mitchell, for example, argues explicitly against this claim, asserting that coal miners could mobilize more political power than oil workers ever could. It may indeed be true that coal workers in numerous contexts have been more decisive in shaping national labor movements and allied political parties. However, such an argument would place undue emphasis on national (especially parliamentary and procedural) representations of power, rather than on contentious politics.¹⁰ In addition, it overlooks those aspects of the oil industry that are more capital intensive, more vulnerable along a longer commodity chain, and thus entail the participation of a wider array of workers than has been the case historically for coal. Oil's production, distribution, and consumption link together with a chain of productive activities that go beyond the phase of extraction (under more diverse geographic settings that include shallow as well as deep water, in addition to land based wells), to include construction, pipeline transport and oversights, shipping, refining, etc. Failure to make these distinctions is a major flaw of the "resource curse" literature, which typically emphasizes the GDP share alone as the basis of their claim for the unimportance of labor as a political factor.

A further decisive difference with coal is the increasingly uneven temporality of contemporary capitalism compared with one or two centuries earlier—one that is "composite and contradictory, simultaneously still and hyper-eventful."¹¹ This contradictory temporality is characterized by recurrent crises of legitimation and profitability that are both damaging to employers and political elites, and arguably more frequent than during the age of industrial capitalism's ascendancy. When labor movements organize

and mobilize during such moments of concurrent crisis, they can reap benefits in both the political and economic realms by strengthening—or “translating”—which ties between the two conceptually and organizationally. The frequency of such crises makes such conjunctural opportunities for labor movements increasingly likely occurrences.

Oil workers’ power in the Nigerian context and elsewhere is arguably further magnified by the fact that private ownership of oil and gas resources worldwide has dropped below 10% in recent years, as national governments restrict the access of foreign companies to oil reserves in their territories in favor of national oil companies (NOCs).¹² In these contexts, there is increasing potential for labor not only to rally political support in favor of keeping production in the hands of the state, but more importantly, to politicize production politics and the distribution of accruing income.¹³

Historical institutionalist approaches to resource governance suggest that the extent to which organized labor can shape trajectories of state–society relations is historically contingent upon prior institutional contexts.¹⁴ Indeed, the actual influence exercised by workers in oil-exporting countries around the world is highly variable.¹⁵ The strength of states alone, however, does not necessarily translate into more redistributive agendas, as can be seen regarding the “capital surplus” Middle Eastern Gulf States, where the weakness of labor movements has yielded weak state “infrastructural power.”¹⁶ These approaches highlight path dependence (whereby initial factors contribute to stable institutional reproduction over time) and the critical junctures during which significant choices concerning institutional arrangements were made. Rather than emphasize corporatist institutions that mediate associational power, however, I seek to highlight the importance of workers’ contentious politics in shaping not only *initial conditions* but—equally importantly—*conjunctural leverage* to explain political outcomes.

In particular, I stress the importance of oil workers choosing to engage in contestation and qualitative bargaining, rather than politics as usual, during periods when oil production attains political salience.¹⁷ Although oil workers’ capacity to influence oil politics is facilitated or hindered by the way their state’s institutional context promotes or deters either workplace control or associational power, or both these sources of worker power, it is their choice to exercise their capacity toward democratizing ends that is decisive. When oil workers mobilize around issues of workplace control and organizing rights while politicizing the way in which oil revenues are spent, they exercise a durable translation of their prior associational and

structural power.¹⁸ Nigerian oil workers, to be sure, face challenges on both counts, but these are to a certain extent the consequence of prior successes. The country's first decade of popular mistrust of central authority, culminating in attempted secession and civil war, led to a post-conflict exclusionary settlement characterized by state-corporatist approaches to oil sector management and employment in the 1970s. As with other exclusionary settlements, this one fueled further violence, manifest especially in Delta-based regional insurgencies in the 1980s and 1990s. However, these structures also helped channel popular democratic initiatives. Workforce casualization, together with intensified violence and repression, characterize the present period of return to formally democratic but still highly corrupt rule. The challenge for oil workers and the broader labor movement, therefore, is to try to enforce existing laws nationally while promoting accountability and equitable development locally.

THE POLITICAL GEOGRAPHY OF NIGERIA'S DELTA REGION

The preceding emphasis upon the latent potential power that oil workers can exercise does not detract from the often-immense challenges they have faced, or from the highly unstable nature of the sector. Over the past five decades, it has witnessed significant shifts in the site of oil extraction, the profiles of corporations involved, the political regimes in power, the extent of environmental degradation, and the modes of contention that workers and communities have pursued in their attempts to realize this power.

The initial onshore site of oil extraction lay in the Delta's complex ecosystems of lowland rainforest, freshwater swamp, mangrove swampland, and coastal barrier islands. The Delta is shaped by a dense network of thousands of distributaries of the Niger river, extending over 70,000 km² of the south central region of Nigeria and making up 7.5% of its land mass. Upon independence, the region comprised the Bendel and Rivers States further subdivided in 2000 to include Akwa-Ibom, Cross River State, Edo, and Ondo States in the region. Although the region is inhabited by less than 15% of Nigeria's total population (today, over 30 million people), it is perhaps the country's most ethnically diverse, with more than 40 ethnic groups speaking scores of languages and dialects. The difficult terrain and ethnolinguistic diversity presented greater challenges to achieving a unified regional political identity, compared with Nigeria's north, southwest, and southeast regions.

This terrain also helps to explain both the advantages and disadvantages of the modes of extraction. For over four decades since its discovery, oil was extracted from dozens of shallow water oilrigs throughout the Delta. Compared to their deepwater counterparts in other countries (as well as to more recent, and increasingly prominent, developments in Nigeria's coastal waters), this terrain not only increased the likelihood of comparatively early discovery and large-scale extraction by oil multinationals, but also rendered the social and environmental effects of extraction much more visible and contentious. If the ecological damage became increasingly clear, however, the industry's revenue flows grew in magnitude, and its accounting became increasingly opaque.

Within a few years of the discovery of oil in 1956, Nigeria became (and has remained) Africa's largest oil producer, with approximately one third of the region's proven reserves. As one of the largest sources of "light sweet" crude, whose low sulfur content makes it eligible for use in a wider range of (especially North American) refineries, its geostrategic importance is magnified, in contrast to most Gulf region oil. Oil accounted for between 25 and 40% of GDP from the 1970s to 1990s, for about three-quarters of government revenue since the 1980s, and roughly 90% of its export earnings. In 2008, oil exports were valued at more than \$74 billion and earned billions in profits for the five multinational "oil majors" (i.e., Royal Dutch Shell, ConocoPhillips, ExxonMobil, Chevron and Agip) that partner with the Nigerian government on oil and gas projects. It is important to emphasize, however, that official statistics in the sector have always been themselves objects of contention. While it is certainly the case that well over three-quarters of oil revenue have accrued to the country's wealthiest 1% of the population, it is unknown how much of this revenue has remained "off the books"—by one estimate, perhaps three-quarters of the \$400 billion in revenue generated "has simply gone 'missing' since 1970."¹⁹

OIL WORKERS IN THE SHIFTING LANDSCAPE OF CONTENTION

In the fluid period from the 1940s to 1960s, it was by no means clear whether workers' institutions, identities, and demands would have an employer-based, regional, ethnic, or class-based character. In fact, all these factors have become institutionally manifest at various points. As was the case for much of the colonial world, wartime mobilization stoked

independence movements in Nigeria in the 1940s, and roughly 50,000 rail workers led workers from over a dozen other unions in the first national strike in 1945 for more rights and better pay.²⁰ The June 1964 general strike, lasting nearly 2 weeks and with almost 800,000 organized as well as unorganized workers (almost 5% of the workforce), signaled a degree of political capacity and independence that for some participant-observers, was propitious for the formation of a union-supported Nigerian Labor Party.²¹ Both strikes followed a pattern that would be echoed repeatedly in episodes of mass action by Nigerian oil workers and others in the labor movement: “What began as a protest over wages quickly widened into an attack on the very basis of the regime’s authority. ... In the confrontation, Nigerian workers scored a significant victory, while the regime was discredited across a wide and crucial segment of public opinion.”²²

As is well known, the majors’ collusion with a succession of repressive and corrupt regimes has led to inequalities on a massive scale. At the same time, however, the state’s penetration of the industry and moves toward quasi-nationalization and revenue decentralization, has made it all the more vulnerable to both political as well as economic disruption. As a result of growing ethnic and regional tensions, in January 1966, Nigeria experienced its first military coup, which Nigerians widely supported.

Rather than adopt a “night watchman” stance of neutral adjudication, however, the state became progressively involved in the oil industry. The Nigerian government is a majority shareholder in many projects run by the oil majors, and it operates a network of its own refineries, gas facilities, and other installations through the National Nigerian Petroleum Company (NNPC) and its many subsidiaries; indeed, the NNPC is often called the “other major” because of its significant role in the oil business. In 1969, the Nigerian federal government’s Petroleum Act made all oil discovered in Nigeria the sole possession of the government and created financial mechanisms to distribute the money collected from oil concessions. During the 1970s oil boom, the federal government raised its allocation of oil revenues from 50 to 80%. More recently, local government elites have demanded an increasing share.²³ As federal and local governments have become more dependent on oil revenue, not only has its distribution become more politicized, but the potential for widespread economic and political disruptions has increased, as oil workers discovered during this period.²⁴

An early state response to popular contention was to promote the industry’s “Nigerianization.” At present, the oil industry employs an estimated 60,000+ workers, of whom about 65% are regular (full-time,

permanent managerial, senior, and junior staff) workers, 25% are contract workers, and 10% are subcontract workers. While as many as 20–25% of regular workers are not Nigerian citizens (a proportion that has steadily increased over the past decade as a result of outsourcing), only about 5% of contract workers are foreign and all subcontract workers are Nigerian citizens.²⁵

Despite the effects of outsourcing, the fact that the industry continues to employ a comparatively high proportion of Nigeria nationals is the consequence of several government decrees and regulations. In particular, Regulation 26 of the 1969 Petroleum and Drilling Act stipulates that the licensee of an oil prospecting license is obliged within a year of receiving the concession to submit for ministerial approval “a detailed programme for the recruitment and ... training of Nigerians in all phases that are handled directly by the lessee or through its agents and contractors.” Section 29 of the Act further requires submission of a progress report on this program’s execution, and Paragraph 37 of its first schedule mandates that the holder of an oil-mining license should ensure, within a decade, that the number of Nigerian citizens employed in connection with the lease in managerial, professional, and supervisory grades shall reach at least 75% of the total number of persons employed in those grades; the total number of Nigerian citizens in any one such grade shall not be less than 60% of the total; and that all skilled, semiskilled, and unskilled workers are citizens of Nigeria.²⁶

More recently, the Nigerian Content Act (NCA, 2010) sets a legal limit of at most 5% of non-Nigerians in management positions, and forbids expatriates in lower positions. Estimates of total expatriate employment vary from one fifth to a third of workers, but observers agree this proportion is growing.²⁷

Senior staff, over three-quarters of all regular employees (including most skilled Nigerian personnel in offshore, drilling, refining, technical, and managerial positions), are organized in the professional staff union Pengassan (Petroleum and Natural Gas Staff Association of Nigeria), while junior staff, 10–15% of regular employees, are organized in Nupeng (the Nigeria Union of Petroleum and Natural Gas Workers). Contract workers are organized in both unions, whereas subcontract workers are unorganized, working for stints lasting typically 3 months.²⁸ The state boosted membership in these two unions considerably in 1978 when it introduced automatic membership registration with “opt out” provisions to all new oil sector hires. Although it rescinded this policy in 2005, fearing that the unions would become too powerful, the sector still retains a union density of roughly 60% (of whom 20% are women).²⁹

There are three sectoral subdivisions: the upstream sector, pertaining to oil exploration, extraction, production, and export, and dominated by the half dozen major multinationals, whose workers command the highest wages; the downstream sector, focused on refining, domestic oil and gas distribution, in which several mostly Nigerian firms compete, and the service sector dominated by the NNPC, which provides consulting and technical services, as well as facilitating government relations.³⁰ As it is typical of the industry the world over, a substantial majority (roughly 85%) of the workforce is male. Women are concentrated in the service sector of the industry, in particular, in administrative, medical, personnel, human capital development, public affairs, and legal positions.³¹

Although the industry as a whole employs a relatively large proportion of Nigerians, Nigeria's oil workers are unrepresentative of the broader society in which they live and work. They represent only a small fraction of the country's formal sector workforce. They tend to earn significantly higher wages than workers in other sectors, they are overwhelmingly male, they tend to come from regions outside the Delta, and although private firms employ the majority of oil workers, their terms of employment are the direct consequence of state action. The politics of production relations in the Nigerian oil industry also shows lasting effects of wide-ranging state involvement and the attempted corporatist subordination of workers within statist structures, during the period of military rule in the 1970s. This privileged, minority status would seem unpropitious for engaging in large-scale, protracted cycles of contention.

Nonetheless, at key moments in the country's political history, Nigeria's labor movement has played the decisive role of unofficial national opposition in the country's complex and contradictory democratization when political parties have been unwilling or unable to do the same. While many analyses bemoan the comparative weakness of Nigerian unions, beset with regionalism, factionalism, and bureaucratic conservatism, the more remarkable fact is that they remain a significant and contentious presence in Nigerian politics.³² This is particularly true for the oil workers' union, Nupeng. As oil's growing dominance has increased the domestic economy's vulnerability to price swings, it has yielded more complex political effects. Facing persistent constraints on the basic organizing and contract rights, oil sector workers became increasingly obliged to court public opinion to rally support.

They did so in the context of increasingly unpopular national political developments. The second coup against a nominally democratic regime (in

December 1983) was even more popular than that of 1966; but most popular of all was the “palace coup” of General Muhammad in July 1975, overthrowing the Gowon junta that had taken power in 1970, in the wake of the Biafra War. Before his assassination in February 1976, Muhammad promoted a degree of administrative decentralization and pursued anticorruption measures, with the intent of promoting ethnic pluralism but subsequently leading to the further marginalization of the least well-organized ethnic communities of the Delta. Nupeng’s latent power historically was magnified by the failed attempts at imposing state corporatist structures. Upon succeeding Muhammad as Head of the Federal Military Government in 1976, General Olusegun Obasanjo continued to pursue the centralization of power, including state-corporatist control of the country’s unions. Decree 53 of 1970 had already severely restricted the right to strike under the Gowon military regime.³³ In response, the four regional labor centers had merged in late 1975 to form the Nigeria Labor Congress (NLC). The Trade Unions (Central Labor Organizations) (Special Provisions) Decree 1976 (No. 44) then attempted to transform the NLC into an arm of the state, disciplining dissident trade union members and dissolving labor centers. Other measures designed to erode the right and ability of unions to organize and recruit workers included the Trade Disputes (Essential Services) Act 1976 (No. 23), which allowed the president to ban any trade union or association representing employees; the Trade Disputes Act 1976 (No. 7), establishing the National Industrial Court with jurisdiction over trade dispute matters; and the Trade Unions (Prohibition) (Federal Fire Service) Order 1976 (No. 42), prohibiting members of the Federal Fire Service from organizing or becoming members of a trade union.

Notwithstanding these restrictions, unions’ rationalized structures facilitated their national reach and appeal. By emboldening unions to strike more frequently, government imposed mandatory check-off dues for NLC members had the effect of increasing rather than reducing levels of contention. In addition, the common-law colonial legacy of a highly fragmented and pluralist union landscape was substantially superseded in late 1977 when more than 1000 existing organizations merged into 42 industrial unions, spurring many wildcat strikes.³⁴ Labor movement activity also became marginally easier upon the lifting of a 12-year ban on political activities in 1978.

Yet it was not so much greater legality, but rather increased economic hardship, that provided the labor movement with the opportunity for more

widespread contention. Just as the Gowon junta had been the initial beneficiary of the 1973 oil boom (but squandered these gains and became even more unpopular in the process), so the civilian presidency of Alhaji Shagari, which succeeded Obasanjo's junta in 1979, began office with growing revenues but could not manage the consequences of a fall in prices in 1981. Conflict with state-level opposition parties grew, and unions seized the brief political opening by staging the country's first general strike since 1964. The NLC organized this nationwide strike of up to one million union members, including the oil workers, and extending over 2 days in May 1981.³⁵

Dutch disease effects, mounting corruption, inefficiency, and indebtedness—all a consequence of oil dependence—swiftly eroded the government's popularity and fiscal room of maneuver during this period. Although oil's price per barrel rose dramatically from \$3.80 in October 1973 to \$14.70 in January 1974, this rate paled in comparison with the exponential rate of increase in Nigeria's oil revenue—over 800-fold in the 1960s, then from N166 million in 1970 to N3.7 billion in 1974, and to N5.3 billion in 1976. Such rates clearly could not last, yet the government took no meaningful steps to adopt counter-cyclical policies that would balance sectoral growth and smooth out revenue cycles. On the contrary, the Gowon regime went on an unprecedented spending spree, granting huge wage increases to civil servants while massively increasing the size of the public sector (especially the army), leading to unsustainable debt levels when the price of oil declined in the late 1970s, and more precipitously during the Iran-Iraq War of the early 1980s. The neglect of the agricultural and manufacturing sectors meant that these goods were increasingly imported during this period, leading to ballooning trade deficits, a problem exacerbated by (momentarily) higher wages, which also contributed to triple-digit inflation. Government attempts to curb inflation by sharply reducing tariff rates led to a flood of imports, making trade deficits and further degrading the competitiveness of Nigerian agriculture and manufacturing.³⁶

By 1985, debt service payments alone cost the government almost 39% of total revenue.³⁷ Structural adjustment, both necessitated and exacerbated by oil's predominance, challenged the elite's legitimacy to an unprecedented extent. Their response tended to combine suboptimal economic outcomes with growing expressions of opposition to their rule. At first, the Buhari regime responded by refusing, on grounds of national sovereignty and pride, to implement the IMF's Structural Adjustment

Program (SAP), as a precondition for debt rescheduling. Increased discontent spurred General Babangida to overthrow Buhari in a palace coup in August 1985, and then to finesse the issue of SAP adoption by promoting national debate around the choice between the IMF's package, or avoiding the embarrassment of accepting the IMF loan while implementing several similar reforms without IMF monitoring. The latter option (monitored by the World Bank) enabled the regime to reach a debt rescheduling agreement with creditors in 1986. This agreement allowed the postponement of most debt repayments for at least 5 years, depreciated naira by over two thirds, liberalized trade, and reduced tariffs.³⁸

While these measures enabled a reduction of debt service by about 25%, a decrease in imports, and a marked increase in agricultural productivity, they also brought severe disruptions. Public as well as private sector unemployment jumped, wages fell by over 90% from 1985 to 1989, manufacturing productivity decreased, and inflation spiked to between 40 and 70% until the mid-1990s. In the wake of anti-SAP protests, the government briefly banned the NLC in 1988, and the military resumed control shortly afterward. In 1993, it nullified the election results—seen by Nigerians and foreign observers alike as the country's freest, fairest, and most peaceful—and under General Sani Abacha, exercised the most brutally repressive, corrupt rule, to date.

OIL WORKERS' CONJUNCTURAL LEVERAGE

In the wake of the SAP protests, however, this move provided unions, and above all Nupeng, with a critical juncture to challenge the military regime and absence of democracy at all levels of society. The challenge confronting Nigeria's political élite after the first oil crisis in 1986 to control the process of economic liberalization as well as revenue appropriation, while resisting political reform only intensified as the economic crisis deepened and popular demands grew. The Nigerian military's state-corporatist institutions became a flashpoint of broader societal discontent.³⁹

Although this repression fell disproportionately on Nupeng and the (heretofore more conservative) Pengassan, ironically, it underscored the oil workers' latent power, further politicizing the membership and leading it to press for more wide-ranging democratic reforms. When the coopted NLC leadership called off their general strike in September 1993 after only 3 days without realizing any of their demands for a return to constitutional rule, Nupeng filled the void. It led an expanded general strike that enjoyed

nation-wide popularity, despite paralyzing the economy, cutting oil exports by half, and causing a widespread electricity blackout and water shortages. The strikers demanded not only a release of all political prisoners, but also a revocation of the military's annulment of the June elections.⁴⁰

The government took steps to repress protests. It disbanded Nupeng and NLC, arrested the Nupeng and Pengassan general secretaries, as well as Moshood Abiola the perceived winner of the 1993 elections (Abiola would die in detention 5 years later). The repression only served to reduce the government's legitimacy. Its only significant source of support remained the oil multinationals, and this backing would shortly experience unprecedented scrutiny and pressure.

Most notoriously, this resulted from its crackdown on the Movement for the Survival of the Ogoni People (MOSOP). The Ogoni are among the smaller ethnic groups of the Delta region, numbering about half a million, but as much as half of the oil extracted in this period came from their territory, including most of the oil extracted by Shell. MOSOP was launched by Ogoni activist and writer Ken Saro Wiwa in 1990, in response to the growing ecological crisis of the Delta region, and continuing political indifference in the face of it. Tens of thousands of Ogoni and members of other Delta communities lost their jobs in the wake of SAP implementation, only to return to the Delta and find that their traditional farming, hunting, and fishing ways of life had been destroyed by oil industry pollution.⁴¹

These grievances were presented to Shell and the Federal and Rivers State governments in the form of the Ogoni Bill of Rights, which demanded compensation for the ecological damage and "political control of Ogoni affairs by the Ogoni people." After this petition was ignored, MOSOP organized a peaceful mass protest in Ogoniland in January 1993, resulting in the expulsion of Shell workers from Ogoni oilfields. Ogoni youth also engaged in sabotage of pipelines and attacks on Shell's production activities, leading to the company's fall in output between 1990–1993, thousands of worker days lost, and two thirds of the company's spill incidents in 1992—nearly 2000—resulting from community protest.⁴² The government's response to peaceful petitions and protest was to arrest Saro Wiwa and eight other MOSOP activists on trumped up murder charges, suppress evidence pointing to their innocence, and hang all but one of them in November 1995. Shell secretly channeled funds to a government military task force that was sent to the region to engage in "a campaign of mass murder, rape, and terror in Ogoniland."⁴³ These actions

led to widespread condemnation of the regime and the oil companies that supported it, above all, Shell.

In spearheading the democratization movement, the oil workers both drew upon and helped expand the transnational political consciousness of consumers, activists and unions. Their actions made a decisive contribution to delegitimizing the military government. This pressure not only facilitated the transition to civilian rule in 1999 and decentralized oil budgeting.⁴⁴ It also presaged the type of oil worker contention under democratization that has continued to the present. Worker protests have maintained the politicization of oil and the leverage that local communities exercise in condemning inequalities and demanding compensation. For example, in 2004 over 70% of Nigerians lived on less than \$1 per day, while only 1% of the population controlled 80% of the oil wealth. Although per capita oil revenues rose tenfold between 1965 and 2000, from \$35 to \$325, per capita GDP stagnated at \$245 throughout this period. Large-scale waste and poor resource use exacerbated the problem. For example, the estimated 182 trillion cubic feet of natural gas reserves in the Delta were flared instead of being marketed. This amounted to an estimated annual loss of two to three billion dollars of income, while causing significant air and water pollution in the region.⁴⁵

Oil workers mobilization against patronage politics and lack of transparency has often been in conjunction with Delta-based groups. These alliances have had the short-term paradoxical result of decentralizing patronage down to local levels and formalizing it. This can be seen not only in the multiplication of federal units from three in the 1960s to three dozen today, but also in the addition of the 13% budget derivation, included as a constitutional provision by then-President Obasanjo in 1999 to address Delta-area concerns, which had been marginalized by the prior system of revenue allocation.

The supposed result of this form of “affirmative action” for the region that has suffered the most from the oil economy is that local communities could exercise more control over oil funds. The federal budget constitutes slightly over half the amount disbursed by the Federation Account.⁴⁶ The Federal Account Allocation Committee, in turn, reported a gross revenue allocation of N1.014 Trillion (approximately \$6 billion USD) in 2013, distributed between the Federal, State, and Local government councils. Of this, the states were allocated between 1.5% to 7.5% of the total, a five fold differential that is not fully accounted for by population. Thus, the populous states of Kano and Lagos had a per capita allocation equivalent to \$11, compared to \$40 for Akwa

Ibom, and more than \$50 for Bayelsa, both in the Delta region. Mostly as a result of the Delta derivation funds, the Delta and Southeast receive higher allocations than the North and Southwest regions.⁴⁷

Despite accompanying official increases in public health and education salaries, the end result is a decentralization of corruption, with a continued absence of transparency or accountability.⁴⁸ Even official figures for 2014 show almost twice the allocation for police and military-related expenditures as for education and health.⁴⁹ Most members of the local political class were supporters of the former military junta who used the decentralized funds to arm local unemployed youth to help rig elections, both in 1999 and 2003. The funds have helped to swell a local arms industry, further exacerbating the practice of “oil bunkering,” or illegal siphoning of oil in commercial quantities for sale on the underground market. A 2003 consultant’s report commissioned by Shell estimated that each day between 275,000 and 685,000 barrels of oil were being stolen in the Delta, with most of the proceeds going to purchase arms. It concluded that “Shell has become an integral part of the Niger Delta conflict.”⁵⁰

If the state’s trend toward increased decentralization of budgeting was designed not only to address Delta-states’ grievances, but also to bribe communities’ quiescence, it has failed entirely in this regard. If anything, violent conflict has been on the rise. The Nigerian state has increasingly militarized its activities in the Niger Delta. These include Operation Salvage, Operation Flush, and the deployment of dedicated military task forces such as the River State Task Force and the Joint Task Force. The latter includes mobile police units called “kill and go,” the regular police, the secret State Security Service (SSS), and the Directorate of Military Intelligence (DMI), both associated with widespread human rights abuses. For example, in 2002, these forces committed the Odi massacre of Ijaw people, resulting in “2000 deaths, many more missing, thousands forced to flee and virtually no house left standing in Odi” (Ibeanu 2002/2003: 30).⁵¹ These repressive state interventions provoke further conflict and contribute to a vicious circle that serves to justify the state’s continued militarization of the region, while provoking local resentment and mobilizing resistance in the Delta.

Both major oil companies and the Nigerian state actively contribute to fostering violence in the Delta region. It is widely believed in the region that oil companies have local chiefs and notables on their payrolls in return for cultivating favorable public opinion on behalf of oil companies. At the same time, oil companies have been known to fuel dissension among local

Delta communities by divulging the names of these collaborators to local restive youths.⁵² The multinationals not only rely on the state for policing the rigs, but they also recruit locals to act as guards to protect oil facilities against their own communities. By the late 1990s, an estimated 20% of Shell's workforce in Nigeria was categorized as "security."⁵³

Officially, Nigeria began to democratize in May 1999 with the election of Obasanjo. But elected civilian government has not put an end to ethnic or regional conflict. Rather, it has exacerbated tensions by increasing the leverage of the main actors in these conflicts and the stakes at play. This became apparent when, shortly after winning the 2003 elections (marked by a high degree of voting fraud), the People's Democratic Party (PDP) began deregulating the oil sector. After it removed subsidies, domestic oil prices increased by nearly 25%, spurring a strike wave led by the Nigerian unions. Rebel groups in the Delta region also escalated their conflict with the government in September 2004, leading a month later to a signed truce with provisions for regional improvement and rebel disarmament. While the truce ultimately stalled, the unions (including oil unions) succeeded in blocking government attempts to reduce unions' rights—especially, the right to strike—as well as the president's attempt to amend the constitution to allow himself a third term in 2007. This mobilization consolidated the unions' national reputation as the only credible opposition to the governing elite.⁵⁴

Their repertoire of comparatively peaceful contention stands in growing contrast with the (entirely predictable) further radicalization of local communities. In the wake of the Ogoni trial, groups such as the Ijaw Youth Congress (IYC), representing youth from the Delta's largest ethnic group, emerged in 1998, reiterating the demand that oil companies leave the region. IN 2005, former IYC President Asari Dokubo, who formed the Niger Delta Peoples Volunteer Force (NDPVF), an armed vigilante group with ties to corrupt Rivers State politicians to fight for Ijaw "self determination" and "resource control," was arrested and charged with treason. Ijaw militants responded by forming a coalition of western Delta armed militant groups, the Movement for the Emancipation of the Niger Delta (MEND). In 2006, MEND militants attacked naval officers protecting a major Shell complex, blew up a Shell pipeline, kidnapped nine expatriate staff of the US servicing company Wilbros, and promised further escalations unless their demands were met.⁵⁵ MEND's spokesman, whose *nom de guerre* is Gbomo Jomo, explained: "All pipelines, flow stations, and crude loading platforms will be targeted for destruction. We are not communists or even revolutionaries. Just a bunch of extremely bitter men."⁵⁶

As MEND's attacks aimed at influencing the global price of crude suggest, the stakes in the conflict have grown increasingly international. The attacks have prompted the US and UK to establish US Africom, their military presence in the Gulf of Guinea, an extension of EUCOM. Oil companies have also contributed to the region's growing militarization, not only through the deployment of private militias and joint exercises with the government, but also via the industry's Global Memorandum of Understanding (GMoU) whose stated purpose is to ensure "high levels of transparency, inclusiveness, and accountability in managing development funds," as well as through the branding exercise "Legaloil.com" (analogous to the diamond industry's labeling of "conflict diamonds").⁵⁷ These industry-led measures are designed to appropriate distinctions between legality and illegality in order to improve their bargaining power with local communities and thereby criminalize non violent protest and local oil markets.⁵⁸

The same oil companies promoting these measures are, however, also guilty of undermining the legality of collective bargaining agreements and work contracts. In addition to coping with an increasingly dangerous work environment, the oil unions continue to grapple with the reality that many Nigerian oil workers are still denied the de facto right to organize and bargain.⁵⁹ Unpredictable and opaque labor practices undermine workplace rights, including revolving day-labor agreements, "direct labor" hires of workers as independent contractors, "service" contracts between majors and small, localized firms (with only 40% of such contract workers unionized), "yellow dog" contracts explicitly forbidding workers from joining unions (which despite being illegal, remain widespread), and "body shop" (or labor broker) contracts, where the broker acts as paymaster for a group of casual workers.⁶⁰ Under these conditions, the unions have learned that it is only through modes of collective action that connect union demands to the broader interests of the Delta that oil workers can defend their interests and realize some gains.⁶¹

The period since 2009 potentially heralds a new era of Delta oil politics characterized by reduced levels of insurgency violence, increasingly public and vocal oil worker strikes and campaigns of contentious politics, and increasingly localized settlements. In that year, the government signed an amnesty with members of the Niger delta insurgency, yielding a fragile but lasting peace. Also in 2009, Pengassan exposed "serious expatriate abuses" at Chevron, where over 900 expats were employed in positions which "were considered nationalized." Unionists hold that, at present, expatriates

earn up to ten times what Nigerians earn for the same job, and dispute companies' argument that it is hard to find qualified Nigerian workers.⁶² More broadly, in their frustration at the lack of progress in gaining recognition, as well as at the practice of bribery-induced quota-busting, the unions have recently attempted to combine lobbying the state with more assertive joint strike action against companies.

The unions have found that without broad-based workplace representation and voice, they are in a weaker position to engage in bargaining with the state over the moral economy. Their associational weakness was underscored when they tried to lead the millions of Nigerians protesting the repeal of oil subsidies in January 2012. Their profile momentarily rose when the government, which had stonewalled on their repeal decision, called for negotiations in response to the oil unions' threat to shut down oil production. However, the unions were widely criticized for "abandoning their historical democratic role" once they failed to follow through on this threat.⁶³

This focused unionists' attention on the areas where their representation was weakest. Casualization has taken its toll in membership for both unions: Pengassan estimates losing between 6500 and 10,000 members to casualization over the past decade, and Nupeng, even more members to contracted workers, who are paid three to five times less than union members on average, but still more than twice the minimum wage.⁶⁴ Another major source of member loss is the "relocating" of production to Export Processing Zones (EPZs), first established in 1992 with the purpose (as is the case the world over) of exempting employers from taxation and adhering to labor laws, and thereby attract investment. The fenced security walls that are supposed to protect workers and property instead serve to exclude union organizers from entering. This was a major factor in preventing unions from shutting down the industry. Although Nigeria's dedicated Oil and Gas Export Free Zone in Onne, Rivers State, with 155 registered oil companies, does not employ a majority of the sector's workers, the EPZ firms are disproportionately concentrated in service and transport. Only five had allowed the unions to organize workers, and at all five companies union leaders complain of having been victimized and dismissed. When, at the end of January 2013, oil companies refused to heed the ultimatum issued by Nupeng and Pengassan, at the end of January 2013, the two unions issued notice of a 3-day strike to start on February 13, if dismissed shop floor union leaders were not reinstated and union rights re-established in all companies in the free zone.

Seeking to resolve issues before the strike, the Minister of Labor and Productivity, Chief Emeka Wogu, met with the Oil and Gas Free Zone Authority (OGFZA) and the unions, and issued a communiqué giving the oil companies 90 days to comply with provisions in the law allowing unions to operate. The communiqué also required companies to establish departments of industrial relations to interface with the free zone authority and the unions. It also mandated companies to comply with labor laws and ILO conventions stating, “No worker shall be victimized for any role played in the unionization process and union activities.”⁶⁵ In response, however, a zonal representative simply commented that “The unions can picket some companies involved in unwholesome labor practices but they cannot shut down the entire zone.” The unions focused their ire on the zonal law providing a 10-year moratorium on strikes and lockouts, pressuring the Labor Minister to confirm that the moratorium was to last 10 years from its inception in 1992–2002. Nonetheless, according to Pengassan’s General Secretary, companies continue to claim the “freedom to exploit workers.”⁶⁶ More recently, members of Pengassan have threatened to strike if the federal government does not curb the increased rate of crude oil theft—an activity in which not only local communities, but also government officials and foreign parties, participate.⁶⁷ On June 6, 2013, Nupeng issued a 14-day strike notice to the Federal Government over disputes with Shell Petroleum Development Company, SPDC, Chevron Nigeria Limited, and Agip Oil Company. At a briefing after its Central Working Committee (CWC), President of Nupeng, Achese Igwe, threatened that if the government did not summon a stakeholders’ national conference to address labor issues in the sector, the union would declare an indefinite nationwide strike.⁶⁸ After a promised meeting with company representatives failed to resolve any issues, Nupeng renewed its strike threat, this time in conjunction with the Maritime Workers Union of Nigeria (MWUN), which threatened to shut down the nation’s ports over the refusal of the Nigeria Ports Authority (NPA) to pay 11 months of back salaries still owed to its members.⁶⁹

This has become a familiar pattern of contention in the industry, with the unions mobilizing for strikes to oppose privatization of refineries, retrenchments, and casualization—most recently connected with strikes against Chevron Nigeria Ltd and Weatherford Ltd—while advocating for measures enjoying broad community support, such as opposition to police brutality.⁷⁰ However, oil unions have achieved greater and more durable success when they have succeeded in joining forces with community organizations and other organized sectors of the economy. Such a

compelling counter-narrative is provided by the example of Edo state, whose strongly contested gubernatorial election in 2007 was ultimately decided by a Court of Appeal in favor of the then-president of the Nigeria Labor Congress (NLC), Adams Oshiomhole, backed by a broad social base of unorganized workers, peasants, and small scale traders, as well as unionists and sections of the middle class. Oshiomhole decided to secure external financing and concentrate spending on road works as “a high profile, relatively quick way to deliver political assets that can appeal to a range of constituencies, generating jobs, facilitating commercial activity and private sector investment, access to markets and services, bringing order and tidiness to urban environments.”⁷¹ Rapid improvements in this infrastructure led directly and indirectly to significantly increased state-level internally generated revenues from local taxation. These increased by an average of 20% each year between 2008 and 2012. Working class support was garnered by beginning with statutory personal income taxes contributed by civil servants and high income taxpayers and local businesses. The revenues also enabled the governor’s plans to reintegrate tens of thousands of young former Delta insurgents into society by providing education and training, as they moved to Edo in the wake of deindustrialization.⁷²

CONCLUSION

The Nigerian example demonstrates how organized labor has shown strength in mobilization capacity, sustaining strike activities against oil firms despite anti-union measures. These specificities notwithstanding, however, there are clear lessons to be learned from this case when it comes to the role of labor in transforming oil politics.

Read in the broader comparative context of major oil producers, it suggests that the timing of episodes of workers’ collective action is affected by, but also substantially independent from, oil production’s growth and decline. Had full-scale production had occurred in Nigeria a decade or two later, organized workers in other sectors and regions outside of the Delta might have had a greater impact in pursuing democratization, perhaps even to the point of avoiding civil war. It is not far-fetched to consider that declining reserves might have afforded the military with fewer resources, thereby reducing their ability to cement their rule. However, the success of episodes of contention during the industry’s height suggests that concerted collective action toward democratizing goals may succeed under diverse circumstances.

Similarly, workers' collective action can draw on a wide array of institutional contexts in pursuing its goals of further empowerment. Although lacking analogous party allies, Nigerian oil workers played a decisive role in the democratic transition, and contributed to the ongoing decentralization of oil income appropriation. Whereas the development of state capacity and workers' associational power prior to the discovery of oil can influence outcomes during episodes of contention, this influence is not unambiguous or decisive. Nigerian traditions of state-led corporatism, centralization, and modernization proved an even greater challenge to achieving unions' autonomy. However, once established, labor movement activists could use these traditions instrumentally toward redistributive and democratizing goals. Path dependencies—"the dynamics of self-reinforcing or positive feedback processes in a political system"⁷³—can have a lasting impact on political development in oil-rich countries. However, these paths are paved with, and their course shaped by, episodes of struggle.

The flurry of writing about oil-rich countries asserts that political outcomes are path dependent and that initial conditions matter for political development. However, while many studies have traced how oil wealth creates self-reinforcing mechanisms in income allocation and social control (contributing to the durability of authoritarian regimes),⁷⁴ there is a critical need to consider other dimensions of the political economy of oil. This essay adds an essential and largely missing dimension of labor contention, showing how the relative mobilizing capacity of non-state actors, notably oil workers, are key factors that shape political trajectories of oil-based societies. Although countries' experience of dictatorship and democracy—including in those with significant oil resources—is determined by "big structures and large processes"⁷⁵ in the long run, these interactions are also driven by labor mobilization at critical junctures.

By recognizing the varied political processes in Nigeria, this essay helps to unpack the simplicity of *rentier*-state theory. It shows that arguments about state building to be excessively statist, and too dismissive of the relative influence of labor unions in shaping the political arena.⁷⁶ The experience of Nigerian oil workers shows that with well-timed mobilization workers can intensify their organizing and exercise greater influence at political openings, though collective action. Theorizing about contemporary democratization in oil-rich societies must consider the centrality of domestic political actors, including, notably, oil workers, who hold the key to explaining the durability (or fragility) of economic reforms, governance frameworks, and the broader political regimes.

NOTES

1. Terry Karl, *The Paradox of Plenty: Oil Booms and Petro-States* (Berkeley: University of California Press, 1997); Benjamin Smith, *Hard Times in the Lands of Plenty: Oil Politics in Iran and Indonesia* (Ithaca: Cornell University Press, 2007).
2. Anthony Bebbington, ed., *Social Conflict, Economic Development and Extractive Industry: Evidence from South America* (London: Routledge, 2012); Marcus Kröger, *Contentious Agency and Natural Resource Politics* (London: Routledge, 2013).
3. For example, the comparative absence of democratic regimes in the Persian Gulf or Western Asia—or the relative presence and persistence of Great Power interference in the region—are most likely spuriously associated with the region’s small subset of major oil producers. On great power influence, see Robert Vitalis, *America’s Kingdom: Mythmaking on the Saudi Oil Frontier* (Stanford: Stanford University Press, 2006); Timothy Mitchell, *Carbon Democracy: Political Power in the Age of Oil* (London: Verso, 2011).
4. Mitchell, *Carbon Democracy*.
5. Apart from Saudi Arabia, Iraq and Kuwait (in a class of their own, averaging 40–60%), only Iran and Venezuela have achieved higher average percentages than Nigeria, and some years Nigeria was higher. Despite producing larger total volumes, Russia, the United States, China, Canada and Mexico have percentages below Nigeria’s over the past two decades. See International Energy Agency, “Statistics,” accessed May 1, 2017, <http://www.iea.org/statistics>.
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8. On labor movements’ translations of power, see Andrew Lawrence, *Employer and Worker Collective Action: A Comparative Study of Germany, South Africa, and the United States* (New York: Cambridge University Press, 2014).
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15. Michael Herb, "No Representation without Taxation? Rents, Development, and Democracy," *Comparative Politics* 37, no. 3 (2005): 297–316; Steffen Hertog, *Princes, Brokers, and Bureaucrats. Oil and the State in Saudi Arabia* (Ithaca: Cornell University Press, 2010).
16. Michael Mann, *The Sources of Social Power Volume II: The Rise of Classes and Nation-States, 1760–1914* (New York: Cambridge University Press, 1993).
17. Critical junctures do not always result in change; they are, however, characterized by the fact that for a relatively brief period, the number of choices available to key political actors over issues of clear consequence increases. An identification of such junctures necessarily implies a number of plausible counterfactual alternatives. Giovanni Capoccia and R. Daniel Kalemien, "The Study of Critical Junctures: Theory, Narrative, and Counterfactuals in Historical Institutionalism," *World Politics* 59, no. 3 (2007): 352–354.
18. On associational and structural power, see Erik Olin Wright, "Working-Class Power, Capitalist-Class Interests, and Class Compromise," *American Journal of Sociology* 105, no. 4 (2000): 957–1002.
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21. Robert Melson, "Ideology and Inconsistency: The 'Cross-Pressured' Nigerian Worker," *The American Political Science Review* 65, no. 1 (1971): 161–171.
22. Larry Diamond, *Class, Ethnicity and Democracy in Nigeria: The Failure of the First Republic* (London: Palgrave Macmillan, 1988), Chapter 6, "The 1964 General Strike," 162.
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 26. Ibid.
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 28. Solidarity Center, AFL-CIO, “The Degradation of Work,” 4.
 29. Ibid., 5–6.
 30. Onyemacchi Joseph Onwe, “Problems and Prospects of Labour Management Relations in the Nigerian Oil and Gas Industry: Some Conceptual and Contextual Issues,” *Journal of Human Resources Management and Labor Studies* 2, no. 2 (2014), 121.
 31. Fajana, “Industrial relations,” 5.
 32. Michael Oyelere and Oluwakemi Owoyemi, “Any Prospect for Trade Union Revitalization in Nigeria through Democratization and Democratic Leadership?” *Journal of Politics and Law* 4, no. 1 (2011): 27–35; Fajana, “Industrial relations.”
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 36. Toyin Falola and Matthew Heaton, *A History of Nigeria* (New York: Cambridge University Press), 182–183.
 37. Ibid., 215.
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political economy, and provide a lot of impetus and international recognition to the prodemocracy movement in Nigeria.” Julius Ihonvbere, “Organized Labor and the Struggle for Democracy in Nigeria,” *African Studies Review* 40, no. 3 (1997): 80.

41. *Ibid.*, 80.
42. Ike Okonta, “Nigeria: Policy Incoherence and the Challenge to Energy Insecurity,” in *The Handbook of Global Energy Policy*, ed. Andreas Goldthau (Chichester: John Wiley and Sons, 2013), 510.
43. *Ibid.*, 511.
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59. International Association of Machinists and Aerospace Workers, "Union Rights at Nigerian Oil and Gas Free Zone," February 14, 2013, accessed November 1, 2017, <https://www.goiam.org/uncategorized/industrial-headlines-30-february-14-2013-2/>.
60. Solidarity Center, AFL-CIO, "The Degradation of Work," 17.
61. The Majors not only help to create the mass impoverishment of the Delta—they also profit from its continuation, not least in its provision of a quintessential reserve army of labor. As one worker observed, "[O]nce their boss hears the complaint, he will remind them of the large army of unemployed youths in the delta. The boss will tell them, 'If you're not ready to work according to our terms, there are people outside who are waiting to take your jobs.' So, in most cases, if you are daring enough to complain you will get fired, or they give you some other sanctions." Solidarity Center, AFL-CIO, "The Degradation of Work," 14–15.
62. Camilla Houeland, "Casualisation and Conflict in the Niger Delta: Nigerian Oil Workers' Unions between Companies and Communities," *Revue Tiers Monde* 224, no. 4 (2015): 25–46.
63. *Ibid.*, 42.

64. *Ibid.*, 31.
65. Isaac Aberare, Acting General Secretary of Nupeng, welcomed the move: “the free zone authority had been going about its business as if legislated union rights did not apply in the free zone, now these have been established through the intervention of government and oil workers in the free zone will soon benefit from being free to become members of the union.” International Association of Machinists and Aerospace Workers, “Union Rights.”
66. Chinwo, quoted in “Casualisation and Conflict,” 31.
67. “Nigerian oil workers to suspend production if crude theft persists—spokesman,” *Premium Times*, April 26, 2013, accessed May 1, 2017, <https://www.premiumtimesng.com/news/131545-nigerian-oil-workers-to-suspend-production-if-crude-theft-persists-spokesman.html>.
68. Victor Ahiuma-Young, “Nigeria: Nupeng Threatens Strike Over Dispute with Oil Giants,” *Vanguard*, June 7, 2013, accessed May 1, 2017, <https://www.vanguardngr.com/2013/06/nupeng-threatens-strike-over-dispute-with-oil-giants/>.
69. Linda Eroke, “Nupeng to Commence Three-day Warning Strike,” *This Day Live*, June 25, 2013, accessed May 1, 2017, <http://www.thisdaylive.com/articles/nupeng-to-commence-three-day-warning-strike/151457/>.
70. Victor Ahiuma-Young, “NUPENG threatens nationwide strike over dispute with Chevron,” *Vanguard*, September 22, 2015, accessed May 1, 2017, <https://www.vanguardngr.com/2015/09/nupeng-threatens-nationwide-strike-over-dispute-with-chevron/>; Willie Etim, “PENGASSAN, NUPENG suspend strike in Rivers,” *The Authority*, October 22, 2015, accessed May 1, 2017, <http://www.authorityngr.com/2015/10/PENGASSAN-NUPENG-suspend-strike-in-Rivers.html>.
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The End of “The Good Fight”? Organized Labor and the Petro-nation During the Neoliberalization of the Oil Industry in Ecuador

Gabriela Valdivia and Marcela Benavides

INTRODUCTION

Early one morning in August 2003, in a residential area of Quito, hundreds of oil workers from Petroecuador, Ecuador’s state oil company, stood outside the headquarters of the Federation of Petroleum Workers of Ecuador (FETRAPEC). The excitement was palpable. By mid-morning, a group brought out two giant *papier mâché* puppets, the first of Lucio Gutierrez, then President of Ecuador, dressed as a bride in a white dress, and the second of Horst Köhler, then President of the International Monetary Fund (IMF), dressed as a groom in a black tux. Hanging from Gutierrez’s dress was a plastic bottle labeled “oil patrimony.” In Köhler’s hand was a contract and in his breast pocket, dollars. The puppets were meant to bring attention to Gutierrez’s proposal to privatize the operations of Amazonian oilfields in order to secure loans from the IMF. Another group of workers carried a large sign that reads “just married,” and a nearby sign reads “*la boda del año*” (“the wedding of the year”), both referring to how the privatization deal was a marriage of convenience that

G. Valdivia (✉) · M. Benavides
Geography Department, University of North Carolina at Chapel Hill,
Chapel Hill, USA

Fig. 1 “The Wedding of the Year.” *Photo credit* Gabriela Valdivia.



weakened state control over the national oil industry, the largest revenue-generating sector in Ecuador (Fig. 1).

Carrying banners of FETRAPEC alongside the puppets, by the end of the morning, the oil workers set out to join one of the largest protests against structural adjustment measures that year. FETRAPEC members marched the streets of Quito alongside indigenous peoples, teachers, university students, middle-class urban residents, and workers of all trades. The streets were alive with colorful banners, signs, and musical instruments accompanying the vibrant multitude. The march ended at the city center, close to the presidential palace. The puppets were set down and a small delegation of workers walked into the congressional building to present their claims. Pressure against oilfield privatization was so strong this time around that Gutierrez' proposal was shelved. In 2005, social movements decrying the negative social outcomes of neoliberal restructuring in Ecuador ousted Gutierrez.

This moment of oil worker mobilization is but one of several instances during the 1990s and 2000s in which FETRAPEC joined forces with other social movements to counter the detrimental effects of neoliberal policies.¹ Though comprising under 2% of the organized labor force in Ecuador,² FETRAPEC's labor politics shaped how the national oil industry operated,

and resisted attempts to restructure oilfield, refinery, and pipeline operations. By August 2015, however, when again thousands of people mobilized to demand the end of neoliberal restructuring, oil workers were conspicuously absent. FETRAPEC, an actor with over 40 years of experience in organized labor mobilization, had all but disappeared from the political map and from public discourse.

Why is the oil worker movement absent from national politics in Ecuador today? An answer could be found in a regional narrative of the relationship between urban labor, capital, and the state in late twentieth century Latin America. During the 1960s–1980s, under socialist and populist regimes, urban industrial labor unions grew in association with state-led industrialization, leading to the institutionalization of labor politics in government, as happened in Chile, Brazil, and Uruguay. A collective consciousness linking identity and industrial work developed during this period.³ Collective labor laws that underpinned the rights to organize, bargain collectively, and strike gained ground during this time of “pro industrial worker” governments.⁴ By the late 1980s and 1990s, Latin American countries moved towards market liberalization and intensifying export-oriented strategies of economic growth. This economic restructuring, often referred to as neoliberalization, called into question the basic tenets underlying industrial labor relations in the region, including models of employer–government–worker relations, forged under earlier economic and political circumstances.⁵ While some governments preserved collective labor laws, they simultaneously abandoned or weakened safeguards in wages, hours, and individual employment contracts. In several cases, urban labor responded by morphing into a force of resistance to the hegemony of market liberalization, specifically, resistance to deregulation that eroded worker protection and disconnected labor power from its human context.⁶ The 2000s then came as the decade of the “return of the state,” through the election of progressive and left-of-center candidates promising greater regulation and economic growth attuned to inclusivity and rights. At this point, labor movements experienced a “crisis of representation.” The dominant models of mass representation, specifically, the populist “left” positions that defined organized labor as an agent of critique and resistance, were disarticulated and eclipsed,⁷ and left-of-center personality-based governments co-opted the discourse of radical change,⁸ minimizing the political agency of the workers’ party, the union, and the workplace.⁹

The Ecuadorian oil labor movement, under the leadership of FETRAPEC, falls within this broad regional description. Oil worker

resistance to neoliberalization stemmed from working within, even nurturing, the hegemony of extractive capitalism under state-led development. In the 1990s, workers developed a collective moral economy of defense of oil as national patrimony, which strengthened their resistance to sector privatization. Former FETRAPEC leaders often refer to this time as “fighting the good fight.” Linking workplace and nation, they not only derived privileges from working in the state oil industry, but also they became national actors. By the 2010s, while their position on oil privatization had not changed, how others saw them, did. President Rafael Correa, elected on a progressive anti-neoliberal platform in 2007, often referred to them as *burocracias doradas* (golden bureaucracies) who had accumulated hefty salaries, benefits, and job security, and got in the way of revolutionary change. In addition, other social movements distanced themselves from FETRAPEC, because they saw them as increasingly disruptive and interest-based. FETRAPEC, it appeared, had not evolved with the times. Their critiques of capitalist imperialism, while initially revolutionary, appeared self-serving at this juncture.

In this essay, we show that this broad narrative on the boom and busts of organized labor is only part of the story. Missing is the situated perspective of the industrial laboring class, regarding the building and disarticulation of organized labor throughout economic restructuring, as well as an understanding of the mechanisms that led to its exhaustion in the 2000s. The oil workers movement was a powerful force and undeniably understood its privileged position to influence the conditions of its workplace, the national oil industry. However, rather than narrowing down organized labor actions and responses as interest-based, which is often the case in the analyses of industrial labor movements of the twentieth century, our analysis brings attention to the contrapuntal dynamics of labor politics. We draw on ethnographic participation in marches; multiple in-depth interviews with eight former Petroecuador employees between 1998 and 2015, including movement leaders in the refinery, pipeline, and administrative sectors of the industry; memoirs written by former Petroecuador employees; and analysis of media produced by the movement and the Ecuadorian state. Bringing these voices to the fore, we argue that today’s absence of labor politics in the oil sector is not the result of an internal inability to get on with the times, but an effect of a sustained grinding against the neoliberalization of the oil sector that structurally exhausted its political agency.¹⁰

To examine the grinding of labor politics and neoliberal restructuring, we follow a “*contrapunteo*” (contrapuntal) analytic. Cuban essayist Fernando Ortiz beautifully illustrates this approach in his book *Cuban Counterpoint*, where he counterpoints the production of tobacco and sugar with nation building in Cuba to explain how the social life of commodities is entangled with the intimate and collective lives of the individuals that are most closely associated with their production.¹¹ Ortiz weaves identity-making, and the cultural exchanges through which macro-ideologies are countered, negotiated, and adapted by individuals to illustrate how they are entangled in the creation of new political economic realities. Similarly, Edward Said favors a contrapuntal approach in his essays on exile to highlight the intertwined histories and perspectives that constitute resistance and hegemony to capitalist imperialism.¹² For Said, a contrapuntal approach represents the polyvocality of the world and, more importantly, a method for recognizing how subject positionality informs perceptions about how the world works and how to act in it. Rather than privileging one master narrative, Ortiz and Said pay attention to both those who are exiled and/or marginalized from politics and those who shape this arena, to contribute a more nuanced analysis of power in postcolonial settings.

We weave together state-making accounts, national imaginaries, and the affective materiality of labor to describe how FETRAPEC members themselves use contrapuntal analytics: how they articulated the oil complex (its fields, pipelines, and refineries) with their own sense of class identity to represent themselves as *national* moral agents. On one hand, workers opposed industry privatization by claiming working class membership in high-risk sites. For them, salaries, compensation, and benefits reflected the profound challenges of industrial work. On the other hand, they also saw themselves as state actors; they opposed the neoliberal restructuring of the industry on the grounds that they were defending sovereignty and national interest. As FETRAPEC leaders publicly declared, their goal was not to undermine state authority or stop the operations of the petroleum industry, but to remind administrations of the state’s moral responsibility toward the nation: to govern petroleum, the people’s resource inheritance, and its rents, for the benefit of Ecuadorians, not foreign interests.¹³ With this dual positioning, they constructed a new political identity that blended laboring bodies, class and national interests together, the individual, and the collective, to produce what we call “petro-citizenship,” an ethical subjectivity that responds to the rights and obligations of two spaces/communities of belonging: a laboring class and a national class.

The essay is organized as follows. First, we provide an overview of how the creation of an oil industry in Ecuador, structural transformations, and rentierism shaped the formation of a national oil worker movement. Then, we discuss how economic restructuring conditioned a new frame of worker consciousness, petro-citizenship, which articulated class and national interests. The third section describes the unraveling of the petroleum movement, elaborating on the counterpointing process of politico-economic restructuring that redefined the conditions of labor and the political identities and strength of unions. In the last section, we place the exhaustion of the oil movement in the current political context of Ecuador.

THE NEW COMPANY AND ORGANIZED LABOR

In 1965, the oil firms Texaco and Gulf, invited by the Ecuadorian government, formed a consortium to explore for oil in the Amazon. In 1968, they located the first commercially viable oilfield in the Ecuadorian Amazon, which they called Lago Agrio 1. This was a transformational moment for Ecuador. Until then, Ecuador had been an agricultural nation and its national revenue depended largely on taxing the productive activities of private landowners. The discovery of significant and high-quality fields would allow the state to derive a source of revenue independent of private landowners. However, because Ecuador lacked its own national petroleum industry, it managed oil exploitation as a landlord: it granted the right to extract oil to foreign firms and these, in turn, paid a relatively low rent for extracting and profiting from the resource. By 1971, 4,096,000 hectares, about 14% of the national territory, had been leased to foreign oil companies.¹⁴

That same year, following nationalist debates and petroleum nationalizations throughout Latin America,¹⁵ a military coup redefined oil industry operations to allow greater state control over oil rents. Ecuador not only would earn rents and royalties from oil's circulation, it would also own all operations. As Ecuadorian sociologists of history Rafael Quintero and Erika Silva point out, "all social sectors, all classes and political parties, all corporations and labor unions—from businesses large and small—as well as labor associations and diverse government representatives centered their attention on how to define this rich resource as a source of 'economic development.'"¹⁶

The most significant move was the nationalization of the operations of the oilfields discovered by Texaco-Gulf, the most productive and

significant at the time.¹⁷ During this period, the first national oil law, the Hydrocarbons Law, was established, which called for a national industry and to more closely regulate the activities of foreign operators, and the first national company, the Corporación Estatal Petrolera Ecuatoriana (CEPE), was created. In the words of the Minister of Natural and Energy Resources, General Gustavo Jarrín Ampudia, “Petroleum is... inalienable Patrimony of the State as established by the Constitution and belongs to thirteen million Ecuadorians, who are its legitimate owners. The government is simply the administrator of the resource and is obligated to provide an honest administration to those owners, who are the present and future generations.”¹⁸ Most foreign firms exited Ecuador at this point, leaving a vacuum in oil operations trained professionals. Texaco remained, however, under a new agreement that allowed it to stay as an advisor and a mentor to the fledgling CEPE until the latter gradually took over oil operations. By 1979, CEPE acquired 62.5% of consortium ownership and, by 1990, became its sole operator.

Coinciding with this period of oil sector nationalization, a series of events strengthened the political agency of oil workers in the new Ecuadorian oil industry. Regionally, organized labor was on the rise among established oil-producing nations. In the 1970s, the Ecuadorian government sent 100 operators to train in Colombia’s Empresa Colombiana de Petróleos (ECOPETROL), in the Barrancabermeja refinery, apparently unaware of the intense labor activism developing there.¹⁹ As one of these Ecuadorian trainees joked in an interview on 10 June 2003, sending the young workers to Barrancabermeja was a “politically irresponsible” move that the Ecuadorian state would regret for the next 40 years: In Colombia “our consciousness was polluted...our perspectives became about revolution, where we saw ourselves as a class with rights and the right to self-represent.”

The first workers’ associations developed precisely out of this cohort of trainees. A former refinery floor manager, interviewed on 14 June 2008, explained that this “nucleus of technicians... mobilized the labor force and marked the vision of what it means to labor for the national petroleum company ... from the refinery, we syndicalized the rest of the labor force to change the terms of capitalism.” A series of small, place-specific unions representing worker needs proliferated as a result, some stronger and more contentious than others.²⁰ These ranged from social clubs to sports federations, to syndicates, and represented the concerns of workers as industrial labor subjects with social reproduction needs (e.g., salary ranges,

vacation and benefits, and the relationship between branch and the worker's social life).

The increasing presence of leftist politics in Ecuador also influenced oil worker politics. In 1971, the main labor organizations in Ecuador—the Catholic-influenced Ecuadorian Confederation of Christian Syndical Organizations (CEDOC), the Marxist influenced Ecuador's Worker Confederation (CTE), and the Confederation of Employees in Semi-State Bodies and Banks (CESBANDOR)—agreed to form the Workers United Front (FUT) to face the growing anti-labor climate in the industrial and manufacturing sectors under the military dictatorship. The FUT called its first strike that same year, calling for a “progressive” and “nationalist” confrontation. For FUT leaders, industrial workers were the actors responsible for transforming society.²¹ Many of the first refinery operators and workers of the petroleum industry identified with this vision and joined the FUT to support demands for better workplace conditions in the industry. As veteran labor organizer Diógenes Cuero Caicedo outlines, workplace conditions at the main refinery were initially deplorable; plant workers often did not have the appropriate security implements to protect them while working under high-risk conditions, and they were often mistreated by administrators.²²

Meanwhile, the oil sector quickly became one of the most important revenue-generating resources in Ecuador, contributing about one-quarter of total government revenue and about a half of its exports. As in many other oil-producing countries, Ecuador assumed a rentier approach to this lucrative sector, where the focus shifted to the administrative redistribution of rents accrued from the sale of oil. Investing little in industrial development or associated productive industries, the Ecuadorian state oversaw a politicized distribution of oil revenues,²³ providing credit to export agriculture and incentives for manufacturing and industry; financing social programs to improve generalized access to education and health; and financing equipment for the Armed Forces. Oil income also allowed a level of economic autonomy from domestic elites, which the state used to strengthen its relationship with citizens via improved quality of life. Throughout the 1980s, jobs in the public sector multiplied; taxes kept relatively low; mega-infrastructural projects built; and subsidies offered for the basic urban services (e.g., cooking gas), all populist strategies to pacify citizen demands, courtesy of oil income.²⁴

PRIVATIZATION AND PETRO-CITIZENSHIP

Just as CEPE was gaining ownership of the oil sector, a debt crisis in 1982 and a significant drop in global oil prices starting in 1983 forced it to adopt a new operational model. The Ecuadorian government broke down the large oil complex into a holding company, Petroecuador, with filial and autonomous state enterprises that managed specific areas: exploration and production (Petroproducción), industrialization (Petroindustrial), and commercialization and transport (Petrocomercial). Each branch was given creative management and economic autonomy over area-specific activities.

As part of the disarticulation of CEPE in the early 1990s, hundreds of workers were fired and transferred to different locations. Workers feared that CEPE's breakup would lead to the loss of the political rights that they had achieved through syndicalization. In this context, the National Federation of State Oil Workers (first FETRAPECEPE and later FETRAPEC), formed in the 1980s by some of the refinery workers sent to train in Colombia, took a prominent role: to represent the class interest of *all* workers. Thus, while workers already belonged to place- and task-specific unions (e.g., maintenance, refinery, pipeline, and storage unions), FETRAPEC functioned as the voice of the *national oil worker* who linked class interests to matters of national security.

FETRAPEC agglutinated class consciousness among oil workers into a form of citizenship where they recognized themselves as members with rights and obligations within the most prestigious and lucrative national industry.²⁵ They were not only a laboring force; as a former FETRAPEC leader described, they were obligated to respond to the historical, moral, and social traditions associated with transforming the resource that fueled the nation's well-being. Thus, while privatization and deregulation alienated labor from its social context, petro-citizenship was a conscious attempt to solidify relations of dependence and co-production with the industry itself.

FETRAPEC cultivated this “petro-citizenship” in two ways: first, on matters of individual social reproduction, which included employment stability protection, remuneration terms, payment hierarchies, subsidies and bonuses, syndical rights, and contract protection; second, in matters of national security, by looking after the universal oil worker, the subject who works for the social reproduction of the collective nation. When workers were redistributed across the complex, they relied on this extended oil subject figure to claim the same workplace rights secured in their original

positions. An oil worker is a national worker, wherever s(he) goes: workplace rights are coproduced with the sovereign rights of the state oil company. As political advisor to FETRAPEC, Ramiro Acosta Cerón, writes, the first clause of the collective contracts that FETRAPEC facilitated always included “the defense of non-renewable patrimony” as the ultimate objective of these contracts.²⁶ Similarly, veteran refinery leader Diogenes Cuero Caicedo writes that the oil worker is not receiving privileges through syndical activities, but requesting recognition for the management and operation of a high-risk sector central to the production of the largest income for the state.²⁷

FETRAPEC leaders and allies visited various worksites, called for general assemblies, and focused on the materiality of labor—how individual bodies toil in the spaces of the oil complex—to educate workers on the need to see themselves as more than just workers. They also produced a magazine, *Revista Petróleo y Sociedad* (Oil and Society) (1994–1998), which showcased the intellectual and material interventions of organized labor throughout the entire oil complex. Through these efforts, they nurtured a “national oil laborer” consciousness that emphasized how the sovereign vacuum created by economic restructuring affected job security and protections workers received as state employees who toil in the high-risk spaces of the oil industry.²⁸ In the Esmeraldas refinery, for example, FETRAPEC leaders talked about the connections between refining oil and refining consciousness.²⁹ As a former FETRAPEC employee described on 28 July 2009, a consciousness of petroleum labor praxis emerged: “those that learn about refining, learn about the economy ... all the possible variables in life are there, in the refining process, in the process of transformation ... this schools you, turns you into a social transformer.” If the labor force was to remain a critical agent in the industry, a former movement leader explained in June 14, 2008, the petroleum worker had to acquire a political vision that extended beyond the traditional spaces of labor and generated support across the industry.

Thus, when the Ecuadorian government proposed to open up oilfield operations to private firms, and partially privatize the refinery and the pipeline in the mid-1990s, organized labor resisted. They claimed that these calls for privatization were a new wave of “primitive re-accumulation” of the nation’s patrimony (Interview, October 21, 2009). Workers believed that disarticulating petroleum and nation minimized their agency, rights, and responsibilities within the industry. In their view, privatization of upstream and downstream sectors would have led to the mass layoffs of

state employees, who would have been replaced by employees of private firms.

Recognizing that privatization raised significant resistance among workers, Petroecuador executives introduced “voluntary resignation,” a form of compensation that offered substantial payoffs for those who agreed to leave the company. Those who voluntarily resigned received thousands of dollars in bonuses and lifetime salaries.³⁰ Others stayed on to fight privatization, using protests, strikes, and the media to question the entire neoliberal economic model. In 2003, for example, several Petroecuador operators went on strike to protest plans for increased involvement of private companies in the country’s oil sector, causing a temporary reduction in flows through Ecuador’s main pipeline. As the Frente Patriótico por la Soberanía Petrolera (FPSN) (a collective of oil workers and allies) put it, a sovereign petroleum policy “starts with the nationalization of petroleum and ends *entreguismo* [selling out resources] and allows the country to restore the rational and sustainable management of its natural resources, so that the revenues derived...are destined to meet the basic needs of the population, as well as restore the productive apparatus of the nation, and do not go exclusively to benefiting the transnational companies.”³¹

Workers actively engaged in civil unrest to oppose privatization, using their laboring bodies to link class consciousness with national consciousness. On October 18, 1995, for example, workers chained themselves to a homemade replica of the nation’s main pipeline, the Trans-Ecuadorian Petroleum Transportation System (SOTE), staged in Quito’s busiest gas station, to raise awareness about its privatization. They entered a hunger strike and even threatened to sever their limbs to emphasize the sacrifice that they were willing to endure to protect the nation’s patrimony. Photographs and editorials in newspapers across the nation documented the strike and helped to generate support for anti-privatization claims.³² The 2-week protest was successful; the government shelved plans to privatize the SOTE. Refinery operators staged similar protests throughout the 2000s. Clad in company uniforms, they lied down in the street in front of government offices and stuck hypodermic needles into their forearms, staining the pavement with their blood. Their goal was to decry how privatization and labor flexibilization in the refinery led the “bleeding out” of the social protections and health of the labor force.³³

FETRAPEC pushed the articulation of laboring bodies and the national body politic further, emphasizing that it was not only the social reproduction of the worker’s body that was on the line, but also the nation’s

sovereignty over its own natural body: oil. For example, FETRAPEC sent public letters to Gutierrez that pointed to the losses to be incurred by the nation if foreign firms were allowed to operate state infrastructure and resources. They stated that because they worked within the intimate, everyday spaces of the industry, they understood how it worked best. Similar letters were sent to Correa in 2007. FETRAPEC critiqued Correa's plan to cede Petroecuador oil operations to foreign companies, which they saw as the continuation of the "old neoliberal project of privatization" that does not have the nation's interests at heart.³⁴

FETRAPEC members often locate their "love" for the movement in this context of citizen action that articulates labor and nation. When asked about their experiences of mobilizing against privatization, for example, leaders described how, in their minds, the physical transformation of oil into the nation's most profitable commodity was linked to the transformation of the national political body. Putting their own bodies at risk, in public spaces, as well as going into hiding for fear of repression and violence, solidified their sense of "fighting the good fight" to keep the nation's physical resource—oil—connected to the nation's political body—the nation. This was a thrilling experience that grounded a consciousness of belonging amongst the oil labor class, and of relevance to Ecuadorian society as a whole. Paradoxically, it is in height of this intense sense of "fighting the good fight," that a decline in the labor movement becomes evident. We turn to this fracturing of oil labor politics next.

THE EXHAUSTION OF THE NATIONAL OIL WORKER

During the 1990s, FETRAPEC conveyed a public image of oil workers as subjects who see the production of oil as interdependent with class interests. "Fighting for" patrimony and sovereignty over oil, in the wake of deregulation and privatization, was the movement's political drive. While FETRAPEC was able to stall the overall restructuring of the oil industry, it was not able to stop other forms of restructuring that changed the structure of labor relations. Below, we describe four interrelated changes in the terms of industrial labor that eventually dismantled FETRAPEC's political capital and exhausted the oil laborer as political subject: the alienation of workers and workplace; the cooptation of the discourse of the left; and the emergence of an anti-politics machine within the movement.

The restructuring of CEPE aimed to decentralize oil operations and open up the industry to create multiple opportunities to insert private capital in the industry. One mechanism to achieve this was to "open up" oil contracts. The nationalization of the oil industry in the 1970s had narrowed down contract types to a few (e.g., services, exploration, etc.). However, in the 1990s, Petroecuador created a variety of contracts that allowed private firms to participate in the oil industry. Services throughout the oil complex that previously had been handled by the state firm were made available to private ones: from oil camp facilities, to laundry services, and to transport and maintenance. This proliferation of contracts was meant to increase the amount of capital invested in the operation of the state-owned company, while allowing the state to cut down production costs.³⁵ However, cutting down costs also affected oil workers. FETRAPEC argued that these reforms did not increase rent efficiency, but that the new contracts created ideological, political, and legal conditions for "hollowing" sovereignty over the national petroleum industry and transforming it into a foreign-controlled one.³⁶

Indeed, the proliferation of contract types translated into labor alienation for state oil workers. A variety of jobs, for example, transport, laundry and food services, camp management, well perforation, and welding, were outsourced through subcontracts with private firms, which brought in new workers to do the work that the CEPE labor force used to do, without collective bargaining protections. Such subcontracting consolidated some of CEPE's worker positions and led to mass-firings. In what seemed like a twisted turn, many of these workers were then rehired work in the same sectors, even do the same jobs, but under short-term contracts that prevented them from participating in organized labor affairs.

The new service contract models effectively minimized the role of the national oil worker. Only those officially employed by the state are protected by unions and can claim national relevance; those who are subcontracted can work alongside syndicalized workers, often perform the same jobs, but are different subjects with different political rights. Thus, by the 1990s, the structures of labor relations and the laws governing such relations had changed in many areas of the oil complex. Thousands of workers no longer had the legal and juridical right to participate in the union. Showing support for labor union activities could easily translate into losing their precarious job positions.

THE COOPTATION OF DISCOURSE

By the late 1990s, Ecuador faced a perfect storm of financial crises, resulting from a banking system collapse, a default on the external debt, natural disasters related to El Niño, and a decline in the price of oil. Between 1998 and 2000, then President Jamil Mahuad initiated fiscal austerity measures to manage the crisis. In 2000, thousands of students, unionists, and indigenous peoples, burdened by and conscious of the costs of neoliberal restructuring, mobilized against Mahuad. Gutierrez, an army colonel at the time, was ordered to contain protestors but instead sided with them, allowing the takeover of the Congress buildings and Gutierrez's temporary installation as one of the leaders in a military-indigenous governing triumvirate of "national salvation."³⁷ Gutiérrez later launched a successful bid for the presidency. His campaign hinged on a nationalist discourse of sovereignty over strategic resources; an anti-establishment ideology; and an economically redistributive, clientelistic approach. In 2003, Gutierrez was elected on this anti-neoliberal, populist platform.

Soon after assuming the presidency, however, Gutierrez agreed to privatize oilfield operations for a renegotiation of Ecuador's foreign debt. FETRAPEC publicly decried foul play; according to a former FETRAPEC leader interviewed on November 24, 2008, Gutierrez's proposal would limit the state's ability to manage rents in favor of Ecuadorians, as prior to the agreement, Petroecuador received 100% of revenues from these fields. To assert their dissent, in June 2003, workers started a slowdown of their activities, which eventually led to an interruption in the functioning of the main pipeline and some refineries. Out of the 9000 Petroecuador employees, 4500 did not go to work as a sign of protest.³⁸ Petroecuador was militarized to safeguard operations and protesting workers were fired. Gutierrez accused workers of interfering with the "natural process of development,"³⁹ and deployed a violent persecution and imprisonment campaign, declaring that workers opposing him were enemies of the state and a threat to the nation's well-being. FETRAPEC members continued to publicly decry privatization efforts, as described at the beginning of this essay, but its leaders went into hiding, fearing for their lives. While workers managed to stall the privatization of the fields, the intense defamation campaigns carried out by the government weakened the public's support for workers. According to a former FETRAPEC leader interviewed on 5 November 2009, by the time, Gutiérrez was ousted in 2005, 60 people

had been fired, accused of terrorism and sabotage, nine of them leaders, and mobilization among the ranks shaken.

Confrontations between organized labor and government continued after Gutierrez's replacement by Vice President Gustavo Noboa, who shelved oil privatization plans, but also approved a highly controversial pipeline to serve the interests of foreign firms. At this point, the Minister of the Economy, Rafael Correa, who appeared to align with the labor movement's position, announced his intention to run for president. Correa denounced the environmental injustices associated with foreign firm operations in the Amazon region⁴⁰; annulled the contract of US oil company Occidental due to contractual misconduct; and made evident his support for responsible environmental protection and resource nationalism. In a presidential campaign aired on Radio Luna in 2006, Correa stated that critics "say that *we* [our emphasis] nationalists who oppose [privatizing] politics have a Stalinist vision of the situation. That is completely false ... In truth, *they* have been boycotting Petroecuador, saying that it does not operate well and wanting to sell its oilfields at sickly low prices."⁴¹

According to an FETRAPEC ally interviewed on July 28, 2009, the labor movement welcomed this nationalist articulation of petroleum sovereignty, though leaders still questioned Correa's potential as a post-neoliberal candidate. After careful consideration, the labor movement decided to support Luis Macas, an indigenous candidate, declaring their support for a longer history of common struggles and solidarity with indigenous movements. Macas was not a strong candidate, however: he received less than 1% of votes on the first round and thus left the presidential race. The second round of elections put Correa against Alvaro Noboa, a Guayaquil banana magnate and former President of Ecuador's Monetary Board, with a track record of abuses against worker unions, tax evasion, and privatization. This was a turning point for the oil labor movement: oil workers (and other sectors of the Left) chose to support Correa, because they wanted to avoid Noboa's presidency at all costs. Correa won the 2007 presidential election with a strong campaign of a "renewed" Left that stood against the "long neoliberal night" of privatizations and denationalizations.

As Ecuador's president, Correa effectively became the strongest and loudest voice of the Left, temporarily agglutinating the position of a myriad of civil society sectors dissatisfied with neoliberal economics. He eliminated the debt repayment fund and redirected it to public expenditures. He renegotiated contracts with foreign firms to gather a larger percentage of

windfall profits and to reduce the number and type of possible contracts available. However, Correa's nationalist discourse changed soon after, when at a 2008 meeting with the Petroecuador executive board, he threw his support behind privatization.⁴² He allowed Petroecuador to share the operations of Ecuador's most productive oilfields, despite his previous position on oil nationalism. FETRAPEC leaders were among the first to publicly question Correa's policies, saying that was continuing Gutierrez's neoliberal framing, and cautioned that he would bring more "invisible privatizations" (Interview, November 7, 2009).

Correa responded with a heavy hand, aiming to shake the hold of FETRAPEC among oil workers. While movement leaders saw themselves as denouncing Correa's "covert neo-liberalism," Correa re-signified them as "petroleum mafias" that impeded progress. Taking advantage of changes in labor laws that limit who can engage in political activism, leaders became a target in the industry's streamlining. The Correa administration restructured the upper echelons of administration in an effort to bring management under greater state supervision; the semi-autonomous branches, which used to have their own boards, have now been fused again under the centralized supervision of a board of directors. Tellingly, while each branch had a member of FETRAPEC on the board, in the latest board structure, the labor force had no representation.

The Correa administration followed up with an aggressive mediatic campaign that revived the criticism levied in the previous administrations against the *burocracias doradas* of Petroecuador. An *Ecuavisa* news program in 2008, for example, made public that 226 voluntary resignations in Petroecuador amounted to \$31 million dollars of "the people's money." Leaders countered this scrutiny over their activities and called it a state-backed strategy to break down class unity.⁴³ These tactics of denunciation and countering isolated the labor movement from former allies, such as indigenous and environmental movements, which, by 2011, were desperately seeking dialogue, not rupture, with the government. More importantly, the Correa administration successfully appropriated the language and representation of the Left, incorporating well-known representatives of the Left into his political party and leaving out those with more critical voices, such as organized labor. For FETRAPEC, this means the cooptation of the very nationalist and patrimonial ideals that gave meaning to the oil labor movement and left it without a national voice.

During Correa’s administration, many of the most militant labor union leaders were strategically laid off, accused of tampering with the country’s economic development, some labeled as “terrorists” with their lives threatened if they continued opposing the restructuring of Petroecuador. Diego Cano, former president of FETRAPEC, for example, declared in a 2010 radio interview that of the 3800 workers with long-term, direct laboring experience in Petroecuador, over 1000 workers have been fired or retired between 2008 and 2010.

THE ANTI-POLITICS OF THE NEW OIL LABORER

While FETRAPEC leaders had actively and at times successfully stalled privatization in the upstream and downstream areas of the industry, it was not able to end the mass firings of state employees, particularly those with historical memory of the syndicate. With a diminished leadership, fewer workers were willing to put their jobs on the line for nationalist ideals, which effectively disarticulated class and national labor politics in oil worker consciousness. Privatization effectively strengthened an “anti-politics machine”⁴⁴ within the movement that minimized national politics as part of the petro-ethic of workers. FETRAPEC leaders began to understand that “standing up” to the state machine was exhausting their agency, exiling them from the political stage as a failing/flailing force. Moreover, FETRAPEC members asked leaders to bracket attacks on the Correa administration and to treat worker-related issues, like job security and “the right to work,” as a domain independent of national politics, morality, and culture. This conscious disconnecting of class and nation paired down FETRAPEC’s role in the oil industry.

The case of the small fuel enterprise Gasolinas y Petroleos S.A. (GASPETSA) exemplifies this disarticulation. GASPETSA was a fuel refining firm created by a cooperative of state oil workers firms in 1999, under the auspices of the Law of Modernization, which stated that public employees can participate in the de-monopolization and privatization of public enterprises. These workers signed an agreement with Petrocomercial in 2001, under an emergency decree, to manufacture gasoline derivatives for fisherfolk demand in the Province of Esmeraldas, in northwest Ecuador, where the refinery is located. GASPETSA processed the fuel and Petrocomercial distributed it locally. According to GASPETSA, Petroecuador profited from the deal: while GASPETSA applied technical knowledge to mix the fuel for local markets, it was the state company who

sold it. Moreover, according to a FETRAPEC leader interviewed in June 2010, Petroecuador did not apply subsidies, as is the case of all other oil derivatives in Ecuador. Approximately 200,000 artisanal fisherfolk used GASPETSAs services. The contract was renewed in 2005.

In September 2010, the National Secretary of Business Management Transparency accused GASPETSA shareholders (628 Petroecuador workers) of perjury against national interests.⁴⁵ Legendary Ecuadorian cartoonist, Asdrúbal de la Torre, captured this moment of “public ethic” questioning⁴⁶ in a cartoon depicting President Correa smelling “something fishy” in Petroecuador’s labor affairs (Fig. 2). The Secretary of Transparency called GASPETSA’s agreement with Petrocomercial illegal and punishable under the new Internal Regulations of the Labor Code of the Law of Public Enterprises prohibits a state employee from having agreements or contracts with a public enterprise to derive profit when there is a conflict of interest. The Secretary sustained that workers were using privileged information to maintain a contract of derivatives delivery and that GASPETSA shareholders did not declare earnings from their active shares. FETRAPEC, in its role as worker representative, countered that GASPETSA was wrongfully accused; its services were carried out under a signed agreement with Petrocomercial and was fully known by Petroecuador.⁴⁷ Soon after the accusation, Petrocomercial rescinded the agreement.

In all sites of the oil complex, from refinery to storage to oilfields, workers were affected by the accusation. Workers marched daily on the

Fig. 2 President Correa smells “something fishy” going on in Petroecuador. Caricature by Asdrúbal de la Torre, *Diario Hoy* (2010, p. 5).



streets of Quito and Esmeraldas, carrying signs that depicted images of hand palms open-wide and read “oil workers are not corrupt.” They also articulated laboring bodies with the right to work: wearing uniforms and hard hats, the fired workers carried banners that read “*somos manos limpias y trabajadoras*” (“we are clean, laboring hands”). The effort was to showcase a work ethic that is about connection to a job and minimizes the politics of nation. In a 2010 demonstration in front of the Presidential palace in Quito, a technician charged with overseeing pipeline operations and wearing a black shirt with the number “628” (the number of people fired because of their association with GASPETSA), lamented how “politics got in the way of doing work.”

Later, marches turned into a critique of government, suggesting that the firings were a strategy to get rid of Petroecuador’s longest-serving workers. Many of the workers fired had been originally with CEPE. In protests, workers highlighted their plight as citizens under attack: “we are Ecuadorians with families, Mr. President.” Through FETRAPEC, they also appealed for legal protection through the International Commission for Human Rights and the International Court. The next step, according to FETRAPEC, was to begin penal lawsuits against the President of Petroecuador and the Secretary of Transparency, which would allow workers to receive payment for burdens incurred as a result of the accusations. “The firings are unconstitutional and are affecting the honor of many families,” concluded Diego Cano, the president of FETRAPEC.⁴⁸

Sensing the possibility of a disadvantageous outcome, by May 2011, Petroecuador agreed to hire back the majority of the workers affiliated with GASPETSA, under the condition that they desist of legal action against the state firm.⁴⁹ However, they were rehired under short-term contracts, which did not recognize the long-term benefits that they had accrued through their service in Petroecuador. For the affected employees, some of whom had been with Petroecuador for over 25 years, these were devastating news. By 2012, all but about 100 employees had returned to Petroecuador, cleared from the wrongful accusation. As became increasingly evident with this high-profile case, workers no longer talked about resource sovereignty or national struggles. Worker rights centered, again, around the immediate needs of oil laborers as a class, not as a national vanguard in the oil industry. Consciousness of their greater role as defenders of the petro-nation was not mentioned in their counter demands. For now, they were grateful that their “rights and names had

been absolved,” and that they were “ready to give their all again for Petroecuador.”⁵⁰

MUTING THE NATIONAL OIL LABOR SUBJECT

FETRAPEC’s reduction and marginalization were not the last event in the exhaustion of the labor movement. In 2014, the Correa administration proposed constitutional amendments that modified the political agency of all laboring subjects. The 1998 Constitution, influenced by social movements, originally distinguished worker types between *obrero* (limited skills worker) and *obrero calificado* (skilled workers with specialized training). While *obreros* are regulated by the Labor Code, which protects the freedom to syndicalize, strike, and claim collective bargaining, *obreros calificados* and public servants are regulated by the Organic Law of Public Service (LOSEP), which does not guarantee collective bargaining rights. If a worker receives specialized training, and or manages, organizes, administers, or represents the interests of others, s(he) has conducted “intellectual” work and thus is no longer regulated by the Labor Code.

Under the 2014 amendment, workers conducting “intellectual” work (e.g., organized labor leadership) would be recognized as “public servants,” and regulated by the LOSEP. According to the leaders of the traditional labor unions, such as the FUT, these changes in regulation and rights protection violate the fundamental principles recognized under the International Labor Organization (ILO) and amount to a serious retreat in the rights of the laboring class. Implementing the amendments would mean that no state employee could claim the protection of labor rights available under the Labor Code.

In the midst of these contentious amendments, a new labor organization, the Central Unificada de Trabajadores (CUT), with close ties to the Correa administration, formed. The CUT vocally supported Correa’s position. Relevant to the oil workers movement is that one of the most public leaders of the CUT, John Reyes, is also the General Secretary of the Petroecuador Committee Workers, the union that replaced FRETRAPEC under the Correa administration. This articulation of government and oil workers is palpable in several television interviews featuring Mr. Reyes. While supportive of amendments, he cautiously claims that oil workers are worried about their future. They are paying attention to how they are recognized in the Constitution and in labor laws, as this affects their personal well-being as *obreros*. Emphasizing the high-risk labor conditions of

industrial workers, Mr. Reyes pointed out that state oil workers should have their own labor code. The LOSEP does not guarantee a series of fundamental labor rights, such as the right to organize as political subjects to protect themselves through collect bargaining, and against the health and environmental risks that come with being an industrial professional. Working with the raw resource, he states and imposes greater risks for the oil worker.

In this twenty-first century contrapuntual relation between the reorganization of the state oil company and oil worker resistance, Mr. Reyes came back to the very arguments and observations that the oil workers movement of the 1970s fought for: the connection between worker bodies and the material conditions of production. Collective consciousness of how bodies interact with oil production and that of the inherent risks of industrial production are the reasons why collective bargaining, the right to strike, and the right to syndicalization must be protected. “This is democracy,” stated Mr. Reyes in an interview in a televised news special in December 2014, “what we want is for the government to check in situ the conditions in which we work...our particularity.” While the new labor organization draws connections between body, identity, and capital, its consciousness is predominantly about citizen rights and the plight of individuals, not about the sovereign rule of the petro-nation. The CUT does not use the platform of the national oil worker as a political subject position.

CONCLUDING THOUGHTS

In August 2015, thousands of people marched from the Amazon to Quito to state their disapproval of the Correa administration. Organized labor called for a national strike, demanding the right of collective bargaining. Diverse sectors mobilized to counter the constitutional amendments proposed by the Correa administration and its political economy of resource extraction. Members of the FUT were present, though not able to gather significant following. The CUT, affine to the Correa administration, was also present, focusing on labor-specific concerns. National level indigenous organizations made up the majority of the opposition, focusing on Correa’s extractivist agenda, and claiming that oil exploitation threatens their right to live a dignified life. FETRAPEC was absent. Only former employees, now removed from Petroecuador for decades, marched alongside protesters, offering support as individuals aligned with the left, not as political

representatives of the oil complex. There was no demand focused on the management of oil rents or on oil national identity or sovereignty. The oil-sovereignty political position was missing; any oil-related concerns publicly expressed were limited to the conditions of labor, such as the risks of working industrial sites. Any connection to the petro-nation was mentioned in relation to protecting those who labor the nation, rather than the other way around, laborers protecting the nation.

This essay counterpointed the emergence and exhaustion of the oil workers movement with the shifting political economy of oil in Ecuador. The counterpointing methodology allowed tracing the trajectories in labor belonging/disarticulation since the 1970s, demonstrating the entanglements of the movement with juridical-legal frameworks, public opinion, and class interest. Organized labor shared the characteristics of labor aristocracy but also combined this with a sophisticated petro-ethic of citizenship that fueled its resistance but also made it vulnerable to the shifting structures of the oil industry. The rise and decline of FETRAPEC is a testament to the organic nature of social movements, and to how their shifting contexts matter to their continued relevance.

It is not possible to claim a conclusion about the fate of the oil labor movement in Ecuador at this point. It is possible to see, nonetheless, that a general retreat in the discourse of the Left has taken place, where “sovereignty” and “state” are no longer part of the vocabulary of organized labor. And that the fragmentation of organized labor as a force of resistance, and its reconfiguration into state-backed actors, will no doubt shape the future of labor politics in Ecuador, as in much of Latin America.

Meanwhile, the national oil industry continues to experience organizational and infrastructural changes, some associated with de-nationalization, others with the Correa administration’s push for alternative sources of energy. More broadly, the cooptation and bounding of the discourse of the Left by the state has repositioned the image of social movements and limited the spaces of dissent and critique. In the current context of declining national oil production and declining price of the barrel of oil, we do not see a decline in labor politics but a search for new political spaces. As Achim Wachendorfer suggests, exiled labor leaders are aiming to form supra-national forms of collective organizing that draw on their common lessons with neoliberal restructuring to reconfigure labor politics.⁵¹ Former FETRAPEC leaders have ventured into these collaborative spaces, though it is still unclear how these new structures can intervene in the deregulated labor structures of Ecuador.

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29. Movement members include a diversity of state employees, such as refinery operators, apprentices, floor managers, fuel storage site managers, environmental oversight and commercialization employees, maintenance employees. Understandably, this diversity means that participating in collective decision-making is a challenge. Worker associations use large, general meetings to discuss worker interests. Due to different work schedules and locations of work, only small groups of workers are able to attend assemblies at the same time. When assembly is called, some teams are not able to attend because they are at work or they are just ending their shift. A council of worker representatives was tried in the early 1980s but abandoned as conflicts over political affiliations reproduced more divisions over collective bargaining.
30. These “sweet” enticements appeared at first as a positive gain for the few who agreed to voluntary resignation. But once the payoffs were brought up to public scrutiny by the media, they tarnished the reputation of the entire labor movement, breeding distrust among movement members.
31. The FSNP is a collective that includes labor unions as well as civil society movements, such as the Coordinadora Por la Vida, Coordinadora de Movimientos Sociales, CONAIE, Diego Borja, Movimiento Polo Democrático, and Observatorio de las Energías.
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PART II

The Productive Life of Oil

Indian Migrant Workers in the Iranian Oil Industry 1908–1951

Touraj Atabaki

INTRODUCTION

The course of history in the Persian Gulf, an area rich in spatial networks, commercial associations, and traffic of ideas, was decisively altered by the arrival of British colonialism. By the mid-nineteenth century, the British had turned the Persian Gulf into a “British Lake.” In the early period of expansion of British hegemony, Indian subjects of the Empire landed in Persia as soldiers, with rifles in hand. However, by the discovery of oil in southern Persia in 1908, Indian skilled and semiskilled workers outnumbered Indian soldiers.

Following the discovery of oil, a massive construction effort was needed to mine, process, and transport the mineral to the world market. Access roads, pipelines, an oil refinery, and shipping docks had to be built. The immediate problem, which the oil business then struck, was the scarcity of skilled and semiskilled labors within Persia/Iran. The unprecedented scale and novelty of the project demanded a grand recruitment drive to find suitable workers, from Mesopotamia to South Asia. While unskilled labor

T. Atabaki (✉)

International Institute for Social History, Royal Netherlands
Academy of Arts and Sciences, Amsterdam, The Netherlands

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Fig. 1 Oil fields and refinery 1928.

could be supplied by local tribal pastoralist and village-based laboring poor, the skilled and semiskilled workforce was recruited from as far away as India and Burma. The recruitment of workers from India by the oil industry continued for more than 40 years. Indian migrant workers formed their own social and residential communities in the major Iranian oil towns, and constituted a distinctive and significant labor cluster in the industry until the mid-twentieth century.

The historiography of Indian migration beyond British colonial frontiers certainly provides perspectives on the established history of labor in India. Pioneer researchers of trans-ocean Indian indentured labor migration have published extensively on the Indian migrant workers who embarked for Africa and the Americas. Among the many publications about these types and routes of Indian migration, the classic works of Gillion, Lal, Emmer, Carter, and Mohapatra should be mentioned.¹ Singha and Tetzlaff have studied Indian indentured labor in Mesopotamia and the northern Persian Gulf; Seccombe and Lawless examined the migration of Indian labor to the Arabian Peninsula at the south end of the Persian Gulf. Nevertheless, the life and times of Indian workers who migrated to West Asia, the Persian Gulf, and Persia/Iran in the era of British colonial rule have only rarely been described.²

DEPARTING FOR PERSIA

In December 1907, 20 Indian cavalymen landed at the port of Mohammareh (Khoramshahr) on the waterway to the Persian Gulf. Their mission, as outlined by the British Consul in Mohammareh, was to guard the expeditionary operations of the Burma Oil Company. The company was engaged in oil exploration in the south of Khuzestan, a Persian province.³ Oil was discovered at Masjed Suleiman in Southwest Persia/Iran 5 months later. The use of Indian cavalymen by the young Persian/Iranian oil industry was a precursor to decades of employment of Indian skilled and semiskilled artisans and clerical workers. The era of Indian employment ended in 1951, after the nationalization of the oil industry in Iran and subsequent changeover in management when the Anglo-Iranian Oil Company⁴ became an international consortium.

In 1901, William N. D'Arcy, an Australian entrepreneur supported by the British legation in Tehran, obtained a remarkable concession in Persia, which gave him monopoly rights to "search for, obtain, exploit, develop, render suitable trade, carry away, and sell natural gas, petroleum" and all

Table 1 Employment in the Anglo-Persian/Anglo-Iranian Oil Company 1910–1950.

<i>Year</i>	<i>Iranian</i>	<i>Indian</i>	<i>European</i>	<i>Other</i>	<i>Total</i>
1910	1362	158	40	146	1706
1915	2203	979	80	187	3449
1920	8447	3616	244	35	12,342
1925	15,820	4890	994	7201	28,905
1930	20,095	2411	1191	7549	31,246
1935	25,240	954	1035	119	27,348
1940	26,484	1158	1056	15	28,713
1945	60,366	2498	2357	240	65,461
1950	72,681	1744	2725	34	77,184

Sources R.W. Ferrier, *The History of the British Petroleum, Vol. 1, The Developing Years 1901–1932* (London: Cambridge University Press, 1982); J.H. Bamberg, *The History of the British Petroleum, Vol. 2, The Anglo-Iranian Years, 1928–1954* (London: Cambridge University Press, 1994)

the derivatives “throughout the whole extent of the Persian Empire.” Article 12 of his agreement stated that “the workmen employed in the service of the Company shall be subject to His Imperial Majesty the Shah, except the technical staff, such as the managers, engineers, borers, and foremen.”⁵ After the first oil flares and the expansion of drilling operations, access roads were built, pipes were laid to bring oil to the Persian Gulf, and the Abadan Refinery was constructed. At that time, the recruitment of unskilled, semiskilled, and unskilled labors for the industry was poorly regulated. Unskilled labor was chiefly recruited from Bakhtiyari peasants and pastoral nomads living in the region adjacent to the oilfield. Indian migrant workers comprised the main trunk of the semiskilled and skilled workforce⁶ (Table 1).

The number of Indian migrant workers grew from 157 in 1910 (representing about 9% of a total workforce of 1706 at that time) to a peak of 4890 workers in 1925 (about 16% of a total workforce of 28,905).

The early cluster of Indian migrant workers who joined the Persian oil industry was either recruited through an intermediary agency in India, or transferred directly from the Rangoon Refinery through the coordination of the Burma Oil Company, which had a large stake in the D’Arcy concession.⁷

In the early years of its operation, the oil company was mainly concerned with establishing the basic infrastructure required to supply oil to the

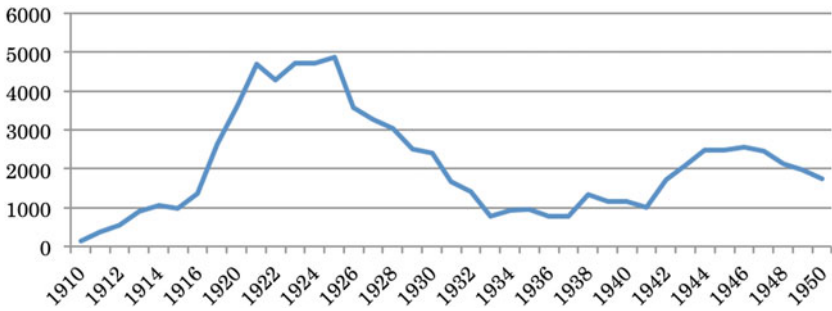


Fig. 2 Indian employment in the Anglo-Persian/Anglo-Iranian Oil Company 1910–1950. Sources R.W. Ferrier, *The History of the British Petroleum, Vol. 1, The Developing Years 1901–1932* (London: Cambridge University Press, 1982); J.H. Bamberg, *The History of the British Petroleum, Vol. 2, The Anglo-Iranian Years, 1928–1954* (London: Cambridge University Press, 1994).

market. Training facilities for local labor were, therefore, not on its list of priorities. At this initial stage, the recruitment and employment policy of the Anglo-Persian Oil Company (APOC) aimed to overcome the scarcity of skilled and semiskilled labors by employing large numbers of migrant workers, mostly from India, both in clerical and skilled or semiskilled manual professions.⁸ As I will show in this essay, this policy changed when the industry grew bigger. Employing labor came to be influenced by political factors—both at the top, through the tripartite relations of APOC, the Government of India, and the Persian government, and from below, through labor activism aimed at improving the situation of workers.

In India, the British Indian trading company Shaw Wallace & Co. Ltd was the intermediary agent recruiting labor for Persia, with Strick, Scott & Co., as its representative in Persia. “With the flotation of the APOC, work in the Bombay office increased rapidly as equipment of every conceivable kind had to be forwarded to the [Persian] Gulf, where Mohammareh was then the base office, and not only for equipment but the clerk staff as well as household domestics and servants for the office.”⁹ Shaw Wallace worked closely with the Burma Oil Company and APOC, and its mission as labor recruitment agency lasted until 1926, when APOC decided to take over the task and recruit Indian labor via its office in Bombay. In India, Shaw Wallace was the sole agent of these oil companies, providing various services in addition to labor recruitment.



Fig. 3 Construction of the Gach-qaraguli (Gachsaran) Road, 1909. *Source* British Petroleum Archive, Warwick, Britain.

Charles Greenway, who originally worked in the oil department of Shaw Wallace as agent of the Burma Oil Company in India, later joined the Persian oil industry in 1910 as Managing Director and became Chairman of APOC in 1914–1927.¹⁰

The majority of migrant workers recruited to the Persian oil industry from Burma were Indians employed by the Burma Oil Company. Their lengthy experience of working at the Burma oilfields and the Rangoon Oil Refinery made them an attractive labor source. Using a free-contract system, Shaw Wallace arranged for the passage of these workers from Burma to Persia. They were mainly Chittagonian Sunni Muslims, who had joined the Burmese oil industry in the 1890s.¹¹ In the APOC administrative records or British colonial archives, the social, territorial, ethnic, or religious backgrounds of Indian migrant workers were never separately identified. The same applied to Iranian workers. Thus, all migrant workers from India employed by the Persian oil industry were simply classified as “Indians.” However, by collating data found in the national archives of

India, Iran, and Britain, sources in the APOC and British Petroleum company archives, and records from the community of Indian migrant workers living in Iran, some additional distinctions can be made. In Persia, workers originating from Burma were, for example, categorized as *Rangoony* (from Rangoon), so distinguishing them from other Indian migrants. In the city of Abadan, the Rangoony community had its own mosque, segregated from other Indian Sunni and Shiites Muslims. It was known as the “Rangoony Mosque,” no doubt a reference to a substantial Burmese population in Abadan.

Shaw Wallace recruited not only Indian migrant workers from Burma to work in the Persian oil industry. Through subsidiary or subcontractors’ offices, it also recruited both skilled and semiskilled workers in Bombay and Karachi. Subcontractors like I.A. Ashton & Sons and Bullock Brothers were specialized in recruiting fitters, oil and diesel engine drivers, marine signalmen, marine raters, boilermakers, pipe fitters, etc.¹² Recruiters often advertised in Bombay papers, especially for clerical employment. However, there are also references stating that intermediaries such as I.A. Ashton posted notices, posters, and wallpapers in the Punjab.¹³ All workers who applied for the announced positions first had to go through a qualifications examination. Those recruited in Punjab were interviewed in Lahore, and Bombay recruits were interviewed in Mazagaon Dock Bombay, before joining the mass of employees departing for Persia. The intermediary companies charged each new recruit 25% of their first month’s pay. Those who had previously worked for the oil company in Persia and returned to India in less than 2 years were required to pay an admission fee of 10 rupees.¹⁴ The same rule applied to workers hired for household and domestic services, such as butlers, cooks, domestic servants, hospital ward orderlies, and sweepers (these were chiefly recruited by Osborn & Co., affiliated to the Parsee enterprise based in Bombay).¹⁵

With the founding of Abadan Refinery in 1909, the number of Indian migrant workers steadily increased. By 1913, there were 1000 clerical and manual employees. However, around the time that the First World War broke out in 1914, there were two new developments, which had a big effect on the recruitment of labor from India. First, the British admiralty decided to convert all its marine steam engines (industrial, army, and naval units) from coal to oil fuels, a transition that had already begun in 1912.¹⁶ Within a few years, that made oil a crucial economic resource for British interests around the world, causing the oil industry to boom. Second, the British government decided to raise its shareholding in APOC to 51%, and

thereby became the major owner of the company.¹⁷ A generous preferential contract was signed in 1914, under which the British admiralty could purchase Persian oil from APOC for the Royal Navy at a fixed price for 30 years. Oil suddenly became a strategic military commodity in the British Empire.¹⁸

As the Persian oil industry expanded its operations during the First World War, the need for an adequate and constant supply of labor became urgent. Unsurprisingly, the whole question of how to allocate and maintain the workforce became a priority in APOC policy, and the British Raj itself became directly involved in administering the migration of Indian workers to the oil industry. APOC claimed that the biggest obstacle in obtaining labor for the Persian oil industry was a formality in the *Indian Emigrations Act* of 1883, which restricted labor migration to specified destinations, which did not include Persia.¹⁹ In March 1915, the APOC Board proposed to the Government of India that restrictions imposed by the Act should be waived, so that APOC could recruit more skilled labor:

Owing to the non-existence of such [skilled] labor in Persia, and the impossibility of training Persians in sufficient number for their requirements, the Company is compelled to indent largely on Indian for skilled laborers of many kinds, such as riveters, engine drivers, assembling machine men, iron and brass moulders, solders, core makers, and others. Now, the number of Indian employees in Abadan and the oil fields is about 1020. It is found nevertheless that it is very difficult to induce men of these classes to leave Bombay, Rangoon, Karachi, or the other ports where they are recruited and to accept employment in Persia. Indian Emigration Act, which are unduly magnified in their imagination, and consequently act as a serious deterrent to their taking the service offered.²⁰

To strengthen its argument, APOC noted its special status as a British company in which the British government had acquired a major shareholding, providing “full power of control and of British Indian subjects being under the jurisdiction of His Majesty’s Consul.” APOC, therefore, petitioned the Government of India to apply the same emigration rule to Persia that was used for Ceylon and the Straits Settlement. According to APOC, the administrative power of the Government of India should be extended to new territory:

... under the provisions of the Persian Coast and Islands Order of 1907, British Indian subject in the Persian littoral is entirely under the jurisdiction of the Consul-General and Political Resident and his subordinate officers. British Indian law is in force and under the provision of the Order, the Indian Code of Criminal and Civil Procedure have effect '*as if the Persian Coast and Islands were a neighbourhood in the province of Bombay*'. In these circumstances, the position of Indian emigrants in the Gulf approximates to their position in Ceylon and the Straits Settlements, which are expressly exempted from the operation of the Emigration Act, and the object of this letter is to enquire whether a similar exemption cannot be accorded to the areas occupied by the Company's Work at Abadan, Mohammareh, and the Oilfields.²¹

The Persian Coast and Islands Order of 1907 referred to in APOC's petition was an appendix of the Anglo-Russian Convention signed in August 1907 in St. Petersburg. This convention aimed to consolidate in international relations various political changes that had occurred in the Far East, the Middle East, and Europe after the Russo-Japanese war and the Russian revolution of 1905. Since 1903, the territorial sovereignty of Persia had been recognized by both Russia and Britain, except for the Persian Gulf, which was considered as a "British lake." However, the 1907 Convention in substance rejected Persia as a sovereign territory, although formally it was still regarded as a sovereign state. The core of the Convention was its first section, which created Russian and British territorial spheres in north and south Persia, while leaving the central part as a buffer zone between the two imperial powers.²²

In April 1915, the Department of Commerce and Industry of the Government of India reacted to APOC's petition in the following terms:

The Government of India is very reluctant to extend the exemption to other countries. The conditions mentioned above do not apply to the Persian Gulf. Emigration of artisans to the Persian Gulf is of very recent date and living very expensive. It is possible that an account of these reasons that artisans are unwilling to proceed to the Persian Gulf even on the high Burma rates and not because of the restriction imposed by the Emigration Act. The artisan class is not so ignorant as the ordinary coolie class and is not likely to be frightened by requirements of the Act, which are not of harassing nature.²³

However, the Government of India did not completely close the door to further negotiations with APOC, and in the same memorandum, it was

considered that if “His Majesty’s Government would consent to be a party to the agreement,” and then, it would consider the desirability of an exemption, provided that “the Governments of Bombay, Punjab—where the emigrant proceed mostly from there—United Province, Bengal, and Bihar and Orissa [were] consulted.”²⁴

The dispute between APOC and the Government of India about whether Persia should be a legal destination for Indian labor migrants was not settled until February 1918. At that time, the Government of India finally agreed to a temporary suspension of the Emigration Act restrictions for territories under the APOC aegis. However, it had already realized the strategic importance of oil supply, and during the war, it had, therefore, extended the scope of its cooperation with APOC, so that oil production would not be hindered by labor scarcity.²⁵ APOC remained very insistent about the importance of a continuing labor supply from India. If that labor supply was cut off or temporarily strained, this posed a risk. When Indian workers deserted their job with the oil company in search of better pay in the British military, a manager commented:

A large number of Sikh fitters are pressing to get leave to return to their country, and a number of them have worked here at least a year. We cannot very well force them to remain as they are not under agreement, and their chief grievance is one of money.

I have no doubt that some of the men wish to go to India, than return for work in Basra, and by this way evades the Force Routine Order of 4th April. Others again will, no doubt, apply in India to Shaw Wallace and Co. for work either at the Gunboats or the I.O. Barges, as they will thus get much higher wages than that we can offer. Regarding the fitters who wish to go to their country, I have had a talk with the Head Fitter Mastery, and he tells me that some of his men here are writing to their friends in Lahore, Amritsar etc., telling them not to apply for work in this Company owing to the troubles caused by the war, dearness of living, and coercive methods that they say that we use in order to retain their services.²⁶

APOC’s concern was “fully appreciated” by the army when “a special order was issued to effect that no labor *ex* Abadan to be employed by any Military or Naval unit.”²⁷

During the war, APOC was not only troubled by the problem of skilled workers deserting the Persian oil industry; the scarcity of the supply of unskilled labor was also a hurdle for the company. During the war, there

were several factors to be reckoned with. There was anti-British tribal strife in Persia. There were famines and epidemics, which caused massive dislocation of the population in the region,²⁸ at least in the early stage of the war. The proximity of the oilfields and refinery to the war front also caused local unskilled labor to leave the oil company. As British forces advanced in Mesopotamia, and were active on the Baghdad front, a new labor market with more favorable working conditions emerged, attracting not only local skilled and unskilled workers, but also migrant workers from other regions, including India:

We have, all along, been having the greatest difficulty in retaining coolies at Abadan, [and]. ... I regret to say that matters have got very much worse during the last fortnight, and we are now nearly a thousand Coolies under strength. ... Last payday (6 days ago), some 200 men cleared off, and this morning, Abadan has rung up to say that a similar number went yesterday. ... I suppose that it is the fall of Baghdad, which it so some extent responsible for this sudden extra demand for Coolies by the [British] government.²⁹

Adding coolies to the list of their preferred recruits was a new chapter in APOC's labor policy. The Indian Labor Corps was invited to join their workforce in Persia.³⁰ In October 1917, when APOC had already accommodated a 300-strong Indian Labor Corps in Abadan, the oil company petitioned the Government of India to increase the total number of men to 800:

We understand that Persian coolies are available and will accept some with very many thanks but if it was possible our existing Indian Corps to be increased, we imagine that it would save having two separate organizations.³¹

The response of the Government of India to APOC's petition was not favorable. About 7 months earlier, on March 12, 1917, the Government had already suspended all unskilled labor migration from India, except to Ceylon and Malaysia.³²

Nevertheless, recruitment of migrant labor from India continued and even increased significantly—despite the problem of desertions by workers in pursuit of better pay, or the restrictions of the Emigration Act, which remained in force during the war. By the end of the war, the enlarged army of Indian migrants at work in the Persian oil industry was sourced from all across India. Chittagonian workers worked in harbor engineering and naval

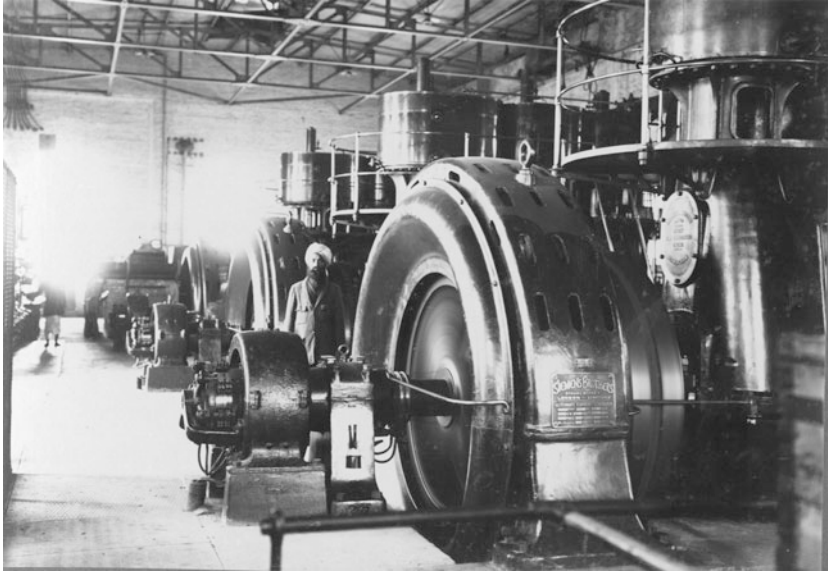


Fig. 4 Power Station, Abadan Refinery, 1921. *Source* British Petroleum Archive, Warwick, Britain.

transport, while the Punjabi Sikhs were chiefly employed as drivers, technicians, and security agents. Migrants from the Madras Presidency occupied clerical functions, the Gazars from Punjab working as dhobi (washerman), while Goans served as cooks and servants.³³

According to the signed contract, Indian migrant employees were not allowed to take their family to Persia. While this was of major concern for some workers, the oil company considered the ban on family reunion as strictly nonnegotiable, except for some high-ranking clerks. However, reports in Iranian archives state that some Indian Muslim migrant workers approached the Persian authorities to intervene on their behalf, calling on APOC to grant permission for family living arrangements. For example, one appeal—signed by “Indian Muslims working at the Persian oil industry” and presented in the autumn of 1927—petitioned the “*Shahanshab* [king of kings] of Iran as the guardian of Islam” and the “protector of people of Islam” as follows:

We are guest in your holy land and hope someday the Iranian workers replace us all. However, since some of us are young and newly married, in order to elude any non-Islamic conducts here, while we are far from our family, or our spouse who burns from such partition to be fallen into naughtiness.³⁴

The contribution of oil capitalism to shaping the course of the First World War was very significant. As I mentioned before, months before the final armistice of November 1918, the Government of India temporally suspended the application of its Emigration Act to Persia, and liberalized migration traffic. However, this suspension was short-lived. In 1920, the Government of India reversed its policy, and once again restricted labor migration to the Persian oil industry. Two years later, in 1922, the old Emigration Act was restructured via an amendment. The amendment intended to end the practice of indentured labor, extensively practiced during the war. As I will discuss in more detail, the main reason for this change in labor policy was the gradual escalation of labor protests among Indian migrant workers.

Following the amendment to curb the Emigration Act in 1922, the maximum period of employment for migrant labor recruited by APOC was reduced from 3 years to 1 year. By reducing the contract period, the Government of India and APOC gave themselves more bargaining power in dealing with labor unrest. However, one drawback of this policy was that, with its reliance on Indian skilled and unskilled migrant labor, APOC now confronted labor shortages and increased labor costs:

The withdrawal of this concession is extremely detrimental to the interests of the Company who has been obliged to rely on India not only for unskilled but for skilled labor as none is obtainable in Persia. You will readily realise how very seriously the limitation of the agreement affects the Company seeing that Indians very often do not reach the oilfields until 6 or 8 weeks after the agreement comes into operation and should a similar period elapse before they reach India on the return journey, the Company gets only 8 or 9 months work for 12 months pay, accordingly not only are labor costs very much increased, but there are more frequent changes in the personnel which it is to be avoided as far as possible.³⁵

A new Emigration Act was introduced in 1922. Other developments in the employment policy of APOC followed. The end of wartime policy and the prohibition of the indentured labor system at first motivated APOC to become directly involved with workforce recruitment. Thus, APOC

opened its own labor recruitment office in Bombay, and began to tap the local labor market for its Persian industry. In November 1925, APOC instructed Shaw Wallace & Co. to end its labor recruitment mission for the Persian oil industry in India as of January 1926. APOC said that it expected “lowered requirements for Indian labor” by replacing Indian labor with locally trained Persians.³⁶ However, that was not the only reason for the new policy.

The “Persianization” of the workforce had been of concern to the Persian government from the time that the oil concession was granted in 1901. According to Article 12 of the D’Arcy Agreement, “the workmen employed in the service of the Company shall be subject to His Imperial Majesty the Shah, except the technical staff, such as the managers, engineers, borers, and foremen.”³⁷ However, this rule was not always followed by APOC. For example, in a 1910 letter sent by Sadiq al-Saltaneh (Oil Commissar of the Persian government) to the Persian Charge d’Affaire in London, we find a complaint that non-Persian coolies were employed by APOC.³⁸ The question of schooling Persians for the technical professions was raised only in the 1920s, during the reign of Reza Shah Pahlavi (who came to power through a coup d’état in 1920, and was inaugurated as the new king in 1925). In 1927, the Persian Ministry of Finance called on the Ministry of Endowment and Education to promote the education of Persians for a technical career in the oil industry, by establishing technical institutes in the southern province of Khuzestan:

According to the report compiled by the Oil Company, at the present, there are 4598 non-Iranians working for the Oil Company. Although the Oil Company, according to the concession [of 1901] preserved its right to employ non-Iranian labor for its technical careers, nevertheless, all necessary measures should be made to replace the entire non-Iranian with the Iranian national.³⁹

By the late 1920s, training Persian labor in APOC workshops had become normal. Persians were instructed by Indian engineers in what today would be called “on-the-job training.” As quasi-apprentices, Persians followed training courses to become “fitters, turners, moulders, blacksmiths, carpenters, armature winders, general repair electricians, boilermakers, welders (electric and acetylene), and instrument makers.”⁴⁰

In 1933, the Persian government canceled the D’Arcy concession, and offered APOC a new agreement that was more favorable to Persia.

According to the new agreement, APOC was required to employ only Persian nationals for unskilled occupations. In hiring clerical and technical employees, Persian nationals were to be preferred, if they had the necessary competence and experience.⁴¹ Article 16 of the new 1933 Agreement—carefully worded to meet Persian employment requirements—stipulated that:

... the Company shall recruit its artisans as well as its technical and commercial staff from among Persian nationals to the extent that it shall find, in Persia, persons who possess the requisite skill and experience. It is likewise understood that the unskilled staff shall be composed exclusively of Persian nationals.

The parties declare themselves in agreement to study and prepare a general plan of yearly and progressive reduction of the non-Persian employment with a view to replacing them in the shortest possible time and progressively by Persian nationals.⁴²

The oil company was invited to advertise its job vacancies not only in the local Persian press, but also in the national press and at employment offices, in order to promote a bigger Persian workforce.⁴³ In one initiative, the oil company called on all its employees to ask their friends and relatives throughout Iran to apply for vacancies in the oil industry.⁴⁴

Taking into account the combined effect of all these developments—new employment policies, political pressure from the Iranian government, and increased labor activism (initially among Indian migrant labor, but later involving Persians)—we can better understand why the number of Indian migrant workers in the oil industry decreased considerably from the mid-1920s and in the 1930s.⁴⁵

The outbreak of the Second World War once again powerfully boosted the demand for oil. A new oil boom resulted, and the number of Indian migrant workers in the oil industry grew by 100%, reaching 2498 men in 1945. However, the Indian independence movement together with the campaign to nationalize the Iranian oil industry caused the Indian migrant labor community in Iran to dwindle. When the Iranian oil industry was nationalized in March 1951, the community of Indian migrant workers broke up. Some had worked for the fallen Anglo-Iranian Company (APIC). A large number of Indian employees decided to join the European staff, and left Iran. Some Indians opted to stay in Iran, and continued to work in the oil industry under a Persian employer.

ABADAN, A TRIPARTITE CITY

In her seminal study of colonial urbanization in Morocco, Janet Abu-Lughod refers to Rabat as a dual city, with sharply segregated urban spaces of the colonizer and the colonized.⁴⁶ However, there is often another urban space in the colonial cities, between the colonial settlers and the colonized indigenous population—a buffer zone occupied by intermediary groups. For example, in Calcutta, “British colonists deliberately cultivated a segment of the indigenous elite, who served as intermediaries between the colonizers and the colonized.”⁴⁷

When the first stone of the refinery was laid in 1910, the island of Abadan (or *‘Abbadan*, as it was spelled back then) was thinly populated by the Nassar Arabs. Their leader was the local Sheikh Khaz‘al, who lived in the nearby village Mohammareh (later Khoramshahr). The inward migration to Abadan of people seeking employment in the oil industry, or providing services to the employees of the oil industry, soon grew beyond all expectations—especially after the First World War when the global dependency on fuel oil greatly increased. APOC’s Indian employees in Abadan numbered only 80 in 1910, but gradually rose to 1028 in 1914, and then grew sharply to 3816 in 1922.⁴⁸ Thus, in two decades, Abadan grew from a modest sheikh’s village to a large company town, which by 1930 had around 30,000 to 40,000 inhabitants,⁴⁹ of which about half—17,370 men—worked at the oil refinery.⁵⁰

In the warm climate of southern Persia, long working hours were normal. In the early years of the oil company, no standard working day for employees existed at all. Workers were often expected to work 7 days a week, from sunrise to sunset. Some years later, however, on the eve of the First World War, a new workday regime was implemented: 6 days were worked per week, from 9 to 12 h per day, depending on the season. Work typically started at 6 o’clock in the morning and ended at 6 o’clock in the evening during the winter, and continued from 6 o’clock in the morning until 3 o’clock in the afternoon during the summer. It was only after a series of labor protests in the 1920s that APOC eventually adopted standard working hours throughout the year, commencing at 6 in the morning and finishing officially at 5.30 in the afternoon, with an hour and a half for breakfast and an hour for lunch.⁵¹ In the early days, the oil company designated Sunday as a day off. In later years, the rest period started at noon on Thursday, and included Friday.

At first, APOC offered temporary housing exclusively to its British and European staff. Two years later, in August 1912—when the construction of the refinery was sufficiently near completion to allow a trial run to be made⁵²—APOC's European employees were accommodated in brick villas and bungalows surrounded by gardens. These houses were built at the northwestern site of the refinery known as *Braim*, where the Sheikh Khaz'al also had his residence. On the opposite side of the refinery, to the southeast and north of the old village, a new neighborhood was constructed for Indian clerks and artisans. The refinery was in fact a "buffer zone" between the Braim and the new neighborhood. During the early years, this new neighborhood was called Coolie Lane. Its name later changed to Sikh-Lane, when the majority of Indians working at the refinery were Sikhs, and finally to Indian Lane. Indian employees in the Coolie/Sikh/Indian Lane were housed in parallel long and round barracks. Each barrack was divided by wall portions into number of units. Each unit could accommodate several employees, or else a family, if by exception family members were permitted by the company to join the employee.

In the early days, Persian recruits either lived in sunbaked mud houses in the old village, around *sheikh-bazar*, or around the old town, in shelters made of loosely lashed sticks or bamboo, roofed with palm leaves.⁵³ However, during the later period, they moved to Ahmadabad, Bahmanshir, and Kofeysheh, often on their own initiative. In the early 1920s, APOC added two new neighborhoods to Abadan: the *Bowardeh* area and the Indian Quarter (*kuarter-e hendi-ha*). Bowardeh was constructed to accommodate Persian clerks and skilled workers. The Indian Quarter was intended for Indian semiskilled workers and security agents. Between the two new labor neighborhoods of Bahmanshir and Ahmadabad, the Indian Quarter featured row houses and a public toilet (new to Iranian architecture), and had its own Sunni and Shi'ite mosques as well as a home-based Hindu temple.⁵⁴ The old Indian Lane, well maintained, was for the use of Indian clerks and artisans.

As a tripartite city, Abadan was spatially divided according to the social stratification principles imposed by British colonialism. A highly stratified racial hierarchy existed, which APOC's British employees brought with them from home and from India. The city was divided between Europeans at the top, Indians in the middle, and native Persians at the bottom. This racial partition was consistently observed, even when new neighborhoods

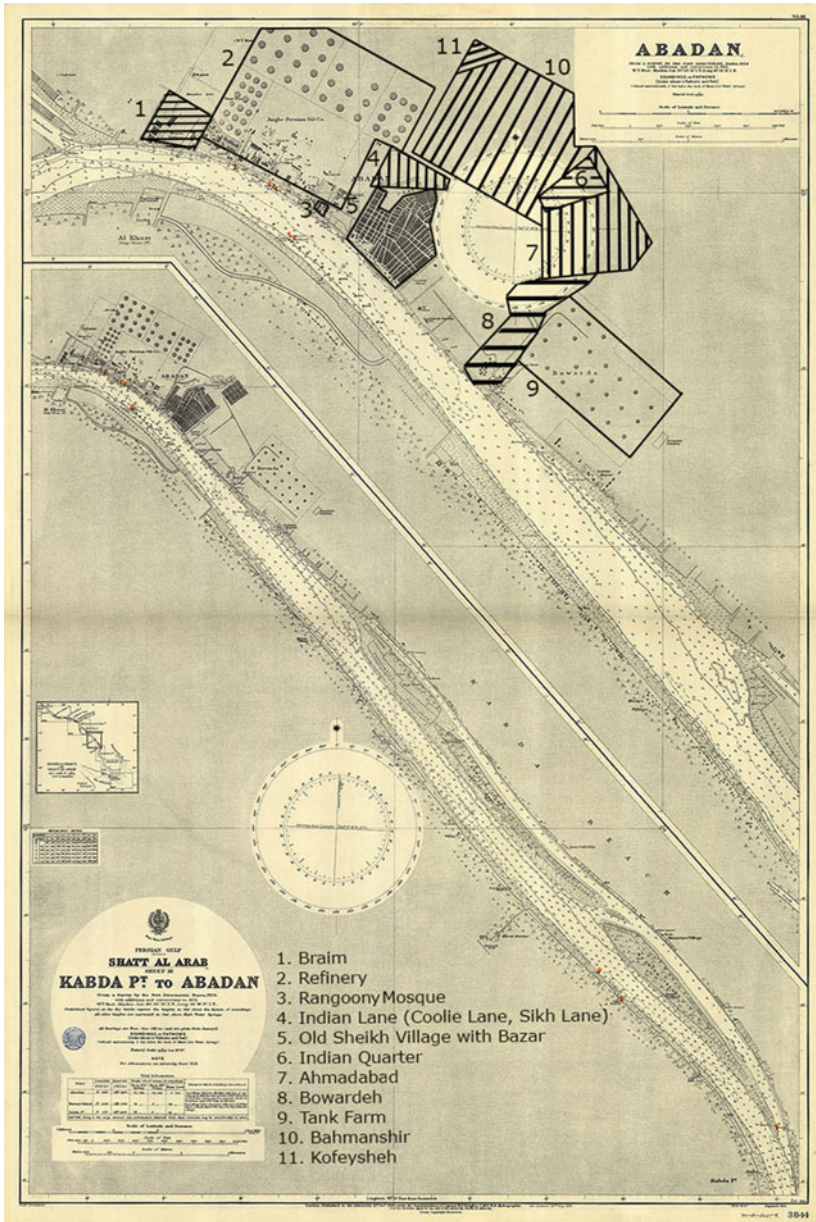


Fig. 5 Map of Abadan in 1926, showing the new suburbs built in the 1920s and 1930s. Source British Library. Location of new suburbs added by the author.

were added to the city, as the oil industry expanded, the refinery was extended, and the employment policy was altered.⁵⁵

Crossing this very rigid racial partition was possible when higher ranking Indians (and, later, Persians) were invited to attend official ceremonies, congregations, or worship services with the European community.⁵⁶ However, mixing across racial borders was “specifically discouraged, and segregation was held up as the best alternative.”⁵⁷ The APOC archive contains a 1926 memorandum signed by Armstrong, an APOC executive in Abadan, which illustrates this segregation. According to the memorandum, when some Indian clerks at APOC approached Armstrong in Abadan to get permission to use the library, he was reluctant to respond positively to their demands, because he was worried that if he granted access to Indian clerks, this might cause Europeans to avoid the library. Consequently, he advised Indians to create their own library with old and used books from the European library.⁵⁸

In colonial culture, racial segregation had a domino effect. In Abadan, it was not just Indian employees who were supposed to have their own community library. The “native” Persians were also barred from using the Indian Library and encouraged to have their own. This ethnic partition extended to other services, such as health and sports facilities. The Europeans had their own exclusive hospitals and sports clubs, separate from Indians and Persians, with different quality standards.⁵⁹ APOC justified its policy and actions by arguing that:

Under European guidance, Persians were learning to separate themselves from fellow Indian workers. Separate Persian clubs would serve the dual purpose of stilling complaints in Tehran and keeping labor divided in Khuzestan.⁶⁰

LABOR ACTIVISM ENCOUNTERS NATIONALISM

The dialectics between nationalism and labor movements during colonial rule in Asia and Africa have been the subject of a few major studies.⁶¹ Increasingly, large-scale labor migrations became a feature of imperial social formations. As anticolonial nationalism gathered steam, there were more and more cases of backlash against migrant workers, including among labor activists and labor movements inspired by nationalist ideas. In many instances, transnational migrant laborers were perceived as invidious

guests, who were there at the courtesy of patronage by the colonial power, in order to weaken the colonized, or aid their further exploitation. The oil towns of Persia were founded as migrant towns. They accommodated large groups of migrant labors coming from different parts of Persia, as well as colonial subjects from the Indian subcontinent. For APOC, all Iranian workers were classified as “Persians,” irrespective of their provincial origin, and they were generally treated as third-class employees. The migrant workers from the Indian subcontinent were considered as the second-class employees and treated accordingly. In the Persian oil industry, the social stratification scheme imposed by British colonial rule contributed to creating nationalist sentiments, both among Indian migrant workers and among the “native” Persians.⁶²

There is no reference in APOC records to any major labor discontent or mass protests in the oil industry during its early years. Nevertheless, the oil company’s operations were not always running smoothly. Many skirmishes and clashes occurred between abusive European foremen and disgruntled workers.⁶³ In the early years of the oil industry, these frictions were negotiated via foremen. Casual workers did not agitate for self-organization as a class of employees. All these changed after the First World War. In December 1920, some 3000 Indian workers of the Abadan Oil Refinery staged a strike. Their demands included an increase in wages, a reduction of daily working hours, additional pay for overtime, improvement of sanitary conditions, and an end to vilification and molestation of workers by staff members.⁶⁴ They were soon joined by their Iranian coworkers, which forced the refinery authorities to accept some of the demands of the workers. This turn of events was of great concern among APOC directors. They feared the radicalization of their skilled Indian workers and the infection of unskilled Iranians by “subversive ideas.” In addition to workers’ fury over “conditions and cost of living,” the British Petroleum historian Ronald Ferrier refers to the 1920 strike as “a consequence of the bitter resentment in India, following the Amritsar massacre riot of April 1919,” and says that it was provoked by some Indian “semi-organized” political agitators.⁶⁵

More recently, other historians have also regarded the Amritsar massacre as the cause of the 1920 Indian workers’ strike.⁶⁶ However, it is doubtful that the Abadan strike of December 1920 can be associated with a massacre, which occurred more than a year and half earlier. Such an interpretation downgrades the extremely deprived living conditions and low wages of workers in the oil industry, or arises from a colonial reading of the

past. The 80% salary increase demanded by workers illustrates how poorly paid both Indian and Persian workers actually were. The petitions by Persian workers, which were sent to the government in Tehran, all refer to “poor pay, inadequate facilities, dirty living conditions, and the lack of compensation in case of disability.”⁶⁷

Although, in the end, APOC’s attempt at reconciliation did concede the strikers’ demand for wage increases, it did not go beyond that. It left other workers’ petitions unrequited. Other workers’ demands had concerned “accommodation, married square, medical services, leisure amenities, exchange rate, and the sale of discharge certificates of Indian employees.”⁶⁸ It was, therefore, to be expected that workers’ discontent would flare up again. Therefore, it did, 18 months later. In May 1922, another strike of Indian workers broke out, which was soon joined by Persian workers. George Thomson, an employee of APOC, recalled the strike as a “well-organized” protest, by “the skilled artisans, involving about 2000 Indians.”⁶⁹ Thomson does not probe the roots of this strike. However, one of the Indian employees of APOC, named Mudliar in an “eyewitness account,” described, in detail, the poor working and living conditions of Indians in APOC. The account of Mudliar followed an early statement by Dr. Ghore in the *Bombay Chronicle* under the title of “Indian Workers in Persia, Miserable Condition.” According to Ghore’s statement:

The Anglo-Persian Oil Company Limited alone employed 95% Indians. There is no restriction in the number of hours worked everyday. Neither coal nor ice was supplied to workers until agitation was started. Workers die of sunstroke in summer and pneumonia in winter as a little is done to look to their wants and comforts. I request Indian labor to take up the cause of their comrades in Persia particularly those employed by the Anglo-Persian Oil Company, whose agents are the Shaw Wallace & Co., Bombay.⁷⁰

Following Dr. Ghore statement, Mudliar narrates his personal experience of working for APOC, where “large numbers of workers of all classes skilled and unskilled are brought up as fast as steamers and trains can carry them, without the slightest care being given to them on board the ship causing untold suffering on the way. From Mohammareh, batches of men are sent up to the oilfields in steamers on open deck, through second-class passengers, to suffer in the biting cold and chill weather of the cruel Persian winter.” On arrival, “they are not given any accommodation in such a dreary place as this, and even if any is given, it is without latrine, without

cookhouse.” Mudliar testified as “there is no certainty of working hours, which are sometimes as long as 10 and 12 h in a day in all weathers.” The working environment, according to Mudliar, was nothing but “humiliating” and “unbearable.” He confirmed Dr. Ghore’s reference to “men dying of sunstroke and pneumonia” as true.⁷¹

In Mudliar’s testimony, there is also reference to extremely poor living conditions for Indian workers:

Living accommodation provided is inadequate and a large number of people are huddled tighter in small room, incompletely furnished, by way of furniture and lights, nothing to say of cookhouses and latrines, thus making life extremely hard.⁷²

Added to these “unbearable” working and living conditions were the steady increase of the prices of essential commodities and high living costs. According to Mudliar, prices were as a rule high and were “on the increase daily,” making it “impossible” for Indian workers to “command even the necessaries of life” in Persia, let alone “to support their dependents in India.”⁷³

APOC responded through the British Consul in Mohammareh by characterizing all the public allegations of Dr. Ghore and Mudliar as “groundless fabrication” intended only to justify a salary increase.⁷⁴ When the 1922 strike broke out, APOC immediately called on Sheikh Khaz‘al to “deal with the native” employees, while “after careful consideration,” the company decided that the “only course open was to repatriate nearly 2000 skilled Indian workmen.”⁷⁵ When the strike leaders refused to board the ship, unless all strikers could leave Persia at once, APOC reluctantly conceded their demand. In doing so, the company lost a large part of its skilled workforce, the majority of them being Sikhs, although “Indian clerical staff, orderlies, process staff, and cooks were still employed.”⁷⁶

Later, in 1924, the British Legation in the Persian Gulf reported the activity of an Indian mechanic in Masjed Suleiman, named Muhammad Khan, who tried to form a workers’ union.⁷⁷ However, the May 1922 strike is the last known collective action by Indian migrant workers in the Persian oil industry. Because Indian employees were thereafter gradually replaced with Persians, the position of the remaining Indian workforce was weakened.

The Iranization of the workforce accelerated after 1920–1922 strikes and paved the way for the gradual reduction of Indian labor.⁷⁸ This



Fig. 6 Foundry, Abadan, 1921. *Source* British Petroleum Archive, Warwick, Britain.

development went hand in hand with the rise of Persian territorial-state nationalism stimulated by the Iranian Constitutional Revolution (1905–1909) and the emergence of a new political society after the First World War, supported by new institutions intending to create a modern centralized state. Along with the consolidation of such a political society, there was also the reemergence of a new anticolonial nationalism, supported by noncoercive institutions, such as political parties, guilds and labor unions, cultural associations, and private schools.

With the making of the workers in the oil industry, organized and non-organized Iranian workers began to engage in mass activities. Not only did they demand better working and living conditions, but also wanted recognition of their autonomous status as citizens of the country. On May 1, 1929 (International Labor Day), when about 9000 workers at the Abadan Refinery launched a mass strike, their demands included an increase in wages by 15%; recognition of the workers' union and May Day as a legitimate holiday; reduction of the working day from 10 to 7 h in the summer, and to 8 h in the winter; and complete equality between Indian and

Iranian employees.⁷⁹ The strike was initiated mainly by Iranian workers, and Indians workers did not participate in it. Indeed, protected by the company's security guards, a group of "Rangoony workers" unsuccessfully tried to cross the picket line and proceed to the refinery.⁸⁰

APOC claimed that the strike of May 1929 was nothing but a "Bolshevik plot," to "foment intense labor trouble" in the oil industry and "ultimately ablaze in the southern Persian."⁸¹ However, the national press accused the oil company of downplaying the true cause of the labor discontent:

There seems to be two factors for the strike among the workmen of the Company; first, the times have changed and workmen in all parts think more of their personal comfort than they did formally desiring easier work and more wages, particularly as individual and social expenses have now naturally been greatly increased. ... Second, [it is] the bad treatment by Company officials of the Persian workmen. It is true that the workmen are not educated, but still they have human sense and natural intelligence and they notice that the Company favours the Indian and the Iraqis and treats them better. ... We can assure the Company' authorities that should they change their treatment of the Persians and treat them as to the Indian and Iraqis and rank them on the same level of pay, then the Persian element would never create trouble, and as they pay no attention to the Bolshevik propaganda.⁸²

The issue of inequality between Indians and Persian workers was raised many times from the early years of APOC operation onward. In the petitions sent by Persian workers to the national parliament, or to local or national authorities, there are often references to the discriminatory policies adopted by APOC, segregating Indian and Persian employees with regard to wages, housing, provision of drinking water, sanitation, medical care, and leisure.⁸³

Why should be there differences between Indians and Persians, while they are both workers? The Indian hospital located in the neighbourhood called *company* is well equipped, while the Persian hospital in the dirty and malodorous neighbourhood of *Sheikh* is nothing [and] lacks all essential equipment.⁸⁴

After Reza Khan (later Reza Shah) rose to power in the 1920s, his new government promoted territorial-state nationalism, to glorify the authoritarian modernization program and the new state-building project. According to APOC authorities, when Reza Khan visited the oil industry in southern Persia in 1924 as Prime Minister, he was deeply disappointed when “he did not see a single Persian employed in the Abadan Refinery.”⁸⁵

The Iranization of labor in the oil industry was juxtaposed with Iranian endeavors to build a centralized modern state after the First World War.⁸⁶ After a brief military operation led by Reza Khan (both Prime Minister and Commander-in-Chief) in 1924–1925, the central government ended the era of local autonomy for Sheikh Khaza‘al in Khuzestan. The Sheikh was known as a long-standing British protégé in the Persian Gulf. His arrest and move to Tehran reinforced Iranian territorial nationalism and helped to clear the way for Reza Khan to be crowned as Reza Shah Pahlavi, founder of the Pahlavi royal dynasty.

One of the major effects of state-sponsored Iranian nationalism on the oil industry was that pressure was put on the APOC to improve working and living conditions in the oil industry, and accelerate the process of Iranization by training up indigenous workers and replacing Indians by Iranians. On a second visit to Khuzestan in 1928, Reza Shah declined to visit the oil installation, despite APOC’s welcome. According to *Shafaq-e Sorkh*, a national newspaper, it was “popular dislike” that induced the King not to visit:

The Company does not deal fairly with people and only has its own interests in mind. The Company’s officials do not see themselves as mere representatives of a commercial enterprise, they prefer to meddle in all affairs and they even have a political office. ... That acts as the embassy of a powerful nation in a weak country. ... Generally speaking, the attitude of the Company before the establishment of the Pahlavi dynasty was akin to the East India Company’s stance in the India of two centuries earlier. It is for this reason and for hundreds of other minor issues that the people here [in Khuzestan] do not like the Company. Consequently, the public opinion was not in favour of seeing their King as a guest of the Company.⁸⁷

The prevalence of such bitter anticolonial sentiment among Iranian workers vis-à-vis APOC translated into a more confrontational stance toward Indian employees. In response, Indian employees tried to secure better protection from APOC, disassociated more from the local community, and in fact

began to identify themselves more with the European staff in the oil industry than with the Persian community. For example, when on March 11, 1928 rumors spread about APOC's intention to "fire 10,000 Iranians, while thousands of Indian and Iraqis are still working for the Oil Company," the Indian working community in Abadan was harassed. The following day, a crowd of Iranian workers "congregated in front of the Company's Labor Office in Abadan and stoned the Office."⁸⁸

However, the most explicit example of the prevailing nationalist sentiments was during the course of 1929 strike. As mentioned earlier, one of the demands of the strikers was total equality between Indian and Persian employees. In the capital Tehran, the press supported the strike. APOC was accused of practicing racial discrimination, and there were complaints that its Indian employees ruled over Iranians. In a nocturnal handout (*shabnameh*) distributed during this period addressing "Our Crowned father, Government and Court Officials," the Iranian worker was described as the "glorious and noble son of Darius," who had to "suffer under the tutelage of the British and particularly their Indian clerks and middlemen, sacrificing everything for the interest of the Anglo-Persian Oil Company."⁸⁹ Such propagandist literature, according to James Bamberg, was "prominent, a ritual prophylactic incantation against malign foreign influence."⁹⁰

The new Agreement of 1933 between the Iranian government and APOC, which annulled the D'Arcy concession of 1901, emphasized the earlier demand that APOC should recruit its artisans, technicians, and commercial staff among Persians. In the opinion of the Persian press, canceling the D'Arcy concession was an act of "political emancipation" and a "new page to Persian honour"—not only did it return the "national wealth" to the country, but also ended a lengthy era of "favouritism towards Indian employees."⁹¹

The Second World War reached Iran in August 1941. On August 25, 1941, the British and Soviet Forces simultaneously launched their military offense against Iran. British troops comprising a large number of Indian combatants invaded Khuzestan and Soviet Forces occupied the Iranian Northern provinces from Azerbaijan to Khorasan. During the British and Soviet military presence in Iran, every effort was made by the Allied Forces to avoid any disruption in the Allied support for the Soviet fronts. During the war, some two thirds of Iran's economy in one way or another were associated with Allied activities in the country and any possible disruption of this association could be considered an act of sabotage.⁹² The oil and its

supply to the Soviet Union was a hallowed sector where the labor agitation was strictly prohibited. Abstaining from open agitation among the labor of the oil and the transport industries, chiefly rail workers during the war, the labor unions decided to commence activities in the central provinces of the country, by organizing large sectors of the workers in and launching strikes and street protests for better working and living conditions. However, it was only by the end of the war and after the departure of the British troops from the Iranian soil on March 10, 1946, when the labor movement in the oil industry decanted their covertly organized army to the street of the major oil cities in south. Celebrating the Labor Day of May 1946 with a series of lively and vibrant processions was, indeed, the result of the labor union 5 years rigorous clandestine activities.

During the British Forces occupation of Khuzestan, the Indian community in the southern province was comprised of the first cluster of the migrant workers, a total of 1000 workers and clerks, a cluster of newly (1942–1946) recruited of 2500 workers and some large but unknown number of Indian combating forces of the British Army. The British Command in Khuzestan stationed these Indian combating forces to guard the oil installation and custody the security of major oil cities. This situation in due course soured relation between Iranian and Indian community. In one 1942 episode, known as the Bahmanshir incident, three Indian soldiers refused to pay a prostitute after enjoying her “service” in the Abadan Bazaar; another six Indian employees of the oil company engaged in a “bout of *araq*-drinking” and abused a local boy and women passing by. These events triggered major ethnic tension in the city, and ended in bloody clashes between Indians and Iranians communities, with casualties and large losses of property.⁹³

Events such as the Bahmanshir incident were irrefutably colored by sectarian features, and had ethnic and cultural dimensions; however, there were other dimensions in the Indian labors community, and not the cluster of Indian soldiers at the service of British Army, interaction with the Iranian workers. A vibrant example of such class interaction occurred during the 1946 strike in the Iranian oil industry. The strike broke out among the workers in the Abadan Oil Refinery in the early hours of a summer day, July 14, 1946. Within hours, it spread throughout the Province of Khuzestan, engulfing the oil industry as a whole. During the 60 h, it was held; the general strike mobilized some 70,000 Iranian and Indian manual and clerical workers and broke, by a considerable margin, the record of any labor walkout convened hitherto in Iranian history.

However, with some fourthly seven deaths and hundred seventy casualties, it was recorded as the bloodiest labor protest in Middle East labor history.⁹⁴

Revisiting the chronology and outcome of the strike exposes that from the early days, following the British Forces evacuation from Khuzestan, the Indian workers joined the labor protest both in the oilfields as well as the refinery; however, what became alarming for the oil company was the solidarity some of the Indian workers proudly displayed with one of the labor unions, the Central Council of Federated Trade Union (CCFTU) which was associated with the communist leaning, the Tudeh Party of Iran. During the May Day demonstration of 1946, some 80,000 demonstrators, including Indian workers, rallied through the old town of Abadan. The March exuded a carnivalesque atmosphere as national anthems blared and workers chanted slogans in Persian, Arabic, Hindi, Armenian, and Assyrian. Later, according to a report signed by the Consul for Indian Affairs at the British Embassy in Tehran, one of the Indian workers by the name of Mohamad Ahmad Farooqi, with a “very pronounced communistic tendencies, managed to secure the leadership of the Indian artisans, who number about 1400–1500 and appealed [to] Tudeh [Party] leaders to help the Indians.” The report continues by arguing that “this contact between the Indian community and the Tudeh and Mohammad Ahmad Farooqi’s leadership was the beginning of the trouble amongst the Indian workers.”⁹⁵

On July 5, about 1000 Indian workers marched to the British Consul in Khoramshahr, sitting in front of the Consulate, demanding to meet the British Consul in order to convey their grievances. In their meeting with the Consul, the Indian workers confirmed that they have come from all over the province. During the meeting, a number of their leaders such as Kabul Singh and Shamsheer Khan called for the removal of the Indian Assistant Labor Officer, Asghar Ali, Welfare Officer, Alaf Shah, and his Quarter Master, Mohamad Ismail. On the following day, the protestors stated their grievances in a petition signed by 1135 Indian workers and delivered it to the British Consulate through a committee of 17 men. The grievances included the zealous exercise of power by the Labor Officer laying off workers without providing compensation to workers for their return travel costs, which according to the company’s own rules had to cover their return to Bombay. Additional complaints against the Welfare Officer included poor accommodation or lack of sports facilities.

The petitioners demanded the immediate removal of both the Assistant Labor as well as the Welfare Officers.

In a meeting that the Labor Officer had with the British Counsel, he rejected the complaints of the protesters and accused the petitioners of committing subversive activities. According to an intelligence report compiled by the British Consul in Khoramshahr, the Labor Officer disclosed the emergent solidarity between the Indian and Iranian workers during the past years. According to the Labor Officers' account, "the Indian artisans came in contact with some prominent members of the CCFTU, specially Husain Muradi, Jahangir, Safa, and Torabi, when they visited the artisans club frequently and addressed the Indian artisans several times in their club. On one occasion, he [Asghar Ali] was also present, and Torabi, a prominent Iranian CCFTU labor activist, told the artisans in a forceful speech that the Tudeh is willing to help the Indians who were their brothers, and that they must unite and should get rid of their Labor and Welfare Officers and that these officers should be selected from amongst the members of the labor class."⁹⁶

In the early June 1946, the empathetic reciprocity of Indian workers with their Iranian counterparts had reached such levels that on one occasion on 16 June when the CCFTU was holding one of its sequential meetings in South Ahmadabad district of Abadan, a group of 200 Indian workers marched from their quarters and attended the meeting, shouting pro-CCFTU slogans.⁹⁷ By this time, there were 700 Indian workers who had joined the CCFTU.⁹⁸ Together with the Deputy General Manager of the Oil Company, the Consul for Indian Affairs at the British Embassy in Tehran compiled a list of 41 Indian labor activists and "revolutionary speakers," 10 with communist leanings. All of the workers named in this list were nominally Muslim, except for two Sikhs.

There are no records of casualties of Indian worker during the bloody strike of July 1946. However, we know that, in the following months and years, the Anglo-Iranian Oil Company along with conducting other anti-labor coercive policies steadily reduced the number of Indian workers in the oil industry. The 5 years following the July strike of 1946 coincides with termination of the British Raj and independence of India in August 1947 and the movement for nationalization of the Iranian oil industry which finally was celebrated in March 1951. The nationalization of Iranian oil industry was not solely the result of tenacious performance of some political elite, as has been largely noted in the historiography of

nationalization of Iranian oil, but, also and equally the outcome of enduring pressure from below, chiefly by oil workers.⁹⁹ On March 20, 1951, the Iranian both parliaments ratified the bill nationalizing the Iranian oil industry, and 6 months later, on October 4, 1951, all European and majority of Indian employees of the AIOC left Abadan.¹⁰⁰

Some Indian employees of the AIOC petitioned the Iranian parliament with a request to stay. The parliament responded favorably to the appeal.¹⁰¹ Although the exact number of Indian workers who remained in Iran is unknown, there must have been quite a few. Even today, senior Abadanis can recall the presence of Indians workers community in everyday life within the city.

CONCLUSION

Following the discovery of oil in southern Persia in the early twentieth century, a massive recruitment campaign was launched for employing Indian skilled and semiskilled workers for the newborn Persian oil industry. These newcomers were engine drivers, marine signalmen, boilermakers, pipe fitters, butlers, cooks, and dhobis. They constituted a new army of labor on the March, bringing technical knowledge and industrial skills to Persia. In the new networks of human interaction, foreign workers gradually replaced foreign soldiers. Both Indian soldiers and Indian civilians fell under the discipline of colonial rule and were subjected to its priorities. The new international networks, which were established, proved to be essential and extremely lucrative for the emerging oil capitalism. Yet, they had also a subversive dimension, once they associated with new political ideas from elsewhere and were globally linked to experiences of labor activism in other places. Indian migrant workers not only played an important role in the founding, development, and eventual consolidation of the Persian/Iranian oil industry, they also contributed to the formation of a labor movement in Iran.

NOTES

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 9. J.B. Backhouse, “Oil-1904-1928,” in *A History of Shaw Wallace & Co. and Shaw Wallace & Co. Ltd.*, ed. Harry Townsend (Calcutta, 1965), 46.
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11. Willem van Schendel, "Spatial Moments: Chittagong in Four Scenes," in *Asia Inside Out: Connected Places*, ed. Helen Siu and Eric Tagliacozzo (Cambridge, MA: Harvard University Press, 2014). I am grateful to Willem van Schendel for providing me with valuable information on the categorization of the Chittagonian workforce.
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23. Ibid.
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25. Stefan Tetzlaff, op. cit., 72.
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27. British Petroleum Archive, ARC 176338; George Thomson, "Abadan During the World War," *Naft* 8, no. 5 (September 1932), 9.
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29. British Petroleum Archive, ARC 68779, Strick, Scott & Co. to Wilson, 7 October 1916.
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Cat Crackers and Picket Lines: Organized Labor in US Gulf Coast Oil Refining

Tyler Priest

INTRODUCTION

“The true majesty of the oil industry is best seen in a modern refinery,” wrote American oil journalist Harvey O’Connor in 1955. Few monuments of industrial architecture could compare to a refinery’s giant crude oil tanks, topping plants, distilling columns, fractionating towers, platformers, extraction plants, lubricating oil units, and de-waxing facilities. The centerpiece of the modern refinery, however, was that “sublime industrial cathedral known as a ‘cat cracker’,” where petroleum molecules were broken down and rearranged to form high-octane motor gasoline and other fuels. “By night,” mused O’Connor, “with a thousand lights pricking the darkness along soaring platforms, catwalks, and ladders, the catalytic cracking unit affords one of the magic sights of twentieth-century technology.”¹

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T. Priest (✉)
University of Iowa, Iowa City, IA, USA

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Fig. 1 Catalytic Cracking Units, Standard Oil of New Jersey Baytown Refinery, 1946. *Credit* Standard Oil of New Jersey Collection, Image Number 43680, Archives and Special Collections, University of Louisville.

As Harvey O'Connor, who was once a publicity director for the Oil Workers International Union (OWIU), clearly understood, a large modern refinery was not just an assemblage of tanks, towers, pipes, and valves, but also a place where, in the United States, more than 2000 workers earned their living. Although petroleum refining was a relatively capital-intensive industry, it depended, from inception, on a large and stable workforce—more than 200,000 people nationwide by 1955, in nearly 300 refineries of all sizes across 39 states—to keep the units running smoothly, around the clock. One third of these workers were employed on the Gulf Coast, most of them in 13 major refineries on the Upper Texas Coast and in Louisiana, the largest concentration of refineries and chemical plants in the United States. Shortly after the 1901 discovery of oil at Spindletop, Texas, the region's first large refineries, owned by Gulf Oil and Texaco, sprang up in nearby Port Arthur and Beaumont. With subsequent discoveries along the

Gulf Coast, refineries spread southwest to Houston and Corpus Christi, and east to Lake Charles, Baton Rouge, and New Orleans, Louisiana. By 1941, the Gulf Coast accounted for 28% of national refining capacity, rising to 32% by 1956, and 36% by 1976.²

During the early decades of the century, oil company management enjoyed unchecked authority over their refineries and the people they employed. Across the region, they exerted their influence in both subtle and strong-armed ways, dominating the civic life of refinery communities, fiercely resisting unionization, and dividing workers against each other, often along racial lines. Working-class people of all races in the Gulf region nevertheless coveted refinery jobs, which were equivalent to those in northern automobile or steel plants. Almost all the higher paying skilled work was reserved for whites, which along the Upper Gulf Coast included both Anglos and Cajuns. The jobs paid well, included generous benefits after the First World War, and offered a means of upward socioeconomic mobility. Minorities, too, including African-Americans as well as Mexican nationals and Mexican-Americans,³ found desirable wage-labor work at refineries, albeit in segregated classifications. Job losses in the oil industry during the Great Depression, however, forced white and minority workers alike to organize. The union movement in oil targeted refining, the least isolated and geographically dispersed sector of the industry.⁴ As was the case across the racially segregated, "Jim Crow" South, labor organizing in refining consisted of a dual struggle, by all workers for dignity, job security, and workplace control, and by racial minorities for workplace equality.

Explaining the failure of unionization in the US South has long pre-occupied labor historians, who debate the relative importance of southern laborers' cultural opposition to unions, the racism of southern whites, and management hostility to unions in small-firm industries.⁵ The pioneering work of F. Ray Marshall inspired a wealth of scholarship on labor and race in the South. Unlike Marshall, however, labor historians have paid little attention to Gulf Coast petroleum refining, which developed into one of the largest industries in the southern United States.⁶ By 1945, the Congress of Industrial Organization (CIO) oil workers union, the OWIU, bucked the odds against organized labor in the South by winning representation in nearly all major Gulf Coast refineries. Union organizing in the South, in other words, was not quite the abject failure southern labor historians have portrayed it to be.

Successful labor organizing in the US oil industry was really only possible in the refining sector. Oil field workers—the drillers, roughnecks, roustabouts, and pipeliners—were widely scattered across the oil-producing regions. They also moved from community to community, from field to field, and from drilling rig to drilling rig, never remaining in one place long enough, or in large enough numbers, to sustain collective action against employers. Refineries, on the other hand, were fixed and permanent installations that brought together large numbers of workers in one place. They were also the choke point in the flow of oil from wells to consumers. If workers were to shut down a series of wells or even an entire field, production would likely be found elsewhere to make up for the shortfall. Large refineries, by contrast, processed crude oil from many different fields and regions. The cessation of operations at just one of them could sharply pinch company profits and disrupt oil markets. By the 1930s, the Gulf Coast had become the region with the most large refineries, making them the prime target for union organizing.

Several other factors enabled the CIO oil workers' union to "challenge the giants"⁷ along the Gulf Coast. The legacy of populism in East Texas, with its distrust of big business, especially Standard Oil, helped override rural whites' suspicions of outside unions. The role of "independent" unions in early refining provided workers with nominal representation and elevated their expectations. The strategic importance of oil during the First World War, Second World War, and Korean War, along with persistent labor shortages as refining expanded, gave the refinery unions' bargaining leverage. Federal intervention to protect workers' collective bargaining rights during these crises bolstered CIO victories. The unusual autonomy that the oil workers' union afforded its local chapters helped them adapt to changing circumstances. Finally, minority workers provided critical support in organizing some key plants.

Through a series of strikes during 1945–1955, the OWIU and its successor, the Oil, Chemical, and Atomic Workers (OCAW) union, built on organizing successes to obtain concessions on wages and job security in most of the major Gulf Coast plants. Although a political backlash against organized labor in the United States constrained worker power beginning in the late 1940s, the OWIU-OCAW nevertheless strengthened its hand within the refineries and won greater say over workplace rules, enforced by the union's ability to strike and shut down refineries. Louisiana and East Texas became the union's largest district in the nation. Although Gulf Coast refineries remained segregated and simmered with racial tensions,

they also had lower racial barriers to employment than in other southern industries, thanks in part to the union movement. As F. Ray Marshall observed in 1963, they were the places where “one of the most systematic efforts has been made to provide better employment opportunities for Negroes.”⁸

OCAW was not able to cling to industrial power long. In the 1950s, management discovered another way to divide and conquer workers, not so much through the manipulation of racial divisions, but through the contracting out of jobs and other manpower reductions made possible by advances in “twentieth-century technology” that so awed Harvey O’Connor. These developments undermined organized labor’s main source of workplace control: the strike. OCAW retained a large membership and national clout through the 1970s, but the focus of bargaining narrowed to compensation and occupational health and safety issues. Meanwhile, oil companies resolutely affirmed management prerogatives in the organization of work in refineries, and automation further diminished the role of workers and thus the negotiating leverage of OCAW. By the time minorities won something close to equality in the refineries, with assistance from federal desegregation measures in the 1960s, the refinery labor market had begun to shrink and union membership had started to plummet. The transformation of refinery work thus foreshadowed labor market trends not only in the South but also across the United States.

REFINERY JOBS IN A POOR FARMING REGION, 1910–1935

As Gulf Coast refineries mushroomed during the first two decades of the century, they attracted migrants from eastern Texas and western Louisiana into the plants by offering better wages, shorter hours, and more job security than other industries in the region. Employers paid a premium wage in order to maintain a stable, nonunion shop, rather than suffer a shutdown if discontented employees walked off the job. The wage premium also gave employees the incentive to endure the dangers of refinery work, where explosions and fires were all-too-common hazards.

It also bought their deference to the rigidly hierarchical organization of plants. Managers wielded tremendous authority over everything that happened in a refinery.⁹ They retained substantial power well into the mid-twentieth century, even after the rise of organized labor. The chain of command typically began with the plant manager, ran through an operations superintendent directly under him, and on down to assistant

superintendents and managers of the various refinery departments. The lower an individual was on the organizational chart, the less authority he had to make decisions and the fewer duties he had to perform. Plant managers maintained control by virtue of these narrowly defined positions and tasks, but they also reserved the right to alter job duties at any time, not to mention hire and fire at will. They treated refinery work as a privilege, not a right.

Refineries were also racially segregated. Most Gulf Coast refinery workers were Anglos and people of European descent from East Texas or Cajuns from Southwest Louisiana who worked in two basic job categories: (1) process or production operations, running various kinds of equipment; or (2) mechanical operations or maintenance, as carpenters, welders, electricians, boilermakers, machinists, pipefitters, etc. The third and lowest-paid category of jobs, "laborers," chiefly employed African-Americans, and later ethnic Mexicans, at menial tasks with no opportunities for advancement. Rather than setting formal rules that segregated the workforce, refineries followed the example set by the local construction industry, creating an informal "two-pool" system that channeled racial minorities into labor gangs, while reserving skilled operating and maintenance work for whites. Refineries typically had separate and inferior wage schedules for "Colored" or "Colored and Mexican" workers, as well as segregated facilities.¹⁰ Some plants, like Shell Oil's Deer Park in Houston, hired whites with a high school education and African-Americans without a high school education, and then followed a policy of promoting only high school graduates to skilled jobs. For minorities faced with limited options in a declining sharecropper system, a job in the refinery gang nonetheless offered the best wage around.¹¹

During the production boom of the First World War, refinery workers, assisted by federal mediators, asserted claims to even better compensation and a voice in the organization of work. A wave of wildcat strikes for higher wages, an 8-hour work day, and job security in the oil fields of California, Texas, and Louisiana, and at four of the nation's major refineries—Standard Oil of New Jersey's Bayonne, New Jersey plant in 1915; Gulf Oil's Port Arthur, Texas refinery in 1916; Magnolia Oil's Beaumont, Texas plant in 1919; and Jersey Standard's Baton Rouge, Louisiana plant in 1920—resulted in the introduction of "non-union employee representation plans" (NERPs).¹² These were designed not only to accommodate workers' demands, but also to fend off outside unions, such as the American

Federation of Labor's (AFL) International Association of Oil Field, Gas Well, and Refinery Workers of America (IAOFGW & RWA), chartered in 1918.¹³

Suspicious of Standard Oil ran deep in the former Populist stronghold of East Texas, generating sympathy for oil strikers. In 1919, when Jersey Standard bought a controlling interest in the Texas firm, Humble Oil and Refining Company, and built a giant refinery at Baytown, east of Houston, the company aimed to mollify these suspicions with the most comprehensive NERP in the industry. Modeled on the "Industrial Representation Plan" instituted at John D. Rockefeller's Colorado Fuel & Iron Company after the notorious 1914 massacre of workers at the Ludlow, Colorado coal mine, Humble's plan provided contractual language on work rules, wages, and working conditions (e.g., safety devices and protocols), along with workers' election of their own representatives to a joint labor-management conference, where grievances could be settled.¹⁴ Refinery owners also introduced "welfare capitalist" programs, including pensions, paid vacations, death and injury benefits, and low-cost housing.¹⁵

Management's assertion of paternalistic authority in Gulf Coast petroleum refining brought concrete benefits to white workers. During the 1920s, refinery wages did decline in relation to some other Gulf Coast occupations, but nonwage benefits extended by NERPs, which were available only in the large refineries and only to white workers, helped to produce an unprecedented improvement in those workers' standard of living. NERPs also gave white workers a voice, however small, in the organization of refinery workplaces, fostering a conviction that a steady job with good wages and benefits was a right to be defended.¹⁶

THE RISE OF INDUSTRIAL UNIONISM, 1935–1945

As was the case in so many manufacturing industries, the labor bargain broke down in the Great Depression of the early 1930s, when thousands of refinery workers were fired or suffered reduced wages and benefits. The loss of job security stoked festering grievances against management and created an opening for outside union organizing in Gulf Coast refineries.¹⁷

The passage of the National Industrial Recovery Act (NIRA) in 1933 inspired organizing campaigns for company representation by national unions such as the IAOFGW & RWA. The union won a critical victory in 1934 when it signed a national agreement with Sinclair Oil, covering all the company's field production, pipeline, and refinery operations. The agreement had glaring weaknesses, but it provided the membership base for

organizing other refineries on the Gulf Coast. The early efforts to expand beyond Sinclair, however, were stymied by competition from AFL craft unions, labor-management councils such as Humble Oil's Baytown NERP, and the Supreme Court's invalidation of the NIRA. After the National Labor Relations Act (Wagner Act) of 1935 finally gave federal recognition to the rights of workers to bargain collectively, the IAOWGW & RWA was emboldened to leave the AFL for the insurgent CIO, which sought to organize workers in mass production industries under one big union, as opposed to the craft distinctions that characterized the unionism of the AFL. The CIO believed that dividing workers by craft into separate organizations within a single plant weakened the bargaining power of all workers and left the majority, who had few craft skills, unrepresented. Two years later, the CIO's IAOWGW & RWA simplified its name, mercifully, to the Oil Workers' International Union (OWIU).¹⁸

Refinery managers resisted the OWIU with the full range of tactics used by employers all over the country—threats, spies, red smears, police deputations of nonunion employees, and racist jeremiads.¹⁹ After the Supreme Court upheld the Wagner Act in the spring of 1937, oil companies recast their management-dominated labor organizations as so-called “independent unions,” usually with separate African-American auxiliaries. The Baytown Joint Conference became the Baytown Employees Federation, and the Industrial Relations Plan at Jersey Standard's Baton Rouge plant, the largest on the Gulf Coast at the time, morphed into the Independent Industrial Workers Association (IIWA). Combined with the internal weakness of the OWIU, these tactics kept the CIO at bay along the Gulf Coast for several years. By the beginning of the Second World War, the AFL and CIO unions together had organized only 3,000 employees in six refineries nationwide, whereas independent unions represented 34,100 workers in 53 refineries.²⁰

“Independent” was a euphemism for management control. Managers at Baytown, for example, orchestrated the election of the Employees Federation as the workers' bargaining agent in 1937. A subsequent National Labor Relations Board (NLRB) hearing collected testimony that the balloting had been conducted without secrecy and that supervisors had coerced employees to vote in favor of the Federation. A white supervisor reportedly ordered Mexican and African-American employees to the polling station to cast their votes for the Federation. In 1939, the NLRB upheld the CIO's challenge to the election results, concluding that management not only had organized and dominated the Employees

Federation, but that it had also intimidated and discharged CIO members and sympathizers, all violations of the Wagner Act. As a result, the NLRB ordered the Federation to be dissolved. Upon appeal in 1940, however, the Fifth Circuit Court in New Orleans, populated by business-friendly conservatives, overturned the ruling, finding that the Employees Federation qualified as a legal labor union.²¹

During the war, the national interest in defense production gave greater urgency and legitimacy to federal intervention in labor relations. This was true for unions in many manufacturing industries, but above all, in southern ones. The NLRB opened plants to fair elections, curbed union-busting tactics, and forced reforms to company-dominated unions. Beginning in 1942, the War Labor Board (WLB) tied defense contracts to union elections. In return for unions' pledge not to strike, the WLB also authorized "maintenance of membership" provisions in union contracts, which required employees to remain members of the union until a collective bargaining agreement expired. The NLRB and WLB thus helped fuel the OWIU's growth from 27,000 members in 1939 to 65,000 members in 1945.²²

A large part of that growth took place along the Gulf Coast. Many Louisiana refineries and Humble's Baytown elected AFL or independent unions, but the OWIU became the dominant labor organization in the Upper Texas Gulf Coast refineries. By the end of the war, the OWIU had 12,000 members in Jefferson County, Texas (home to Port Arthur and Beaumont) alone, the largest concentration of OWIU workers in the nation.²³ One reason for the OWIU's growth was the union's newfound internal stability and resolve, backed by the CIO's Oil Workers Organizing Campaign (OWOC), established in 1941. A year earlier, at its national convention in Fort Worth, Texas, the union elected a new generation of officers, led by president O. A. "Jack" Knight, who had been an effective organizer in California and who would remain president for the next 25 years. The convention also revised its constitution to enhance the decision-making autonomy of locals, establishing the OWIU as one of the most democratically organized CIO unions. Although local autonomy hampered efforts to launch national campaigns against an oil company or group of companies, forcing unionists to organize each plant individually, it nevertheless boosted the *esprit de corps* of rank-and-file workers, with demonstrable effects on the Gulf Coast.²⁴

Race was a critical factor in the OWIU-OWOC campaign. In 1939, African-Americans working in Gulf Coast refineries numbered about 1450,



Fig. 2 Cover art, Harvey O'Connor, *History of Oil Workers International Union-CIO* (Denver, CO: Oil Workers International Union, 1950).

or 4% of the total workforce of approximately 36,000, and Mexicans about 750, or 2% of the total. Because nearly 90% of these minorities were concentrated in refineries on the Upper Texas Gulf Coast, there they comprised as much as 12% of the workforce.²⁵ Therefore, it is not surprising that the OWIU, with its commitment to the CIO's policy of interracial unionism, had its greatest appeal in East Texas. Houston-Pasadena OWIU Locals 227 and 367 integrated minorities into their membership, helping the union win representation at the Sinclair, Shell, and Pan-American refineries. Although racial discrimination persisted in promotional ladders and in other informal ways, union contracts in these integrated locals formally eliminated separate wage scales, thus granting black and Mexican workers significant wage increases. A separate pattern emerged in Beaumont and Port Arthur. During the First World War, black workers in these communities had formed their own all-black locals (229 and 254, respectively), which endured and later proved crucial to OWIU's victories at the Texaco and Gulf refineries.²⁶

The Beaumont and Port Arthur victories, in particular, were hard won. The OWIU's organizing of minority workers stirred up white supremacist reaction. Port Arthur police chief, Hardie F. Baker, a former refinery supervisor at Gulf Oil, and a "notorious Negro-beater" and harasser of CIO "agitators," infamously led a group of policemen through black neighborhoods on the eve of a 1938 NLRB election at the Gulf refinery, threatening African-Americans who intended to vote.²⁷ The intimidation worked. Members of the all-black Local 254 stayed home, and the OWIU narrowly lost. Four years later, however, newly vitalized unionists stood up to the intimidation. In February 1942, Baker and two deputies brutalized OWIU organizer F.H. Mitchell, a Native American from Oklahoma who was assigned to recruit Port Arthur's black refinery workers. Afterward, those black workers defiantly showed up in large numbers to give the OWIU a crucial victory in the second Gulf Oil election.²⁸

Union advances and community-based organizing in Gulf Coast refineries turned the local political tide in Port Arthur, Beaumont, Texas City, and Pasadena. Activism by OWIU leaders, along with the work by their women's auxiliaries, helped to elect union-friendly city officials and garner support from local businesses, civic organizations, and churches. In Jefferson County, unionists pressured the Port Arthur city government to fire Police Chief Baker in 1943, and they took credit for forcing oil companies to withdraw their support for the anti-CIO crusader and zealous red hunter, Martin Dies, who, in 1944, chose not to seek reelection to Congress. At the state level, oil workers and CIO unionists formed the nucleus of a new liberal faction of the Texas Democratic Party.²⁹

The OWIU still came up short in extending industrial democracy to racial minorities. The Wagner Act did not name race discrimination as an unfair labor practice, and so federal intervention to guarantee all workers' rights was limited. Despite the CIO's and OWIU's egalitarian position on race, most rank-and-file white unionists opposed any alteration of the two-tier, segregated job system. "The Negro was at a disadvantage," admitted John Crossland, a white unionist with Shell Refinery Local 367 in Pasadena. "A lot of white membership... did not want them to have a line of progression."³⁰

Where "independent" unions had a strong presence, racist appeals held off the CIO. Jersey Standard, one of the most anti-union oil companies, stubbornly fought the OWIU at its Baytown and Baton Rouge refineries.³¹ At Baytown in 1942, Humble hired a former newspaper publisher to circulate hundreds of bulletins for the Employees Federation assailing the

CIO, often by inflaming the racial prejudices of rank-and-file white workers. “The CIO already has a large block of votes in this refinery in almost 100% of the Negro workers, whom they have blinded with promises of complete social and industrial equality with white people, both men and women,” stated one of the bulletins in 1943, insinuating that the CIO was promising black men sexual access to white women.³² At election time, a group of well-dressed white women appeared at the refinery gate handing out a pamphlet entitled, “CIO Promises Negroes Equality with Whites,” and telling white workers that unionized black workers in other plants were earning so much that their wives and daughters refused work as maids.³³ Baytown’s white workers overwhelmingly voted for the Federation, to protect what had become their racially defined job security, as well as, perhaps, the gendered social order of Jim Crow.

Still, federal officials and minority workers made determined efforts to challenge this system. During the war, the Texas office of the Fair Employment Practices Commission (FEPC), the agency charged with enforcing President Franklin Roosevelt’s executive order banning racial discrimination in defense plants, targeted three refineries—Humble-Baytown, Sinclair, and Shell-Deer Park—for discriminatory practices, hoping to force changes across the entire industry. Anticipating white opposition to upgrading African-Americans, the FEPC focused on complaints by ethnic Mexican workers, whose numbers were growing as refineries staffed up to meet defense needs. Ultimately, however, this strategy failed. Both Anglo workers and refinery management resisted any nondiscrimination directives from the FEPC, whose lack of enforcement powers and brief existence in Texas hobbled efforts to reform the two-tier job system.³⁴

THE ZENITH OF UNION POWER, 1945–1959

The unionization of most Gulf Coast refineries by the OWIU did not dismantle workplace segregation, but it did alter the balance of power between labor and management. It gave white workers, and to a lesser extent, minority workers, enforceable guarantees on wages, expanded benefits (vacations, sick leave, paid mealtimes, etc.), and seniority and grievance procedures. The most potent weapon of enforcement in the union arsenal was the strike—or the threat of a strike. Shutting down and restarting a refinery were time-consuming and potentially dangerous processes. Any sustained interruption in the commercial conversion of crude

oil to marketable products also strained an oil company's bottom line. The first-ever industry-wide strike, initiated by the OWIU in 1945, shut down refineries in the region and provoked President Harry Truman to authorize the Navy to seize the refineries and to appoint a government panel to mediate the strike. In the end, OWIU workers received an 18% wage increase. With this settlement, the OWIU surpassed Jersey Standard and its independent unions as the industry leader in setting wage rates. By backing up their negotiating positions with a strike, OWIU locals also obtained more generous fringe benefits and pressed their advantage to shape contractual guidelines on tenure, promotion, seniority, and job classifications.³⁵

Securing this advantage remained an uphill battle. After the war, the OWIU, and organized labor in general, operated in an increasingly hostile political environment. The passage of the Taft-Hartley Act in 1947, over President Truman's veto, permitted states to outlaw closed union shops (which Texas did immediately), prohibited some of the practices unions had employed to shut down plants, required advance-notice of strikes, and banned sympathy or solidarity strikes. Taft-Hartley also allowed companies to reduce the size of union bargaining units by classifying more employees as "supervisors," a provision of which oil companies took great advantage in refineries. The act's requirement of anti-communist affidavits from union officers led to the purging of radicals, more so in other CIO unions than in the OWIU, which had never leaned far to the left. However, this did not prevent the red-baiting of the OWIU and its leadership. Beginning in 1951, OWIU president Jack Knight, who served part-time on the National Production Authority, which advised government officials on defense mobilization for the Korean War, endured a nasty investigation by the Loyalty Board of the Department of Commerce into charges that Knight had been a member of the Communist party or at least a sympathizer. Although the charges were eventually dropped, the investigation had a chilling effect on Knight and perhaps the union itself.³⁶ In all, Taft-Hartley and the crusade to root out leftists from the ranks of labor narrowed the scope of union action from broader based political organizing in the quest for greater social democracy to a focus on collective bargaining, "cost-of-living" wage increases, and workplace control issues.³⁷

After the humiliating 1948 defeat of a campaign to organize California refineries, the OWIU learned lessons about planning and carrying out strikes, which it then applied to the Gulf Coast region with noticeably greater success than the CIO's "Operation Dixie" efforts in southern

textile mills. The OWIU began shifting greater resources and power to the national office to coordinate collective bargaining and establish national patterns in contract language. The OWIU also began forming alliances with non-OWIU unions, obtaining in the early 1950s cooperation from some AFL unions and even many independent unions to carry out a month-long strike in 1952, during the Korean War, that shut down one third of the nation's refining capacity (excluding California plants that directly supplied the war effort) and won a 15% wage increase.³⁸

In 1953, the OWIU and the independent unions explored the notion of forming a single, powerful refining union. Oil companies responded with a negative press campaign branding the merger talk "a development of fearsome portents."³⁹ The campaign worked, discouraging the independents from consolidating with the OWIU. However, in 1955, the OWIU aligned with workers in burgeoning petrochemical plants by joining with the United Gas, Coke, and Chemical Workers to form the Oil, Chemical and Atomic Workers Union (OCAW), shortly before the grand merger between the AFL and CIO. At the same time, independents, such as the Employees Federation and IIWA at the two large Jersey Standard plants, pursued coordinated actions that reinforced their bargaining leverage.⁴⁰

By the mid-1950s, operators and maintenance workers in Gulf Coast refineries enjoyed enhanced job security, power to shape workplace rules, and steadily rising wages that far exceeded those of all other workers in the region.⁴¹ As demand for oil and chemical products soared during the 1950s, oil companies seemed to accept, grudgingly, the new labor arrangement as a way to force issues at the bargaining table and maintain a stable labor supply to staff expanding refinery operations. Strikes had become more predictable than in the past, and companies could make preparations to deal with them. "When our local union met with Shell," recalled Roy Barnes, a union official at Shell and later president of OCAW Local 4-367, "there were two givens: one was we would give them a strike, and the other, they'd take a strike."⁴²

The growing privileges of the refinery jobs that were reserved for whites generated rising aspirations among minority employees, who stepped up their challenge to the two-tier labor system. Beginning in the mid-1950s, the National Association for the Advancement of Colored People filed numerous complaints with the President's Committee on Government Contracts against companies and OCAW locals. These efforts won promotions for some minority workers and produced various contractual settlements, such as those ensuring that minorities who possessed high

school diplomas could move into line for skilled jobs. Companies and locals still found ways to defend racial barriers, for example, by hiring only African-Americans who lacked high school diplomas or by making unit seniority, as opposed to plant seniority, a prerequisite for advancement. By the late 1950s, segregation and racist attitudes remained entrenched in many refineries. Yet, in a growing number of them, thanks to federal intervention and grassroots activism by African-Americans and Mexican-Americans, the color barrier was beginning to break down.⁴³

“THE QUIET REVOLUTION”

Just when OCAW and other refinery unions were consolidating their power and minority workers were gaining some access to skilled positions, the effects of a “quiet revolution” in refinery operations began to undermine that very strength. Improvements in refinery technology, such as remote controls, automatic controls, digital computers, and new kinds of sensors and instrumentation, meant that operations that previously required a human hand could now be automated; the number of gauges and valves to be checked manually could be greatly reduced. This substitution of capital for labor, or the deskilling of the workforce, was not necessarily a direct response to the unionization of the refineries, but rather a long, steady transformation dating back to the First World War. Only in the late-1950s did this transformation begin to produce results dramatic enough to convince refinery managers that technology was making many operational workers redundant.⁴⁴

Technology, in other words, gave them an opportunity to redress the balance of power in the industry. Oil companies had long viewed union-enforced job definitions as “featherbedding,” the practice of adopting make-work rules and retaining surplus employees. If repairs or routine maintenance was needed in an operator’s area, for example, contractual work rules required him to call in a maintenance man—carpenter, welder, pipefitter, electrician, etc. Refinery management saw this as an inefficient way to deploy labor, especially as technology reduced the number of tasks assigned to operators, who had time and skills to perform work not included in their contractual job description. From the perspective of some workers, on the other hand, operators could not always do a tradesman’s job.⁴⁵

In 1958, faced with declining profits due to intensified competition in oil products, and armed with ideas from a new generation of engineers,



Fig. 3 Cat Cracker Control Room, Shell Oil Deer Park Refinery. *Credit* United Steelworkers Local 13-1, Pasadena, Texas.

refinery managers began trimming costs by eliminating jobs through attrition and layoffs. When they required large maintenance or “workover” jobs, they brought in cheaper outside contractors—usually white workers recruited from AFL-CIO building trades hiring halls. Managers also altered work rules to combine craft jobs (i.e., welder and pipefitter) and require operators to perform more maintenance duties. Most controversially, many refineries introduced a new job called a “universal mechanic” who performed multiple tasks previously done by several tradesmen.⁴⁶

These job losses affected both white and minority workers, closing the narrow avenues of promotion the latter had begun to find in some refineries. Beginning in 1958, labor unrest spread throughout the industry, increasing OCAW’s attractiveness to hitherto independent unionists. In 1959, facing demotions and disappearing jobs, workers at Baytown finally elected OCAW to represent them, a seemingly momentous victory after years of struggle. However, few other victories followed. The national union was forced to cut back on organizing in order to defend its representation in existing OCAW refineries, where management was reasserting

prerogatives to reorganize work, reclassify assignments, and contract out jobs.⁴⁷

OCAW could always file grievances to test management actions, and if that failed, go on strike to resist changes in contract language. In 1959, OCAW workers struck Standard Oil of Indiana (Amoco/BP) refineries in Texas City, Port Arthur, and El Dorado, Arkansas to protest cross-crafting. In pre-strike negotiations, company officials indicated that they wanted a pipefitter to undertake routine tasks like rewiring an electrical panel. The union countered that if the pipefitter did not complete the work satisfactorily, he could be fired for incompetence, thus setting him up for discharge. After workers walked off the job, management experimented with a new tactic. The company brought several refinery units back on line using engineers, clerks, and supervisors—those who were exempted from the bargaining unit by Taft-Hartley. Union workers came back after 191 days and signed a new contract that included a “work incidental” clause, which allowed the company to assign work that crossed craft lines.⁴⁸

By operating part of the plant without workers, Standard of Indiana not only weakened the union’s bargaining leverage in its own plants, but it also emboldened other companies to take harder lines in negotiations with OCAW. At its Port Arthur refinery in 1961–1962, Gulf Oil deployed 600 supervisors and technical staff to keep part of its plant running, forcing OCAW’s striking workers, after 6 weeks on the picket line, to agree to management’s terms, which included Gulf’s use of contract workers for many maintenance jobs. “Management has a right to run its business,” company spokesmen increasingly declared. According to an official OCAW history, “employers kept pressing for broader ‘management rights’ to tinker with work assignments, manipulate overtime, and otherwise weaken contract terms.”⁴⁹

While oil companies exercised their newfound muscle to alter postwar arrangements with organized labor in refining, OCAW sensed its ability to protect jobs and deliver the goods to its members slipping away. By the summer of 1962, the stage was set for a major confrontation.

THE WATERSHED

In 1961, during a period of slumping corporate profitability in the oil industry, a new president, Monroe “Monty” Spaght, took command at Shell Oil Company, the partially owned US subsidiary of the Royal Dutch

Shell Group, and launched a cost-cutting campaign that included the company's first significant layoffs since the Second World War. He ordered some salaried employees into early retirement and terminated others. In his first 2 years, he reduced the workforce by more than 11%, saving \$21 million in wages and benefits.⁵⁰

Spaght targeted manufacturing (oil products and chemicals) for streamlining and cutbacks. Top management believed that Shell refineries were burdened by underemployed workers, outmoded operating practices, and the growing power of unions to block changes in workforce assignments. In 1957, Shell had begun a policy of workforce reduction by attrition, not hiring replacements for employees who were reassigned, discharged, retired, or promoted. Then, in March 1961, the company began laying off workers. During the 1962 contract negotiations, as pink slips were issued, Shell refineries submitted proposals to remove long-standing contract clauses regarding work assignments. In response to the escalating challenge to their job security, Shell refinery workers resorted to dramatic action. On 19 August 1962, some 5200 unionists simultaneously struck Shell Oil's three major East-of-the-Rockies refineries and chemical plants at Wood River, Illinois, Norco, Louisiana, and Houston-Deer Park.⁵¹

Shell management was surprised that the three different unions at the three refineries could pull off a coordinated strike. A loose federation of 13 AFL building trades unions represented workers at Shell's largest refinery, Wood River; OCAW represented the Houston-Deer Park refinery and chemical plant; and Norco had an independent union. There were no natural lines of communications or necessarily the same problems among the three. In 1959, however, the unions representing major Shell oil and chemical installations East-of-the-Rockies found enough common ground to pursue a joint and coordinated program of bargaining. Their contracts all expired at the same time, so they could legally call simultaneous local strikes in all three places. The West Coast unions were still under contract, had not suffered the layoffs that the other plants did, and thus did not join in the strike. Nevertheless, the East-of-the-Rockies unions felt that their alliance could defend the gains that they had made during the 1950s.

The main job security issues were the amalgamation of job assignments or cross-crafting, as in the 1959 Standard of Indiana strike, and contracting out, the main source of conflict in the 1961 Gulf Oil strike. "They've cut out several jobs and combined them," complained Jack Cooke, a striking chemical plant operator at Houston. "The combined jobs are too much;

they have not lessened the responsibility—you just have to work more things, do more things.”⁵² As workers from maintenance crafts were reassigned to fill vacated operating jobs, Shell had begun to contract out some plant maintenance tasks, such as cat cracker turnarounds, to outside specialists. Since one out of every two employees in Shell’s refineries and chemical plants was engaged in some kind of maintenance, the threat to the workers’ job security was real.⁵³ Furthermore, when a maintenance employee was transferred to the operations department, he maintained his total company seniority, but his seniority in operations was zero. He also received a reduction in pay and was required to work shifts rather than straight days as in the maintenance department.⁵⁴ Such changes created ill will toward the company among a growing number of workers. “It had to stop,” said Johnny Garrison, vice president of the OCAW refinery workers at Houston. “We had hit a brick wall.”⁵⁵

Several other issues concerned the unions. One was advance notification and consultation before layoffs. The unions wanted longer notices and detailed explanations for why layoffs were needed, which would allow union representatives to present counterproposals to management. Increased wages and severance pay, the biggest concerns at Wood River, also came under discussion. Still, compensation was not the main issue in the 1962 strike. The differences between Shell labor and management went beyond wages and benefits. OCAW accused Shell of seeking to establish “unilateral control” over all working conditions.⁵⁶ Shell sought to reclaim a measure of the authority that it had enjoyed before the rise in union power after the Second World War. Monty Spaght took an uncompromising stand on this. He condemned management’s laxity and the union leaders’ shortsightedness in permitting the rise of practices that left workers underemployed. “He ran the flag up to the mast and nailed it hard,” said John Quilty, vice president for personnel and industrial relations and Shell’s chief negotiator during the strike.⁵⁷

When the battle was joined, Shell unleashed the same weapon tested by Standard of Indiana and Gulf, maintaining operations with supervisory and technical employees. Rather than bringing the plants back into partial operation, as in the previous strikes, Shell announced that it would bring all three back into full production. Shell sent staff to occupy the plants and obtained court injunctions at Wood River to assure entry past the mass pickets. Supervisors, engineers, researchers, clerical workers, accountants, secretaries, and stenographers all contributed to getting the plants running again. After intensive safety training, they worked 12-hour shifts, 7 days a

week, some even sleeping in the plants in the beginning. Within 3 months, the refineries were operating at close to capacity with only one-half the usual complement of people.

Although union officials suspected that Shell exaggerated the degree to which the refineries were brought back on line, the strikers gradually realized that they were fighting a losing battle. Tensions mounted on the picket lines and in the communities as workers and their families stretched incomes, savings, and patience to the limit. The company now had the power, and management the resolve, to outlast the strike. Roy Barnes remembered one co-worker exclaiming: "Damn it, if we stay out any longer, all we are going to do is to make scabs out of some darned good men."⁵⁸ Fortunately, there were only a couple of minor confrontations and isolated incidents of violence between strikers and picket-line crossers. The Wood River unions settled first, based on a 5% general wage increase obtained by unions at other plants. Contracting out was not the central issue with them, and Shell had not proposed new contract language there. This settlement undermined the tripartite labor alliance, and 2 weeks later, Norco's independent union settled on similar terms, plus "contract revisions to permit better utilization of manpower."⁵⁹

Houston endured another five and a half months. Both sides were strongly committed to their positions. Shell was not happy with the OCAW contract at Houston and took a hard line, demanding new language to relax restrictions on job practices, particularly in the area of cross-crafting.⁶⁰ OCAW appealed to the International Federation of Petroleum Workers (IFPW), a worldwide alliance of 120 oil unions, to mobilize pressure against Shell around the world. The IFPW threatened sympathy strikes in Venezuela and Trinidad, ostensibly to cut off crude oil supplies to Houston. But these strikes did not happen, and even if they had, the Houston refinery's crude supply, most of which came from Texas and Louisiana, would not have been affected. After marathon negotiations mediated by William Simkin, director of the Federal Mediation and Conciliation Service, the Houston workers returned to work in early August 1963. Lasting 11 months and 20 days, the Houston strike was the longest in the history of OCAW.⁶¹

In the end, Shell management extracted significant concessions from the unions. Offering severance pay and early retirement bonuses, the company reduced the workforce at all three locations, by about 400 people at Houston, 240 at Norco, and 250 at Wood River. New contract language enabled operators to do routine maintenance and provided for greater

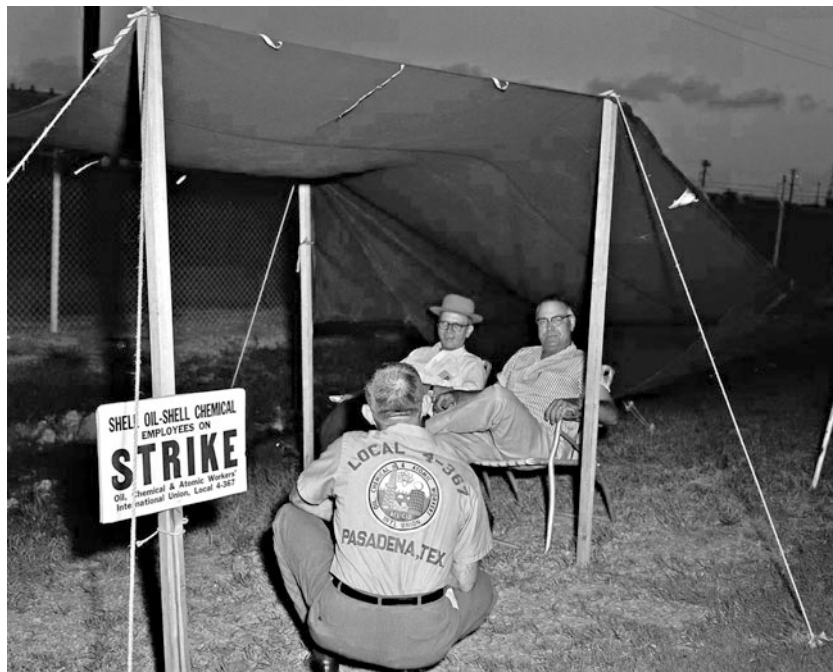


Fig. 4 OCAW Local 4-367 Picketers, Shell Oil 1962 Strike. *Credit* United Steelworkers Local 13-1, Pasadena, Texas.

flexibility in revising job and work rules. Hearings before the National Labor Relations Board upheld Shell's right to contract out some tasks. Assured of limits on the minor maintenance required of operators, OCAW called the agreement an "honorable settlement."⁶² Employees who kept their jobs were relieved to return to work. Although the bitterness built up during the year-long strike still lingered, as Garrison points out, "both the company and the union saw that they had to sit down and try to work out their differences without a strike."⁶³

The 1962–1963 Shell strike was a watershed for organized labor in US refineries and chemical plants. The OWIU-OCAW union had emerged victorious in the 1940s and had asserted increasing influence over wages and working conditions in the 1950s. The Shell showdown, however, starkly revealed the limits of the union's power. OCAW lost its most

effective bargaining tool: the strike. In the dawning age of automation, the threat to shut down plants with strikes was shown to be hollow, and the unions entered a new era of gradual decline. Meanwhile, technical and supervisory personnel grew proficient at operating refineries during strikes, limiting labor's bargaining power on all issues. As other refineries reduced their workforces, OCAW's national membership declined from its 1957 peak of 186,000 to 161,000 in 1965.⁶⁴

THE LONG RETRENCHMENT

In the aftermath of the devastating defeat in the Shell strike, OCAW regrouped. In 1965, Alvin F. Grospiron, a long-time Texas City unionist, was elected OCAW president, a position which he held for the next 14 years. Grospiron improved coordination among the locals across the nation and mobilized the union to pursue a national oil bargaining strategy. In 1966, OCAW succeeded in fixing a common expiration date for all oil contracts, which put the union in a position to bargain industry-wide, rather than continue the plant-by-plant practice that allowed oil companies to play one set of negotiations off against another. In 1969, unsatisfied with wage and benefits proposals from management, Grospiron called for the first industry-wide strike since 1952, ushering more than 50,000 workers off the job. Lasting 38 days, the strike won a concession from the oil companies to eliminate employee contributions to pension plans and established a precedent for "pattern" bargaining, whereby OCAW would come to a settlement with a lead company (usually Gulf or Amoco during the 1970s) that would establish a pattern for settlements with other companies.⁶⁵

Beginning with the 1969 strike, labor-management confrontations shifted from workplace control issues, which had dominated the relationship in the 1950s and 1960s, to a more narrow focus on wages, benefits, and occupational health and safety matters. In fact, during the 1969 strike, companies successfully operated plants again with supervisory and technical staff, and Shell obtained revisions to contract language at its California refineries pertaining to work practices that were similar to those achieved at the East-of-the-Rockies plants in 1963. The union, in effect, had submitted to formal management control over job assignments.

Workplace safety emerged as an issue that might improve working conditions in the plants while also changing the rules of engagement in what had become a losing battle for OCAW. In 1971, the union put

forward strong new language on health and safety in its contract proposals to oil and chemical companies. Central to these proposals was OCAW's call for the creation of joint committees on health and safety that would include workers, managers, and industrial health specialists chosen with union approval. Such committees would exercise broad powers in identifying and rectifying problems that might affect workers' health and safety. Under the union's proposal, workers would be compensated for time spent serving on these committees. In addition, a small tax on the throughput of refineries would be put aside to create a joint union-industry fund for research on health hazards in the industry.

The oil companies dismissed this proposal with a little discussion. Undeterred, OCAW reintroduced the same proposal to more receptive ears when the next round of bargaining began in 1973. This time around, numerous major oil companies opted to accept the language of the union's proposal on health and safety. With declining profits and great economic uncertainty in refining, these companies decided that the issues at stake were not worth the threat of an extended and costly strike. Nearing a much-needed victory in establishing a new bargaining pattern with the industry, OCAW bore down on holdout companies. The most prominent was Shell Oil, which stood as one of only two major firms that rejected the union's call for joint committees. These not only would have given workers real power to shape decisions about health and safety in the workplace, but also would have empowered labor arbitrators to determine staffing levels on generating units that they judged to be required for safety reasons. Shell leaders felt strongly that such committees represented an unacceptable infringement on the firm's authority to determine staffing levels and crew sizes. They insisted that these demands merely masked an effort by the union to control manpower levels and operating methods. "So, in reality," spoke corporate publicity, "the issue is not 'health and safety,' but featherbedding [deliberate overstaffing] in disguise."⁶⁶

In January 1973, confident that it could force Shell to fall in line and accept the industry pattern, the union called a nationwide strike targeted at Shell alone. OCAW mounted an aggressive public relations campaign with the aid of 11 major environmental groups, many of which had seldom if ever become involved in labor-related issues. The centerpiece of the campaign was a national boycott of Shell gasoline and pesticides under the slogan, "Shell? No!" The union drove home its message with billboards, newspaper ads, radio spots, and millions of pamphlets and leaflets.⁶⁷

As the strike wore on, Shell negotiators concentrated their efforts on the large local at Houston-Deer Park. There, rank-and-file union members seemed increasingly skeptical of staying out for a long period over somewhat abstract health and safety issues. In May 1973, fearing that the Deer Park local might actually move to decertify the union, OCAW agreed to accept a local agreement that included a greatly watered down version of the original proposal for a joint health and safety committee that would have the authority to impose decisions on management. Once this agreement was signed, other Shell locals quickly accepted similar contracts, and the strike ended. In essence, the new committees would invite worker input, but they would vest final authority to act in the hands of management.⁶⁸

Organized labor in refining continued to give ground. OCAW orchestrated another national strike in 1980, which achieved, in addition to a wage increase to match galloping inflation, a dental plan and vacation leave. Soon after the strike ended, the union was in desperate retreat. During the recession of 1980–1981, employers closed down smaller, less profitable refineries, and reduced workforces elsewhere. The election of anti-union political conservatives pushed labor supporters out of office. Ongoing improvements to refining and processing technology, further small refinery closures, and drastic staff reductions through mergers continued to shrink the workforce. The slow decrease in OCAW membership accelerated, dropping from 140,000 in mid-1980 to under 100,000 by 1986.⁶⁹

The decline continued, year after year, into the 1990s. OCAW eventually had to combine with other unions that faced the same trend. In 1999, OCAW merged with the United Paperworkers Union to form the Paper, Allied-Industrial, Chemical, and Energy (PACE) International Union, and in 2005, PACE merged with the United Steelworkers Union to form the United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied-Industrial and Service Workers International Union—or United Steelworkers (USW) for short.⁷⁰

THE LEGACY OF THE PAST

The possibilities looked so different many years earlier. For a time, refinery workers overcame the hurdles that frustrated the industrial union movement in the South. In the early twentieth century, the giant, expanding refining complexes on the upper Gulf Coast provided a pathway out of rural poverty for wave after wave of white and minority migrants.

Beginning in the late 1930s, grassroots organizing assisted by federal intervention led to union victories that secured workers' access to well-paying refinery jobs for many years. By the mid-1950s, labor had won a voice in the organization of refinery workforces. The crucial support of racial minorities, despite their subordinate status, in the organizing victories of OCAW on the Gulf Coast signaled at least some incremental progress toward interracial solidarity in the workplace and even held out hope for greater social equality in refinery communities.

Starting in the late 1950s, broad-based upward mobility for the working class in refining stalled. Technological change and the reassertion of managerial authority chipped away at union power until the workers' chief weapon, the strike, was rendered ineffective. Organized labor's loss of control in the workplace after the pivotal Shell Oil strike and the erosion of its membership in the years that followed narrowed the route to socioeconomic advancement for the working class along the Gulf Coast and elsewhere. OCAW steadily ceded ground until it eventually fell victim to trends that weakened organized labor across the nation.

Although, in its heyday, the OWIU-OCAW had accommodated white supremacy, the union's decline offset some of the gains that minorities finally achieved in their struggle for workplace equality. In the late 1960s, presidential orders prohibiting discrimination in federal projects forced refinery management to dismantle what remained of the two-tier labor system. When minorities and women finally won full access to refinery jobs, however, those jobs no longer provided the economic benefits and job security that working-class white men had enjoyed in unionized refineries along the Gulf Coast a generation before. As in many other US industries, the shrinking of refinery employment since the 1970s has worked against anti-discrimination measures. With fewer jobs available, racial polarization increased, and many white workers began to view unions as part of a "liberal establishment" whose affirmative action programs were giving minorities "unfair" advantages.⁷¹

The legacy of the past endures into the present. The United Steelworkers, which now represents some 30,000 US refinery workers, a fraction of the former strength of organized labor in this sector, continues to struggle over the very same issues that proved so divisive in the 1960s and 1970s. In February 2015, the USW initiated the first nationwide refinery strike since 1980 after the collapse of negotiations with oil companies led by Shell over a nationwide contract covering hourly workers at 63 US refineries. The sticking point for the USW was not wages and

benefits, but its concern about contractors performing routine maintenance, echoing the 1962 strike, and serious safety issues stemming from worker fatigue, reminiscent of 1973.⁷²

By 2015, these two issues had become closely joined. The union believed that the increasing practice of contracting out maintenance to workers with no lasting stake in, or knowledge of, the refineries that they were brought into maintain was not only eroding union job security but also compromising safety. For the 6,550 members who went on strike at 15 facilities, memories of deadly refinery accidents from the past decade were all too vivid, especially the March 2005 explosion at its Texas City refinery (the one formerly owned by Standard of Indiana) that killed 15 contractors housed in a trailer close to the blast site and wounded dozens more. This disaster led to the largest criminal fine ever up to that point against BP for felony violations of safety regulations under the Clean Air Act.

As it had in the past, Shell announced a start up of the Houston-Deer Park refinery without USW labor, undercutting union bargaining leverage and hastening a national settlement, again with mainly toothless language that addressed union demands about maintenance and fatigue management. For the first time in 35 years, organized labor in refining tried to make stand over what have become intolerable conditions in aging refineries, only to discover that their ability to shift the balance of power had changed very little, if it had not diminished beyond repair. Where once a refinery worker could gaze at lights of a massive cat cracker at night with wondrous pride, as Harvey O'Connor did in 1955, a common emotion that such a sight elicited 60 years later was one of fear.

NOTES

1. Harvey O'Connor, *The Empire of Oil* (New York: Monthly Review Press, 1962), 94.
2. Joseph A. Pratt, *The Growth of a Refining Region* (Greenwich, CT: JAI Press, 1980), 93.
3. Mexican and Mexican-American workers were mainly in Texas. According to a 1943 Fair Employment Practices Commission survey, 59% of Mexican refinery workers in Texas were born outside the United States. Cited in Emilio Zamora, *Claiming Rights and Righting Wrongs in Texas: Mexican Workers and Job Politics During World War II* (College Station: Texas A&M Press, 2009), 161.

4. See the discussion of the union organizing potential of different sectors of the industry in Melvin Rothbaum, *The Government of the Oil, Chemical, and Atomic Workers Union* (New York: John Wiley and Sons, 1962), 4–10.
5. See, for example, Timothy J. Minchin, *Fighting Against the Odds: A History of Southern Labor Since World War II* (Gainseville: University Press of Florida, 2005), 2–3.
6. F. Ray Marshall, “Independent Unions in the Gulf Coast Petroleum Refining Industry,” *Labor Law Journal* 12, no. 9 (1961): 823–840; Marshall, “Some Factors Influencing the Upgrading of Negroes in the Southern Petroleum Refining Industry,” *Social Forces* 42, no. 2 (1963): 186–195; and F. Ray Marshall, *Labor in the South* (Cambridge, MA: Harvard University Press, 1967), 194–201.
7. This is the title of the official history of the oil workers’ union, Ray Davidson, *Challenging the Giants: A History of Oil, Chemical, and Atomic Workers International Union* (Denver: OCAW, 1988).
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16. Pratt, *The Growth of a Refining Region*, 170.
17. Davidson, *Challenging the Giants*, 55–59.
18. O'Connor, *History of the Oil Workers International Union*, 29–39; Davidson, *Challenging the Giants*, 61–91.
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26. Davidson, *Challenging the Giants*, 150–151, 267; Marshall, “Some Factors Influencing the Upgrading of Negroes,” 189, 192–193.
27. Quoted in Obadele-Starks, *Black Unionism*, 77. Pratt, *Growth of a Refining Region*, 93.
28. Davidson, *Challenging the Giants*, 109; O'Connor, *History of the Oil Workers International Union*, 314–315. A month later, a white mob descended on a black section of shipyard workers in neighboring Beaumont, burning buildings and attacking residents before Beaumont officials declared martial law.
29. Srinivasan, “The Struggle for Control,” 50–53.
30. Quoted in Obadele-Starks, *Black Unionism*, 76.
31. In 1942, a smaller Humble refinery in Ingleside, Texas, near Corpus Christi, had chosen the OWIU over the Federation, giving the CIO a foothold in Jersey Standard. But in 1945, the company shut down and dismantled the plant, putting employees at its other refineries on notice about the Jersey Standard’s determination to keep its operations free of outside unions. Pratt, *Growth of a Refining Region*, 174.
32. Case File 5945, Employees Federation Bulletin No. 11, Record Group 25, Records of the National Labor Relations Board, National Archives and Records Administration, College Park, Maryland.
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34. Zamora, *Claiming Rights and Righting Wrongs in Texas*, 159–180.
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68. OCAW Strike Bulletin No. 21, OCAW Records; Mac MacIver interview by Tom Stewart, September 24, 1998, Houston, TX. MacIver was a Shell industrial relations official involved in labor negotiations.
69. Davidson, *Challenging the Giants*, 345–350.
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White-Collar Wildcatters and Wildcat Strikes: Oil Experts, Global Contracts, and the Transformation of Labor in Postwar Houston

Betsy A. Beasley

INTRODUCTION

On February 25, 1946, the streets of Houston overflowed with garbage.¹ A thousand municipal employees, trash collectors among them, declared a citywide strike. As in other cities in the US and throughout Europe, Houston's workers greeted the end of the Second World War intent on securing and extending wartime labor gains for the post-Depression, postwar future. Houston's municipal workers left their posts and took to the streets to demand wage increases and improved working conditions. Inescapable and putrid, the uncollected trash evoked both the workers' discontent and their centrality to the city's functioning.

Far from being outraged by the inconvenience of overflowing garbage cans, Houston's non-municipal workers quickly declared their solidarity. The city's American Federation of Labor (AFL) unions called a citywide labor holiday. As many as 10,000 people marched on City Hall to demand justice for the striking municipal workers.² The general strike brought together a diverse alliance: municipal repair workers, taxi drivers, long-shoremen, bakers, musicians, and office employees all joined the march.³

B.A. Beasley (✉)

Institute for Advanced Study, Princeton, NJ, USA

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Ultimately, the city agreed to investigate its wage rates and to bring wages in line with those in the private sector. It was not a resounding victory, to be sure. But this strike, the largest in Texas history, made clear that workers in Houston embraced their identities as *workers*. The strike united garbage collectors, dock and oil industry workers, and white-collar employees as part of a common class determined to forge the city's future.

Sixteen years later, the city's labor landscape had fractured. In August 1962, workers at Shell refineries across Texas struck to protest automation's impact on blue-collar workers and the company's contracting temporary maintenance workers in lieu of retaining a maintenance department. This time, the strike backfired. Shell appealed to its white-collar engineers, administrators, and managers to keep the plant open during the strike. Staffed by white-collar employees working around the clock, the refineries remained open during the strike and operated almost at capacity.⁴ If the general strike of 1946 demonstrated solidarity, the Shell strike of 1962 made clear that blue-collar workers could no longer count on white-collar workers to identify with them. The Shell refinery strike ended in massive layoffs and no substantive change in the company's contracting policy.⁵

The transformation of the city's most important industry, oil, from a primarily blue-collar to a largely white-collar workforce lay at the heart of this tremendous shift in Houston's labor landscape. After the Second World War, Houston transitioned from a city organized around the extraction and refining of oil into the urban headquarters of the global oil industry. In the 20 years after the war, the city's working class, and especially its oilfield tools manufacturing workers and oilfield and refinery workers orchestrated almost 1700 strikes in Houston, an unprecedented high of labor activism for the historically conservative city.⁶ In response to these strikes, manufacturers, international oilfield contractors, and oilfield services companies launched a fervent anti-labor campaign, most visibly through their vehement support for right-to-work legislation.⁷ At the same time, corporate interests pursued new strategies for overcoming labor unrest, including the international outsourcing of oil refineries and replacing manufacturing workers with professional employees exempt from the Fair Labor Standards Act. By the beginning of the 1960s, two shifts had been effected: culturally, corporate interests had drawn a firm distinction between the blue- and white-collar workers; and materially, Houston's oil industry boasted fewer blue-collar jobs and more white-collar jobs than it had in 1945.

Houston's transition from a blue-collar to a white-collar city is not singular in postwar history; many cities in the US, the UK, and Europe experienced similar

shifts during this period. However, taking Houston as a case study—and focusing in particular on the city’s oil industry—make two points clear. First, Houston’s shift from a predominately blue-collar to a white-collar workforce was not merely an accident of history; rather, it was a deliberate strategy pursued by oil and oilfield services company executives who sought to rein in unruly blue-collar workers. Crucially, oil refineries relied upon third-party oilfield services contractors to provide them both with flexible white-collar experts and with nonunion labor to perform any remaining blue-collar work. Second, Houston’s shifting reliance on white-collar labor carried transnational resonances. Increasingly, the work of the production of oil took place outside the United States—in countries with varying level of US and Western corporate influence—while the logistical and consulting functions of producing oil remained in the US, especially in Houston. This transnational division of labor reshaped prospects for US workers, labor conditions for workers overseas, and the cultural idea of the role of the US in the global oil industry.

Domestic consequences amounted to an end run around equal employment opportunity legislation. Battles among unions, management, the state, blue- and white-collar workers, and African-American and Mexican-American oil employees threatened the gains that African-American and Mexican-American oil workers had made in overcoming workplace discrimination. At the same time, the export of blue-collar labor remade the relationship between Houston and oil-producing nations outside the United States, as Houston executives increasingly managed blue-collar workers across the globe. Houston’s local labor struggles carried dramatic consequences, both at home and abroad.

THE GEOGRAPHY OF HOUSTON’S OIL INDUSTRY

Oil lay at the center of the city’s economy and identity throughout the twentieth century. In 1901, wildcatters discovered oil at Spindletop, 145 km from Houston. The Texas economy revolved around oil by the 1920s, with almost 70 million barrels extracted during the first quarter of 1929 alone.⁸ With more nearby oil strikes to follow, Houston boasted forty oil company headquarters and quickly became the regional headquarters for the Southwest’s oil industry.⁹ High levels of production drove down prices, however, and oil production outpaced demand until after the Depression. The Texas Railroad Commission made repeated attempts throughout the 1930s to curb oil production in the state to manage supply and maintain prices.¹⁰

The war solidified the importance of oil to Texas and Houston’s centrality in the state’s extractive economy. The astonishing demand for

petroleum worldwide buoyed Texas oil production, especially when federal wartime regulation ceased in 1946. Prices rose from \$.92 per gallon of crude during the war to \$2.32 in December 1947, and the US oil industry was at peak production in 1948.¹¹ A booming population in Houston supplied the oilfields and refineries with labor. The Texas oil business had never been stronger.

Although commentators routinely referred to a unified “Texas oil industry,” the industry itself comprised several related but distinct components. Oil extraction was the most iconic and the most dominant cultural image of the industry in Texas. During the first half of the twentieth century, Texas produced millions of barrels of oil per year, rising from 375 million in 1935 to 992 million in 1951, then over a trillion in 1952 before beginning to decline in 1957.¹² The wildcatter—a tough, rugged individual who struck out on his own to go broke or strike it rich in the search for oil—emerged in popular culture as the central figure of the Texas oil industry. The lone wildcatter was more apocryphal than real, but, the wildcat oilman occupied a prime location in the national idea of Texas.¹³

Refinery output in Houston continued to increase even as extraction declined in Texas. Refining was not new to the city at mid-century. By the end of the First World War, Texaco, Gulf, Humble, and Sinclair had all built refineries along the Houston Ship Channel.¹⁴ Petroleum refining had become the top manufacturing industry in Texas in 1939.¹⁵ After the war ended, the United States began importing oil at an increasing rate, from 74 million barrels in 1945 to 153 million by 1949.¹⁶ Increasing oil imports from abroad and declining rates of production in domestic oilfields made refining an even more important segment of the Texas oil industry than extraction. Whereas oil drilling could be best compared with similar energy extraction industries like mining, refining was much more akin to industrial production. Working in large refineries in teams on a line to finish a product, refinery workers labored as assembly line employees working in an industrial setting not too dissimilar from a Ford plant.

In addition to the major oil companies, the refineries, and the independent wildcatters, Houston hosted another class of companies growing more quickly than any of the others: the oilfield services industry. Oilfield equipment companies like Hughes Tool, Brown Oil Tools, Baker Oil Tools, Halliburton, Schlumberger, and the Byron Jackson Company originated in Texas, Oklahoma, and Louisiana during the early twentieth century to manage the oil rush that had accompanied the discovery of oil at

Spindletop. In their earliest years of operation, these companies either sold oilfield tools or patented specific processes to extract oil more efficiently. Before the war, these companies primarily partnered with domestic oil-producers and rarely ventured beyond the Gulf Coast.

During the Second World War, the oil and oil-related companies in Houston boomed because of the government spending on war materials. After the Second World War, Hughes—and other oilfield services companies like it—employed industrial workers in its Houston factories, manufacturing oil tools to be shipped abroad. But, increasingly, oilfield services companies turned their attention away from the actual manufacture of oil tools and toward the marketing of less tangible products. Before the war, their operations had focused on selling tools domestically, but after the war they turned their business strategy towards exporting tools to international markets. Even more crucially, they began to contract with international oil companies, American and non-American alike, to sell their expertise as consultants and logisticians on oilfields worldwide. Unlike the major oil corporations based in the US and Western Europe, oilfield equipment and services companies did not depend on their control of oil reserves.¹⁷ Instead, their expertise and services were the product.”¹⁸

At the end of the war, then, the oil industry encompassed three very different segments. The domestic extraction industry was becoming less important as the easy-to-reach oil wells in the state grew exhausted and imports from abroad grew. The refining industry was bustling, but it relied on industrial labor that managers struggled to control, particularly in the wake of the 1946 general strike. And the burgeoning oilfield services industry, which once consisted of predominately industrial workers, increasingly relied primarily on white-collar engineers and managers selling expertise to international oilfields instead. But as troops returned home to Houston and the war drew to a close, how these macroeconomic industry changes would affect the city’s labor dynamics remained unclear.

Houston’s status as the central node in Texas’ oil economy seemed well established, but precisely what that status meant remained in question. Months before the war’s end, the city’s Chamber of Commerce confidently pronounced Houston “the Petroleum Center of the World.” Importantly,

they defined that title by the city's postwar strengths—its crucial role in the extraction and refining of oil. The United States was the world's largest oil source in 1945, and Texas was by far the country's largest oil producer. Moreover, Texas boasted 56% of the nation's proven oil reserves, making the future seem bright. And Texas also could claim the largest number of refineries in the nation, with an operating capacity of 1.5 million barrels per day. Clearly, the Chamber classified the "petroleum center of the world" as the world's leader in producing oil for market—as a competitor in a global industry, not the facilitator of an integrated network of producers.¹⁹

This understanding of Houston's place in the world of oil carried with it a specific imagined geography. For most Houstonians in the 1940s, Houston was an oil city because of its location within a region that was the greatest oil producer in the world. "Within 100 miles [161 km] of Houston, 268 oil fields produced 193,667,589 barrels in 1944, and within 200 miles [322 km] of Houston nearly 65 per cent of all Texas oil is produced," the Chamber explained. Richard Gonzalez, an economist employed by Humble Oil and Refining Company, echoed this sentiment: "The 19 counties in the Houston territory have 6% of the area in Texas but account for 21% of the state's crude oil production and 40% of its refinery operations."²⁰

The "Houston territory"—a stretch of land encompassing both the refinery-heavy city and its oil-producing hinterland—embodied the idea that Houston's importance lay in its role as a producer of petroleum. In these statements, Houston elites made clear that oil's geography was regional. Houston could best be imagined as a central node in a broader region dotted by oilfields, refineries, and ports shipping Texas oil to market. Indeed, they imagined Houston itself as primarily relevant to its immediate surrounding geography, the rural lands that had given birth to the mythic wildcatter cowboys who struck out on their own in search of oil riches.

If this geographic imaginary prioritized extraction and refining in determining "petroleum city" status, a subtle challenge to that narrative emerged at war's end. In its analysis of the city's oil industry, the Chamber of Commerce mentioned that "[i]n addition to the fact that Houston is the leading petroleum center of the world, it also manufactures more oil equipment, oil tools, and accessories than any other city." In fact, one Houston company had recently "prepared to export shipments to Colombia, Venezuela, Chile, and Egypt, machinery that when created, totaled more than twelve million pounds."²¹ The presence of this segment of Houston oil—the oilfield services industry—would help change not only

the geography of oil in Houston but also the city's labor structure in the years to come.

HOUSTON'S LABOR LANDSCAPE

Houston's power elite, in particular its oilfield services companies, had a long history of anti-union sentiment and action. During the First World War, for instance, Hughes Tool refused to honor the eight hour day standard. Its employees worked nine hours per day and earned less than their counterparts in other regions of the country. When the National War Labor Board (NWLB) decreed that employers in the defense industry, including Hughes Tool, had to pay their workers a standard national wage and employ them for no more than eight hours per day, Hughes Tool refused to follow the directive. Skilled workers struck in response. When the NWLB sent a representative to Houston to settle the dispute, Houston manufacturers joined forces to refuse to raise pay under any circumstances. Another strike followed, but the company ultimately triumphed.²²

The Second World War—and especially the federal government's increasing role in regulating business—changed the ways in which companies could resist labor's demands. Even as Hughes Tool was transitioning from primarily a manufacturer of drill bits to a services company, African-American blue-collar workers at Hughes launched a crucially important civil rights campaign. In 1940, 25% of Hughes Tool's employees were African-American. Yet black workers' hourly wages ranged from \$0.48 to \$0.62, while whites earned between \$0.65 and \$1.30. Jobs for black workers included “common laborers pulling metal chips, handling material, doing all the heavy lifting, fetching and carrying, and cleaning, while whites operated all machines.”²³ In 1943, CIO Local 2457, the segregated black local, filed an FEPC complaint against Hughes, alleging discriminatory hiring and promotion practices. Simultaneously, the local filed against the CIO on account of its contract, which continued to segregate job classifications by race.²⁴ As CIO member N.H. Shepherd put it, “It [is] unfortunate that the Hughes Tool Company sees fit to operate on the money of the United States Government on war contracts and could not see fit to abide by the laws of the United States.”²⁵

But the US government seemed more reluctant to challenge discrimination at Hughes Tool than Shepherd hoped. CIO rank-and-file members launched a wildcat strike in June 1944 to protest Hughes Tools' violation of a NWLB order that the company had to recognize the CIO as

the company's collective bargaining agent. To the CIO leadership's dismay, workers violated the wartime no-strike pledge to join the fray. The CIO and management were both unable to convince the three thousand strikers to return to work until a week had passed. Even at the strike's conclusion, however, Hughes Tool continued to ignore NLRB orders, hoping that the federal government's need for the company's help would stop the president from intervening. Hughes executives were not so lucky. In response to the NLRB's plea for federal intervention, President Roosevelt sent the army to seize Hughes in September. The army managed to negotiate a maintenance of membership agreement between the CIO and management, but they failed to address discrimination in hiring practices. Since the army remained segregated, army officials reasoned that forcing desegregation at Hughes would prove to be nothing but an embarrassment. At the beginning, black CIO staffer Robert Grovey had boasted, "In the old days every time there was trouble and white men walked off the job the boss would sidle up to the Negro. If they hang us this time they will have to hang us together." Clearly, that solidarity extended only so far for white workers.²⁶ Formalized workplace discrimination would not end at Hughes Tool until black workers won a National Labor Relations Board (NLRB) case in 1964.²⁷

It was in this context that the 1946 general strike took the city by storm. In February, almost a quarter of Houston's four thousand total municipal workers were on strike.²⁸ City trash collectors and street, sewer, and water main repair workers complained that their wages remained far lower than their counterparts' in private industry and did not keep pace with the rising cost of living. Beyond bread-and-butter issues, workers protested the "caustic and insulting remarks and threats' made by city officials." Through their local chapters of the AFL City-County Workers Union, workers demanded raises ranging from 12 to 25%. When the city refused to negotiate, workers voted 179 to 41 to go on strike—the first municipal strike Houston had ever seen.²⁹

A casual observer in 1946 would have been surprised by this demonstration of labor militancy. Among city residents, trade unions members, or business leaders, Houston hardly had a reputation as a bastion of working-class radicalism. Before the war, the union presence in the city was moderate, heavily segregated along racial lines, and concentrated among blue-collar workers.³⁰ The labor-backed mayoral candidate in the 1942 election, for instance, finished dead last.³¹ As one in a wave of postwar strikes across the country and internationally in 1946, Houston stood out

as an unlikely site among cities with histories of more vibrant union activity, such as, Rochester, Pittsburgh, and Oakland.³²

In Houston as in these other cities with stronger labor histories, the war had transformed urban political culture, making the general strike a cause to support for workers citywide. During the war, workers had seen the federal government increase its support of unionized workers facing anti-union employers, especially in Houston where the city's oil industry was heavily entwined with the nation's war effort. And as the privation of the Depression and wartime lifted and the postwar United States promised broadly shared prosperity, workers saw unions—newly legitimated through the federal government's defense of them during the New Deal and wartime—as a pathway to a share of the pie. As historian Robert Self explains, “The unprecedented growth in union membership between 1935 and 1945, the incorporation of both AFL and CIO leaders into wartime planning, and the institutionalization of labor relations within the New Deal state had in the space of a decade transformed organized labor in the United States into an influential axis of political and economic power.”³³ And this was true even in Houston.

Convinced that the labor upsurge would not last long, the city's political leadership held a hard line at the beginning of the strike. Mayor Otis Massey and the City Council refused to negotiate with strikers until they returned to work and rebuffed union representatives altogether.³⁴ Acting City Manager J.M. Nagle argued that the city had simply fired employees who “had resigned by failing to report for work.” “These workers actually quit voluntarily,” he claimed. “We are issuing their final checks and they have lost all their Civil Service, seniority and pension rights.”³⁵ Mayor Massey agreed: “So far as I'm concerned, those who are off the job are no longer in a position to bargain with us. They are simply former city employes [*sic*].”³⁶ The city council planned to call on state officials and the Texas Rangers to declare martial law. Massey encouraged Houstonians to weather the strike by volunteering to pick up garbage and clean streets.³⁷

Yet the strikers did not fold quickly, as city officials predicted. Houston workers' support for the strike grew as the fight wore on. After 6 days, several thousand more AFL sympathizers declared a citywide work holiday on February 26. “Taxi drivers, bakers, barbers, longshoremen, musicians, office employees, packinghouse workers and railroad clerks” swelled the ranks of the striking workers, with twelve hundred dockworkers and seven hundred taxi drivers, for instance, joining the original thousand striking

municipal employees in an overwhelming demonstration of solidarity.³⁸ Spurred by the solidarity strikers, Houston Labor and Trades Council secretary George A. Wilson called on sixty-five AFL locals in the city to March on City Hall in support of the fired workers to respond to “the arrogance and utter lack of consideration of the mayor and city council of the welfare of the city employees and citizens of Houston.”³⁹ By some estimates, as many as ten thousand workers marched on City Hall. As Building Trades Council president L.E. Patrick put it, “It’s not only a city employee fight now, but it concerns all labor.”⁴⁰

The citywide work holiday and mass march on City Hall made city officials’ position untenable. The *Houston Chronicle*, hardly a friend to labor, declared the march and work stoppage “the greatest mass demonstration of organized labor’s strength in Houston’s history, or for that matter in Texas’s history.”⁴¹ In the face of such clear opposition, Massey relented and agreed to meet with AFL representatives. Before the crowd amassed in front of City Hall, Massey and an AFL representative embraced, announcing that the fired workers would be reinstated and wages would be studied.⁴² The city’s Civil Service Commission agreed to compare city wage rates with rates in private industry, to bring municipal employees’ wages in line with the private sector.⁴³ The strike’s momentum lasted through the end of 1946, when Massey was ousted in favor of labor-friendly Mayor Oscar Holcombe.⁴⁴

The emerging political climate of the Cold War complicated this labor triumph, in Houston and elsewhere. Prominent anti-communist political figures like Joseph McCarthy leveraged the Cold War fears of communist encroachment into the United States to launch witch hunts against suspected communists, particularly in trade unions. Moreover, following the passage of the Taft–Hartley Act in 1947, many states passed the so-called right-to-work laws in the postwar years, which “prohibited collective bargaining and striking by public employees” and limited the ability of unions to gain members.⁴⁵ Texas passed its right-to-work law in 1947, an unprecedented move for the state which had had little labor legislation on the books in Texas before the 1940s.⁴⁶

Houston’s general strike constituted the largest, most vivid example of labor power in the postwar city, but it was hardly the only one. In the same year, unionized construction workers went on a 77-day strike and won a closed shop on all construction jobs in the city. The next year, workers threatened another citywide construction shutdown after the Associated General Contractors and Houston Building Trades Council announced a

plan to draft a contract banning the closed shop.⁴⁷ In March 1950, a thousand AFL dockworkers in Houston went on strike demanding higher wages, with another thousand striking in Galveston.⁴⁸ And in November 1950, 1200 CIO bus drivers and mechanics went on strike to demand “a 25-cent hourly wage increase, better working conditions and pensions.”⁴⁹

African-American workers continued the prewar and wartime fights to end racial discrimination in the oil industry. Workers at Houston’s Shell plant launched another fight in 1953. In Shell’s 57 departments, only one—the labor department—hired African-Americans, at a wage of \$1.69 per hour. Whites hired in similar positions started at a wage of \$1.98 per hour.⁵⁰ Black workers appealed to the CIO Oil Workers International (OWIU), but found that the union contract actually codified this discrimination. They visited Roberson King, an African-American Texas Southern University law professor, who filed suit against the OWIU in the Texas courts.⁵¹ Black workers simultaneously filed a case against Shell with the President’s Committee on Government Contracts. Army officials stepped in to work with management at Shell’s offices in New York. In the eventual agreement, the company pledged to open all job categories to African-Americans if they had a high school diploma and could pass a qualification test.⁵²

Beyond these localized struggles, the NAACP placed oil workers at the center of a highly visible national campaign for workplace civil rights. In 1955, the NAACP represented black workers at Esso, a Carbide Chemicals Company plant in Texas City, and the Lion Oil Company in Arkansas in a joint suit filed with the President’s Committee on Government Contracts and with the NLRB. The complainants argued that both the company and their unions discriminated against black workers in hiring practices. As government contractors, Robert L. Carter of the NAACP Legal Defense Fund argued, these discriminatory companies “deprived complainants and all other Negroes employed of rights and privileges guaranteed to them by the Constitution and laws of the United States.” The NLRB denied pursuing the case, but the President’s Committee on Government Contracts (PCGC) pursued it to great effect. At the PCGC’s urging, Esso “opened all but professional and clerical jobs to African-Americans and promised to promote twenty-five black workers to newly opened jobs.” However, the PCGC had little enforcement power, and its officials favored a company-by-company tactic that “left cooperative unions vulnerable to raids by competitors who promised to restore the discriminatory status quo

ante.” Meanwhile, employers could blame white workers’ resistance for their reluctance to implement change.⁵³

By the mid-1950s, African-American workers could trace a long line of wins in oil workers’ civil rights cases beginning during the war. And like African-American workers, Mexican-American workers were able to mobilize the state to intervene on their behalf in the wartime and postwar period, most dramatically in a wartime FEPC case at a Shell refinery. Ultimately, continued FEPC pressure led the union to broker a compromise: a few skilled jobs for African-American and Mexican and Mexican-American workers would be set aside in segregated departments.⁵⁴ Although workers remained stymied by resistant companies, the 1940s and 1950s seemed to offer hope for progress in the future.

CORPORATE RESPONSES

Workers’ hopes notwithstanding, companies were finding new ways to resist laborers’ power. In the refineries and at oilfield services factories like Hughes Tool, African-American and Mexican and Mexican-American workers won concessions, albeit limited ones, during the 1940s and 1950s. Despite these limited successes, capital flight and automation undermined workers’ hard-won gains. The peak of domestic refinery employment in the US came in 1953, when 206,000 Americans worked in refineries. 142,000, or about 70%, of these workers, worked in production rather than management or engineering-related functions. Just 5 years later, total employment declined to 6.8%, but production workers declined at a rate of 14.8%.⁵⁵ Meanwhile, production increased to 9.8% during these years.⁵⁶ Generally speaking, blue-collar oil industry workers worked on an oil field or in a refinery, doing the manual labor of extracting and refining oil. Blue-collar workers also worked in ports and on ships transporting oil from one city to another. White-collar workers, on the other hand, managed these workers and the manufacturing processes they operated. The blue-collar employment for which black and Latino Gulf Coast workers had fought was actively disappearing.

This labor shift was not merely an unfortunate coincidence of history; in many cases, it was a deliberate management strategy. Employers actively countered labor and civil rights gains by shifting their employment structure. When three Mexican workers brought a wage discrimination case against Humble Oil’s refinery, for instance, Humble responded by raising the complainants’ wages, but they also pursued a strategy of “rid[ding]

[the company] of its minority workforce by contracting out to the [the oilfield services firm] Brown and Root Company for all of its laboring work.”⁵⁷ In the process, the company avoided conflict with white workers while seeming to obey federal mandates.⁵⁸

Other companies cut their workforce as well. In just 1 year, from 1948 to 1949, Hughes Tool’s employee base shrunk from 4000 to 2600. Ten years later, only 2000–1600 white and 400 black—remained—even though production had increased. The total number of employees at Gulf declined throughout the 1950s and 1960s. Despite black employees’ organizing successes, Gulf employed 883 black workers in 1957 but only 741 by 1959.⁵⁹ And at Shell, the company’s agreement to open all job categories to African-Americans with a high school diploma had little actual effect. Only 11 of the plant’s 250 black employees had high school diplomas. As one onlooker pointed out, in the future, “the company could avoid Negroes from being upgraded by refusing to hire Negro high school graduates.”⁶⁰

At Hughes, Gulf, and Shell, the 1940s and 1950s witnessed the beginning of a decline in blue-collar as opposed to white-collar oil industry jobs.⁶¹ This development undermined the gains of African-American and Mexican and Mexican-American workers in two ways: first, by reducing the number of jobs that blue-collar workers (disproportionately Mexican-American and African-American) were eligible for; and by cementing the relationship between whiteness and white collar. During the 1940s and 1950s, challenges to the dual-wage and dual-tier labor system in the blue-collar oil industry had sought to challenge cultural associations between white masculinity and unionized, blue-collar work in refineries and oil tools plants. As one observer commented, the “sentiment among white workers [was] that mechanized jobs are automatically white jobs”—and workers’ successes in advocating for African-American and Mexican-American access to these jobs had succeeded, at least provisionally, in undoing that association.⁶² Esso, for instance, had “set aside twenty-five skilled jobs for African-Americans” in the wake of the PGC case, a coup for black workers. However, the industry’s—and Houston’s—increasing reliance on white-collar labor, which had not seen the same legislative victories in civil rights organizing, essentially evaded this challenge by claiming white, white-collar workers as the true agents of the modern Houston oil industry. At Esso, after the original twenty-five positions were filled, the company ceased promoting African-Americans and, in fact, laid off a third of its employees in 1957, spurred by a recession

and automation. Yet as Esso's white-collar workforce expanded, the company refused to hire African-Americans to these positions.⁶³ The material and cultural decentering of blue-collar labor in the domestic oil industry undermined the civil rights gains of African-Americans and Mexican-Americans.

Houston-based companies augmented automation and promoted white-collar labor with another union-busting strategy: moving blue-collar labor overseas. Houston's Brown & Root, an international construction company specializing in oil-related projects, is perhaps the starkest example. The company, best known for its domestic and international contracting work constructing oilfields, pipelines, military bases, and government buildings, was a key proponent of right-to-work legislation in Texas. Texas passed a right-to-work law in 1947, which "prohibited collective bargaining and striking by public employees."⁶⁴

Herman Brown, president and co-founder of Brown & Root, sought to make sure that the law would be enforced as strictly as possible. After campaigning in support of right-to-work legislation in the 1940s, Brown helped launch a landmark case to extend the law in the 1950s. In 1950, Brown & Root sued the AFL Building Trades Council under the state's right-to-work law. The company's case alleged that the Council had violated state laws prohibiting the closed shop and secondary boycotts and the state's antitrust act. The controversy had begun when Brown & Root won a contract to work on the Bull Shoal Dam in Arkansas. Eight other contractors from across the country were collaborators on the project, and all eight operated with a closed shop. An AFL union official pointed this out to Brown & Root executives and requested a meeting. The AFL representatives demanded that Brown & Root operate a closed shop at Bull Shoals, use only union members on its Texas highway projects, and sign an agreement that the company would hire only union members at all of its projects nationwide. Brown & Root executives refused.⁶⁵

The AFL would not be thwarted so easily. In the 10 months that followed, AFL union members protested at Brown & Root construction sites across the country. At an oil pipeline compressor station site outside Beaumont, Texas, union members unaffiliated with the job picketed the project site, drawing crowds of up to one hundred and fifty. The company alleged the union members used violence and harassment against the work crews. Union members picketed at two different Houston construction sites. According to company officials, the Houston Lighting & Power Company refused to connect electricity to Brown & Root job sites out of

fear of retribution from the electrical workers' union. These kinds of protests followed the company to Austin, with more threats of pickets and boycotts springing up nationwide. According to company officials, the chief of police in Beaumont sided with the workers: "There is another epidemic here of Brown & Root, and we are doing all we can to exterminate that terrible dreaded disease," he said. "You boys have helped exterminate that disease, and with your help, we will eventually get rid of all those festered sores in Beaumont."⁶⁶

Outraged, Brown & Root executives and supporters appealed for sympathy. "Our company has been in business over 30 years and have worked on an open shop basis all of this time," Herman Brown explained. "It is an arduous and expensive task" to sue the union, he continued, "but we intend going through with it with the idea that it will help the employees as well as the employers in this State in the future."⁶⁷ The company's lawyer was even more livid in his address to the Texas State Bar. "Not once have Brown & Root employees engaged in a strike. Not once in a period of nearly 40 years have Brown & Root workers walked off the job for so much as a single hour because of dissatisfaction with wage, hour, or other policies of the company," he exclaimed. "Brown & Root employees have no union and have sought no union... [This] is the story of a Texas contractor ensnared in the fetters of a giant labor conspiracy and compelled to fight for the right to obey the law and stay in business."⁶⁸

The company claimed that their resistance to the closed shop was about liberty rather than the bottom-line, but in private, executives suggested otherwise. Herman Brown explained to another contractor on the Bull Shoal Dam project that if the project was not "operated on an open shop basis... it would probably cost us from a million to two million dollars extra in the increase in labor rates." Brown went on to assure him that the AFL's arguments against Brown & Root were "a pure bluff" and that the labor leader already knew that "they have lost the battle at Bull Shoals."⁶⁹ The Houston Building Trades Council estimated that Brown & Root's wages in Houston ranged from \$0.50 to \$0.75 per hour lower than the union rate, and argued that "working conditions are also far below the standards in like employment in this community established by years of work, sacrifice and organizational endeavor."⁷⁰

These facts notwithstanding, Brown & Root won its suit. Courts ruled against the AFL and enjoined the union from picketing Brown & Root in Texas, although the court made a point to say that "legal picketing" (left relatively undefined) would still be allowed.⁷¹ Brown & Root's

legislative victory, and its staunch anti-union stance, reverberated across the industry. At Humble Oil Refinery, for instance, workers complained that 300 Brown & Root contract workers had replaced the unionized maintenance workers, all of whom had been laid off.⁷² In other words, “the battle of Bull Shoals” mattered beyond Brown & Root’s worksites. It enabled companies to evade worker demands by contracting out jobs to anti-union companies.

Using right-to-work laws at home represented only one anti-union strategy. In fact, in the 1950s, Brown & Root increasingly operated overseas. The company repaired war damage in Guam and built new air bases for NATO and the US Air Force in France and Spain. But Brown & Root’s primary expertise lay in oilfield construction. The company was among the first to develop offshore drilling platforms in the Gulf of Mexico in the 1950s and soon moved on to the North Sea, the Persian Gulf, and Peru.⁷³ The company continued its overseas work, consulting with the Turkish government to construct a pipeline spanning Turkey, Syria, Israel, Jordan, and Saudi Arabia.⁷⁴ Based in Houston, but performing work elsewhere, Brown & Root was everywhere and nowhere, giving a double meaning to the term “offshore.”

Oilfield services company Halliburton, Brown & Root’s parent company, also invested an increasing amount of its resources—and gained an increasing percentage of its profits—abroad. By 1960, Halliburton operated in 26 countries outside the US, “serving all the principal drilling areas of the free world.” This strategy proved extensively useful when political upheaval, declining oil reserves, or labor unrest threatened a particular drilling site; in 1960, for instance, “expanded drilling programs in Argentina and Libya, as well as increased activity in Mexico, Peru, and the European countries, offset the further decline of operations, and resulted in an increase in Halliburton’s foreign business.”⁷⁵ By 1959, Halliburton employed over 200 US employees who had been in foreign service to the company, averaging 5 years each working abroad. The company also employed over 1,000 non-US citizens internationally.⁷⁶

The fact that Brown & Root promoted right-to-work legislation at home and benefitted from international construction abroad was hardly coincidental. The Cold War constituted the zenith of government-sponsored corporate growth, as construction contractors like Brown & Root negotiated federal contracts at home and abroad that boosted their bottom lines. International projects made good business sense as the Cold War chilled during the 1950s and 1960s.

In addition to this federal largesse, the unruliness of blue-collar labor at home encouraged the company to focus its efforts abroad, often in locations where government regulation protected labor less thoroughly. Moreover, the company and those like it benefited directly from the expansion of manufacturing overseas, often at the expense of US manufacturing. From the 1950s onward, Brown & Root built factories and oil refineries in countries as diverse as Japan, Botswana, Mexico, Nicaragua, and Spain, and fought for a contract in Syria that they lost to a Czechoslovakian construction company.⁷⁷ At the same time, the percentage of global oil refining performed in the US declined while refining abroad increased.⁷⁸

This shift of manufacturing overseas corresponded with an emphasis on white-collar labor in the domestic oil industry. For staunch anti-union companies like Brown & Root, this constituted a deliberate strategy of sorts, since many white-collar workers were not protected under existing labor legislation. Furthermore, white-collar workers like engineers had largely been unsuccessful at organizing unions. At oilfield services company Sperry Gyroscope, an engineers' union was decertified, demoralizing engineering union members across the country. In 1960, observers predicted, "the Engineers and Scientists of America, a professionals-only national union, 'will fade out of existence this month'". They worried that "there have been no new units of any significance formed within the past several years... Even the AFL-CIO, with all its resources, has been completely unable to record any real progress." TVA Engineers Association President Gene M. Wilhoite worried that "each group [has] made the same mistake, they underestimated the power of the non-member, and allowed their membership to drop so low that the non-member voted them out."⁷⁹

Although US companies like Brown & Root began building refineries overseas during the postwar years, moving existing refineries offshore often proved challenging. The fixed cost of refinery equipment was high, making automation and replacing blue-collar workers with white-collar workers more profitable for many companies.⁸⁰ By 1958, professional, managerial, and technical refinery workers outnumbered unskilled workers. Of the refineries' 13,000 Houston workers, 3300 were management, technicians, clerical and sales workers, or services employees; the majority of the remaining numbers were skilled and semi-skilled workers.⁸¹ It was this new balance of labor in the refineries that would factor into the labor defeat at Shell.

THE STRIKE AT SHELL

These industry developments—the oil industry’s investment in union busting, its shift toward white-collar employment, and its relocation of the blue-collar labor of extraction and refining abroad—culminated in the Shell strike of 1962. On August 18, 1962, 2200 workers at the Shell Oil Refinery in Houston went on strike to protest unfair work assignments, problems with seniority and employment security, and the increase in contract workers at the expense of unionized employees at the refinery.⁸² The plant, which boasted more than two thousand blue-collar workers producing 135,000 barrels of oil every day, was the Gulf Coast’s largest.⁸³

The company responded to the strike by replacing the blue-collar workers with 1170 white-collar staff members. As the strike wore on, Shell argued that the refinery “continued operating at better than pre-strike levels with 1000 less workers” with “the only cutbacks... in engineering work, research and technical studies, and some maintenance” because “those normally engaged in work in these areas are manning the production equipment.”⁸⁴ Nonunion “supervisory, clerical and technical personnel” operating the refinery proved embarrassing to the union fighting for the right of workers to having a say in the plant while it also underscored Shell’s case.⁸⁵

For Shell, the strike was “an opportunity to try new methods of operating.” “Supervisors, engineers, researchers, clerical workers, accountants, secretaries and stenographers” took charge of the plant, working 12-hour shifts seven days a week. Shell vice president for personnel and industrial relations John Quilty explained the white-collar workers’ enthusiasm this way: “The supervisors, the engineers, they’d been wanting to get their hands on those units for years... They’d been wanting to show these operators that they could run them.”⁸⁶ Shell’s strong resistance was unprecedented. Union representatives claimed that it was “the most extreme position [in bargaining] by a major oil company” and was an attempt to “force contract retrogression.”

Fundamentally, what was at stake was the question of whether the oil industry in the US would be a blue-collar or white-collar one. Workers protested the impact of automation in replacing them, as well as the company’s policy of contracting out for maintenance and other blue-collar workers rather than hiring union-eligible employees. The company argued that it should have “the right to determine whether plant work should be done by its own employees or by those of outside contractors,” and said

that the strike had demonstrated that the plant could run on fewer workers. The company announced plans to lay off almost 400 workers at the strike's end. Strikers pointed to the fact that Shell had already laid off 600 workers in the past 5 years, making a tremendous impact on the Houston economy.⁸⁷

The strike lasted almost a year, making it the longest in the oil industry's history.⁸⁸ The settlement was a tremendous blow for organized labor in Houston. Shell reduced the workforce by 400 while offering a 5% wage increase for employees who kept their jobs. The union's biggest fears, concerning automation and management prerogative, were decided in favor of the company.⁸⁹ The new contract "allow[ed] the company to continue contracting out construction work" to anti-union companies like Brown & Root and "g[a]ve the company more flexibility in using workers for several duties."⁹⁰ In other words, the strike served as a boon to rather than a check on the anti-labor politics Brown & Root represented.

WHITE-COLLAR WILDCATS

The popular image of Texas oil traditionally focused on the wildcatter, the fiercely independent, virile (and white) oilman who struck out on his own to strike it rich. Blue-collar oil workers sought to reframe that image to celebrate an unionized collective of workers who were more likely to call a wildcat strike than to identify as wildcatters. But the Shell strike cemented a different image of the oil industry employee, one that would be increasingly important in Houston in the coming decades. This worker combined the fierce autonomy of the wildcatter with the shrewd expertise of the engineer. It was this worker—not the refinery worker or oilfield tool manufacturer—who would represent the future of the US oil industry.

Houstonian Will Wilson evoked this slippage between the wildcatter and the engineer-manager eloquently in a speech he gave to the General Press Club opposing Democrat John Connally's bid for Governor of Texas in 1962. "John Connally's career in the oil business was *not* on the Horatio Alger formula of the poor but proud boy who, by hard work and saving his money, became successful," Wilson told the crowd. He went on to explain: "[Connally] is not a geologist, an engineer, a landman, a roughneck, or a production man. He did not work his way up in the oil business," Wilson noted with disdain. By contrast, Wilson bragged, "I have a degree in geology, have rough necked on drilling rigs, have been a land surveyor in the oil fields, and have practiced oil and gas law." Connally was nothing

more than an “aide’ to a big rich man,” famed only for being Lyndon Johnson’s campaign manager. “I respect a lot more the man who stands on his own feet and makes his way,” he concluded.⁹¹

Blue-collar roughneck or production man, white-collar geologist, engineer, or lawyer—these occupied the same realm of masculine oilfield authenticity for Wilson. But this slippage ignored the displacement of blue-collar labor that white-collar workers had wrought in the Houston oil industry while bestowing the engineer or manager with the rough-and-tumble Texas oilfield spirit. In an impressive sleight of hand, the engineer who replaced the “production man” in the Shell refinery became equivalent to him, enchanted with the wildcat spirit. The wildcat strike was nowhere to be seen; the enemy, instead, was the effete “aide,” a political elite. The production man and the engineer, the manager and the worker, it seemed, could stand together against this decidedly non-wildcat figure.

At the same time, the geographical imaginary of oil in Houston had shifted decidedly. Increasingly, Houston as an oil city was understood as a sprawling metropolitan area that carried important financial functions for a global oil market. In this new mental map of the city, Houston was no longer a central node in a regional system, but a large urbanized area with connections extending nationally and globally. Now, the role of oilfield services was central: “Houston [has] 43.3% of the nation’s petroleum equipment and suppliers,” the Chamber of Commerce boasted.⁹² And even beyond the city, Houston’s reputation as an oil city had spread. In 1965, Pennzoil relocated its headquarters to Houston after 75 years in Pennsylvania in an “attempt,” as one company spokesperson put it, “to be more centrally located in domestic and foreign oil operations.”⁹³

Now, Houston was the center of a metropolitan region, which “sustain [ed] an expanding population in the seven contiguous counties” but also “support[ed] population growth and prosperity in the second—and even in the third—tier of surrounding counties.” Houston was no longer a central node in an oil network, but a shopping center where “consumers within the wholesale trade territory of Metropolitan Houston” could come to exert their “expanding purchasing power.”⁹⁴ In this new calculus, the white-collar suburb was a central part of what made Houston an oil city. In fact, Houston had embarked on a tenacious annexation campaign that had made it, by 1960, “the largest incorporated urban area in the world.” In a span of 12 years, the city had “increased its land area by about five and one-half times.”⁹⁵ And this process of annexation further established the

city as a sprawling metropolitan area rather than an urban center bound to its rural hinterlands.

Moreover, one of the city's fastest growing sectors was petrochemical manufacture, an industry that involved industrial manufacturing along with large investments in research and development. "In a mere 20 years the Houston area has become the principal center of petrochemical manufacture in the United States," du Pont plant manager Thomas Chase proclaimed, and one of the main reasons he noted was "access to skilled employees."⁹⁶ As Executive Vice-President of the Houston Chamber of Commerce, Marvin Hurley, explained, "We are now in an era of technologically-based, science-oriented industry, and our continued economic development will depend increasingly upon the application of the fruits of science and technology to our natural resources... The face of Houston has been remade, as the urbanized area has reached into the countryside in every direction."⁹⁷

And the imagined future of oil involved as few blue-collar workers as possible. A.W. Rose, president of the Houston-based Petroleum Equipment Suppliers Association, predicted that "substantially before the year 2000 it is conceivable that an automated oil well drilling rig will be operated at a control console in an air-conditioned cab; information and instructions will be fed back and forth by computers located at an information center miles from the drilling site; [and] robots on the ocean floor will do underwater drilling and well completion." In fact, a prototype for an automated drilling rig was slated to be shown at the 1966 International Petroleum Exposition.⁹⁸

CONCLUSION

If the 1946 general strike announced Houston's emergence as a self-conscious working-class city, the Shell strike symbolized the strategic and cultural importance of white-collar labor to the city's image by the early 1960s. Whereas white-collar employees had joined in the general strike after the war, by 1962 they were being relied upon as strikebreakers, with engineers and managers stepping in enthusiastically to prove that they could operate a refinery—indeed, to demonstrate that the modern, high-tech refinery *should* be the realm of white-collar experts rather than blue-collar industrial workers. This development signified a new division in the oil industry, as well as a new imaginary of what the domestic oil industry was and who its workers were. Not coincidentally, the Shell strike

dovetailed with the rising importance of the white-collar oilfield services industry and the transfer of much oil extraction and refining outside the United States.

The transformation of Houston from an extraction- and manufacturing-based municipality to a metropolis driven by corporate headquarters and oilfield services firms effected a transnational renegotiation of labor power. Materially, blue-collar jobs moved overseas, while a greater proportion of Houston's oil workers were in white-collar occupations with fewer bargaining rights. At the same time, for oil industry executives to promote a corporate vision in which extraction and productive activity like refining occurred abroad, with management the only industry function occurring onshore, they would have to transform manufacturing from the symbolic birthright of the white middle class to a job category that was understood to be performed most efficiently by workers of color outside the United States.

This transition occurred at the same moment when African-American and Mexican and Mexican-American oil workers were making unprecedented gains in reducing workplace discrimination, particularly in refineries. However, the rebranding of oil in Houston as a white-collar rather than blue-collar industry both undermined blue-collar civil rights advances at home and cemented the relationship between whiteness and white-collar job categories. Outsourcing and the championing of expertise were both responses to domestic labor unrest *and* imperial strategies. The relocation of oil refining overseas reduced domestic workers' power while promoting a new ideology of American imperialism that imagined the US as a manager of integrated global production rather than as a producer or exporter in its own right.

This local story carried profound transnational consequences. Centering the white-collar oil employee, both materially and imaginatively, in Houston reracialized the American oil worker as white and male in a moment when African-American and Mexican-American workers were making unprecedented gains. At the same time, the relocation of the blue-collar labor of oil production abroad—to countries including Venezuela, Brazil, Nigeria, Iran, and Saudi Arabia—helped to forge an association between productive labor and “elsewhere.” In this formulation, the US was the home of oil experts and expertise, responsible for teaching those elsewhere to do the dirty productive labor. This transition helped to displace a producerist vision of American empire—one which imagined the US as a Fordist land of production engineering material goods for export

to the rest of the world—to a service vision. This new vision of US global power celebrated the engineer, the manager, the expert as the central figure of American capitalism. While the oil industry would increasingly send its extraction and production work abroad, US experts would continue to oversee the increasingly global assembly line.

NOTES

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3. “40,000 Workers Plan March on Houston’s City Hall Today,” *The Washington Post*, February 26, 1946; “700 City Workers End 7-Day Houston Tie Up,” *New York Times*, February 27, 1946.
4. Tyler Priest, “Labor’s Last Stand in the Refinery: The Shell Oil Strike of 1962–1963,” *Houston History* 5, no. 2 (2008): 12. Priest also identifies the strike at Shell as a crucial turning point in Houston’s labor history and in the labor history of oil more broadly.
5. Priest, “Labor’s Last Stand,” 13.
6. Ruth A. Allen, George N. Green, and James V. Reese, “Strikes,” *Handbook of Texas Online* (<http://www.tshaonline.org/handbook/online/articles/oes02>), accessed July 31, 2015. Uploaded on June 15, 2010. Published by the Texas State Historical Association.
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9. Michael R. Botson, Jr., *Labor, Civil Rights, and the Hughes Tool Company* (College Station: Texas A&M University Press, 2005), 12; McComb, “Houston, Texas,” *Handbook of Texas Online* (<http://www.tshaonline.org/handbook/online/articles/hdh03>), accessed October 7, 2014. Uploaded on June 15, 2010. Published by the Texas State Historical Association.
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11. Ibid.

12. Railroad Commission of Texas, "Crude Oil Production and Well Counts (since 1935)," available at <http://www.rrc.state.tx.us/oil-gas/research-and-statistics/production-data/historical-production-data/crude-oil-production-and-well-counts-since-1935/>.
13. Karen R. Merrill, "Texas Metropole: Oil, the American West, and US Power in the Postwar Years," *Journal of American History* 99, no. 1 (2012): 197–207.
14. McComb, "Houston, Texas"; Botson, *Labor, Civil Rights, and the Hughes Tool Company*, 37.
15. Clara H. Lewis and John R. Stockton, "Manufacturing Industries," *Handbook of Texas Online* (<http://www.tshaonline.org/handbook/online/articles/dzm01>), accessed October 7, 2014. Uploaded on June 15, 2010. Published by the Texas State Historical Association.
16. US Energy Information Administration, "US Imports of Crude Oil," available at <http://www.eia.gov/dnav/pet/hist/LeafHandler.ashx?n=PET&s=MCRIMUS1&f=A>. The United States had imported over one hundred million barrels of oil during the early 1920s, but imports declined until after the Second World War due to increasing demand. Oil imports rose steadily until reaching an all-time high of 3.695 trillion barrels in 2005.
17. The Seven Sisters included, "the Standard Oil Company of New Jersey (later Exxon), the Standard Oil Company of New York (Socony, later Mobil, which eventually merged with Exxon), the Standard Oil Company of California (Socal, later renamed Chevron), the Texas Oil Company (later renamed Texaco), Gulf Oil (which later merged with Chevron), Anglo-Persian (later British Petroleum), and Royal Dutch/Shell." See "Milestones: 1921–1936," US Department of State Office of the Historian, available at <http://history.state.gov/milestones/1921-1936/RedLine>.
18. For a full history of oilfield services companies' shifting business strategies, see Betsy A. Beasley, "At Your Service: Houston and the Globalization of US Global Power" (Ph.D. diss., Yale University, 2016).
19. *Houston* magazine, April 1945, 8.
20. *Houston* magazine, September 1945, 63.
21. *Houston* magazine, April 1945, 8.
22. Botson, *Labor, Civil Rights, and the Hughes Tool Company*, 41–50.
23. *Ibid.*
24. *Ibid.*, 135–136. Later Local 2457 dropped these charges under pressure from CIO whites, who promised that they would work with the WLB to rectify union segregation.
25. *Ibid.*, 136.
26. *Ibid.*, 128–141.
27. *Ibid.*
28. Marilyn D. Rhinehart, "A Lesson in Unity: The Houston Municipal Workers Strike of 1946," *The Houston Review: History and Culture of the Gulf Coast* 4, no. 3 (1982): 137.

29. "City Workers Strike in Houston," *New York Times*, February 21, 1946; Lipsitz, *Rainbow at Midnight*, 136; Rhinehart, "A Lesson in Unity," 137.
30. Lipsitz, *Rainbow at Midnight*, 136.
31. Rhinehart, "A Lesson in Unity," 139.
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Heroic “Black Gold”? Working for Oil and Gas in the Western Siberian Oil and Gas Complex of the 1960–1970s

Dunja Krempin

INTRODUCTION

The development of the Western Siberian oil and gas complex as the last mega-energy project of the Soviet Union in the 1960s to 1980s could draw upon a rich history of Soviet energy projects. The definite industrialization and electrification of the Soviet Union under Stalin forced masses of peasants into all kinds of industries and industrial mega projects. Workers and specialists were needed in many branches of the energy industry, such as the construction of giant water-power stations since the 1930s¹ or the restructuring of the Baku oil region as the main oil basis of the country before the Second World War. It was in this region that masses of unskilled Muslim workers and Russian specialists could be hired.² The new vast oil and gas regions after the Second World War represented a significant change according to its climate. Out of these at least, the Volga–Urals were still a populated and more industrialized part of the Soviet Union. The oil and gas industry of less developed and unsettled Western Siberia, the “Third Baku”, could neither rely on local population nor on migrants willing to work in this remote and harsh area. As a result, the Western Siberian oil and gas complex

D. Krempin (✉)
University of Zurich, Zurich, Switzerland

formed a special case regarding the challenging exploitation of arctic resources and the mobilization of workers in the late Soviet planned economy under Brezhnev.³

The allocation of resources in the Eastern and Northern parts of the country forced the Soviet planners to think about workers' mobilization. Under Stalin, forced settlement was used to exploit and develop similar areas of Northern European Russia and Siberia.⁴ The process of Dekulakization involved the collectivization campaign and forced labor within the Gulag system, during which former peasants were directed into industrial production and industrial megaprojects. Several immense mobilization campaigns such as Stakhanovism,⁵ shock work or socialist competitions aimed at increasing productivity, allowed the establishment of "new proletarian forces" and showing the superiority of the Soviet system. Later, in Khrushchev's "Thaw" such forced labor was abolished and work relations "normalized". Wage reforms and a "democratization process" created the image of a higher participation of workers at their workplaces⁶ and established consumerist attitudes among the Soviet citizens.⁷ As a result, work conditions including extremely cold temperatures, work on permafrost grounds in winter and swamplands in summer,⁸ did not seem to be attractive to the average Soviet worker of the 1970s. Moreover, such conditions meant an immense technological challenge and demanded specialized oilmen (*neftianiki*) and gasmen (*gazoviki*). In addition, there was great demand for blue-collar workers to build up a reliable infrastructure who still had to be mobilized for work within the region.

This essay provides a case study of labor and labor relations within the Western Siberian oil and gas complex in the 1960s and 1970s. First, the essay focuses on recruitment, working and living conditions, labor relations and social impacts. Second, it examines the "Siberian" media campaign as a mobilization campaign of the late Soviet Union. I argue that oil labor in Siberia well reflected Brezhnev's welfare promises⁹ of "developed socialism" and a changing status of Siberia from a provincial periphery to a promising economic and military future region with a global perspective. Lastly the paper discusses the relevance of continuing labor shortage, over-bureaucratization of the planning system and full employment that caused social problems and missing technological and social inputs to the late Soviet Unions planned economy.

MOBILIZING WORKERS: RECRUITMENT AND MOTIVATION

Until the mid-1960s the Northern part of the Western Siberian lowlands east of the Ural Mountains was one of the most remote areas of the Soviet Union, hosting only forest, agriculture and fishing industries. Since the 1930s, geologists assumed that huge amounts of oil and gas were situated in the region, though it was only after the Second World War that geological works were intensified. Despite this, even after promising deposits were found, the political and economic leadership hesitated to take a great leap into Siberia. Although the first decrees on industrial development were issued in the early 1960s, decision-makers only discussed the feasibility of exploiting Arctic resources. The Soviet oil industry still seemed to be well based on the “Second Baku” in the Volga–Ural oil province which was located in the densely settled and industrially developed Western part of the country.¹⁰ After a trip by Prime Minister Aleksei Kosygin and the head of the state planning organization (*Gosplan*) and former oilman, Nikolai Baibakov, to the Tiumen’ region in January 1968,¹¹ did Western Siberian oil and gas gain in importance. Kosygin gave a speech on the 24th party congress in 1971, establishing the Western Siberian oil and gas complex as the most important base (“*krupneishaiia baza*”) of oil and gas in the East.¹² During the 1970s, the region’s importance continued to grow because of decreasing production in the older oil regions and rising export obligations¹³ called for an increasing output in the first Tiumen’ oil fields and later in Northern Tiumen’ gas fields.¹⁴

Soviet planners to some extent could revert to former experiences of recruiting workforce for the oil and gas industry. The Baku oil industries of the late nineteenth and early twentieth century mostly attracted young, unbound and unskilled Muslim workers which caused high fluctuation, and in the 1920s even provoked political rebellion due to nationality conflicts, an imbalance of supply and demand in specialists and low working and living standards.¹⁵ During the Second World War, the Soviet oil industry moved in a rushed campaign with all its technical equipment to the Volga–Ural region to prohibit the Caucasian oil fields from falling under German control.¹⁶ Whole working collectives were, therefore, moved to the East to develop the new oil region as fast as possible. The demand for specialists in that situation even became so important that oil specialists were demobilized from the Soviet army.¹⁷ Regardless, up to the 1960s all Soviet oil or gas production fields as well as important educational

centers were still located in the Western and Southern part of the country, which were densely populated and of moderate climate.

Therefore, it was a challenge for Soviet planners to attract workforce to Northern Siberia. Not only were specialists needed but huge numbers of blue-collar workers and construction units were necessary to convert settlements such as Surgut, Nizhnevartovsk, Nadym and Novyi Urengoi, pipelines, transport infrastructure, communal facilities, into real towns. Others were to be employed in food production, medical services, schools, and canteens. In the 1960s and 1970s, Soviet workers had freedom of movement and of occupational choice, and this caused certain difficulties for the planners since the workers did not move in the desired patterns. In 1965, 90% of the workers were recruited from the older oil and gas regions with the help of media campaigns, which announced and promoted the work in the media (radio, newspapers).¹⁸ The CPSS took the lead in this policy, which not only appealed to single specialists but to whole working collectives. Workers were then employed in regional trusts (*glavki*) which were the sub-units of the Federal Ministries in each region.¹⁹ After the first workers were hired the news about the Tiumen' region mostly spread via word-to-mouth recommendation to former colleagues and friends all over the country.²⁰

The transfer of personnel (*perevod*) from other trusts of the same ministry or other construction projects was a form of recruiting the leading cadres, specialist engineers and geologists from older oil and gas regions. The newly formed regional oil and gas trust *Glavtiumenneftegaz*²¹ was provided with specialists from Bashkiria, Tatarstan and Kuybyshev, the so-called Second Baku, in the late 1960s²² when the region's important status was officially supported. It underlined the significance of the project that there were not only young enthusiastic workers sent to Western Siberia but also specialists with long-term experience. Other oil and gas specialists came from the Tiumen' Industrial Institute, and from 1973 on some were recruited from a reserve²³ which every industrial enterprises in the Soviet Union ought to provide.²⁴ The demand for specialists steadily rose: The first period of Western Siberian development was characterized by accessible resources that could be developed fast, but the late 1970s were characterized by a setback of oil exploitation and the drillers had to exploit deeper layers. A call-invitation (*vyzov-priglasenie*) as a form of recruitment for specialists remained rare in the Tiumen' region.²⁵ Both groups included the "fanatics" of the great Tiumen' explorations, as well as many specialists who went to Siberia with the credo: "If I have to then I

have to.”²⁶ This attitude was typically a result of the recommendations of their scientific supervisors during their studies or after long “educational” talks with authorities.

Fluctuation, which was an immense problem, was also influenced by difficulties of the migrants to adapt to the natural conditions and the harsh climate in Western Siberia. This is why in the beginning of the 1970s three-fourth of the working force in the Tiumen’ region originated from Southern Siberia²⁷: It was an attempt to prohibit the long-lasting adaptive changes of workers from Southern and Western parts of the Soviet Union to the region’s climate. During the 1970s, workers from Central Asia were successfully settled in the Tiumen’ region and the planners reached their goal to keep emigration lower than immigration. In the early 1970s, technical schools were opened in the region to educate the local youth for work in the oil and gas industries, mostly in such professions which needed heavy physical work. The gas trust *Tiumentgazprom* did not have its own basic educational institutes in the Northern Tiumen’ region for training their own workers, in contrast to the oil production industries.²⁸ Unskilled workers for the construction and transport units, however, were directed to Tiumen’ through the Administration for Organized Recruitment (*orgnabor*). The workers recruited by this institution were in most cases allocated to the Northern regions.²⁹ Their number rose 2.4 times between 1967 and 1976, but nevertheless only represented 3–8% of all recruitment.³⁰

Moreover, the Soviet Youth Organization *Komsomol* was one of the main suppliers of workers in all areas of Western Siberia where the “Northern fee” (*severnaia nadbavka*³¹) was too low, especially in the Middle-Ob oil region.³² In the 1960s more than 20,000 young workers were sent to Western Siberia by public call (*obshtestvennyi prizyv*).³³ The planning bodies for that purpose used a system that had been established since the Stalinist period: young graduates were obliged by the state to work at a working place they had been allocated to for a 3-year period. The young workers were hired in two ways: Through the *Komsomol* vouchers (*komsomolskie putevki*) or through the “student construction brigades” (*studentcheskie stroitelnye otriady*). The *Komsomol* vouchers were part of a system that directed young workers to the army or to top-priority industrial projects” (*udarnye stroiki*). The origin of this youth movement goes back to the late 1950s and was formalized in the early 1960s through a decree “On the Participation of *Komsomol* Organizations of Moscow, Saint Petersburg and Kiev in the industrial construction of the Virgin Lands”.³⁴ The student construction brigades had been deployed since the beginning

of the energetic development of Western Siberia. In 1966, the CC CPSU and the Council of Ministers released a decree “On the Public Call of the Youth to the Important Construction Projects of the Five-year Period,” and already in the same year more than 800 Komsomol volunteers arrived in Western Siberia and started to work for *Glavtiumenneftegaz*, the local oil trust. In addition, 1600 students arrived in 1965 for work in construction brigades.³⁵ The Komsomol was responsible for the building and maintenance of oil and gas objects and for that purpose offered brigades with young specialists. Simultaneously, it was also responsible for building up an infrastructure (towns, railways, etc.); for example, Ukrainian students and students from other major Western Soviet cities worked in Western Siberia during the summer months.³⁶ The Komsomol youth trusts *Shaimgazstroi* and the trusts *Severgazstroi* und *Tiumengazmontazh* were responsible for the quick development of the gas deposit *Medvezhe* in the Iamalo-Nenets district and the building of the city Nadym; and among the tasks of the Komsomol trust *Tiumengazmontazh* in Tiumen’ was the building of houses and sanitary facilities.³⁷ Students also delivered medical services and acted as cultural mediators and agitators of the communist ideology.³⁸

Another possibility to meet the demand for manpower was the recruitment of army reservists. As these were not specialists they were employed in construction work, but this did not always go smoothly. In one document from 1980, for example, the officials complained that the number of reservists remained below the planning targets. They argued that the public call was organized too late and led to delayed recruitment. Again, in the same document, the inappropriate living conditions were named as one reason for workers not to come to Western Siberia.³⁹ Even now, it remains quite unclear whether prisoners were then forced to work in Siberia, as mentioned by the German newspaper *Der Spiegel*.⁴⁰ Nevertheless, due to the shortage of manpower, trusts had to hire everyone they could get: Worker brigades even contained former miners, police officers, peasants and delinquents.⁴¹

Mobilization under those circumstances seemed to be quite difficult. A Russian scholar characterized the motivation of the workers as follows: “The first [group – annotation D.K.] are romantics ... the second group formed those who have read, and this warrantable, that there will be a lot of work in all areas and analogous, good payment. These came alone or with their families. For a short period or for a longer period or forever. The third group consisted of those who wanted to prove themselves, their skills and their possibilities.”⁴²

This shows that material benefits played an important role for the workers' motivation. Due to Brezhnev's ideas of "developed socialism" and welfare state, the Soviet citizens had developed a consumerist attitude. This found its roots in the Khrushchev era and let material reasons appear as one of the main criteria for attractive workplaces. Incomes ought to provide what was considered to be a "normal life".⁴³ Therefore, to make the recruitment more attractive for the second group, the workers obtained material benefits, for example, the "Northern fee" to their normal wages for work in the Soviet North. Furthermore, the workers received other privileges concerning holiday regulation, sick benefits, work benefits, retirement age, and the reservation of living space and housing cooperatives.⁴⁴ However, the advantage of such benefits has to be doubted. In fact, the real wages in the region were often lower than in other regions of the Soviet Union. Food was more expensive than in the Western parts of the country and natural conditions led to an increase in costs of living. That caused disapproval among the workers and led to an increase of emigration.⁴⁵

WORKING AND LIVING IN THE COLD

In the beginning of the development of the oil and gas complex, the range of Western Siberian resources was intensively discussed. For those who argued in favor of their exploitation, the shift system (*vakhtovyi metod*) became a main argument of the given economic feasibility of the whole development project. The method foresaw the flying of specialists to the region's oil and gas fields for a shift of several weeks and their accommodation in small temporary settlements. One of the main supporters of that method was Aleksei Kortunov, the Soviet gas minister, who argued that the *vakhhta* was keeping the development costs low, and therefore, to fulfill his hopes to generally exploit Siberian gas resources. He rejected the expensive building of big cities for whole workers' families in the "taiga or tundra".⁴⁶ On the contrary, he underlined the project's importance as a (temporally limited) school for young specialists that were later to be sent to the East even more.⁴⁷ Gosplan's head Baibakov later argued that the *vakhhta* was not only to be applied in the oil industry but in all industrial branches in Western Siberia. If workers would live in towns with communal facilities and would be brought on reliable roads to the remote oil fields where they were to live in basic accommodations,⁴⁸ this would probably make a positive contribution to workers' motivation. As noted in Baibakov's

memoirs “to a preassigned time [...] the helicopter flies in [annotation D. K.] the next shift. The demoralized, exhausted, frozen drillers looked forward to homely warmth, their family, recreation.”⁴⁹ According to a leading Siberian scholar of that time, the temporary character of workers’ settlement and the great fluctuation had a negative mental impact. The “psychology of limited temporal presence” led to missing responsibility for the region’s development, normal living conditions, and environmental treatment.⁵⁰

The brigade was the center of everyday work life in the *vakhhta*-system much like the entire Soviet labor system. Most work relations were limited to a small “workers’ world” with 84% of blue-collar workers, 12% managers on different levels and 4% of nonmanagerial staff. The foreman (*master*) was the link between the brigadiers (*brigadir*) and their brigade, with higher economic and political authorities. In his “one-man-management” responsibility and authority were concentrated.⁵¹ In the Tiumen’ oil and gas fields, the *master* and his brigade provided the main working units. The drilling brigade consisted of workers with different professions as drillers, motormen, and mechanics. The master’s task in this remote area was the organization, supervision, control, and even the selection of workers.⁵² The foreman held responsibility for the whole brigade’s production output and their teamwork. The masters shared a modest level of education with their workers, and their authority mostly derived from social and organizational skills that they obtained “in office.”⁵³ Socialist competitions between working collectives within the Western Siberian oil and gas complex or between collectives of different oil and gas regions⁵⁴ were organized to improve production output.

Everyday life in Siberia suffered from destitution. Living standards were low due to missing living space, schools, hospitals and recreational facilities. In the bigger towns families often had to wait very long for a flat and several people or families had to live in one together. Recreation facilities were insufficient, too. A decree “On further development of towns and settlements in the oil and gas regions of the Tiumen’ oblast” was issued in December 1971⁵⁵ aimed at an overall improvement of living conditions, housing, local food production, communal and cultural facilities, but the problem could not be solved for years. The move to Siberia meant poor living standards, especially for established specialists from the Western part of the country. Many of them, as the geologist Iurii Erv’e mentions in his memoirs, had to give up a well-established life with their own flat “in the best living quarters” of some Western Soviet city and exchange it for “[...]”

minus 53 in Yakutia, minus 45 in Novosibirsk and minus 37 in Sverdlovsk while in Moldova they are growing wheat, and apricots are blooming”.⁵⁶ Pictures of the cold and bad housing conditions arose and stood in a strong contrast to promises of “big oil” that their supervisors had made. Regardless, in contrast to other workers, specialists and officials could establish themselves more easily than unskilled workers. For an extra fee, they managed to maintain high standards in their housing or obtained additional “benefits” such as parlor cars.⁵⁷

At the shift-settlements (*vakhtovyi poselok*) and for most of the unskilled construction workers, living conditions were even worse. During their shift, workers mostly lived in settlements consisting only of wagons, close to the drilling and exploitation spots. These wagons were poorly equipped with rarely more than a bed and a table.⁵⁸ Smaller settlements and towns consisted of barracks and wooden houses, but in the beginning they were only equipped heating, not water and plumbing. For construction workers, living standards, even in the towns such as Nefteugansk, were similar to the shift-settlements: In some cases, their dormitories had neither table nor chairs.⁵⁹ Kosygin during his trip to Western Siberia in 1968 “lost his temper” and ordered the renovation of the buildings. This, however, could not hide the fact that such attempts very often remained a drop in the ocean: The investments in the regions not directed into the oil and gas industry itself even got smaller during the 1970s; their share was only 19%—much smaller than in many developed regions.⁶⁰ Even in the mid-1980s, a Soviet newspaper mentioned the wagons as big a city as Surgut (over 200,000 inhabitants), in which workers were living without a reliable heating system.⁶¹ Under those circumstances, the gap of material well-being and social prestige even seemed to widen between leaders in the oil and gas industry and the blue-collar construction workers.

Concerning the gender of employees, the Western Siberian oil and gas complex likewise other Siberian megaprojects remained a “man’s world”.⁶² As work was physically challenging, women had serious difficulties to find work, making it harder to integrate them in the production process. If women accompanied their husbands to Western Siberia, they were often employed in canteens, in schools, medical health services, and offices.⁶³ Only a few women were employed as specialists or officials: A female mayor of the city of Surgut in the early 1970s⁶⁴ and female engineers who specialized on oil production were listed among various oilmen and officials in an illustrated publication on the history of *Glavtiumenneftegaz*.⁶⁵ Life for women in Western Siberia was thought to be much harder than in the central and

southern regions due to the lack of social institutions such as kindergartens, schools and domestic appliances.⁶⁶ Women also worked in the student brigades of the Komsomol but were employed in physically less demanding sectors such as food production but also in construction industries. The “*Toboliansochki-76*,”⁶⁷ for example, worked in the fishing combine in Tobolsk, and there were women who finished a dormitory for *Tiumenzhilstroï*. Despite this, the number of girls in the student Komsomol brigades was expected to not exceed 30%.⁶⁸ Due to a quote from Baibakov, women ought to create a warm atmosphere for their oilmen-husbands at home, largely fitting into the official Soviet concept of women’s femininity (*zhenstvennost’*) in the late Soviet period.⁶⁹

Even though the planners tried to improve the regional infrastructure, surveys showed that the bad living conditions were the number-one-reason for emigration in most cases. Respectively, the respondents blamed the insufficient food supply and the insufficient recreational and cultural facilities. Although the workers received material benefits and concessions, the real wages were lower than in the European part of the Soviet Union, because costs of living were higher due to costly transportation routes to the northern regions. Nevertheless, it was due to the bad living conditions that almost 40% of the workers did not want to stay under any circumstances. It should be noted that these survey results may not entirely be reliable, as respondents might have feared disadvantages at their next working place if they would have listed low wages and dissatisfaction with their work as reasons for their emigration.⁷⁰

THE SIBERIAN CAMPAIGN AS A MOBILIZATION PROJECT OF THE LATE 1970s

During the 1970s, it became obvious that the range of resources in the older oil and gas regions was definitely limited. The Volga–Urals region peaked in the mid-1970s, export obligations rose steadily, while exploratory work was well below target and the extensive oil production showed deficits. This is why at the 26th Party Congress Kosygin announced a roll-back on atomic energy and even coal.⁷¹ However, on this occasion Brezhnev delivered a speech focusing on the development of Siberian resources in territorial complexes, which should cut long-transportation routes through a settlement of processing industries of several sectors close to the resources.⁷² Internal voices and a CIA report of 1977 anticipated

that the Soviet Union would be confronted with decreasing oil production and a labor shortage in the upcoming years. Since the 1960s, birth rates dropped and it was only in Central Asia that birth rates increased.⁷³

At the December plenary meeting 1977 Brezhnev announced a focus on Western Siberian oil and gas. Shortly after Kosygin's trip to the Western Siberian oil and gas complex in late March 1978,⁷⁴ Brezhnev went on a much-publicized trip to Siberia. The trip was followed by the media to a greater extent than Kosygin's and regularly appeared in the headlines of *Pravda*⁷⁵ and in the television program “Time” (*Vremia*).⁷⁶ Brezhnev's attention was directed at economic and military projects in the region. His mobilization efforts were represented by meetings with local party committees, members of the Komsomol and young soldiers who worked on the Baikal-Amur-Mainline (BAM). The film “Always with the people” (*Vsegda s narodom*) was made in 1978 about Brezhnev's trip to Siberia and underlines that impression. It displayed the potential of Siberia, its industries, the commitment of its citizens, the mobilization of the Komsomol and Siberians towns and military bases.

On the 1st of May 1978 the *Literaturnaia Gazeta* published an article under title “The Siberian Might” about various industrial projects in Siberia shortly after Brezhnev's trip.⁷⁷ The article did not only focus on the economic development of the scientific and coordination program “Siberia” (*Sibir*), but published a picture with masses of Siberian workers. *Pravda* also participated in the media campaign: The report “For Eastern Regions a complex development” (*Vostochnym raionam—kompleksnoe razvitiie*) discussed the issue of resource development and underlined the political intensions.⁷⁸ The campaign's main aim, therefore, was to change the image of Siberia from an underdeveloped province to a pioneering engine of the economic future.

This campaign also used visual accounts. Pictures and posters generating “optimistic mental images”⁷⁹ were of great use to shape the mobilization campaign as they were present in the everyday life of the workers and created a link to the presence of political authorities.⁸⁰ The way the Siberia and Gas Campaign took after the 26th party conference can be traced through the posters used. On the propaganda poster for the 26th party conference in 1976 only three of the ten economic projects shown were to be realized in Siberia (oil regions in Tiumen' region, BAM, Saiano-Shushenskaia GÉS).⁸¹ In 1978, however, a poster showed a man on a plane, waving goodbye and departing to the great projects of Siberia.⁸² In 1980, it was possible to present some results as can be seen on the poster

“The Siberian Might.” This presents countless high-rise buildings, hydroelectric power stations, bridges, petrochemicals, agriculture, pipelines and oil derricks widely spread out between the hands of a worker.⁸³

Such pictures were also used in other media as an attempt to change the image of Siberia as remote area to a seminal region, and in that way to attract motivated workers. The operation in the Far North was presented as a “school for life” in which the workers would have the chance to live new experiences with nature⁸⁴ as well as experiencing life in community with their coworkers. The media campaign generated a picture of togetherness and solidarity of the workers of the Far North and of their “work”: it was presented as something the workers had pushed forward and that aligned them to the region.⁸⁵ Articles kept trying to show progress by providing figures, such as the length of the newly laid pipeline or the quantity of transported raw material.⁸⁶ In addition, there were articles openly discussing the problems of infrastructural development, for instance, concerning the building of houses, and making suggestions about how to address these problems.⁸⁷ This gave the impression of an enterprise to which everyone could make a personal contribution.⁸⁸ In contrast to an aggressive colonization, romantic pictures of Siberian nature and the life of adventurers were created. This picture was not as contradictory as it was at the BAM (Baikal-Amur-Mainline) where the “smell of the taiga”⁸⁹ formed a strong contrast to the modern and unobstructed construction of the railway.

Movies were valued by the political membership similarly to pictures and posters for their mass effectiveness.⁹⁰ The closeness of the population to movies was estimated to be very high, and a moral message could be included in them, generally showing human progression and a change for the better.⁹¹ The life story of Farman K. Salmanov fit well into the picture as the political leadership was presenting of a typical Soviet hero in the Western Siberian oil and gas complex. His figure was characterized in the movie *Strategiia Riska* (“The Risk Strategy”), which shows the advancement of the head of a geological expedition to the chairman of a trust. Images in the movie were tightly connected to images published in the Soviet press, such as a picture that had been published on the front page of the journal *Nef'tianik*.⁹² It is a representative sketch of a man who at the beginning of the 1960s revolts against the lethargic position of his superiors and independently prepared the relocation of the geological exploration group under his leadership to the Tiumen' North, where he thereafter discovers several giant deposits. The movie precisely defines the

character of the West Siberian hero: he is persevering, hardened, independent—portraying how the developers of the region need to be.

These and other exemplary qualities are also described in the memoir literature and texts of numerous high-ranking oilmen, geologists, party officials, and journalists that were published since the 1980s.⁹³ Their experiences were mostly regarded as “historically significant and socially important,” having a positive influence on the society (*sotium*).⁹⁴ Here—mostly by using the examples of real living persons—pictures of ideal superiors and coworkers are presented. Due to Erv’e, the Tiumen’ oilmen had their own character: “The weak moved to the South, into warm regions, to the West, to well-equipped flats [...]. The most who stayed, did pass their own Tiumen’ school [...]. The school of brave, dedicated and energetic people who toughened in the fight of overcoming the harsh nature [...]”⁹⁵. To Viktor Muravlenko, head of *Glavtiumenneftegaz*, flexibility appeared to be a character trait as oilmen were proud; they were always ready to leave the places where they just had arrived in order to find new oil.⁹⁶ It even seemed to fit the “normal” idea of a “young, tall and energetic conqueror of the North” when oilmen had a “domestic” appearance.⁹⁷

Nevertheless, the leadership was well aware that due to the hard working condition most efforts would be undertaken by the Soviet youth. Attempting to mobilize even more young workers in the late 1970s, General Secretary Brezhnev on the 18th Komsomol congress in April 1978 summarized the last 10 years in which millions of square kilometers have been economically developed and settled. Yet, the region would not only need hands but construction workers, mechanics, drivers, drillers, teachers and other professions. These ideas were not new.⁹⁸ Since the 1960s, the Komsomol was seen as a driving force in the development of the oil and gas complex. Gas minister Aleksei Kortunov valued the activities of the youth in the Western Siberian oil and gas complex in the “fight for oil and gas on the forefront.” He underlined the age of the workers that were younger than other workers in the forest and fishing industries. Due to the example of Anatolii Kashaev, who was employed in the building of railways in the Western part of the Soviet Union and later came as a specialist to Tiumen’, the youth from all over the country was to be sent to Western Siberia. There the youngsters would be educated and later sent to regions further east. At the same time the local youth would be trained for the work in the oil and gas industry also in the Tomsk region.⁹⁹

Therefore, through the decree of the CC and the Council of Ministers “Over the measures for the accelerating development of Western Siberian oil industry” the Komsomol gained the role of a sponsorship (*shestvo*) over the projects, and would expand educational work and organize recreational time. Additionally, the Komsomol would gain more publicity and present the different projects in the media, for example in the newspaper *Komsomolskaia Pravda*, the radio station *Iunost’* (“Youth”), the TV and the publishing house *Molodaia Gvardiia* (“The Young Gard”). The media ought to be used to present the “heroic work of the Komsomol and Youth within the development of the Western Siberian oil and gas complex”.¹⁰⁰ Furthermore, the Tiumen’ local party committee decided to publish a newspaper called *Gorizont* (“Horizon”) twice a week with an edition of 3000 that would “start with the arrival [...] of the students [...] and with regard to the seasonal character of their work”.¹⁰¹ In that way, students and Komsomol brigades were to become multipliers to overcome regional stereotypes among their relatives, friends, and neighbors in the Western and Southern regions.¹⁰²

For being successful multipliers, the media tried to create a unique idea of the Youth’s role, work, and life in the Western Siberian oil and gas complex. They referred to the geologist’s self-conception to be “colonists”, “adventurers on treasure hunting” in the cold and remote regions of the country.¹⁰³ Posters tried to attract the youth with headlines such as “Your country—romantic” („*Tvoia strana – romantik*“).¹⁰⁴ The students as well as the geologists were presented as “Robinsons” that ended in solitude (*gluhoman*) and had to start from scratch, but in the meantime lived a “romantic life” in a “town of tents”.¹⁰⁵ The young people from the Western and Southern parts of the Soviet Union were often attracted by the idea of Siberian nature and romanticized their natural surroundings in their reports: “Yesterday we were in the taiga. We walked through the swamps. That was interesting. The soil felt elastic under our feet. The larch shimmered bluish. [...] The nicest experience was the sauna. A real Siberian one with birch branches and a steam bath”.¹⁰⁶ Everyone who did not want to live under these circumstances, however, was written off: “We feel no grievance for those who hide from the difficulties and escaped to find a warm place”.¹⁰⁷

On the other hand, they focused on the industrial development and the Youth’s contribution to it: “We are no loner-pioneers but a strong organized division of the Soviet working class and on our shoulders we hold a giant might, difficult tasks, we do not fear difficulties of the fight against the

harsh and malicious nature.”¹⁰⁸ The construction projects of the Komsomol should become “laboratories of fast drilling and construction work, schools for inventing of progressive methods.”¹⁰⁹ And they went on: “We are constructing the Tiumen’ taiga for centuries; we are no guests here but permanent rulers.”¹¹⁰ The students would have become aware of the importance of their work through the “numbers” of built houses, kilometers of pipelines and so on that in the planned economy were an official measure for productivity in all industrial sectors and for the administration. These figures were also used for the Komsomol: “When the working semester has ended we are able to see the tangible results — the apartment houses and public buildings that had been built by students, the industrial buildings, and roads. We can name the number—the million rubles that the student work costs. And we understand: The result is determined by the success of the political work in the student brigades.”¹¹¹

Despite these “heroic” ideas of the work in Western Siberia in official speeches and the propaganda campaigns, its success to mobilize workers is highly questionable. In a meeting in January 1979 several leaders of regional Komsomol organizations, one brigadier of *Tomskgazstroï* criticized that Komsomol members and youngsters from Azerbaijan were neither trained for the construction industries nor did they have an appropriate image of the working conditions in Western Siberia, which is why many of them left Western Siberia after facing initial difficulties.¹¹² On the whole, the Soviet citizens of the 1970s were also quite used to the gap between the propaganda and reality.¹¹³ Therefore, Brezhnev’s trip and the following media campaign seemed just a “farce”.¹¹⁴

SOCIAL PROBLEMS AND CONFLICTS IN THE WESTERN SIBERIAN OIL AND GAS COMPLEX

Official propaganda could not hide the fact that it was difficult to recruit workforce to the Arctic regions. As early as 1964 the Institute for Economic and the Organization of Industrial Production (*IEOPP*) of the Siberian branch of the Academy of Sciences warned the planners to be careful with sending “unwanted elements” of the Western regions to Western Siberia. They feared that these would probably have a great impact on the indigenous population and would increase crime and alcoholism in the region. In January 1967, regional party officials complained about mistakes concerning the selection, nomination and “education” of

technical and working cadres of *Glavtiumenneftegaz* and about the authorities within the *glavka* only superficially checking their political attitude and ability to work. People very often climbed up the hierarchy of an organization despite not providing the necessary personal and organizational skills.¹¹⁵

Minor problems were linked to the “moral discipline” of young workers and students. The Komsomol newspaper “Horizon” (*Gorizont*) complained about the laissez-faire attitude of the leaders toward amusements and intimate relationships of the students who were still characterized as “children”. These amusements were to be “dancing parties until the morning” or the trip of some students to a sauna far from the camp without any supervision. The article complained that even if the students had a private or even intimate life because the “stars in the Taiga were so beautiful”, the young “fighters” ought to maintain the moral spirit as well as the official and unofficial rules.¹¹⁶

Alcoholism, however, was widely spread among Russian workers of the 1970s: According to one survey, one-third of the Russian workers were heavy drinkers, and in remote factories even 40%. Drinking alcohol became a social ritual on almost every occasion, even in work relations. Drinking meant a manifestation of masculinity, virility, and strength.¹¹⁷ This problem was nothing new for Soviet energy workers: e.g., in the Donbass coal region the “beloved” recreational activities of the miners were drinking vodka, playing cards, and fighting.¹¹⁸ Regardless, some documents of the late 1970s presented a shocking picture of alcoholism and its consequences. One telegram to the Komsomol Central Committee reported about an incident from November 1979: On November 18th after a dancing evening in the club *Maiak*, two men became entangled in a fight, with their family names and the description suggesting it was ethnically motivated. After the incident in the club, the fight continued in the dormitory where Azerbaijani students from a student brigade took part in the fight. Four members of the brigade were seriously injured. Indeed, between 1978 and 1979, 76 offences were recorded in the polar city Urengoi alone. Very often individual conflicts led to fights in which firearms were also used. In most cases the involved persons were drunk. Within 10 months 115 persons were held liable for alcohol abuse, but the responsible organizations did not react properly. Officials instead blamed missing ideological education, work discipline and fulfillment of plans in the region. This lack of proper attention led to more incidents within the Komsomol: seven Komsomol brigade members from *Urengoineftegazgeologiiia* changed their

working place, two were dismissed on their own request and two persons were dismissed for dawdling. For the ongoing working months of the student construction brigades almost every third member of the brigade was involved in dawdling. The missing material base was blamed for the offences: During these months the dormitories were relocated several times and were badly equipped and overcrowded. For young families, the report stated, the situation for finding living space was even harder and they had to wait even longer for a flat. The living conditions were very low, as there was not enough food and not enough recreational possibilities. Even so, after a meeting of the Tiumen' Komsomol committee the responsible people were fired and the criminal put on trial.¹¹⁹ Other reports named cases of refusals of work, dawdling, alcoholism, and fighting. In four cases they led to death of the involved persons. In one case a member of the Estonian brigade, G.A. Vasilev, a demobilized soldier from the red army, died as a consequence of drinking stolen alcohol.¹²⁰ In another case in the Tomsk region, a Komsomol member from Kaliningrad died because of a fight after consuming alcohol.¹²¹ Although Russian scholars even today reject conflicts with a national background,¹²² the naming of nationalities of the delinquents confirms the assumption that many conflicts occurred between them.

The oil industry also caused problems among the indigenous population. The oil and gas industry disturbed the traditional way of life of some 23,000 Khanty, Mansi and Nenets, 12,000 of which lived as nomads.¹²³ They lived from hunting and gathering as well as reindeer breeding. The policies of settling nomads had been in effect since the 1930s so that they could be taught "principles of brigade organization, Soviet law, sanitation and Communism."¹²⁴ But denomadization and collective reindeer breeding, a source of producing heavily demanded meat for the Northern regions was not achieved until the early 1950s.¹²⁵ In the 1960s, the Soviet leaders announced the achievement of a Soviet nation, praising the leap from primitive communal society to socialism.¹²⁶ The arriving oil and gas industry had an even greater impact: From 1959 to 1979 the overall population in the Khanty-Mansi district increased by a factor of 4.6% while the proportion of the indigenous people dropped from 14.5 to 3.2%.¹²⁷ Furthermore, it limited those areas which could be used for reindeer breeding.¹²⁸ As an oilmen mentioned in his memoirs, "for many indigenous Siberians, the advancing oilmen must have seemed like unwelcome intruders. Of course, the view prevalent among the newcomers, that they were national heroes who should be free to do anything they liked, did

little to enhance their popularity [among the indigenous population—annotation D.K.].”¹²⁹ Even “indigenous” Russian inhabitants who lived in the area up to its industrialization, among them friends of officials, expressed their dissatisfaction with the new arriving “pioneers” that were keeping them away from fishing and woodcutting, disturbing the peace and turning everything upside down and even made them work “all day and night.”¹³⁰ The conflict between the land, its significance, and the contrary interests of its inhabitants intensified since the 1960s. The environment suffered extensively through geological works, pipeline accidents, burning accompanying gas, forest fires and water pollution.¹³¹

For young indigenous people moving into the cities was an attractive option. Smaller towns were underdeveloped and did not offer any broader perspectives, which is why youngsters preferred “films, food, education, and social life of the central towns to life in the tundra”. As a young Khanty explained in 1976: “Reindeer breeding is not desirable to young people, who want films, volleyball, and to leave from here. Many try to live in Tiumen. Some return.”¹³² In November 1976 the Mansi writer Juvan Šestálov tried to mediate between the interest groups while citing parts of a speech of Antonina Grigoreva, a Khanty official, on a meeting of the Supreme Soviet: “We, the indigenous inhabitants of the Far North vote consent for the great Siberian oil. The great oil is the youth of the old Iurga. But we also want that the geologists and oilmen do not pollute the water, do not damage the Taiga without a reason, that they—as real landlords—watch over the plants and animals and save them for the coming generations. We have to act in such way that the small people of the North—the Khanty, Mansi, Komi, Selkup and Nenets—do not have a reason to complain about the oil and gas industries of the North but do see and experience a faithful, reliable helper [in these industries].”¹³³ This request was sadly not fulfilled. In 2000, the *Samotlor* region was called an “ecological catastrophe zone.” Pipelines contaminate rivers, lakes, and groundwater; accompanying gas was burned and caused air pollution. Cancer rates among the indigenous people rose, and life expectancy decreased from 61 to 45 years.¹³⁴

CONCLUSION

Under Brezhnev and his concept of “developed socialism” Soviet citizens developed a wish for welfare and consumerism, and official statements strengthened these wishes. Since 1956, the creation of living space had

been a priority and until the 1980s many Soviet citizens at least managed to improve their housing standards. Radios, TVs, refrigerators, and washing machines were, by the end of the 1970s, widely spread in town households, and material well-being became one of the main goals of Soviet citizens. Under those circumstances, work lost its character of a struggle for existence, but became the search for well-paid jobs which opened the access to consumer goods and social networks.¹³⁵ Compared to such improvements in the Western industrial regions of the Soviet Union, work and life in the Western Siberia oil and gas complex seemed to be less than promising. Specialists often had to cut their living standards which they had only gained after long years of changing workplaces in various regions and social promotion within the industrial and political hierarchies. Brigade workers faced even more deprivation: despite the promotion of automated industry, work in the Western Siberian oil and gas fields remained manual. Material shortages influenced the structure of working days and periods, and well-being at the workplace mainly depended on personal relations with foremen and coworkers. In the remote towns and settlement, workers had to lower their sights even more: Missing recreational facilities as sport halls and clubs led to boredom, fighting and drinking, leaving workers and youth spending recreational time far away from official (Komsomol) institutions.

The Western Siberian oil and gas complex is the centerpiece of the Russian economy even today. However, it remains questionable if propaganda and the “myth of the heroic Siberian” oilman of the 1960s and 1970s had an impact for workers’ motivation and succeeded in changing the perception of Siberia within the Soviet Union and abroad. Instead, the temporary character of an exotic youth project, missing quality of public works and a lack of financial means left their social and environmental marks until this day.

NOTES

1. Klaus Gestwa, *Die Stalinschen Großbauten des Kommunismus: Sowjetische Technik- und Umweltgeschichte, 1948–1967* (München: Oldenbourg, 2010).
2. Jörn Grünewald, Die Ethnisierung des Proletariats. Arbeiter in der Ölindustrie Bakus im ersten Drittel des 20. Jahrhunderts, in *Sowjetische Bergleute und Industriearbeiter: Neue Forschungen*, ed. Tanja Penter, vol. 37 of *Mitteilungsblatt des Instituts für soziale Bewegungen* (Essen: Klartext Verlag, 2007), 31–50.

3. E.g. on the general development of frontier areas see: Greg Rohlf, "Dreams of Oil and Fertile Fields: The Rush to Qinghai in the 1950s," *Modern China* 29, no. 4 (2003): 455–489; For a case study on oil workers see: Terisa E. Turner, "Oil Workers and the Oil Bust in Nigeria," *Africa Today* 33 (1986): 33–50.
4. Eva-Maria Stolberg, *Sibirien: Russlands "Wilder Osten" – Mythos und soziale Realität im 19. Und 20. Jahrhundert* (Stuttgart: Franz Steiner Verlag, 2009), 323–332.
5. The Stakhanovite movement aimed at increasing production through an authoritarian control over society. See Donald Filtzer, *Soviet Workers and Stalinist Industrialization: The Formation of Modern Soviet Production Relations, 1928–1941* (London: Pluto Press, 1986).
6. Paul T. Christensen, *Russia's Workers in Transition: Labor, Management, and the State under Gorbachev and Yeltsin* (DeKalb: Illinois University Press, 1999), 32.
7. Carsten Goehrke, *Russischer Alltag: Eine Geschichte in neun Zeitbildern vom Frühmittelalter bis zur Gegenwart*, vol. 3 (Zürich: Chronos, 2005), 356–359.
8. Adolf Karger and Claus Christian Liebmann, *Sibirien – Strukturen und Funktionen Ressourcenorientierter Industrieentwicklung* (Köln: Aulis, 1986), 30–31.
9. See also: Linda J. Cook, *The Soviet Social Contract and Why It Failed—Welfare Policy and Workers' Politics from Brezhnev to Yeltsin* (Cambridge, MA: Harvard University Press, 1993), 19–53.
10. In the beginning of the exploitation of Tiumen' oil and gas, these resources ought to cover the regional needs and to supply the refinery at Omsk. In: RGAĖ, f. 4372, op. 62, d. 544, ll. 164–165; Nikolai Bajbakow, *Sache des Lebens: Aufzeichnungen eines Erdölarbeiters* (Berlin: Dietz Verlag, 1985), 339.
11. D.A. Smorodinskov and V.N. Klepikov, eds., *Neft' i gaz Tiumeni v dokumentakh, 1966–1970*, vol. 2 (Sverdlovsk: Sredne-Uralskoe Kizhnoe Izdatel'stvo, 1973), 135–136.
12. *Ibid.*, 13.
13. Since the late 1960s several Western European countries signed "gas for technology" deals with the Soviet Union. In: Per Högselius, *Red Gas: Russia and the Origins of European Energy Dependence* (Basingstoke: Palgrave Macmillan, 2013), 3.
14. Tiumen' oil production increased from 0.2 million tons in 1964 to 352.85 million tons in 1982 while overall oil production rose from 224 million tons in 1964 to 613 million tons in 1982. Soviet gas production grew from 127.7 bcm in 1965 to 500.7 bcm in 1982. In: Mariia V. Slavkina, *Triumfi tragediia: Razvitie neftegazogo kompleksa SSSR v 1960–1980-e gody* (Moskva: Nauka, 2002), 69, 75, 85. On Soviet energy policy of the 1970s and 1980s, see: Thane Gustafson, *Crisis Amid Plenty: The Politics of Soviet*

- Energy under Brezhnev and Gorbachev* (Princeton, NJ: Princeton University Press), 22–181.
15. Grünewald, *Die Ethnisierung des Proletariats*, 31–50.
 16. Jennifer I. Considine and William A. Kerr, *The Russian Oil Economy* (Northampton: Elgar, 2002), 23–56.
 17. Bajbakow, *Sache des Lebens*, 93.
 18. N.M. Pashkov, *Deiatel'nost' partijnykh organizatsii Zapadnoi Sibiri po sozdaniiu i razvitiuu neftegazogo kompleksa 1964–1980gg* (Tomsk: Izdatel'stvo Tomskogo Universiteta, 1988), 89.
 19. Han-Ku Chung, *Interest Representation in Soviet Policymaking: A Case Study of a West Siberian Energy Coalition* (Boulder: Westview Press, 1987), 16.
 20. Slavkina, *Triumpf i tragediia*, 90.
 21. *Glavtiumenneftegaz*, the oil ministry's largest production organization in Western Siberia, was founded in 1965. In 1969, *Glavtiumenneftegaz* employed 26,401 workers. In: Galina Iu. Koleva, *Zapadno-Sibirskii neftegazovyi kompleks: Istoriia Stanovleniia*, vol. 2 (Tiumen': TiumGNGU, 2005), 74.
 22. *Ibid.*, 65–66.
 23. *Ibid.*, 114.
 24. Johannes Grützmacher, *Die Baikal-Amur-Magistrale: vom stalinistischen Lager zum Mobilisierungsprojekt unter Breznev* (München: Oldenbourg 2012), 234.
 25. Koleva, *Zapadno-Sibirskii neftegazovyi kompleks*, 95.
 26. Slavkina, *Triumpf i tragediia*, 89–90.
 27. Zh.A. Zaionchkovskaia and D.M. Zakharina, “Problems of Providing Siberia with Manpower,” *Soviet Geography* 13, no. 10 (1972): 682.
 28. Koleva, *Zapadno-Sibirskii neftegazovyi kompleks*, 69.
 29. Bernd Knabe, “Aspekte der gegenwärtigen Arbeitskräftepolitik in Sibirien,” in *Sibirien: Ein russisches und sowjetisches Entwicklungsproblem*, ed. Gert Leptin (Berlin: Verlag Arno Spitz, 1986), 123–137.
 30. Gertrude E. Schroeder, “Managing Labor Shortages in the Soviet Union,” in *Employment Policies in the Soviet Union and Eastern Europe*, ed. Jan Adam (Basingstoke: Palgrave Macmillan, 1987), 10–11; N.M. Pashkov, *Deiatel'nost' partiinykh organizatsii Zapadnoi Sibiri posozdaniiu i razvitiuu neftegazogo kompleksa 1964–1980gg* (Tomsk: Izdatel'stvo Tomskogo Universiteta, 1988), 90. Other scholars provide higher figures for recruitment through orgnabor in Western Siberia, e.g.: Koleva, *Zapadno-Sibirskii neftegazovyi kompleks*, 62–64.
 31. The “Northern fee” was a special benefit system for work in the Northern areas of the Soviet Union. It consisted of the zonal coefficient (poiaznoi koeffitsient) and the Polar fee (poliarka). In: M.V. Slavkina, *Triumpf i tragediia: Razvitie neftegazogo kompleksa SSSR v 1960–1980-e gody* (Moskva: Nauka, 2002), 99.

32. Russian State Archive of Socio-Political History (RGASPI), f. M-1, op. 65, d. 238, l. 38; Smorodinskov, *Neft' i gaz Tiumeni v dokumentakh, 1966–1970*, 83–84; 114.
33. Koleva, *Zapadno-Sibirskii neftegazovyi kompleks*, 70.
34. Viktor A. Pristupko, *Studencheskie otriady: istoricheskii opyt 1959–1990 godov* (Moskva: Moskovskii gumanitarnyi universitet, 2008), 35–43.
35. Pashkov, *Deiatel'nost' partijnykh organizacii*, 91.
36. “Tiimenskie besedy,” *Neftianik* 1 (1971), 3; Smorodinskov, *Neft' i gaz Tiumeni v dokumentakh, 1966–1970*, 17.
37. Smorodinskov, *Neft' i gaz Tiumeni v dokumentakh, 1966–1970*, 207.
38. Grützmacher, *Die Baikal-Amur-Magistrale*, 243.
39. RGASPI f. M-1, op. 65, d. 441, ll. 15–17.
40. The German news magazine *Der Spiegel* in August 1982 referred to 100,000 Soviet prisoners: “Dreckige Lüge,” *Der Spiegel*, August 16, 1982, 94–96.
41. Iurii G. Erv'e, *Sibirskie gorizonty* (Ekaterinburg: Sredne-Ural'skoe knizhnoe izdatel'stvo, 1999), 36.
42. Koleva, *Zapadno-Sibirskii neftegazovyi kompleks*, 64.
43. Walter D. Connor, *The Accidental Proletariat: Workers, Politics, and Crisis in Gorbachev's Russia* (Princeton: Princeton University Press, 1991), 133.
44. Knabe, *Aspekte der gegenwärtigen Arbeitskräftepolitik in Westsibirien*, 132–134.
45. Peter De Souza, “The Nature of Manpower Problem in the Development of Siberia,” *Soviet Geography* 27, no. 10 (1986), 689–715.
46. Slavkina, *Triumf i tragediia*, 61.
47. Smorodinskov, *Neft' i gaz Tiumeni v dokumentakh*, 20–21.
48. Bajbakow, *Sache des Lebens*, 371.
49. *Ibid.*, 364.
50. Grützmacher, *Die Baikal-Amur-Magistrale*, 266.
51. Connor, *The Accidental Proletariat*, 162–163.
52. Erv'e, *Sibirskie gorizonty*, 36.
53. Connor, *The Accidental Proletariat*, 163.
54. „Tiumen' – Tataria: Sorevnovanie neftianykh gigantov“, *Neftianik* 7 (1974): 1–2.
55. State Archive of the Russian Federation (GARF) f. 5446, op. 105, d. 278, l. 95-102ob.
56. Erv'e, *Sibirskie gorizonty*, 29.
57. Lev Tchurilov, *Lifeblood of Empire: A Personal History of the Rise and Fall of the Soviet Oil Industry* (New York: PIW Publications, 1996), 66.
58. Stanislav V. Vtorushin, “Zolotyie gody: Povestvovanie o zhizni,” accessed September 12, 2012, <http://www.akunb.altlib.ru/files/LiteraryMap/Personnels/Vtorushin.html>.

59. Tchurilov, *Lifeblood of Empire*, 69–70.
60. Leslie Dienes, “The Development of Siberia—Regional Priorities and Economic Strategy,” in *Geographical Studies on the Soviet Union*, ed. George J. Demko and Roland J. Fuchs (Chicago: Chicago University Press, 1984), 189–213.
61. David Wilson, “The Siberian Oil and Gas Industry,” in *Siberia: Problems and Prospects for Regional Development*, ed. Alan Wood (London: Croom Helm, 1987), 96–129.
62. Grützmacher, *Die Baikal-Amur-Magistrale*, 290–293.
63. E.g. Tchurilov, *Lifeblood of Empire*, 66; S.D. Velikopol’skii and Iu. I. Perepletkin, eds., *Glavtiumenneftegaz: 40-letniiaia istoiia Glavka v svidetel’stvakh ochevidtsev, vospominaniiakh, dokumentakh, fotografiakh* (Tiumen’: Mandr I Ka, 2005), 60 and 64.
64. Tschurilov, *Lifeblood of Empire*, 91.
65. Velikopol’skii and Perepletkin, *Glavtiumenneftegaz*, 52 and 91.
66. T.I. Zaslavskaia, V.A. Kalmyk, and L.A. Khakulina, “Social’nye problemy razvitiia Sibiri,” *Izvestiia Sibirskogo Otdeleniia Akademii Nauk* 1 (1982): 3–11.
67. RGASPI, f. M-17, op. 7, d. 12, l. 13ob.
68. RGASPI, f. M-1, op. 65, d. 325, l. 38.
69. Anne Köbberling, *Das Klischee der Sowjetfrau: Stereotyp und Selbstverständnis Moskauer Frauen zwischen Stalinära und Perestroika* (Frankfurt/Main: Campus Verlag, 1997), 124–220.
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PART III

The Social and Urban Life of Oil

Building an Oil Empire: Labor and Gender Relations in American Company Towns in Libya, 1950s–1970s

Elisabetta Bini

INTRODUCTION

In 1965, several Libyan men entered into the industrial area of Marsa el Brega, built by Esso in the early 1960s to refine and export the crude oil the company extracted in the desert, and blew up three storage tanks and a water pipeline. Their aim was to express their opposition to the Libyan monarchy, at a time of rising criticism of American oil companies operating in Libya. In the previous months, a growing number of articles published in Arab nationalist weekly newspapers had accused US firms of exploiting the country's wealth by employing foreigners rather than Libyans, and not allowing the Libyan government to control their activities, including their labor policies.¹ Esso Libya replied to such forms of opposition by increasing security measures in the industrial area and company town it had built for its American and British employees. Not only did it raise new fences and established three army checkpoints in Marsa el Brega, but it asked for support from the US State Department, which recommended the creation of a National Security Force to patrol pipelines, oil fields, and storage facilities.²

This story raises a series of questions about the ways in which American oil firms defined and reshaped their interests in Libya after the Suez crisis of 1956, when they expanded the country's oil production in an effort to

E. Bini (✉)
University of Naples Federico II, Naples, Italy

avoid the Suez Canal. Most research on postcolonial Libya has examined the “transfer of power” from Italy, to the UN trusteeship, to independence, or the relationship between the US government, American oil companies, and the Libyan state.³ This chapter takes a different approach. It analyzes the labor relations American oil companies introduced in oil camps and company towns, as Libya became one of the main oil-producing countries of the Mediterranean. Through a study of government sources, corporate and trade union records, newspapers, memoirs, interviews, home videos and Facebook pages, it argues that between the mid-1950s and the late 1970s, debates and struggles over labor policies played a crucial role in shaping US–Libyan relations.

Clashes and tensions between Americans and Libyans were not limited to trade unions and organized forms of labor protest, but extended to living spaces. By examining the conflicts that emerged around the oil camps and company towns American firms established in Libya, this chapter sheds new light on the social history of labor in the oil industry. It argues that US oil companies reproduced the gender, class and racial hierarchies that characterized other American camps across the globe, based on racial and ethnic segregation, and the elevation of white women to symbols and agents of America’s corporate civilizing mission. It thus contributes to an understanding of the experience of a specific category of skilled workers, which has not received much scholarly attention, but was crucial in the history of the global oil industry during the twentieth century, namely the expatriate workforce.

The study of social relations in oil towns has recently been at the center of a growing scholarship.⁴ As Robert Vitalis has argued, American firms exported to Latin America, Indonesia, and Saudi Arabia a model “rooted in Jim Crow,” with its ideas of “white supremacy, norms of discrimination, and segregation and, at its margins, of paternalistic racial uplift.”⁵ Such a model drew on and replicated the forms of segregation that had characterized mining industries on the American frontier, as well as US businesses in Latin America. As Myrna Santiago has pointed out in her work on early twentieth century Mexican oil fields, women “were an integral part of the local and transnational economy created by oil extraction.”⁶ White American women followed their husbands and established their homes in company towns, where they oversaw servants, formed ladies’ clubs, and attended social events.

While American oil companies operating in Libya drew on previous experiences, they also introduced significant changes. In particular, they

tried to limit the number of Libyans they trained and hired, and kept under control the size of the industrial area and company town. This decision was the result of a wider set of changes taking place in other producing regions at the time. After the nationalization of Iranian oil in 1951, oil firms were aware of the risks involved in employing a large number of local workers. The Abadan crisis in 1951–1954, in particular, showed the power large numbers of concentrated and organized workers in urban, industrial centers, could have over crucial nodes of the international oil market, and pushed oil companies to change their policies. After the crisis, oil companies decided to refine in Western Europe most of the crude oil they extracted in the Middle East. At the same time, they limited the number of local workers they employed in oil camps, in order to prevent the emergence of organized political conflict.

In Libya, American oil companies reproduced some of the features that characterized US suburbs in the post-World War II decades.⁷ They created segregated company towns for their white American and British engineers, technicians and secretaries, where workers could have access to the same forms of leisure and domesticity they enjoyed in the US. Women played a particularly important role in building the community, by organizing their families' everyday lives, along with the leisure activities of the town as a whole. By doing so, they maintained and reinforced the class and racial hierarchies needed for the expansion of American corporate capitalism. Like in American suburbs, US company towns in Libya were characterized by tensions: families did not always have access to the standard of living promised by the company, and many women felt isolated, especially single women who moved to Libya as secretaries.

While most studies of oil towns have focused on the decades preceding the rise of oil nationalism, this chapter investigates the ways in which the nationalization of oil resources in the early 1970s transformed labor relations and everyday life in American company towns in Libya. Once Muammar Qaddafi's regime came to power in 1969, it emphasized the need to create a class of skilled Libyan oil workers, capable of operating the plants US oil companies had built in the 1960s. During the 1970s, Libyan workers increasingly challenged American oil companies' labor policies, by demanding the right to live in company towns and have access to the same services as their American and British colleagues. As this chapter shows, relations between American and Libyan engineers, managers and

technicians—and their families—were characterized by strong gender tensions. While some Libyan men who moved into the company town considered American women as sexual objects, Esso Libya replaced families with male bachelors working on a temporary basis. In this context, the company town as it had been built in the early 1960s became unsustainable, until in the early 1980s American oil companies left Libya, in the context of growing tensions between the American and the Libyan governments.

BUILDING AND MANAGING AN INFORMAL EMPIRE

At the end of the Second World War, Libya was one of the poorest countries in the world. Italian colonial rule had been characterized by extreme violence and exploitation, particularly after the rise of the Fascist regime in 1922. Whereas the previous Italian government, which ruled over Libya between 1911 and 1922, had established numerous forms of exchange and collaboration with merchants and the Jewish middle-class in Tripolitania and Cyrenaica, the Fascist regime pursued a form of control based on racial segregation and subordination. Since Libya was to serve as Italy's "fourth shore," reviving imperial prestige and providing an outlet for Italy's overpopulation, the regime seized much of the land used by Libyans and established settlement farms through the *Ente per la colonizzazione della Libia* [Agency for the Colonization of Libya]. In Cyrenaica, where the Sanusi tribe resisted Italian colonial rule, the Fascist regime deported over 100,000 people to concentration camps built in the desert, killing most of the region's inhabitants.⁸

When Libya became independent in 1951, its population had been reduced to 1 million. Most people lived in the desert as seminomadic pastoralists and farmers, or in Benghazi and Tripoli. Despite the fact that during the Second World War and after independence tens of thousands of Italians left Libya, about 20,000 stayed behind. They continued to live in the farms they had acquired during the colonial period, and many of them worked as merchants and businessmen in Tripoli. In the early 1950s, Libyans and Italians interacted with a growing number of American and British citizens working in military bases, or for the International Bank for Reconstruction and Development (IBRD).⁹

Following the discovery of oil resources in the first half of the 1950s, Libyan society experienced a deep transformation. In 1955, the government passed a new Petroleum Law, which increased the presence of international oil companies in Libya. The Law encouraged competition among firms, by limiting the size and number of their concessions, and forced companies to develop their oil fields within a specific time period. With the introduction of this new Law, which included the possibility of paying lower royalties than in other oil-producing countries, dozens of firms started operating in Libya, including independent ones from West Germany, Japan, and Italy. The development of Libya's oil resources was also closely related to the decision on the part of the US and Great Britain to differentiate the sources of oil coming from the Middle East, in order to avoid being entirely dependent on the Suez Canal. Libya's geographic position west of the Canal and close to Western European markets and refineries made it an ideal place where to invest public and corporate resources.¹⁰

As dozens of international oil companies applied for concessions, thousands of Libyan men left the desert, while hundreds of expats arrived to work in the oil industry. Many Libyans found employment in the growing construction and service industries catering to oil companies. They became night watchmen or domestic workers for wealthy oil company employees and military personnel, or contractors in a range of sectors including water-well drilling, air transport, and trucking. Tripoli and Benghazi changed accordingly. As their population increased, the two cities introduced a clear-cut separation between luxurious neighborhoods inhabited by a wealthy class of foreign businessmen on the one hand, and slums for the Libyan population on the other. As the American Embassy in Tripoli put it, whereas foreign workers moved into "new, white, gleaming, 'Mediterranean' style buildings," most Libyans occupied "the rapid burgeoning of 'bidonvillas'...jammed with thousands of country people—mostly semi-nomadis [*sic*]." ¹¹

Given that most Libyans were rural and unskilled, oil companies imported skilled workers from abroad. At the Zelten oil field, for instance, Esso employed drilling and derrick technicians from California. In other cases, firms hired Egyptians who had acquired experience in their country's oil industry and moved to Libya in search of a better job. Or else Italians who stayed after the end of colonialism or migrated to Libya to find employment in the growing transportation, construction and oil sector,

and who were not only more qualified, but often less hostile to the American and British business world.¹² Libyans, on the other hand, were hired on a weekly or monthly basis and did not receive any benefits or allowances. Most of them were young, unmarried and unskilled migrants, who considered working in the oil fields a temporary and transient job.¹³

By the mid-1960s, international oil companies in Libya employed about 9000 people. Of these, 6400 were Libyan, 1290 American, 600 British and 210 Italian, while the rest were divided between Canadians, French, Germans, Dutch, Maltese, and Greeks. The divisions between different nationalities reflected and reinforced divisions and hierarchies between skills and salaries: whereas Libyans worked as laborers, drivers and servicemen, American and British employees occupied the higher ranks as managers and technicians. Italians, on the other hand, were hired as clerical, professional, or technical workers.¹⁴ A typical crew was composed of approximately ten people and included, for example, a Libyan cook, a Danish tool pusher, a Berber driver, a British derrickman, an Italian driller, and several Arab laborers recruited from the tribes around the wells.¹⁵

In this context, labor relations became the object of increased tension between Libyans and Americans. In the second half of the 1950s, the Libyan government and oil workers' trade unions started challenging American labor policies. In 1957, the government passed a Labor Law aimed at "Libyanizing" the oil workforce and securing social rights for Libyan workers. The decision to regulate labor was in many ways tied to international oil companies' behavior. In order to quickly set up their businesses and carry out their activities, firms often hired people who worked for the Libyan government and were politically influential. Faced with the threat that they would draw on the more educated employees, the government made sure that all workers were registered and employed through provincial and federal Labor Offices. The Law also introduced a series of social rights, such as the right to a minimum wage, and the right to proper working and living conditions. Furthermore, it challenged the forms of discrimination between Libyan and foreign workers, particularly between Libyans and Italians. While the Labor Law concerned all categories of workers, the Libyan government applied it primarily to oil workers employed by foreign oil companies. By doing so, it established a clear separation and hierarchy between a class of skilled oil workers that could serve as the backbone of the country's economy on the one hand, and unskilled workers on the other. US oil companies reacted immediately to the Labor Law and argued that it constituted a "harassment of American

oil companies.”¹⁶ Nonetheless, they approved the final draft and accepted the introduction of fixed pay scales, and the need to hire workers through the Labor Office.¹⁷

While the Libyan government used the Law to further its control over the Libyan workforce and the country’s oil resources, other groups advanced more radical requests. In 1958, Abd al-Latif Kekhya, a trade unionist previously employed by Mobil Oil Canada, founded the Petroleum Workers Union (PWU), which aimed at representing all employees of the oil companies operating in Tripolitania. With a membership of 600 people, it soon joined the International Federation of Petroleum Workers (IFPW), based in Denver, Colorado. The PWU denounced employers for not respecting Libya’s Labor Law, and attacked firms for establishing hierarchies between Libyan, Italian and other foreign workers.¹⁸

In the late 1950s, the US administration, along with the companies, became increasingly worried about Kekhya’s activities. While the Central Intelligence Agency (CIA) described him as “a rabid opportunist with strong grievances against the Western companies,”¹⁹ the State Department feared that “Kikhya [*sic*]...could well become a matter of serious concern to Western petroleum and political interests for years to come.”²⁰ In order to undermine his growing power, the American government, with the support of US oil companies, offered Kekhya a fellowship to study at the “Centro Studi CISL” in Florence. Funded by the anti-Communist International Confederation of Free Trade Unions (ICFTU), the Center was run by the Italian trade union Confederazione Italiana Sindacato Lavoratori [Italian Confederation of Trades’ Union] (CISL) and played an important role in training pro-Western trade unionists from Italy and, increasingly, from Latin America, Africa, and Asia.²¹ However, when he returned to Libya, Kekhya organized a major labor federation, which received support from the Soviet Union, the Tunisian Communist Party, the Port Workers’ Union, and Arab Communists.²² Like in other contexts, the US administration reacted by offering its support to a pro-Western trade unionist, Salim Shita, and mobilized the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) to establish a strong relationship between Shita and the ICFTU. In 1959, with the support of the American government and the AFL-CIO, Shita expelled Kekhya from the PWU, and placed Libyan trade unions under the Libyan General Federation of Trade Unions (LGFTU), directed by him.²³

“THE HOUSES THAT OIL BUILT”

In a context characterized by limited social and political rights, American oil companies proceeded to establish a firm presence in Libya. In 1959, Esso made one of its most important discoveries at the Zelten oil field, located in Cyrenaica about 100 km south of the Mediterranean coast. The amount of crude extracted was such that it supplied most of the company's share of the European market. With its 30 wells, in 1963 the field produced up to 300,000 barrels of crude per day. Esso thus became the largest and most important company in Libya, and contributed significantly to transforming the country into the main African oil producer, with an extraction of 58.5 million tons of oil by 1965.²⁴

The firm quickly expanded its activities, and introduced a series of changes that had profound social and political consequences. In 1959, it started building an industrial area along the coast, near the village of Marsa el Brega, to process the oil it extracted in the desert. This included a pipeline connecting its oil field to the sea, a power station to provide electricity to Zelten, a terminal to ship petroleum to Western Europe and the US, and several storage tanks. In the early 1960s, the company decided to build a refinery, needed to transform the increased amount of oil coming from its concessions. It was prefabricated in Belgium by the Chemical Construction Company of New York and sent to Libya in 1962, and was supposed to refine 8000 barrels of crude per day, for its own needs and those of Libyan consumers. In 1965, Esso added a plant to produce liquefied natural gas (LNG) for its Western European markets.²⁵

In order to operate its various plants, Esso imported skilled workers from the US, Canada, and Great Britain. As long as it limited its activities to extraction, Esso relied on a pool of geologists and technicians that moved monthly between the company's domestic and international affiliates. After it built the refinery, it needed a more stable workforce, willing to work and live in Marsa el Brega. The first group of workers, which was particularly crucial in getting the refinery started, came from several plants Esso owned in Great Britain, at Milford Haven (Wales), Fawley (Hampshire), and Whitegate (Ireland). Most employees, though, were part of an American group of expats who moved from one oil town to another, and many had previously worked and lived in Venezuela, Texas, and California. One of them, for instance, after graduating from Ohio State

University in the late 1940s was hired in Aruba as a refinery plant safety engineer. He stayed there until 1965, with his wife, the daughter of an Esso employee from Louisiana, with whom he had seven children. They eventually moved back to the US so that their children could attend school, and then to other oil towns across the world, from England, to Singapore, to the Philippines, before going to Marsa el Brega, where they stayed for 2 years, after which they moved to yet another oil town, in Baytown, Texas.²⁶

With the construction of the refinery, Esso also built a company town for the growing number of foreign employees operating the plant. One resident described it as, “a large fenced enclave, about five miles across, surrounded by the Great Sahara Desert to the south and the Gulf of Sirte, the southern reach of the Mediterranean Sea, on the north.”²⁷ The company aimed at creating what it called a “settler community,” based on a clear-cut separation between white American, British and Canadian employees and the Libyan population. Like other oil towns Esso (and other companies) built in oil-producing countries, Marsa el Brega was a gated community. As the *Residents’ Guidebook* Esso distributed to its employees and their families put it,

To assure Esso exclusive use of the area as set forth in the agreement [between Esso and the Libyan government], the entire Esso development is isolated and separated from the surrounding area by a fence 17 km long, and like other oil installations, is guarded by security police.²⁸

Marsa el Brega had been the site of an Italian concentration camp for those Cyrenaican tribes that had tried to resist Italian colonial rule. The town was abandoned after being destroyed during the Second World War. At first, Esso Libya preserved the memory of colonial violence, by having “concrete fences constructed around four of the Brega cemeteries.”²⁹ Americans, however, quickly forgot about the past, and proceeded to build a new town based on new forms of segregation and violence. As Richard H. Tallman, Community Development Advisor for Esso Libya, stated during a lecture held at the University of Tripoli in 1968, before the oil boom Marsa el Brega had been “little more than a point on the map marking the location of a police post, a few shallow water wells and a very small community.”³⁰ Yet, Libyans continued to draw parallels between the two camps. In an article published in the Cyrenaican newspaper *Al Zaman* in 1963, a

journalist defined Marsa el Brega as an “empire,” and Libyan workers’ living conditions as “concentration camp conditions.”³¹

In 1965, the residential area had three streets, which housed about sixty families. The “houses that oil built,” as one Esso publication called them, were standard concrete houses made of two, three or four bedrooms. The company encouraged male employees to bring their wives and children, and provided bachelors with small trailers or houses that could accommodate approximately ten workers. Unlike other American oil towns, the residential area was not characterized by spatial hierarchies between employees, although office workers—mostly female—lived in a separate area called “Secretary Street,” along with teachers. In order to attract employees, a pamphlet emphasized how,

In the fashion of other towns that in the mid-twentieth century have been planned and engineered into sudden existence by private investment, almost every conceivable material need has been anticipated and met. The neat rows of bungalow-style houses are equipped with both central heating and central air conditioning.³²

Esso provided its employees with a supermarket, a clinic, a cinema which mostly showed Western movies, a bowling alley, tennis courts, and several recreation facilities, including a golf course made “by rolling a mixture of oil, sand and sea weed.” Children could attend school up to eighth grade, after which they would go—with Esso’s financial support—to boarding schools in Europe and the US, or to international schools in Rome. In order to provide high learning standards, Esso made sure to hire American and British teachers. Employees, therefore, had access to the standard of living they were used to in the US or in other American company towns across the world, with the supermarket providing “a wide selection of canned, packaged and frozen food products imported from Europe and the United States.”³³ As Muriel Arnold, who worked in Marsa el Brega as a secretary, put it, the supermarket “could be anywhere in the world. Shelves are filled up when a ship comes in with supplies mainly from America. It then takes on an atmosphere like Christmas. Goodies everywhere.”³⁴

Esso aimed at building an informal community of employees and their families. In order to attract workers, the company highlighted the forms of

leisure workers could have access to in Marsa el Brega. As one publication put it,

A recreation center with swimming pool, restaurant, lounge and sailing facilities provides an atmosphere, a view of the Mediterranean and—most of the time—a climate that most people have to buy with vacation money.³⁵

Marsa el Brega relied on a strict gender segregation. Wives were not only in charge of planning their families' everyday lives, but also of building a sense of community by organizing social events for the town as a whole, thus preventing the emergence of social conflict. They took care of their children, volunteered in schools, socialized through the Ladies Ghibli Golf Club, "cook[ed], paint[ed], [and played] bridge."³⁶ The company provided them with *Information Packages*, which included a Ladies Group Directory, as well as recipes to be used in the Libyan desert, such as a recipe for stuffed camel. One resident offered the following description,

There is a very active social life here. In addition to the Golf Club, we have a Dramatic Group...the Scuba Club...There is a Go-Kart Club, a Ladies Bowling League and a Children's Bowling League. A Sailing Group, the Brega Lawn Tennis Association. Ladies Duplicate Bridge and Mixed Duplicate Bridge, a Gourmet Group, a Garden Club, a Square Dance Club, the Caledoniam Society and Brownies.³⁷

In the middle of the desert, wives had the difficult task of maintaining "sophisticated and civilised standards." Esso encouraged them to reproduce the forms of middle-class identity that characterized other company towns in Latin America and Asia, setting a "dinner table equal to any Manhattan apartment with crisp table linen, dinner services of the finest bone china and Waterford crystal glass for the fruit juice," and engaging in stimulating conversations, so that it would be "difficult to believe that we are several hundred miles from anywhere."³⁸

Despite Esso Libya's efforts to describe Marsa el Brega as a tourist resort, many residents felt isolated. The town was located hundreds of miles away from Benghazi and Tripoli and "seem[ed] to come up out of nowhere almost mirage-like."³⁹ While Esso's official publication depicted "the houses that oil built" as colorful and surrounded by trees and grass,

the residential area was “built on the grid system...[and] segregated by... long, bare, empty streets with not a hint of colour or lick of paint, not a bush or tree or plant.”⁴⁰ Yards were filled with sand “that proved hostile to most vegetation,” while sandstorms (*ghiblis*) forced residents inside their homes for days at a time.⁴¹ As Arnold put it,

In the Esso brochure Marsa el-Brega is described as a ‘modern port community’. In fact, Marsa el-Brega is a camp with top security, enclosed by that high mesh fence with armed guards at check points. I have described it in my diary as a B.G.D (bloody great dump) smell of dead rats, smell of sewers and oh! The smell of gas!⁴²

Furthermore, despite the fact that for some families living an international corporate life meant social mobility and access to higher living standards than those possible in the US, the forms of status described in Esso’s official publications rarely translated into reality. According to one handbook, employees could employ domestic servants and each house even had a small room for a maid, but in fact “no one hired servants because there were none to be had.”⁴³

Nonetheless, for many women (and their families), Marsa el Brega offered a good quality of life and provided them with a close-knit community. The experience of living in the desert struck many residents as unique, and many enjoyed encountering Bedouins on the outskirts of the company town. An engineer’s wife, for instance, pointed out that “probably [she] would not move there and live there, it would not be her choice to live there if she had the choice to live anywhere in the world, but it was beautiful in the Spring, with the Spring rains and the desert in bloom.”⁴⁴

Children, in particular, had access to a range of facilities and forms of entertainment, and still remember growing up in Marsa el Brega as “the greatest part of [their] childhood & teenage years!”⁴⁵ The company encouraged boys and girls to become members of scout organizations, and most of them spent their time on the beach, at the swimming pool or on the go-kart racetrack. Children would also be taken on trips to the desert, where they searched for fossils, or visited plane wreckages from the Second World War. Especially for boys, Marsa el Brega provided a safe haven where to build their identities as frontiersmen. Journalist Neil MacFarquhar, who moved to the company town in 1965 with his father, a chemical engineer, described Marsa el Brega as “the perfect little beach

town..., a little Texas oil town inadvertently planted along the Mediterranean coast.”⁴⁶

Libyan employees, on the other hand, lived a segregated life. In order to comply with the Labor Law, which stipulated that after a period of 10 years Libyan nationals should make up 75% of the labor force, in 1963 Esso opened a training center for its Libyan workers. Directed by Leverett Guess, who had previously worked as a training supervisor for Esso in Venezuela, the center provided courses in accounting, mechanics, oil field operations, and clerical work. Libyans, however, were often discriminated for their trade union activities and were usually employed on a temporary basis. Furthermore, they were not allowed to bring their families with them and were assigned small segregated bungalows. Other Libyans worked in Marsa el Brega, at the town’s restaurant, the grocery store, or the bowling alley. They usually lived in what was called the “crossroads,” just outside the compound, “a collection of shacks of corrugated iron, open bazaar type shops, filth and litter everywhere,” located in an area between the industrial plant, the desert and the few existing paved roads. While Libyan women were not allowed on the compounds, men entered every day and left after their workshift. Americans, therefore, rarely interacted with them. The only encounters took place at the stores, or when Bedouins lent their donkeys, camels or sheep for the school’s Christmas pageant. As MacFarquhar put it, “Libyans were mostly strangers viewed from afar.”⁴⁷

CHALLENGING AMERICAN FORMS OF SEGREGATION

Starting in the mid-1960s, Libyan oil workers began challenging American oil companies’ labor policies. In 1963, they rioted against Bechtel Brothers, which was building a pipeline for the Oasis Oil Company. They challenged the forms of working and living segregation the firm had established in its oil camp, where 120 American and British employees lived in a trailer camp, whereas almost 600 Libyans were lodged in a tent camp. As the American Embassy reported,

a crowd of approximately 100 Libyans descended upon the non-Libyan camp. Under a barrage of stones and bottles, the foreign employees ran to the trailers and barricaded themselves inside. For the next 2 h the Libyan mob battered the trailers with rocks, boards, and bottles, breaking most of the windows and damaging the air conditioners.⁴⁸

Two years later, Libyans placed bombs in the homes of two Esso employees, as well as at the British Embassy, the American and the German Consulates in Benghazi. Furthermore, they sabotaged and blew up three storage tanks and a water pipeline in Marsa el Brega.⁴⁹

In response, American oil companies increased their security measures and asked support from the State Department. During a meeting held in Washington, DC with representatives of Standard Oil (N.J.), the State Department recommended the creation of a National Security Force, which could patrol pipelines, oil fields and storage facilities. It pointed out that, "Libya needs to have a new, elite 'National Resources Security Force', somewhat analogous to the National Guard which was formed in Venezuela at oil company request."⁵⁰ Esso built more fences and assured its employees' security by establishing three army checkpoints in Marsa el Brega. It also increased the forms of discrimination carried out against Libyan oil workers, by requiring them to leave the compounds after working hours. In MacFarquhar words, "after the fence went up, the volatile Middle East seemed even more distant from inside our oil company cocoon. Brega felt more Texan than Libyan."⁵¹

Despite the introduction of more security measures, Libyans continued to oppose the forms of segregation and discrimination carried out by Esso. In 1966, over 100 Libyan employees signed a petition asking the company to increase their wages, provide married quarters for all married men, and allow Libyans to access positions that had been vacated by expats. An article published in the newspaper *Al Hakika* pressured the Ministries of Petroleum and Labor to inquire into the differences between Libyan and American workers' living conditions. In order to respond to these growing tensions, Esso proposed to transform Marsa el Brega into an "open community," a city that, as Esso's President put it, "could become one of the proudest examples of development in modern Libya." The plan included the "establishment of municipal utilities system, construction of housing under a home purchase plan... government schools, medical facilities and the necessary public buildings." Unless these problems were addressed, Esso's President pointed out, "ugly settlements will spring up around the area and social problems will develop."⁵²

These discussions about Libyans' working and living conditions became part and parcel of the political changes that characterized Libya in the second half of the 1960s. During the Six Day War of 1967, oil workers and their trade unions played a crucial role in redefining international oil politics. Along with dock workers and students, they organized a strike in July

1967, which began with a 3-day general strike in Tripoli, involving the boycott of American goods, and continued with a 3-week work stoppage in various oil industry installations in Tripoli and the Gulf of Sirte. Oil companies reacted accordingly. Whereas Esso used an alternative pipeline to transport crude oil from Zelten to Marsa el Brega, American firms replaced Libyan workers with expats, and evacuated the wives and children of their American and British employees.⁵³

Oil workers' activism in the Six Day War set the stage for Qaddafi's military coup in 1969. In the weeks preceding and following the coup, oil workers offered their support to the new regime, by organizing meetings and demonstrations. They asked for better working and living conditions in oil fields, and the expulsion of unskilled foreign workers. Once he came to power, Qaddafi assigned oil workers a particularly important role in carrying forward the ideals of the revolution. He nominated Mahmud Sulaiman al-Maghribi, one of the leaders of the 1967 embargo, Prime Minister, and placed him at the "head of a team to renegotiate the terms of the country's contracts with foreign oil companies."⁵⁴ Born to a Palestinian mother and a Libyan-Sirian father, al-Maghreibi had studied petroleum engineering and geology at George Washington University and law at Johns Hopkins University, before being employed by Esso Libya as a lawyer. He advocated the need for the Libyan educated class of advancing oil workers' rights through forms of oil nationalism.⁵⁵

With the rise of Qaddafi, labor relations changed profoundly. The new regime declared trade unions illegal, thus excluding the possibility of redefining international oil politics through forms of social justice. Inside oil facilities, the Libyan Revolutionary Command Council (RCC) organized workers around popular committees, which supervised the election of boards and union officials, forbade "direct contact with foreign labor unions, require[d] Cabinet approval for all union decisions," and outlawed strikes.⁵⁶ The RCC expelled or transferred many American and British workers, encouraged the employment and training of Libyans, and critiqued Americans' high salaries and allowances.⁵⁷

These policies went hand in hand with the nationalization of Libya's oil industry. Following the example of the Algerian state-owned company Sonatrach, in 1971 Libya nationalized British Petroleum's assets and, between 1973 and 1974, those of nine other international companies operating in Libya. One of its main aims was to make sure that skilled Libyan workers would operate the oil fields and plants previously managed by American and British firms. In order to do so, it required foreign oil

companies to provide training services, in exchange for concession rights. While Occidental set up a training program for Libyans, the Italian company Ente Nazionale Idrocarburi [National Hydrocarbon Agency] (ENI) provided courses in drilling, mechanics, refining, and pipeline operations. The regime also established relations with other Arab countries, such as Algeria, in order to exchange technical information, equipment and training, and founded the Tobruk Higher Petroleum Institute.⁵⁸

As a result, expats' everyday lives underwent several important transformations, and many decided to leave. Under the new regime, US, British and Canadian citizens were allowed to enter into Libya with a 3-month visa, and they could be deported if they did not comply with the rules of the new government. Qaddafi banned the consumption of alcohol and the selling of pork, restricted access to Coca Cola (because of the presence of a Coca Cola plant in Israel), and censored newspapers and magazines. During the 1970s Esso's *Residents' Guidebook* advised employees that "if you arrive at the airport drunk...you will be deported and blacklisted thereby forfeiting any chance of return to Libya."⁵⁹

The town of Marsa el Brega changed accordingly. In 1971, the plant was partly nationalized (with the National Oil Corporation gaining control over 51% of the company). While it continued to be operated by Esso personnel, the firm also trained Libyans as engineers, technicians and managers.⁶⁰ In the company town, the population increased to 3000. Most foreign workers continued to be British and American (with a small number of Norwegians, French, and Germans), but the community was made less of families and more of bachelors. Their contracts did not require them to move to Libya permanently, but rather to work for 55 days in a row and then return to their home countries for 18 days of paid leave.

During the 1970s, Marsa el Brega's communal life was deeply transformed. Inside the company town, all signs in English were replaced by Arabic ones, the movie theater started showing Egyptian films rather than Westerns, while most consumer goods were imported from Eastern Europe rather than the US. Single men brought with them a strong sense of male camaraderie and homosociality, as they lived together in big houses, which became the center of the company town's social life. With the limitations placed on alcohol consumption, most residents tended to organize private parties, where they served homemade alcoholic beverages, prepared according to a semi-official instruction manual handed out to every new resident.⁶¹

The Brega Social Club continued to organize dinners and balls regularly, so that American, British, and Canadian employees would feel at home, “anywhere but at the edge of the Sahara desert.”⁶² Since Esso recognized that under Qaddafi’s regime living conditions in Marsa el Brega had become worse, it allowed its employees to have one extra week of vacation per year, which gave them “a chance to dash out to nearby civilized locations for a needed break from homemade booze and boredom.” They often spent their vacation time in Beirut, Lebanon, which MacFarquhar described as “the ‘Paris of the Middle East,’ a great place to vacation away from the restrictions of living in a country where citizens could be flogged for having a beer.”⁶³ In the 1970s, though, Esso was less willing to provide its employees with all the benefits and privileges that characterized American corporate culture in the previous decades. As one interviewee put it, “in Aruba [in the 1940s] the company would ship Christmas trees, because we couldn’t get Christmas trees... in Brega... the quality of support from Esso [went] down as years went on...The employees at first were treated as kings and then as time went on...you were just a normal employee.”⁶⁴

With the new regime, restrictions previously placed on Libyans living in Marsa el Brega were removed. As a result, a growing number of Libyans working at the plant as engineers and technicians moved to the company town, although still in a segregated area, with a separate school for their children. Most of them had studied in the US, with funding provided by Esso. For instance, Ali Gabriel el Kubti, the son of a merchant from Benghazi, had earned a degree in chemical engineering at UCLA. Many of them, though, complained about their living quarters, pointing out “that they’d been assigned inferior housing, stables unfit for animals, apparently imagining all those years that the foreigners were living in absolute luxury.”⁶⁵ Contacts between American, British, Canadian, and Libyan workers were polite, but distant, as Libyans “would come home for coffee or tea, but they never came home for dinner.” This led to tensions, as “little Libyan kids would hang over the wall and throw rocks at the people walking by and spit at them.”⁶⁶

Relations between Libyans and Americans were gendered in several important ways, as Libyan men sometimes perceived American women as being sexually available.⁶⁷ American teenage girls tended to spend time with young male Libyan employees living in the company town, and there

were instances when relations turned sexually violent.⁶⁸ Arnold, for instance, reported,

recently a new secretary was settling into her bungalow on the day she arrived when there was a knock at her door. There stood a handsome young Libyan clutching a fistful of dinar (Libyan currency). When you realise just what the Western television stations are churning out—naked white men and naked white women performing acrobatics on a bed before millions of viewers—who can blame these frustrated young men for believing that we are all prostitutes and available.⁶⁹

At the end of the 1970s, with the expansion of Libya's oil and gas industry, the government planned a new city, New Brega, which was intended to serve what had become the country's most important industrial area. Its aim was to "stabilize the workforce by encouraging permanent settlements and socio-productive interactions that could create open communities."⁷⁰ The town, as well as the oil and gas plants, were directly managed by the state and were built according to a series of principles laid out in the Green Book. New Brega, which included large residential areas and public parks overlooking the sea, aimed at promoting a specific brand of socialism through forms of autocracy and centralization, areas, and "was designed with the goal to remove social discrimination and to encourage achievement on an equal basis."⁷¹ Families were, once again, the main social unit, and received the bigger and nicer apartments, while bachelors lived in bungalows or in the old houses built by Esso in Marsa el Brega. When it was built it had a population of 45,000 people.

By the time the Libyan state started transforming the industrial and urban area of Marsa el Brega, American oil companies were facing growing opposition. In 1979, demonstrators attacked and burned the American Embassy in Tripoli, along with the French Embassies in Tripoli and Benghazi, leading to the temporary evacuation of most of Exxon's employees. With the election of Ronald Reagan in 1980, relations between the US and Libya deteriorated, and in 1981 the American government decided to close the US Embassy in Tripoli. Tensions rose when the US Sixth Fleet shot down two Libyan planes off the country's coast. Following the increased harassment of its employees and "occupation of company housing at Marsa el-Brega by security forces," Esso (which in 1972 changed its name to Exxon) withdrew its workers from Libya and closed its operations. By the end of 1981, the Libyan government had completed the

nationalization of the company's assets and passed them into the hands of the Libyan national oil company.⁷²

NOTES

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71. Di Paola, *The Towns of Petroleum*, 212.
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Tapline, Welfare Capitalism, and Mass Mobilization in Lebanon, 1950–1964

Zachary Davis Cuyler

INTRODUCTION

This chapter examines the politics of the technical and of anti-colonial nationalism in the labor history of the Trans-Arabian pipeline, or Tapline, in Lebanon. It covers the period between 1950, when Tapline was completed, and 1963–1964, when the company’s Lebanese workforce unionized and participated in a successful nationwide strike. After reviewing the purposes Tapline was built to serve, this chapter examines the technical systems that enabled and regulated the flow of oil through the pipeline and the managerial strategy Tapline pursued to prevent worker mobilization that could disrupt those systems. It then shows how Tapline’s Lebanese employees unionized, secured coordinated control over the flow of oil through the pipeline and used their resulting power to contest the terms of their labor. In doing so, this chapter aims to illustrate the unpredictable ways in which technology distributes agency, and the complex and

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Z.D. Cuyler (✉)
New York University, New York, NY, USA

seemingly contradictory ways in which labor activism engages with the managerial strategies it opposes.

From 1950 through the 1960s, Tapline was a critical conduit for flows of energy and capital from Saudi Arabia through Lebanon to Western Europe and the United States. As the pipeline itself was built, the Tapline company also assembled a paternalistic management system that provided for workers' welfare, accommodated certain workers' demands, and treated Lebanese as the social equals of their American employers while maintaining disparities of power and compensation. For the first decade of Tapline's operation, this strategy successfully deferred unionization. Though Lebanese workers occupied positions critical to the flow of energy, their lack of organization left American management in control of Tapline's facilities and the terms under which Lebanese workers operated them.

Yet Tapline's Lebanese employees unionized in 1963, thereby gaining the ability to act in concert to halt the flow of petroleum through the pipeline. This control over energy flows gave Tapline's Lebanese unions the ability to force concessions from management, but also required that union leaders unite a workforce of diverse socioeconomic and sectarian backgrounds against the company's American managers. To this end, Tapline's unions employed anti-colonial nationalist discourse that challenged Americans' unequal access to decision-making power, benefits, and pay. But despite the oppositional terms in which they were framed, these demands also represented an insistence that the U.S.-owned company grant Lebanese workers the equal treatment and paternalistic care it had encouraged them to expect.

This chapter aims to make interconnected interventions in the historiographies of Lebanon and the global petroleum industry. Historians of oil have tended to focus on petroleum's upstream and downstream—relations between exporters and importers, exploration of and geopolitical competition over oil fields, producers' political economies, and occasionally ecology and labor in fields and refineries—while paying little attention to the transportation of oil by pipeline, tanker, or other means.¹ This focus on petroleum's upstream and downstream mirrors a tendency to rigidly categorize states as oil-producers or consumers, corresponding in the literature influenced by world-system theory to the core and periphery of the capitalist world.² A similar tendency also emerges in public discourse in the United States on what some call oil dependency, and others regard as oil imperialism. This chapter aims to complicate that picture by examining the history of Tapline, a major piece of midstream oil infrastructure, in

Lebanon, a commercial intermediary that transshipped petroleum and used it to sustain flows of people, capital, and goods.

One exception to the tendency noted above is Timothy Mitchell's *Carbon Democracy*, which devotes significant attention to the politics of transporting energy. Mitchell argues that petroleum transportation technologies like pipelines and tankers tend to neutralize the labor politics of energy by employing small, isolated, and easily controlled workforces.³ Mitchell correctly identifies the ways in which the technical features of such technologies, largely determined by the physical task of moving oil, help managers, engineers, and policymakers insulate transportation systems from disruptive labor activism. Yet as this essay will show, at the scale of the Lebanese nation-state, as opposed to Mitchell's scale of the global oil industry, Lebanese Tapline workers had sufficient control over energy flows to assert autonomy in the workplace and force greater equality within Tapline's hierarchy of labor. This mobilization required social links across collar and communal lines as well as shared workplace experience, a shared repertoire of demands, and a shared language of grievance. Another exception is Rania Ghosn's excellent 2010 doctoral thesis on Tapline, *Geographies of Energy*, which mainly focuses on Tapline's construction and operations in Saudi Arabia and gives only cursory attention to the company's critical Lebanese operations.⁴ This chapter uses Tapline's history in Lebanon to examine the work required to transport oil, to show how and why Lebanese Tapline workers mobilized to gain coordinated control over an oil pipeline's technical processes, and how they exercised that control to change the terms of their labor.

In doing so, it also seeks to demonstrate that Tapline's American managers unintentionally fostered a particular and oppositional form of worker mobilization while conditioning the types of demands that Lebanese Tapline employees would make from management. As will be shown, Tapline's unions were specifically anti-sectarian and cross-collar, and employed anti-colonial nationalist discourse to insist upon equality between Lebanese and non-Lebanese employees. Pointing out the links between Lebanese labor activism and struggles against foreign domination is not new to Lebanese historiography, but previous historians of labor in Lebanon have not examined how particular conditions fostered specific kinds of worker mobilization. Moreover, historians like Elizabeth Thompson, Malek Abisaab, and Ilyās al-Buwārī have drawn a clear line of opposition between Lebanese labor and foreign capital, which is unsurprising given the extent of trade union participation in Mandate-era anti-colonial mobilization and links of solidarity and coordination between organized labor and anti-imperialist

political parties after independence.⁵ Yet as Frederick Cooper has argued in *Colonialism in Question*, this line is not always clear. This chapter aims to show that it certainly was not in the case of Tapline's operations in Lebanon: Tapline's management practices unintentionally encouraged Lebanese workers to unionize, strike, and demand equality between Lebanese and non-Lebanese employees, but that demand was itself informed by elements of Tapline management's own discourse and practices.⁶

Finally, this chapter aims to make an intervention in the historiography of Lebanon. An especially influential strand of pre-civil war Lebanese historiography rendered labor and labor activism invisible by depicting Lebanon as a nation of merchants not suited to manual labor. Much of the historiography written during and after the war either construed Lebanon as a collection of warring sects for which communal loyalty and inter-communal conflict drive all political mobilization, or sought to explain the origins of sectarianism as the primary means of political mobilization. Yet Lebanon has a rich history of labor activism and other forms of nonsectarian mobilization, as historians such as Fawwaz Traboulsi, Elizabeth Thompson, and others have demonstrated, and as 2015's "You Stink" protests have shown. This chapter's final goal is to contribute to the marginalized history of Lebanese labor activism, to show how Lebanese Tapline employees mobilized along anti-sectarian and cross-collar lines, and to link their activities to the broader spectrum of working class and progressive mobilization in post-Mandate Lebanon.

ARAMCO, THE COLD WAR, POST-MANDATE LEBANON, AND TAPLINE

Tapline was born of a confluence of the strategies of Aramco, the U.S. government, and the elites of the states through which the pipeline was to pass. Following an abandoned wartime U.S. government plan for a similar pipeline, Aramco planned in the mid-1940s to construct a pipeline that would transport Saudi oil to the Mediterranean as a means of efficiently supplying European markets.⁷ After the Second World War, the size of the world's postwar oil tanker fleet was insufficient to meet rising petroleum demand, and an overland pipeline promised to be less expensive than the tanker route around the Arabian Peninsula and through the Suez Canal.⁸ Though Tapline was originally planned to terminate in Haifa, the looming partition of Palestine forced Aramco to devise a new route from eastern Saudi Arabia to the Lebanese coast.

Work began on Tapline in 1947 with the diplomatic support of the U.S. government, which sought to develop Saudi Arabia's oil resources to conserve U.S. supplies for use in a war with the Soviet Union, maintain the United States' ability to manage the global oil market through its position as swing producer, and build prosperous non-communist economies in Western Europe and Japan.⁹ Some within the Truman administration also saw Tapline as useful in the United States' prosecution of the Cold War in the Middle East. Aramco quickly seized on that idea. Though Aramco was primarily interested in increasing its profits by cutting transportation costs, the company marketed the pipeline to the Truman administration as a private Marshall Plan for the Middle East that would inoculate the region against communism.¹⁰

In Lebanon, Tapline fit within an elite strategy to make the new nation-state into a regional trade and financial hub.¹¹ Fawwaz Traboulsi notes that local elites conceived of the coast of Ottoman Syria as a commercial intermediary between "East" and "West" at least since the nineteenth century, and continued to develop this region's intermediary role through the Mandate period.¹² As Carolyn Gates has argued, after independence Lebanon's elite aimed to "attract foreign capital; maintain a strong currency, surplus budgets and balanced external accounts; promote international trade and service exports; and mobilize private financial resources to develop the economy" along those lines.¹³ To that end, the Lebanese government invested heavily in its "communications and transport infrastructure," strengthening the position Lebanon had developed as a regional entrepôt since the mid-nineteenth century and taking advantage of the rapid postwar growth of the Persian Gulf's oil industry.¹⁴ Indeed, the vast majority of Lebanon's transportation infrastructure was petroleum-based by the mid-twentieth century, and the country required imported petroleum products like gasoline to sustain the movement of people and goods.¹⁵

When Aramco officials approached the Lebanese government to propose that Tapline's terminal be constructed on the Lebanese coast in the late 1940s, Lebanon's economy was in dire need of the capital and fuel the pipeline promised to provide, and its government was eager to secure revenue—a promised £150,000 in annual transit fees—without increasing taxation.¹⁶ The young state's political elite, including Prime Minister Riyāḍ al-Ṣulḥ and sympathetic editors of major newspapers, therefore, made strong diplomatic and public relations efforts to ensure that Tapline would pass through and terminate in Lebanese territory.¹⁷ Lebanon's parliament unanimously approved a transit agreement with the company in 1946.

Five months later, lawyer and Şulḥ-allied parliamentarian Ḥabīb Abī-Shahla left for Saudi Arabia to help Tapline representatives negotiate a transit agreement with the desert kingdom. When Syria, another prospective transit state, objected to Aramco's plan to terminate the pipeline in Lebanese rather than Syrian territory and attempted to extract additional concessions from the company, Şulḥ expended strenuous diplomatic efforts between 1947 and 1949 to mediate between the two parties, and Shahla interpreted for Tapline representatives in meetings with Syrian officials. Though the Syrian government remained intransigent until a CIA-backed coup overthrew President Shukrī al-Quwatlī in 1949, the high-level involvement of Lebanese politicians like Şulḥ and Shahla—and their willingness to remove the left-populist politician Kamāl Junblāṭ of the Progressive Socialist Party (PSP) from the government following pressure by U.S. diplomats who were concerned that he was a resource nationalist—indicated deep interest in the project by Lebanon's commercial and political elites.¹⁸

Completed in 1950, Tapline transported Aramco oil from Abqā'iḳ in eastern Saudi Arabia through Jordan and Syria to Zahrani, south of Sidon, Lebanon.¹⁹ It supplied nearly 110 million barrels of oil per year to tankers in the Mediterranean, equivalent to roughly 25% of Western Europe's oil imports, by 1951.²⁰ Together, Aramco and Tapline's parent companies invested a total of \$168 million in the pipeline by the time of its completion.²¹ This investment made quick returns: in 1952 Tapline seems to have provided roughly \$23 million in profit for Aramco, and its throughput equaled between 30 and 45% of Saudi production until 1960.²² Tapline thus served as a critical piece of infrastructure supporting Aramco's bottom line, U.S. efforts to build and sustain Western Europe's economy, and the U.S. strategy for managing global oil supplies.²³ Tapline was also critical to the Lebanese economy. According to Irene Gendzier, petroleum pumped through Tapline and the larger Iraq Petroleum Company (IPC) pipeline accounted for "97% of the tonnage and...45% of the value of goods in transit through Lebanon" by 1952.²⁴ Together, the two pipelines provided Lebanon with the vast majority of its fuel, as well as transit fees for crude exported via Zahrani and Tripoli.

Tapline's construction was the result of a perceived commonality of interest between the U.S. government, Aramco, and transit states including Lebanon. While Tapline did not amount to the Middle East Marshall Plan promised by Aramco, it literally fuelled Western Europe's economic recovery, and it served Aramco's bottom line by permitting the company to sell its petroleum to European markets more economically. Tapline was

also part of a long-standing economic strategy to secure Lebanon's role as a commercial and financial intermediary between the *mashriq* and Western Europe. The pipeline was a vital component of a massive, interconnected network of corporate and state power, centered in the United States, that ensured and regulated the flow of oil to consumers in Western Europe, throughout the capitalist world, and within Lebanon itself. Tapline's Lebanese facilities, which constituted a critical node in this network and in the Lebanese economy, required a trained and disciplined workforce to maintain and regulate the flow of energy.

TAPLINE'S LEBANESE OPERATIONS AND WORKFORCE

Tapline employed a small but diverse workforce to run its Lebanese operations, which were essential to maintaining and regulating the flow of Saudi oil. This workforce was situated within a labor hierarchy predicated on national distinctions in which American managers and European employees generally occupied higher positions than Arab employees. Though Tapline's Lebanese facilities had latent vulnerabilities to disruptive strike action, the company's American managers maintained control over their Lebanese workforce—and thus over the flow of oil through that portion of the pipeline—for more than a decade.

Lebanon hosted two of Tapline's critical facilities: the administrative headquarters in Beirut and the terminal at Zahrani. The pipeline's pumping stations, located mainly in the Saudi desert, were linked to Zahrani and to one another via a Zahrani-based radio system. A Radio and Dispatch office at Tapline's headquarters in Beirut's Ḥamra neighborhood regulated the flow of oil, relaying orders to the pipeline's pumping stations through Zahrani's radio room.²⁵ When crude reached the Zahrani terminal, it was stored and then either pumped into waiting tankers or sent to the adjacent Medreco refinery (after 1955) to be processed into fuel for domestic consumption.²⁶ The British-, French-, and U.S.-owned IPC operated a larger parallel pipeline system, importing Iraqi crude oil for its own refinery and terminal in Tripoli.

The majority of the workers operating this critical piece of infrastructure were located in Lebanon, but Tapline's workforce in Lebanon was small—around 1000 workers between 1953 and 1960—and primarily Lebanese, though it also included Europeans and Palestinians.²⁷ Local employees performed a range of jobs, including medium- and high-skill administrative and technical positions, but most worked at the bottom or middle of

Tapline's hierarchy of labor. These local employees were also subject to internal distinctions of class and sect.

The diverse array of low- to high-skilled positions occupied by Lebanese employees of Tapline gave the company's Lebanese workforce a mixed collar composition. A profile of the Zahrani terminal from the early 1950s provides as sample some of the low- to medium-skilled jobs Lebanese men performed: "M. Makhoul" is listed as a machinist, "Joe Safi" as supervisor of the Zahrani terminal's machine shop, "F. Abboud" as a forklift operator, "Joe Geha" as the terminal's storekeeper, and Moses Bezirgianian as an assistant chemist.²⁸ A large number of Lebanese citizens also worked under American management at Beirut headquarters, including drivers, secretaries, nurses, doctors, receptionists, aircraft dispatchers, architectural draftsmen, and chemical engineers. The workforce also included a number of Armenians, who tended to hold Lebanese citizenship; Palestinians, who tended to have refugee status in Lebanon; and Saudis, who tended to be temporarily transferred from Tapline's facilities in the kingdom.

Though most Lebanese Tapline employees filled such low- and medium-skilled positions, some were highly educated and performed high-skilled work. Raja' Ilīya, trained as a civil engineer at the American University of Beirut (AUB) and the University of Texas, joined Tapline in 1949 to survey the pipeline route before becoming a structural engineer in 1952.²⁹ Dzocack Manoukian, who had been displaced from Anatolia to Lebanon in the 1920s, graduated from AUB's nursing school and became head nurse at Tapline's hospital in Beirut. Fu'ād Qa'wār and Albert Laḥḥam served as local attorneys for the pipeline's Lebanese operations.³⁰ A very small number of Lebanese even held positions near the top of Tapline's labor hierarchy, including Ḥabīb Abī-Shahla, the lawyer and former Speaker of Parliament who had helped negotiate Tapline's agreement with the Saudi government and subsequently served as the company's head legal representative in the Middle East.

Tapline's Lebanese workforce also had a mixed sectarian makeup and was imbricated in sectarian patronage politics. When Tapline was first built, Aḥmad al-As'ad, a member of parliament who served as the head of Lebanon's Chamber of Deputies and was an important figure in Sidon's local politics, secured employment for his constituents at Zahrani. Ḥabīb Abī-Shahla did the same at Beirut headquarters. Employees at Beirut, therefore, tended to be Greek Orthodox like Abī-Shahla, and employees at Zahrani tended to be Shī'a like As'ad. Zahrani's workforce also included many supporters of the Arab nationalist, Sunnī Muslim politician Ma'rūf Sa'd. Still,

hiring did not take place on intentionally sectarian lines, and neither site was completely dominated by employees of any particular sect.³¹

Though most of Tapline's diverse Lebanese workforce held relatively low positions in Tapline's labor hierarchy, they also performed critical semi-skilled and skilled tasks. As tankers approached the Zahrani terminal, tugboats manned by Lebanese workers transported European "mooring masters" aboard to help tanker captains position their ships. The Lebanese tugboat crews then secured the tankers in place and led hoses onto them to offload petroleum from Zahrani's high-capacity tank farm.³² By the late 1950s, amidst a wider push to employ more local labor, the company had also trained a group of English-speaking Lebanese radio operators who were responsible for maintaining communications between Beirut headquarters and the rest of the pipeline.³³

Tapline's communications and offloading systems had multiple vulnerabilities ripe for exploitation by Lebanese workers in strategic positions. Though the Radio and Dispatch Office at Beirut headquarters regulated the flow of oil, the central node of the entire communication system was at Zahrani.³⁴ An official Tapline publication described this system as follows:

The dispatchers and management maintain communication with the pump stations entirely by means of radio. The pump stations are connected by HF voice and teletype circuits to one another and to the Sidon [Zahrani] Terminal. Oil dispatching circuits are connected from Sidon to Beirut headquarters via a VHF multichannel link. Administrative and general communication between the Beirut office and the Sidon Terminal is accomplished by dialing telephone circuits over the VHF radio link. Calls between pump stations and the Beirut office are connected by a radio operator at Sidon.³⁵

This arrangement left Beirut headquarters completely dependent upon communication with Zahrani's radio room to maintain and regulate the flow of oil.³⁶ Zahrani's communications staff was also responsible for maintaining contact with oil tankers, making that site's radio operators integral to the pipeline's functioning.³⁷ Lebanese workers increasingly occupied positions essential to the flow of oil through the pipeline and its distribution to markets, but could not exploit that positional power without organizing.

Beyond its vulnerability to disruption at key chokepoints, Tapline's connections to other portions of Lebanon's energy infrastructure made

Lebanon's whole energy distribution system vulnerable to mass mobilization.³⁸ Tapline employees maintained constant contact with other Lebanese petroleum workers, forming a network of laborers covering the country's entire petroleum distribution infrastructure. Oil shipped through Tapline to Zahrani was processed at the adjacent Medreco refinery, which provided fuel for gasoline truck drivers who delivered their cargo to gas station owners and to workers who refueled planes at Beirut's international airport.³⁹ Parallel links connected the IPC terminal and refinery in Tripoli to this workers' network.⁴⁰ These links between workers throughout Lebanon created the informal connections needed for nationwide coordination.

Lebanese workers occupied a relatively low place in Tapline's division of labor but constituted a majority of the company's workforce in Lebanon, and the vast majority of the workforce at the pipeline's Zahrani terminal. They also gained increasing amounts of control over processes critical to the pipeline's operation, creating latent vulnerabilities to strike action. Though they were divided along lines of collar and sect, common experience at the lower end of the company's labor hierarchy as objects of the U.S. company's management practices would generate a set of shared grievances among Lebanese employees, and spur their unionization. Shared control over the pipeline's operation would then allow diverse but organized Lebanese Tapline workers to threaten the flow of oil and demand changes to the terms of their labor.

TAPLINE'S EVOLVING WELFARE CAPITALISM

To control its small, diverse, and potentially powerful workforce, Tapline introduced a U.S. variety of welfare capitalism—designed largely to deter worker mobilization—into the tumultuous labor environment of 1950s Lebanon. Though they initially lacked a union, the company's Lebanese employees also pushed for the further extension of benefits and rights from their employer, and between 1950 and 1963, Tapline's brand of welfare capitalism evolved from a confluence of top-down and bottom-up pressures.

Lebanon had a long history of labor activism against foreign-controlled companies before Tapline's construction. As Elizabeth Thompson notes about the French Mandate era,

Labor strikes proliferated in the late 1920s... In the vanguard were public-sector workers at ports and in the railroad, tramway, and electric companies, along with workers in the tobacco and transport industries. They were joined by many artisans, particularly in textile and shoemaking trades. The number and size of strikes increased in the early 1930s, as wages fell and unemployment rose... ⁴¹

Much Mandate-era labor activism was directed against French companies, and Thompson contends that this activism aimed to strengthen state provision of welfare to reduce workers' dependence upon "mediating paternalistic elites—in their case, bourgeois employers and French concessionary companies."⁴² In Lebanon as in the United States and Europe, labor activism intensified after the Second World War. In 1946—the year of the French withdrawal from Lebanon—this pressure led to the passage of a labor law that supported unionization.⁴³

Yet the foreign-dominated petroleum industry initially shielded itself from these developments. As Gendzier notes, foreign petroleum companies were granted informal exemptions from the 1946 labor law.⁴⁴ In 1947, employees of IPC, Socony-Vacuum, and Shell struck for a raise framed as a "13th month" of pay—common in multiple sectors of the Lebanese economy. The Lebanese government then permitted petroleum companies to dismiss employees at will if they paid one month's wages in compensation, in violation of Lebanon's recently passed labor code. The companies—including Tapline, which was in its construction phase—fired most Lebanese petroleum workers and began relying on easily terminated contractors,⁴⁵ establishing a government-backed, industry-wide informal exemption from the new labor law and eliminating the sector's "13th month" precedent. The petroleum industry thereby insulated itself from labor activism, although some oil companies remained unionized.⁴⁶

Tapline pursued a management strategy intended to contain these pressures and prevent its workforce in Lebanon and elsewhere from unionizing. This strategy of providing paternalistic care to maintain hierarchy was reminiscent of that employed by Lebanon's "mediating paternalistic elites," to use Thompson's phrasing. But its roots lay in what Lizabeth Cohen identifies as U.S. "welfare capitalism," which emerged in the United States in the 1920s and evolved in response to the growing power of U.S. unions into the 1950s.⁴⁷ In welfare capitalist firms, management provided for employees' welfare, and occasionally allowed worker

input in production processes, to improve productivity, harmonize industrial relations, and preempt unionization.⁴⁸

Such firms' strategies for dealing with ethnic, national, and religious difference varied by location. In certain parts of the United States, these firms employed mixed workforces of European immigrants, African-Americans, and Latinos, and often exploited that diversity to intentionally undermine labor solidarity.⁴⁹ In the U.S. South and Southwest, and in U.S.-operated oil fields around the world including those owned by Aramco in Saudi Arabia, welfare capitalist firms racially segregated their workforces while providing workers with paternalistic care.⁵⁰ Tapline's Saudi operations followed a similar pattern, providing housing and industrial training for Saudi employees in order to defer worker mobilization and demands for equal pay between locals and foreigners.⁵¹

Yet Aramco and Tapline imported an unsegregated, relatively egalitarian version of welfare capitalism to Lebanon, quite distinct from Aramco's segregated Saudi oil fields. As noted, the company's headquarters and terminal employed highly skilled, English-speaking white-collar American, European, Lebanese, Armenian-Lebanese, and Palestinian staff alongside Arabic-speaking, blue-collar Lebanese and other Arab workers, all under American management. English-speaking Lebanese draftsmen, engineers, secretaries, and lawyers worked alongside their American and European bosses and European and Palestinian coworkers. Efficiency aside, Americans' perception of Lebanese "whiteness" (as opposed to Saudi "blackness") may also have prevented segregation.⁵²

The company's Lebanese facilities were mostly marked by spatial egalitarianism. Foreign and Lebanese employees of diverse religious backgrounds worked side-by-side at Beirut headquarters. Most employees, foreign and Lebanese, commuted by automobile from Sidon and its suburbs to work at the Zahrani terminal.⁵³ The social lives of Tapline employees and their families also included socially egalitarian spaces organized and supported by the company. The Tapline Sporting Club, overseen by an American Manager of Industrial Relations and a group of elected officers and committee members that included Lebanese workers, held social events open to all employees.⁵⁴ Golf and softball tournaments included employees of all nationalities.⁵⁵ The Sidon Welfare Society, established by the American, European, and Lebanese wives of Tapline employees, met weekly in the early 1950s to sew garments for Palestinian refugees.⁵⁶ Both work and leisure time were marked by a degree of inclusiveness that differed starkly from Aramco's Saudi operations, and

helped foster an expectation of equality among workers who occupied very different positions in the labor hierarchy.

To be clear, a lack of segregation did not entail a lack of hierarchy. As noted, Americans occupied the most senior positions in the company, with a few exceptions. American managers were also paid much more than their Lebanese employees, and the Zahrani terminal's four American managers had large houses on-site. American and European employees also tended to receive more ample benefits than their Lebanese subordinates and coworkers, including free, on-site English-language schooling at Zahrani and a Loan Assistance Program for house purchases and emergencies. Furthermore, Tapline's Lebanese workers were not unionized, leaving American management in control of the terms of their labor.

But Tapline strained to emphasize the social equality of its employees in its official discourse. The *Pipeline Periscope*, the company's in-house newsletter, reported on work and social news, including profiles of individuals and offices, retirements, deaths, births, and sports tournaments, covering both Arab and non-Arab employees. The publication's first issue noted that its "purpose is to bring together the employees of Tapline... of more than a dozen nationalities, into a closer understanding of one another and of the Company for which we work."⁵⁷ Company publications represented employees of all nationalities, sects, and collars as belonging to a single community, and regarded them as socially equal enough to be represented side-by-side. Despite the work and wage hierarchies that characterized Tapline's operations, the company made strenuous efforts to convince its employees that they were social equals, and created spaces in which they could act as such.

Intervention in employees' health and welfare was another key feature of Tapline's strategy to maintain a productive, healthy, and disciplined workforce. The firm established company-owned clinics and hospitals, launched initiatives to reduce workplace injuries, and undertook inoculation campaigns. The *Periscope* regularly published graphs of accident rates to make employees monitor their own workplace behavior, and frequently included cartoons with captions such as "When you're NOT ALERT you may be HURT, "Accidents don't just HAPPEN they are CAUSED," and "Two drips make a drop! *Keep oil off the floor.*"⁵⁸ The company campaigned to inoculate workers against typhus, tetanus, smallpox, diphtheria, and whooping cough in 1953.⁵⁹ Tapline also added a wing to AUB's hospital to treat serious workplace injuries.⁶⁰

The company made even more holistic interventions in employee health, welfare, and social reproduction. Tapline established a sporting club in Beirut in 1953 open to employees and their families for a small annual fee to maintain its workforce's health and provide for their leisure.⁶¹ In 1954, it began offering to pay for half of the cost of an insurance plan for "eligible employees" of all nationalities and their families. According to the *Periscope*, the plan "[provided] generous benefits in cases where members need hospitalization because of serious illness, accident, or surgery," also to minimize the impact of employees' injuries on productivity.⁶² Tapline invested significant resources in ensuring the welfare of its workforce, and repeatedly communicated that commitment through official media like the *Periscope*.

Such practices insulated Tapline from, but did not inoculate it against, the working-class mobilization roiling independent Lebanon. In the early post-Mandate years, Lebanese workers made demands similar to those that the company's variety of welfare capitalism aimed to meet. In 1949, Lebanon's government and unions negotiated the first draft of a Social Insurance law that included disability, workplace injury, unemployment, retirement, maternity leave, and other benefits. Though they lacked a union, IPC workers struck in 1950 to protest a mass termination, prevent such actions in the future, and secure free health care and other benefits. Strikes making similar demands continued into the 1950s.⁶³ By the mid-1950s many of Lebanon's populist parties, from the leftist PSP to the right-populist Kata'ib, were calling for a more equitable distribution of wealth and for state investment in social reproduction.⁶⁴

As Lebanon's working class mobilized into the 1960s, Lebanese Tapline employees demanded and received additional benefits from the company. In 1956, employees at Beirut and Zahrani established workers' committees with the approval of management, which picked their members and even appointed Arabic-English interpreters to facilitate—and manage—employees' airing of grievances.⁶⁵ This fit within a long-standing pattern of industrial democracy in American welfare capitalism, in which management established tightly controlled workers' councils to allow workers' limited input into decision-making while deferring unionization.⁶⁶ In 1963, Lebanese Tapline employees requested and received access to the Loan Assistance Program, originally established for American and Saudi employees, which lent money for housing purchases, remodeling, "unanticipated personal expenses due to emergency illness or death," and "other essential purposes of a non-luxury nature" to maintain and improve employees' welfare, assist in social

reproduction, and encourage the proliferation of single-family households.⁶⁷ Lebanese employees also requested and received the construction of a second sports club, this one in Sidon.⁶⁸ Tapline's brand of welfare capitalism thus evolved in response to Lebanese employees' demands, themselves informed by the demands of other Lebanese workers.

Yet Tapline's stated concern for and investment in employees' welfare also fostered expectations of care that management was unwilling to undertake. In the late 1950s the company paid for one employee, Muḥammad Fu'ād Khabbāz, who had lost a leg in a workplace accident, to be flown to Austria to receive a prosthesis. One year later, it granted Khabbāz an indemnity of 10,000 Lebanese *lira* when it became clear that he could or would no longer perform his duties.⁶⁹ Though the company claimed to have offered Khabbāz another job, he apparently refused. In 1963 he requested further compensation for his injury, which management rejected.⁷⁰ While the precise circumstances of Khabbāz's injury, treatment, and termination are unclear, his experience demonstrates that Tapline's commitment to its employees' welfare was more limited than some employees had come to expect.

Finally, poor and unequal treatment of Lebanese workers belied the company's egalitarian discourse and undermined its more benign forms of paternalism. According to Ayyūb Shāmī, who would ultimately establish Tapline's first union, the racism shown by some managers—including especially a former ship captain from the U.S. South who had previously worked in Aramco's segregated Saudi facilities—translated into profoundly unequal treatment: American managers routinely gave Lebanese workers 16-hour shifts for a week at a time, terminated Lebanese employees without giving reason, and required skilled Lebanese workers to perform menial tasks like sweeping and mopping not expected of equally skilled Americans and Europeans.⁷¹

To prevent disruptive labor mobilization of the kind that rocked Lebanon during and after the French Mandate, Tapline pursued a management strategy that promised employees social equality and paternalistic care in exchange for productivity and docility. Tapline's variety of welfare capitalism also included a racially inflected, nationality-based hierarchy of labor that made most Lebanese subordinate to their American managers, a management-controlled workers' council that allowed the company to respond to employees' grievances without granting them autonomy, and an unequal distribution of pay and benefits to American, European, and Arab employees. Still, between 1950 and 1963 Tapline granted certain

benefits requested by its Lebanese workforce, and its particular brand of welfare capitalism evolved in response to its workforce's demands and workers' mobilization across Lebanon. Yet Tapline's emphasis on equality was not reflected in its managers' reported treatment of its Lebanese employees, and its concern for workers' well-being did not entail the promise of permanent employment or care. By the early 1960s, Tapline's management practices had encouraged expectations of equality and care among its Lebanese employees that the company was unable or unwilling to fulfill. This, together with managers' demeaning and apparently racist informal practices, called into question the company's official commitment to the social equality of its diverse workforce and generated grievances that Tapline's Lebanese workforce mobilized to redress.

UNIONIZATION AND ANTI-COLONIAL NATIONALISM

In 1963, Lebanese Tapline employees unionized and began agitating more actively and effectively to improve the terms of their labor. This mobilization crossed the sectarian and collar lines dividing Tapline's Lebanese workforce—striking workers protested perceived American racism and employed anti-colonial nationalist discourse to insist that Lebanese workers, whatever their socioeconomic and sectarian backgrounds, were the equals of the Americans and Europeans that worked for the company. Though the union was not involved in formal politics and did not ally itself with anti-imperialist political parties within Lebanon, its use of anti-colonial nationalist discourse to protest mistreatment and unify workers of disparate backgrounds who controlled different portions of Tapline's technical systems resonated in the context of Lebanese politics in the 1950s and early 1960s.

Yet as Frederick Cooper argues, anti-colonial labor activism does not necessarily entail a strict rejection of the discourse with which foreign capital justifies the division and terms of labor, “but [can] instead [be] an engagement with it—the molding of... rhetoric into a language of claims,” and the employment of foreign capital's “egalitarian assertions to try to turn them into a reality.”⁷² Labor activism framed in anti-colonial terms, then, can “[bind] workers more tightly” to their foreign employers, and represents a complex interplay between resistance against and reinforcement of the relationship between labor and management.⁷³ As noted, Tapline's qualified egalitarianism and its paternalistic investment in employees' welfare helped foster expectations of care and equal treatment among them. Its failure to meet these expectations generated grievances

that Tapline's Lebanese employees mobilized to redress, using anti-colonial nationalist discourse to organize workers across lines of collar and sect to wield shared power over Tapline's technical systems.

Though Tapline's unions actively avoided involvement in Lebanese party politics, the rhetoric of anti-colonial nationalism was readily available as a means of mobilizing across collar and sectarian lines to demand more equal treatment. Unions had been instrumental in challenging the French Mandate, and anti-colonial Lebanese nationalism continued to evolve alongside organized labor after independence. Soon after Tapline's construction began, for example, representatives of a union federation decried the small number of jobs the pipeline had generated, and asked rhetorically in pamphlets and newspapers if Tapline's control over Lebanese land, waters, and resources did not constitute a form of imperialism. Unionized workers and anti-colonial nationalists also often found a shared foe in the Lebanese government. Presidents Bishāra al-Khūrī and Kamīl Sham'ūn actively suppressed Lebanon's more progressive unions, and their governments launched raids on leftist syndicates between 1948 and 1958.⁷⁴ When President Sham'ūn began abandoning Lebanon's avowed neutralism in international affairs and leaned toward the capitalist United States in the early 1950s, left-leaning unions participated in anti-imperialist demonstrations. Workers and students led a strike against the U.S.-backed Baghdad Pact in 1954, for example, and progressive unions and parties mobilized against a 1955 visit by President Celal Bayar of Turkey, a NATO and Baghdad Pact member, triggering raids against union offices.⁷⁵

Lebanon's 1958 civil war brought a shift in Lebanese labor politics. Following covert U.S. intervention in the country's 1957 elections and Sham'ūn's attempt to secure a second, unconstitutional presidential term, Kamāl Junblāt's PSP led a bloc of leftist, progressive, and other anti-Sham'ūnist forces in a brief revolt, leading to U.S. military and political intervention that removed Sham'ūn. The new president Fu'ād Shihāb, who aimed to construct a more socially inclusive and economically statist Lebanon, was backed by populists from the leftist PSP to the rightist Katā'ib.⁷⁶ Shihāb's integration of non-Christians into the civil service and promises of "comprehensive social reform" resonated with the types of changes that Lebanon's populists and organized labor had long sought. Moreover, while Shihāb's government continued to use the intelligence services to monitor union activity, it also attempted to manage labor activism through dispute resolution rather than direct repression.⁷⁷ In a sign of how labor politics had shifted, in 1963 workers won the creation of

a state-run social security program that had been subject to 14 years of debate between Lebanon's government and unions.⁷⁸

Foreign oil companies occupied a complex position in this shifting political environment, but were increasingly treated as antagonists in an anti-imperial struggle for equality and independence in which many progressives and workers saw themselves participating. Under Khūrī and Sham'ūn, the Lebanese government had often intervened on the side of foreign oil companies in labor disputes—for example, by permitting IPC to fire 1200 employees in 1950.⁷⁹ Yet in 1956, IPC workers mobilized in support of the Sham'ūn government's attempt to increase its share of transit fees from the company.⁸⁰ Indeed, foreign oil companies became increasingly identified with colonialism over time. At AUB, Arab nationalist journals such as *al-'Urwa al-Wuthqa* called for the nationalization of foreign companies like Tapline, which one contributor claimed “[sucked] up the resources from the workers and the peasants and the producers and the employees.”⁸¹ For its part, Tapline's management was careful to remain neutral in the 1958 civil war, and even requested that Marines not guard its facilities during the fighting.⁸² Nonetheless, U.S. intervention in that conflict was motivated in part by a desire to maintain Lebanon's position as a friendly oil transit state, and unsurprisingly led left-leaning politicians like the PSP's Kamāl Junblāṭ to accuse companies like Tapline of resource imperialism.⁸³ The prevalence of such political discourse by the early 1960s prepared the ground for an association between U.S. economic domination and local working conditions at Tapline's Lebanese facilities.

When Lebanese Tapline workers organized in 1963, they quickly made a rhetorical connection between local and national subordination in their protests. Ayyūb Shāmī, a radio technician working at Zahrani terminal's communications room, began the push for unionization in response to a set of grievances engendered in part by the expectations of equality and care fostered by Tapline's welfare capitalism. Though Shāmī recalls being treated well himself, he chafed at the treatment of his fellow employees, which he remembers as disrespectful, arbitrary, and sometimes clearly racist. As noted, Lebanese workers received long shifts, were fired arbitrarily, and lacked effective representation, and skilled Lebanese employees like Shāmī's colleagues in the communications room were required to perform menial tasks not required of Americans or Europeans of equal skill levels.⁸⁴

Shāmī's complaints and unionization drive were not unusual for the time. Since the early 1950s, Lebanese workers had repeatedly struck to

secure 8-hour days and safeguards against termination.⁸⁵ A wave of inflation sparked strikes for wage increases throughout the early 1960s, including a mass strike in 1961 for a nationwide raise.⁸⁶ Lebanon's petroleum sector, initially shielded from mobilization by foreign oil companies' insulation from labor laws, had also begun to organize: the Lebanese workforces of Mobil, Shell, IPC, Sonoco, and Lepco were all unionized by the early 1960s, and in January 1963 workers staged a mass strike in Tripoli following IPC's attempt to fire several hundred employees from its facilities there.⁸⁷ George Şaqr, president of Mobil Oil's white-collar union since the mid-1950s, had also been pushing to mobilize Lebanese petroleum workers, and helped Shāmī organize Tapline's workforce.

Yet although Tapline workers aimed to improve their pay and benefits, Shāmī's reported motive for unionizing was not that compensation was insufficient, but rather that skilled Lebanese workers were not being treated as the equals of American and European employees.⁸⁸ Dissatisfied with labor conditions at Tapline, Shāmī began studying law at night school with the intention of quitting his job. Ironically, this industriousness apparently impressed Tapline President W.R. Chandler, who admired Shāmī's "achievement in holding down a steady job, supporting a family of five and winning a law degree by virtue of attending night classes," in the words of a U.S. Embassy report. Instead, after graduating Shami used his knowledge of the law to file a unionization request with the Ministry of Labor in 1963 to form the Tapline Laborers' Syndicate (*Niqābat 'Ummāl al-Tāblayn*) at Zahrani and begin rectifying the inequalities he perceived.⁸⁹ Though the union did not challenge capitalism itself or the presence of foreign capital within Lebanon, it did assert its autonomy from its American managers, insist on the equitable treatment of Lebanese workers, and used anti-colonial nationalist discourse to make those claims.

This was no easy task: unionizing Tapline's diverse Lebanese workforce required mobilization across sectarian and collar lines. As noted, Tapline's unions included employees of diverse sectarian backgrounds. Beirut headquarters was largely Christian, much of the Zahrani terminal was Shī'ī, and some were supporters of the Sunnī, Arab nationalist Sidon MP Ma'rif Sa'd. Shāmī himself was Catholic, and when he founded the Zahrani union, some Muslim employees reportedly expressed concern that the syndicate was a sectarian, Christian-only organization. They feared that unionization would lead to the firing of nonunion—meaning Muslim—employees. Shāmī claims that he won the local Director of Social Affairs over by bringing 15 of the politician's Muslim, pro-union supporters to a

meeting between the two of them, demonstrating the Zahrani syndicate's nonsectarian basis. The union's bylaws also explicitly rejected the principle of sectarian quotas in filling leadership positions, building its anti-sectarian orientation into its organizational structure.⁹⁰

Collar lines also divided Tapline's Lebanese workforce. Shāmī was a college-educated, English-speaking, high-skilled worker but the majority of his peers at Zahrani were not—and the union he led had to wrest concrete gains from management. Indeed, although grievances based around the unequal treatment of Lebanese employees provided the impetus for Shāmī's unionization drive, workers from non-elite backgrounds quickly used the syndicate as a means of receiving welfare the company had denied them. For example, Muḥammad Fu'ād Khabbāz, who had lost his leg in a workplace accident and was eventually terminated, brought his case to Shāmī's attention, requesting the union's assistance in securing further compensation and lifelong care for his debilitating injury.⁹¹ The syndicate served as a means of rectifying the grievances of Lebanese employees of disparate socioeconomic backgrounds, rooted in expectations of equal treatment and lifelong care, structured by decades of Lebanese labor activism and by Tapline's own managerial discourse and practices.

Indeed, when Tapline management learned of the employees' intention to establish a union, it relied on a paternalistic strategy of corporate welfare to prevent labor disputes, toward which it had a policy of "complete inflexibility" in order to avoid higher labor costs.⁹² Management circulated a memorandum to employees before the unionization vote took place that argued against the use of a secret ballot and reflected the company's paternalistic stance toward labor, stating that "it is natural for us to think of the employees' welfare, since that is also Tapline's welfare.... Tapline does not agree that you need a syndicate for protection since Management has always provided that protection."⁹³ The memorandum continued to argue that labor conditions at Tapline were superior to those of unionized workplaces due to management's concern for workers' well-being and its willingness to listen, listing benefits like an employees' club, medical care, and an expanded loan plan, and arguing that although Tapline employees worked only 40 hours per week rather than the national average of 48, wages were far higher at Tapline than in comparable positions in Lebanon.⁹⁴ Finally, in a strikingly direct expression of paternalism, the memorandum contended that the company constituted a single family, and that unionization would tear apart that family.⁹⁵

Tapline's arguments were apparently not convincing, and employees at Zahrani voted to unionize. For its part, the Tapline Laborers' Syndicate construed its confrontation with management in anti-colonial nationalist terms to unite its diverse constituency in opposition to managers' mistreatment of Lebanese employees. In its first pamphlet the syndicate accused "the colonialist Tapline company" of making 700,000 Lebanese *lira* in profit daily, but refusing to pay the equivalent of 2 hours' profit in bonuses to its Lebanese workforce—one of the union's first demands, made in tandem with other Lebanese petroleum workers—and, instead, spending 300,000 *lira* on anti-union propaganda.⁹⁶ When union members were expelled from Tapline's premises following a demonstration in late 1963, the syndicate's second pamphlet argued that they had been removed from the Lebanese soil of Tapline's facilities "as if they were not Lebanese."⁹⁷ The union did not involve itself in formal anti-imperialist politics, and publicly thanked a sympathetic American manager who was apparently fired for not preventing the workforce from unionizing. Still, the syndicate's first public statement strongly emphasized anti-colonial nationalist themes: Tapline's foreignness, its unwillingness to distribute its immense wealth equitably to its Lebanese employees, and its antagonism toward Lebanese workers on Lebanese soil.⁹⁸

The Zahrani union's anti-sectarian and cross-collar basis allowed it to also quickly organize Beirut headquarters by early 1964.⁹⁹ Shāmī's Christian background and AUB pedigree likely made unionization at his initiative appealing to the largely Christian, white-collar employees at headquarters. The Beirut union's name, the "Tapline Employees' Syndicate" (*Niqābat Muwazzafi al-Tāblayn*), explicitly suggested that it represented Tapline's white-collar administrative workforce, as opposed to the blue-collar "laborers" ("*Ummāl*") of Zahrani. Like the Laborers' Syndicate, the Employees' Syndicate's bylaws also rejected the principle of sectarian representation.¹⁰⁰ The close alliance between the Zahrani and Beirut unions underlined organized Tapline workers' anti-sectarian and cross-collar basis.

Tapline's hierarchical tendencies and the discriminatory practices of some of its American managers, which contradicted the egalitarianism of the company's rhetoric and some of its practices, were the impetus for the formation of the Tapline Laborers' Syndicate. Unionized workers quickly used this organization to meet expectations of company intervention in their welfare. Unionization constituted a response to grievances engendered by the company's violation of the expectations it had itself helped foster in its

employees—as well as Lebanon’s long history of labor activism—and served as an avenue to begin rectifying those grievances and improving the terms of Lebanese employees’ labor. Tapline’s union employed anti-colonial nationalist rhetoric to unify the company’s diverse Lebanese workforce around the struggle to make Tapline meet the expectations of equality and paternalistic care it had encouraged in its employees. As will be shown, unionization consolidated those employees’ shared control over the technical systems necessary to Tapline’s operation, empowering them to force change.

THE 1964 PETROLEUM WORKERS’ STRIKE

In 1964, the new syndicates played a critical role in a nationwide petroleum workers’ strike, demonstrating the vulnerability of Tapline and Lebanon’s energy distribution system as a whole to local and mass mobilization. Ten unions from across the Lebanese oil sector demanded an industry-wide raise, resonating with calls throughout the early 1960s for a nationwide raise in response to increased inflation. As will be shown, the 1964 petroleum workers’ strike would secure more equitable terms of labor for Lebanese Tapline workers and demonstrate their positional power. Though the immediate goal of this strike was higher pay, the strikers’ rhetoric showed that Lebanese workers saw the raise as part of a struggle for equality. Ironically, Tapline’s Lebanese unions won important concessions and significant autonomy from a company they construed as behaving in colonialist fashion, while ultimately tightening the paternalistic embrace of its particular variety of welfare capitalism.

The specific vulnerabilities of Tapline and Lebanon’s energy distribution network were central to Lebanese petroleum workers’ power. Though Timothy Mitchell contends in *Carbon Democracy* that at the global scale petroleum tends to be distributed in flexible, redundant, grid-like networks, at the scale of the Lebanese nation-state the petroleum distribution system resembled the vulnerable and inflexible “dendritic networks” that Mitchell argues are characteristic of coal, “with branches at each end but a single main channel, creating potential chokepoints at several junctures...”¹⁰¹ Tapline’s Lebanese employees controlled flows of information and oil that were critical to the pipeline’s operation, and Tapline’s infrastructure in Lebanon—which was critical to the transportation of energy into and through the country—was vulnerable to local and mass strike action. On a national scale, Tapline was one of Lebanon’s two sources of

oil and links between Tapline employees and other Lebanese petroleum workers allowed coordination to threaten the distribution of petroleum energy through the country. The resulting vulnerabilities gave Lebanese Tapline workers the ability to threaten the flow of energy via Lebanon and, therefore, to press their demands.

Tapline workers, acting in concert across lines of collar and sect, controlled critical chokepoints in the flow of energy through Lebanon. As noted, the president of the new Tapline Laborers' Syndicate at Zahrani was a radio technician in the facility's communications room. This office controlled the flow of information and the regulation of oil pressure across the entire pipeline system. Shāmī was also an AUB-educated Christian, but led a union whose members included less-educated employees of diverse socioeconomic and sectarian backgrounds who worked alongside him to maintain system-wide communications, and performed other critical work that included connecting oil tankers to Zahrani's offshore terminal system and offloading crude oil onto them. These particular positions were especially critical to the Lebanese economy, since Tapline provided Lebanon with much of its fuel and government revenue. Further, links between the Zahrani union and other Lebanese petroleum workers allowed coordination to threaten the distribution of petroleum energy through Lebanon: the flow of information through the Zahrani radio room that regulated the pumping of oil, and the flow of oil from Tapline's storage tanks to Mediterranean tankers. The Tapline Laborers' Syndicate at Zahrani had helped form the Beirut headquarters' mainly white-collar Tapline Employees' Syndicate, linking the two sites' technical and administrative workforces with their somewhat disparate class and sectarian bases.¹⁰² Tapline employees at Zahrani also had social links with employees of the adjacent Medreco refinery and organizational links with George Şaqr's union of employees of Mobil Oil's distribution branch in Lebanon. Tapline's diverse Lebanese workforce itself controlled much of the flow of energy through Lebanon, but was also embedded within a nationwide network of petroleum workers that extended across other critical points within the sector.

In the 1964 petroleum workers' strike, union coordination extended across Lebanon's "dendritic" petroleum distribution system. Workers from the Tapline and IPC pipelines, the Zahrani and Tripoli refineries, and Beirut's airport joined a strike committee that included Lebanese employees of Mobil Oil, Shell, IPC, Lepco, and Total under George Şaqr's leadership to press for an industry-wide annual bonus again framed as a

13th month of pay, equivalent to an 8.33% raise.¹⁰³ The “13th month” had long been a project of Şaqr’s, who noted that his own employer, Mobil Oil, had been offering an additional month of pay every year to its employees in Cyprus. A general strike was to open in stages if the companies failed to meet this demand, aiming to disrupt foreign companies’ operations rather than the Lebanese economy itself and starting with local strikes by employees of fuel distributors Shell and Mobil Oil.¹⁰⁴ The strikers vowed to continue supplying critical services and facilities including hospitals and the military, permitted local Lebanese distributors to service gas stations previously supplied by Shell and Mobil Oil, and secured a commitment by the Private Drivers’ Union not to purchase gasoline from foreign companies targeted by the strike. On the strike’s first day, a demonstration at the Beirut airport delayed Mobil Oil and Shell tanker trucks, blocking more than half of the ordinary daily fuel delivery. In an attempt to marshal business and political leaders against the strikers, Lebanon’s petroleum companies announced that they could no longer guarantee that airplanes would be refueled at Beirut.¹⁰⁵ In response, workers at IPC’s Tripoli refinery threatened to stop filling tanker trucks altogether.¹⁰⁶

The specter of expanding strike action spurred a round of government-mediated negotiations between the companies and the strike committee. When these talks failed, Mobil Oil and Shell employees resumed their strike, and Tapline’s twin unions at Zahrani and Beirut announced their intentions to close the pipeline.¹⁰⁷ Tapline employees’ direct participation in the 1964 strike was brief, but it signaled a major escalation: in the early 1960s Tapline accounted for roughly half of the crude oil that passed through Lebanon, and the Medreco facility processed Tapline petroleum into roughly half of the gasoline required for domestic Lebanese consumption by 1964.¹⁰⁸ According to an observer at the U.S. Embassy in Beirut, the Lebanese government was “[faced] with the possibility of a shutdown of practically the entire petroleum” industry, and President Ḥilū—inaugurated in the middle of the strike—appealed to U.S. Embassy officials for assistance in convincing the companies to moderate their positions to avert crisis.¹⁰⁹

Though the strike in which they participated focused on an industry-wide wage increase, the rhetoric employed by Tapline Laborers’ Syndicate’s made clear that its members saw their actions as part of a struggle for equality. The Zahrani union circulated a number of pamphlets that emphasized the gap between Tapline’s egalitarian rhetoric and its

hierarchical practices. Despite Ṣaqr's promise to the U.S. Embassy to avoid anti-U.S. and anti-British rhetoric, one set of pamphlets accused the Zahrani terminal's superintendent, who was also the intermediary between management and the company-dominated workers' councils, of racial discrimination akin to that prevalent in the U.S. south.¹¹⁰ Workers also picketed along the road leading to the Zahrani facility's entrance, holding signs that protested workplace inequality in nationalist terms. One held aloft an English-language sign that read, "10 Americans are paid more than our 200 laborers."¹¹¹ This rhetoric united Tapline's Lebanese religiously and socioeconomically diverse workforce in opposition to unequal treatment by management, linked this local struggle to broader national and even international struggles for equality, and helped weld workers into a political force capable of blocking the flow of energy.

Though Tapline's first strike on September 15 ended for legal reasons within one day, the threat to halt Tapline precipitated government intervention in the unions' favor. Parliamentarians Ma'rūf Sa'd and Jamīl Laḥūd, as well as the PSP's *al-Anbā'* and the Katā'ib-affiliated *al-ʿAmal*, publicly announced support for the strikers, though the corporatist and pro-U.S. Katā'ib expressed concern about the strike's impact on oil companies.¹¹² The risk of the pipeline's closure led to arbitration by Prime Minister Hussayn al-ʿUwaynī, who negotiated the Zahrani union down from closing Tapline, citing the dire effects the pipeline's shutdown would have on Lebanon's economy.¹¹³ Government intervention on the unions' behalf quickly followed, and petroleum workers won a 6% raise, ending Lebanon's longest strike since independence.¹¹⁴

Following the 1963–1964 unionizations and the 1964 petroleum workers' strike, Lebanese Tapline workers consolidated their power. The Zahrani and Beirut unions helped organize the workers of the adjacent Medreco refinery and formalized their relationship with other Lebanese petroleum workers' unions under a national Federation of Syndicates of Petroleum Employees and Laborers (*Ittihād Niqābāt Muwazzafi wa ʿUmmāl al-Bitrūl*). Led by Mobil Oil's George Ṣaqr, this union confederation helped petroleum workers cement their positional power vis-à-vis their employers and take a leading role in the Lebanese labor movement. From 1964 to the mid-1970s, unionized Tapline workers and their allies used their control over chokepoints in Lebanon's energy distribution system to continue to improve the terms of their labor.

In a 1966 strike pamphlet, the Tapline Laborers' Syndicate quoted the company's Marshall Plan-style slogan: "Petroleum is a means for a better

life,” and responded with a radical question: “A better life for whom?”¹¹⁵ Unionization allowed Lebanese Tapline employee workers to redress their grievances, rooted in expectations of equal treatment and substantial investment in employee welfare. Though a full account of their gains is outside of the scope of this essay, the Zahrani and Beirut syndicates won raises, greater workplace autonomy, fought for more equal treatment in the workplace, defended union members’ jobs, pressed for improved medical care, and were even able to secure preferential hiring for their children.¹¹⁶ This would have cemented a multi-generational labor and welfare-provision relationship between the company and its employees’ families. Tapline employees also maintained the union’s nonsectarian orientation by continuing to reject a communal quota system, employed anti-colonial nationalist rhetoric while electing a Palestinian as Beirut union president and protecting a European employee’s job after he refused to help break a strike, and challenged the petroleum federation’s relatively conservative leadership by pushing its member unions to mobilize more aggressively.¹¹⁷ Lebanese Tapline workers used the power they held over the flow of oil to improve workers’ lots by asserting worker autonomy and achieving a more equitable distribution of power and resources, while deepening the company’s commitment to their well-being.

CONCLUSION

Lebanese employees of Tapline occupied key chokepoints in the flow of petroleum through Lebanon’s “dendritic” energy distribution system. They were, therefore, able to mobilize across collar and sect lines to gain control over a critical component of Lebanon’s energy infrastructure and force their employers to make concessions. Shared grievances against American managers and the requirement of cross-collar, anti-sectarian cooperation to assert control over Tapline’s technical systems encouraged union members to couch their demands in anti-colonial nationalist terms, resonating with a long legacy of anti-colonial Lebanese labor activism. Yet these demands were not anti-capitalist or even opposed in principle to foreign capital’s presence in Lebanon, and also resonated with more egalitarian currents in Tapline’s welfare capitalism. Tapline employees’ positional power, and concerted action by diverse workers occupying distinct critical positions in the pipeline’s operations, strengthened their ability to extract concessions from management while also pulling them deeper into its paternalistic embrace.

NOTES

1. This tendency is strong in the vast historiography of the global petroleum industry. Some better known works that share it, but were written with distinct methodologies and subject matters, include Daniel Yergin, *The Prize: The Epic Quest for Oil, Money, and Power* (New York: Free Press, 2009); Robert Vitalis, *America's Kingdom: Mythmaking on the Saudi Oil Frontier* (London: Verso, 2009); Toby C. Jones, *Desert Kingdom: How Oil and Water Forged Modern Saudi Arabia* (Cambridge: Harvard University Press, 2010); Nathan J. Citino, *From Arab Nationalism to OPEC* (Bloomington: Indiana University Press, 2010); Terry Lynn Karl, *The Paradox of Plenty: Oil Booms and Petro-States* (Berkeley and Los Angeles: University of California Press, 1997); and Myrna I. Santiago, *The Ecology of Oil: Environment, Labor, and the Mexican Revolution, 1900–1938* (Cambridge: Cambridge University Press, 2006).
2. See, for instance, Bruce Podobnik, *Global Energy Shifts: Fostering Sustainability in a Turbulent Age* (Philadelphia: Temple University, 2006) and Steven Hurst, *The United States and Iraq since 1979: Hegemony, Oil and War* (Edinburgh: Edinburgh University Press, 2009).
3. Timothy Mitchell, *Carbon Democracy: Political Power in the Age of Oil* (New York: Verso Books, 2011), 7–8, 31–39.
4. Rania Ghosn, “Geographies of Energy” (Ph.D. thesis, Harvard University, 2010).
5. Throughout this chapter, I will use the IJMES transliteration system for Arabic names transliterated from Arabic-language sources, except when citing authors of English-language scholarship. When citing English-language sources with their own transliterations of Arabic names, I will preserve that transliteration within quotation marks. For place names, I will use the common English spelling.
6. Frederick Cooper, *Colonialism in Question: Theory, Knowledge, History* (Berkeley: University of California, 2005), 213–238.
7. Ghosn, “Geographies of Energy,” 48–53.
8. Yergin, *The Prize*, 392.
9. Mitchell, *Carbon Democracy*, 31; David Painter, “Oil and the Marshall Plan,” *The Business History Review* 58, no. 3 (1984): 361–362; Yergin, *The Prize*, 409–412.
10. Vitalis, *America's Kingdom*, 35.
11. Fawwaz Traboulsi, *A History of Modern Lebanon* (London: Pluto Press, 2007), 117.
12. Traboulsi, *A History of Modern Lebanon*, 55–59.
13. Carolyn Gates, *The Merchant Republic of Lebanon: Rise of an Open Economy* (London: Center for Lebanese Studies, 1998), 82.

14. Gates, *The Merchant Republic of Lebanon*, 102–104.
15. By the late 1940s, the Iraq Petroleum Company already operated a pipeline and exported petroleum to Lebanon, and provided a large proportion of the country's fuel supply.
16. This amount was increased in 1952 to \$600,000 annually, and then to a 50/50 profit-sharing agreement between Tapline and all transit states including Saudi Arabia in 1962–1963. Ghosn, "Geographies of Energy," 58, 149–150.
17. Youssef Chaitani, *Post-Colonial Syria and Lebanon: The Decline of Arab Nationalism and the Triumph of the State* (London: I.B. Tauris, 2007), 74; Douglas Little, "Pipeline Politics: America, TAPLINE, and the Arabs," *The Business History Review* 64, no. 2 (1990): 268; Ghosn, "Geographies of Energy," 59.
18. Chaitani, *Post-Colonial Syria and Lebanon*, 85–87.
19. Tapline's throughput was originally 350,000 barrels per day, but was upgraded to 450,000 per day by 1958. Tapline, "Kilometer 1213: Tapline Today," (promotional material, Tapline, 1961); Ghalib al-Turk, "The South," in *Lebanon and Its Provinces: A Study by the Governors of the Five Provinces*, ed. Halim Said Abu-Izzedin (Beirut: Kayats, 1963), 73–90.
20. Interview with anonymous former Tapline employee, July 2013.
21. Tapline, "Tapline: Modern Trade Route of Steel," 3, <http://almashriq.hiof.no/lebanon/300/380/388/tapline/ancient-lands/index.html>.
22. Petroleum Attache to U.S. Embassy in Beirut Nestor Ortiz to Charge d'Affairs John Bruins, "The Middle East Pipeline Agreements: A Review and Appraisal of Their Current Status and Suggested Approach for Attaining Policy Objectives," August 4, 1953 RG 59, Decimal File 1950–1954, 883A.2553/12-2352 to 883A.392/7-1752 (Stack 250), National Archives and Records Administration (NARA), College Park, Maryland; Interview with anonymous former Tapline employee, July 2013; DeGolyer and MacNaughton, *Twentieth-Century Petroleum Statistics 2009* (Dallas: DeGolyer and MacNaughton, 2009); John Bowlus, "Connecting Midstream: The Politics and Economics of Oil Transportation in the Middle East" (Ph.D. diss., Georgetown University, 2014), 38; *Foreign Relations of the United States, 1952–1954*, Volume IX, Part 1: The Near and Middle East, document 303, "Memorandum of Conversation," July 28, 1953.
23. Interview with anonymous former Tapline employee, July 2013.
24. Irene L. Gendzier, *Notes from the Midfield: United States Intervention in Lebanon, 1945–1958* (New York: Columbia University Press, 2006), 45.
25. Tapline, "Tapline: A Report on Five Years of Successful Operation," *The Petroleum Engineer* (April 1956), <http://almashriq.hiof.no/lebanon/300/380/388/tapline/petroleum-engineer/index.html#10>.

26. Tapline, *Pipeline Periscope*, August 1953; Tapline, *Pipeline Periscope*, August 1958; Barre Ludvigsen, in conversation with the author, June 27, 2013.
27. Gendzier, *Notes from the Minefield*, 97; Ghosn, "Geographies of Energy," 156.
28. Tapline, *Pipeline Periscope*, August 1953.
29. Raja' Iliya, e-mail messages to author, January–February 2015; Tapline, *Pipeline Periscope*, April 1953.
30. Gendzier, *Notes from the Minefield*, 96.
31. Ayyüb Shāmī, conversations with author, July 15, 2013 and August 14, 2013.
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94. Ibid.
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96. Tapline Laborers’ Syndicate, “To Lebanese Public Opinion (1 of 2),” (leaflet, Tapline Laborers’ Syndicate, 1963).
97. Tapline Laborers’ Syndicate, “To Lebanese Public Opinion (2 of 2),” (leaflet, Tapline Laborers’ Syndicate, 1963).
98. Although the Tapline Laborers’ Syndicate employed anti-colonial nationalist rhetoric in its first pamphlets and placards, and although it had good relations with the Arab nationalist MP Ma’rūf Sa’d, it was not affiliated with Lebanon’s Nasserist movement, as Ghosn suggests. Ghosn, “Geographies of Energy,” 160.
99. Shāmī, conversations with author.
100. Ibid.
101. Mitchell, *Carbon Democracy*, 38.
102. Shāmī, conversations with author.
103. *al-‘Amal*, September 4, 1964. This was framed as a demand for a 13th month of wages paid at the end of each year, an annual bonus that amounted to an 8.33% salary increase.
104. *al-Nahār*, October 4, 1964; Gendzier, *Notes from the Minefield*, 99.
105. *al-‘Amal*, September 5, 1964.
106. *al-‘Amal*, September 9, 1964.
107. *al-Nahār*, October 4, 1964.
108. Tapline throughput reached 439,000 barrels per day in 1964, compared to the IPC line’s 445,000 barrels per day in 1960. The IPC refinery at Tripoli accounted for roughly 55% of premium gasoline sales and 56% of regular

- gasoline sales in Lebanon in 1964, with Tapline crude processed at Medreco likely making up almost all of the remainder. Interview with anonymous former Tapline employee, July 2013; Iraq Petroleum Company—Lebanon, “General Information on Pipeline & Terminal—Lebanon and Tripoli Refinery,” 1970, <http://almashriq.hiof.no/lebanon/300/380/388/ipc/ipc-gi-1970/index.html>.
109. U.S. Embassy in Beirut to U.S. Department of State, “Petroleum Workers’ Strike Continues,” September 25, 1964; “President Helou Seeks Quick Settlement of Oil Strike,” September 30, 1964; “Petroleum Workers’ Strike Ends,” October 14, 1964; RG 59, Central Policy Files 1964–1966, Box 1309, NARA.
 110. Tapline Laborers’ Syndicate, “To the Management of the Tapline Company,” (leaflet, Tapline Laborers’ Syndicate, 1964); Brickhouse, “Tapline’s Sidon Terminal”; Ludvigsen, conversation with the author.
 111. Photograph provided to author by Ayyūb Shāmī.
 112. *al-ʿAmal*, September 5 and 20, 1964; *al-Anbaʿ*, September 19, 1964.
 113. Ghosn notes that the company suggested to the Lebanese government that a shutdown would cost Lebanon 35,000 *lira* daily. Ghosn, “Geographies of Energy,” 160; Gendzier, *Notes from the Minefield*, 58, 83; Shāmī, conversations with author.
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 115. Tapline Laborers’ Syndicate, “Statement number 2: Petroleum is a means to a better life,” (leaflet, Tapline Laborers’ Syndicate, 1966).
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“Oil Is Our Wet Nurse”:
Oil Production and *Munayshilar*
(Oil Workers) in Soviet Kazakhstan

Saulesh Yessenova

THE SOVIET OIL COMPLEX IN KAZAKHSTAN

The northeastern coast of the Caspian Sea forms Kazakhstan’s western frontier. Oil was struck there for the first time in 1912 by the Nobel Brothers; but capitalist oil entrepreneurs did not find this coast of the Caspian Sea so attractive, concentrating instead on Baku and Grozny. In 1922, the Soviet government created Embanef, a state-controlled trust that would prospect for and develop oil on the northeastern coast. By the late 1960s, Embanef’s resource base consisted of a number of oil deposits located above deep salt domes characteristic of the local geology. In 1971, however, local oil production peaked, and by 1975, all Embanef’s fields showed signs of depletion. Embanef needed new finds. In 1975, Zholdaskhali Dosmukhambetov, a chief geologist at Embanef, marked a spot on a local geological map: “The first [discovery] well should be here,” he declared. “I shall name this well ‘Tengiz,’ let it give us a sea of oil.”¹ In 1979, the existence of oil lying beneath the thick layer of salt at the edge of the Caspian Sea was finally confirmed. “It was a grand spectacle!” recalls Oringazy Iskuzhiev, another geologist at Embanef, referring to a tall black

S. Yessenova (✉)
Department of Anthropology and Archaeology,
University of Calgary, Alberta, Canada

fountain of oil that burst up from the depth of over four thousand meters.² Dosmukhambetov, who led the prospecting, did not get to be part of this happy moment: he died of illness in 1977. To honor him, his colleagues named this field, containing nine billion barrels of recoverable light oil, Tengiz, which is a Kazakh word for “sea.”

The Tengiz field is situated 280 km southeast of the city of Atyrau. Previously named Guryev, this urban center at the Ural River Delta is a gateway to the local oil fields. The landscape between Atyrau and Tengiz, punctuated with older and more recently installed oil collectors, pumping stations, and other industrial facilities, is clear evidence that crude production has been underway there for decades. The oil industry forever altered the local environment that had previously served the needs of pastoral nomadism and transformed old herding communities into culturally mixed populations with a wide range of relationships with oil projects. By the time crude production peaked in the early 1970s, the Soviet oil industry had become an integral part of local social realities, so much so that rural communities, including Dossor, Kosshagil, Emba, Makat, Karaton, and Kulsary, came to identify themselves both with the individual oil projects they hosted and with the local oil industry more generally.

The discovery of Tengiz was, therefore, a major achievement for Embaneft and bred hopes for a strong renewal of the oil industry among local communities. The Soviet state invested significant resources in exploring and developing this field that went into production in April 1991—just months before the dissolution of the Soviet Union. The largest discovery since Alaska’s Prudhoe Bay in 1968, Tengiz immediately attracted foreign corporate interest. In 1992, the government of Kazakhstan, already an independent state, established Tengizchevroil (TCO), a multinational oil enterprise operated by Chevron, Inc. that would exploit Tengiz for 40 years. What began in the 1970s as a local battle with the Soviet bureaucracy and local geology grew into a major international affair.

In this chapter, I discuss how the Soviet oil industry put down deep roots in this formerly pastoral nomadic region, which remained predominantly rural throughout the Soviet era despite profound changes resulting from the state-driven political and economic interventions. Historically, the social structure of indigenous communities reflected a pastoral order in which respectability and privilege derived from livestock ownership and assumptions of patriarchy. In the 1930s, the Soviet state attempted to transform unruly mobile herders of camel and sheep into Soviet collective

farmers, thereby generating considerable chaos in the region that lasted until the Second World War. After the war, however, an entirely new social class was formed within these herding communities. Collectively self-identified as *munayshilar*, which is a derivative of a Kazakh word for crude oil (*munay*), this class encompassed industrial professionals and laborers working in the oil industry. By focusing on the twists and turns in the historical relationship between Soviet industrial practice and indigenous communities, which came to be centered on the *munayshilar*, I illuminate the social and industrial processes and situations which led to the discovery of Tengiz, and to the community’s critical response to the state’s attempt to re-engineer the social fabric of local society as part of this field’s development in the 1980s.

This study has emerged as part of my ethnographic research on the oil industry in Kazakhstan, which focuses on the effects oil multinationals’ involvement in this industry had on political culture in this post-Soviet country. The impact of oil on a given locality is conventionally measured in terms of corporate wealth, private and public revenues, development, and corruption as well as in terms of pressure on the environment and indigenous communities and their cultures.³ All of these are important concerns, relevant to the study of the post-Soviet situation in Kazakhstan⁴; but these concerns are less helpful in making sense of local historical contexts, within which neither the accumulation of wealth, nor the preservation of a traditional way of life (deemed incompatible with oil development) figured as dominant ideas driving either the oil industry or the surrounding communities. On my visits to Kulsary, a settlement in the Atyrau *oblast*, which is discussed below, I heard people saying that their streets “should be paved with gold” based on such a long history of local engagement in oil production. But it is only in the post-Soviet period that this community has come to associate oil with the question of prosperity. Not a single personal testimony about life and work during the Soviet period that I collected while conducting fieldwork in this region conveyed the relevance of oil to economic gains derived from its exchange value on the world’s market.

Kulsary and other oil-producing communities certainly deserved to have their roads paved, at least with asphalt, based on their contribution to the war effort, postwar reconstruction and the subsequent rise of the Soviet Union as an oil exporter. At the same time, it is important to keep in mind that the rate of oil production in Soviet Kazakhstan was always quite modest. In the 1970s, the republic’s share in total Soviet oil production

ranged between 8 and 10%,⁵ most of which came from the oil fields in the Mankishlak peninsula, presently composing the Mangistau *oblast*.⁶ The current status of the Atyrau *oblast*, which is the focus of my inquiry, as the most important oil-producing region in Kazakhstan, generating billions of dollars in revenues for the state and for the oil companies involved, is a post-Soviet phenomenon. Furthermore, during the Soviet period, even the largest oil-producing regions in the Russian Federation did not experience, as Douglas Rogers reminds us, “the capitalist oil booms” observed outside the Soviet Union.⁷ “The socialist oil complex” that linked different industrial, bureaucratic, and social elements in one interactive whole for the purposes of the production and marketing of oil, he argues, operated very differently from the capitalist oil complex as discussed by Michael Watts and other scholars.⁸

One of the key distinct aspects of the socialist oil complex was the separation of oil production from marketing: revenues from oil exports never returned to the enterprises that produced oil; resources required to sustain the operations of the oil enterprises were allocated by the central planning committee based on the expected productivity of individual enterprises.⁹ The volume of allocated resources reflected the cost of oil production and not the price of oil. This Soviet practice provided no incentive for the oil-producing enterprises to increase the efficiency of their operations; nor did it help create exchange value for crude oil within the Soviet economy,¹⁰ which was another crucial moment: oil was worthless, as Rogers points out, unless it was refined into usable products—fuel or other petrochemicals—which is why Soviet refineries enjoyed a greater power in relation to oil producers.¹¹ Although there was a refinery in Guryev, the Soviet oil industry in Kazakhstan never attained the same degree of vertical integration of upstream and downstream operations as the oil industries in Russia and Azerbaijan: Embaneft was merely in charge of on-site production, functioning as a multiple project operator dependent on many other enterprises for fuel, machinery, and parts that positioned it near the bottom of the Soviet industrial hierarchy. Social development in the Guryev (future Atyrau) *oblast*, the home base of Embaneft, reflected this enterprise’s plight: outside Guryev, it consisted of spread-out villages featuring schools and office buildings that stood among self-built houses, animal sheds, and pyramids of dry cakes of animal dung, which herders used for fuel to prepare food and heat their homes. These villages were also home to local *munaysbilar*: but now it was oil rather than herding which had become their major source of livelihood.

It is not my purpose to analyze the Soviet political economy, given that it did not bring affluence to the oil-producing communities, even by Soviet standards; but rather to trace some of its effects on local understandings of oil and to explain why people became so invested in the oil industry, attaching so much pride to their identities as *munayshilar*. Since the time of the Bolshevik government, the northeastern coast of the Caspian Sea has always been defined by its capacity to produce oil. The Soviet regime was established there in 1928; but Embanefit was founded 6 years earlier, becoming a Soviet outpost driving the *osvoenie*, which is a Russian term denoting the process of “incorporation” and “economic development,” of this region.¹² Willard Sunderland points out that since imperial times, the Russian government had used this term to gloss over what was, in fact, a “conquest” or “expropriation:” a method of internal colonization, in which “outsiders made the natives’ region their own.”¹³ The historical circumstances behind the narrative I present in this chapter are characteristic of Soviet internal colonization; but the narrative itself is about how “natives” asserted control over the local social environment and the place of oil in this process.

This discussion is based on fieldwork that I conducted in the Zhiliiy *audany*, which is a primary oil-producing administrative district in the Atyrau *oblast* centered on Kulsary. This district roughly corresponds to Embanefit’s sites of operation during the Soviet period. During three summer seasons of fieldwork (2004–2011), I interviewed members of this already urbanized community who had worked in the Soviet oil industry and collected oral history narratives from the old-time local residents. I have also drawn in this study on so-called brokered data,¹⁴ including local media sources, memoirs, and corporate publications. I also interviewed present-day *munayshilar* in Astana and Atyrau-city who trace their genealogies to Kulsary and other locations in the Zhiliiy *audany*. Not every person who contributed to this study is acknowledged in the text; however, those who are mentioned are introduced by their real names.

In the following section, I discuss the first decades of the Soviet oil industry that, as invasive as it was, became integrated into this region’s social life. Focusing on the realities of industrial praxis, I then discuss how working in oil became an important part of local culture and identity. The issue of oil depletion and local efforts to avert industrial decline are explored next, followed by a discussion of developments pertaining to the *osvoenie* of Tengiz. This latter issue aptly demonstrates the double meaning of this Russian term: in a broad sense, *osvoenie* refers to colonization by

means of resettlement and the creation of social and political infrastructures that makes the region in question governable; in a narrow sense, however, it denotes the process of development of a significant and hitherto untapped natural resource, such as an oil field. This distinction is important to acknowledge here because local resistance was directed against the *osvoenie* of Tengiz in the first broader sense. To conclude, I sum up my discussion of this historical engagement in oil that shaped local skills and expectations, preparing local society for “the capitalist oil booms and associated inequalities” that Rogers mentions,¹⁵ which they experiences only in the aftermath of Socialism.

MAKING THE KAZAKH OIL WORKING CLASS

Made up of Caspian lowlands, the northeastern coast of the Caspian Sea was historically occupied by herding communities of predominantly Turkic origin. Their engagement in pastoral nomadism, a system based on the seasonal migration of animals and people between ecologically specialized grasslands, shaped local cultural and physical environments. For the living generations of the Aday, Berish, Sherkesh, Yissyk, and Taz lineages that are native to the region, oral tradition locates long successions of names, place-names, and events that communicate the depth of their history. Belonging to the Bay Uly and the Kishi jüz tribal confederations, historical lineages used these political umbrella organizations to access regional trade centers on the Ural and Volga Rivers. By linking individual communities to broader cultural universes, markets, and political structures, these historical relations and exchange networks ensured the long-term survival of the local society and its culture.¹⁶

Subsequent historical developments tied this region to even more distant markets and political structures. In the mid-nineteenth century, the Caspian lowlands were incorporated into the Russian Empire, and, in 1924, they were added to the Kazakh Soviet Socialist Republic¹⁷: which brought further challenges for the local society. In 1918, the Bolshevik government nationalized the oil industry in Baku and Grozny. Nationalization generated a fuel crisis in the Soviet Union, which transformed the Caspian lowlands from distant backwaters into an important resource for the Soviet state; in 1920, Embaneft was thus established to operate the Dossor and Makat oil fields.¹⁸ Two years later, the company became a state-controlled trust that was headquartered in Moscow until 1929; after that it was managed from Guryev: but the enterprise remained

under Moscow’s direct control. In 1970, Embanefit was reorganized as a production association containing divisions that not only prospected for, drilled and pumped oil, but also built roads, railroads and pipelines, and trained cadres. Their activities created the Soviet oil industry on the ground. In accounts that have been published in post-Soviet Kazakhstan, there is a tendency to stress the participation of the local Kazakh society in the oil industry since the 1920s. This is when oil indeed began shaping the lives of individual Kazakh men and their families; however, at the societal level, the indigenization of the local oil industry only became a trend in the postwar period. Before that, as a local observer from Kulsary noted to me, the relationship between local communities and the oil industry was a “forced” one in which neither party was a willing partner.

In 1924, the first local school of industrial studies was opened in Dossor, where oil had first been discovered, and which was the center of oil production at that time. By 1928, only five Kazakhs had graduated. In the early 1930s, a total of 510 Kazakh students were enrolled at this school and at another one in Guryev.¹⁹ This was a significant increase. This increase should not be attributed to a desire to master new professions, but rather to the desperation created by Soviet sedentarization and collectivization campaigns, which began in 1928 and drove local Kazakh youth to the schools in search of food and shelter. Local herders’ position as suppliers of food and draft animals to the industry somewhat facilitated the establishment of a symbiotic relationship between the implanted industry and local communities. But the violence and coercion involved in both sedentarization and collectivization, prompting mass slaughters of animals and outmigration of herders to Iran and Turkey, complicated the relationship between the indigenous populations and the oil industry still further.²⁰ In 1935, the Soviet government quietly backtracked from its uncompromising decree on collectivization, which had put food production in crisis, by allowing rural Kazakhs to maintain private herds as long as they participated in collective farms.²¹ As a result, the remaining Kazakhs continued to rely on animal husbandry which was the backbone of their household economy.

The Second World War, or more precisely, the beginning of the Great Patriotic War in 1941, imposed new demands on the region. The advance of Hitler’s army pushed Soviet industrial enterprises eastward. Caspian lowlands became a prime destination for equipment and workers evacuated from Grozny and Baku. Locally, over ten thousand Kazakhs were drafted into the oil industry, which at the start of the war included nine

oil-producing projects, to work side by side with the evacuees and the workers who had arrived earlier. Nearly half of these rural Kazakhs were women: hundreds of them engaged in drilling and well operation, which attested to the depth of labor recruitment among local communities, from which many men had already been sent to the front.²² The threat of losing fuel production capacities in Baku created the need for a refinery in Guryev.²³ Following the construction of this refinery, initially coded as “Plant #441” and completed in 1945, the *oblast* was granted the status of industrial center, despite the fact that it remained rural outside the city of Guryev.²⁴

The war, which led to an expansion of industrial activities in the region, prompted changes in pre-existing cultural norms and economic patterns among the indigenous population. In particular, it fostered new understandings of the oil industry that became a collective experience for many. Individual stories of endurance and appreciation of industrial work were integrated in local lore as sources of pride and honor that alongside other deeds gave meaning to community life. Trying to expand the existing workforce, the Soviet state supported aspirations for industrial labor among the indigenous population. Photographs of Kazakh oil workers, such as the ones included in this chapter, standing by the oil gushers and rigs or handling heavy equipment, as well as portraits and biographies of local Heroes of Socialist Labor were printed in newspapers both during and after the war (see Figs. 1 and 2).

Individual experiences of wartime labor thus acquired a public form in which the misery and duress it involved were replaced with a sense of purpose and heroism.²⁵ “The eyes of local Kazakhs [finally] opened,” said an amateur historian from Kulsary to me. They came to recognize that, as he noted, “the oil industry was a major source of prestige and political advancement” in the region and, therefore, wanted to join it. This candid comment was intended to explain the turn in the postwar relationship between local Kazakhs and the oil industry, previously dominated by newcomers. However, it conveys the reverse idea as well: after the Second World War, the oil industry lost its foreign roots in the eyes of the local society, going beyond its industrial function. It became part and parcel of, as Michael Hardt and Antonio Negri put it, “the production of social life itself, in which the economic, the political and the cultural increasingly overlap and invest in one another.”²⁶ A key process in this production of social life in the Soviet industrial context was labor.

Fig. 1 1955. Masters of subsurface well repair K. Zhusupov (*left*) and A. Karzhauov (*right*), the Kulsary oil field. Courtesy of the Aldongar Public Foundation for Cultural Development, Almaty.



OIL IS OUR WET NURSE

“Neft’ i kormilitsa nasha i poilitsa,” said Bagit Kulbaev, a veteran of the Soviet oil industry, during an interview in Kulsary during the summer of 2009. He used this metaphor, which means “oil is our wet nurse,” to underscore the importance of oil significance as a means of subsistence for the local society. In Russian, the term *kormilitsa* denotes a “wet nurse” and is also used to refer to a river, a cow, or even land from which people can obtain nourishment vital for their survival. In this case, the source of nourishment is an inedible and nonrenewable mineral. “My father was a *munayshi*, so were his brothers,”²⁷ Kulbaev said, explaining his decision to choose this profession. He was born in Kosshagil, which was the name of a collective farm that hosted one of the Embaneft oil projects at which he worked as a young man. In 1960, he became a student at the Institute of Energy in Alma-Ata, then the capital of Soviet Kazakhstan. Upon

Fig. 2 1943.
Operator K.
Begembetova, the
Shubarduk oil field.
Courtesy of the Aldongar
Public Foundation for
Cultural Development,
Almaty.



graduation, he worked as an assistant driller in Kulsary. Eventually, he was promoted to master driller, then to engineer, and finally to chief engineer. He had a stellar *munayshi* career that he built by participating in a number of oil projects, including Karaton, Prorva, and Tengiz from which he retired in 2003 (see Fig. 3).

Not every man of his age in this region had this kind of career or was an oil worker at all; and yet his biography reflects the professional aspirations among the generation of Kazakh men who began their working lives in the 1960s. Many of these men established family dynasties of *munayshilar* by passing their ambitions to the next generation. Through dedication and hard work this 1960s cohort claimed symbolic ownership of the local oil industry that the local populace came to treat as “their” industry. Kulbaev’s testimony attests to the degree to which individual narratives about how “oil became



Fig. 3 Bagit Kulbaev and his wife, Svetlana Kulbaeva, in 2011. All five of their children—three daughters and two sons—work in Kazakhstan’s oil industry. Photo by the author.

our life,” in his words, are not merely personal testimonies, they are cultural narratives of identity which extend to broader communities.

Working in oil became an important part of local men’s lives: so much so that even dangerous and exhausting jobs, such as drilling, acquired meaning consistent with pre-existing expectations of masculinity and peer pressure, and images of wartime efforts. The emblematic organization of the Soviet oil industry, within which tasks, goals, and strategies were often divorced from the common sense dictated by economics and even geology, supported the continuous absorption of local youth into Embanefit. The Soviet Ministry of Energy and Mineral Resources determined binding production targets for each oil enterprise in the country. As Rogers discusses, the targets were usually set so high that they were impossible to achieve.²⁸ In this situation, oil enterprises met the expectations of Moscow’s authorities by drilling new wells. Not every new well delivered

more oil from a known field or signaled a new find (or was even expected to). At the same time, drilling represented a frantic effort that was legible to Moscow's authorities. This is why the number of drilled meters was an important measure of the enterprise's performance. In the early 1980s, Embanefit had 3641 wells: nearly half of these were either dry or in need of repair. Nonetheless, the company drilled eighty thousand meters for prospecting purposes alone in 1 year. This was not a useful practice at all since the existence of Tengiz, which was confirmed in 1979, proved the need for deep drilling in order to find new sources of oil, something that, as discussed below, Embanefit could not perform on its own. Unable to achieve oil production targets, the enterprise was forced to continue drilling, despite the fact that it constantly ran short of resources and workers for this task and, therefore, was in constant need for young recruits.

One of them was Asset Magauov, who is now a senior manager at KazMunaiGaz, Kazakhstan's national oil company. In the early 1980s, Asset was a student at the Gubkin Institute of Oil and Gas in Moscow and worked in Kulsary as an assistant driller in the summer. Drilling brigades stayed at their work sites for days, he remembers, "hiding from the wind in cardboard boxes while the wind was protecting them from mosquitoes" at night. He joined a drilling brigade at the insistence of his father, a distinguished *mumaysibi* himself, who believed that his son had to endure the physical hardship involved in drilling, which for him was an important part of learning about the oil industry from the bottom-up. Asset was to follow the steps of the previous generation, including his father and his peers, as well as Kulbaev, who worked as a roughneck and an assistant driller, jobs that did not require a particular qualification, except physical strength, before and after he graduated from an institution of higher learning: he defined it as a "school of life," about which he clearly had no regrets.

As in other extractive industries around the world, in the oil industry entry-level positions, such as assistant drillers and other roughneck jobs in well repair and prospecting were used to discipline recruits and prepare them for industrial labor.²⁹ Drilling is always an important task, requiring a well-coordinated team effort: insubordination or incompetence may cause injuries, explosions or fire, something that has often been a problem in the past.³⁰ In the Soviet Union, accidents and equipment loss, as Span discusses in the context of oil development in Soviet Kazakhstan, could also result in prison sentences.³¹ As noted earlier, before the Second World War, drillers, derrick operators, and geologists included in Embanefit drilling expeditions were workers from the outside. The few Kazakhs recruited

by the oil industry were youth from impoverished families and orphans who learned Russian in boarding schools.³² Furthermore, after the War, many of the Kazakhs who joined the industry during the conflict, returned to animal husbandry; however, some were drawn to the oil fields for the same reasons that attracted rural people to industrial enterprises elsewhere: as a means to escape “from the oppressive routine of agricultural life,” as Alison Frank put it,³³ and claustrophobic community life, as well as hunger, which in the 1940s was still a leading cause of death in the Soviet Union.³⁴

Kazakh workers were welcomed as roughnecks. With the end of the war, evacuees returned home. The expansion of oil production in the Volga-Urals oil basin led the Russian workforce back to Russia. Those who remained in Kazakhstan, on the other hand, wanted to get away from the mud and dust of the oil fields by moving to Guryev. The outmigration of these workers in the aftermath of the war generated labor shortages in oil production that, in turn, stimulated the recruitment of local youth, creating opportunities to learn trades, obtain degrees, and seek promotion. Thus, unlike other historical contexts, such as Mexico and Saudi Arabia, where oil corporations,³⁵ reinforced race-based divisions by employing foreign workers, in Soviet Kazakhstan the shortage of labor led to a wider involvement of indigenous people in the oil industry, and to their recognition by Russian authorities as members of the Soviet industrial working class. In the 1960s, Kazakhs came to dominate drilling crews, from roughnecks to master drillers and geologists. They were able to use their native language, thus reducing the cultural distance between home and work. Working autonomously in distant locations, local crews had control over the work processes in which they were involved, an important component of which was teaching trade and subordination to recruits. What the *munayshilar* came to regard as their “school of life” was defined as such because the on-site training and labor processes in oil production were consistent with the cultural practices of the broader local communities.

The oil produced by Embaneft was pipelined to Russia and processed at the refinery located in Guryev. In the 1960s, i.e., before local production peaked, Embaneft filled 35–40% of the refinery’s capacities, and was about to decrease its supplies.³⁶ In the following decade, the Dossor field, once containing 50 million barrels of oil, struggled to sustain prewar production rates, while the enterprises that exploited the Kosshagil and Prorva fields were shut down. Embaneft relocated oil workers and their families to Kulsary. Yet,

every Embaneft enterprise was embedded in a local community, providing jobs, building and maintaining kindergartens and schools, supplying water and gas, and meeting other social needs. The closure of the Prorva project led to the decay of Sarakamis, a settlement that was built for oil workers and, according to the census, had over four thousand permanent residents in 1970. In 2004, Sarakamis had become a ghost town and was used in the post-Soviet period as a shelter for migrant families from distant villages, who were the last to abandon it (Fig. 4).

As Nasibkaliy Marabaev, who worked at these oil projects testifies, in the 1950s and 1960s the names of Prorva, Dossor, and Makat “were on everyone’s lips;” these towns “were bustling with life as if they were the center of the universe.” They certainly seemed to be to those who saw “caravans” of trucks arriving to their worksites from different parts of the Soviet Union. “People worked hard thinking about the future with enthusiasm and optimism,” he reported.³⁷ In the 1970s, however, a



Fig. 4 Sarakamis (2004). One of the last families to leave Sarakamis, shown here with visitors from Kulsary. Photo by the author.

gloomy prospect began to appear: with the depletion of the oil supply, the future became unstable, and looked similar to what happened in Oman.³⁸ As Mandana Limbert argues, this instability was clear in the idea people had about their future, which looked more like the past when their country was one of the poorest in the world.³⁹ In Soviet Kazakhstan, a “return to the past” meant an unlikely event of the turnaround of the Soviet regime that taught citizens to believe in the “bright communist future.” This is why local *munayshilar* mobilized for what would become a historic discovery: after all, oil was the “wet nurse” for all of them.

“We always knew there was big oil,” recalls Iskuzhiev, a geologist who was involved in the discovery of Tengiz, referring to the lack of commitment from Moscow to expand exploration in Kazakhstan.⁴⁰ In the postwar period, the Soviet state prioritized the Volga-Urals oil basin and Western Siberia, allocating no resources for systematic prospecting in Kazakhstan. In the early 1970s, however, Embanefit carried out theoretical research in order to examine the potential for new discoveries.⁴¹ By October 1975, the company had obtained enough information to start exploratory drilling. Its chief geologist (Dosmukhambetov), head of the Geology Department (Iskuzhiev), and the General Director (Bulekpay Sagyngaliev) went to Moscow where they met with the Soviet Minister of Energy and Mineral Resources, Nikolai Yerofeyev, and members of the Ministry’s Department of Geology.⁴²

A key difficulty in obtaining the Ministry’s approval was Embanefit’s intention to drill deep underneath the ground surface. Moscow officials were initially dismissive of the possibility of there being oil buried 4000 or 5000 m below the surface, as the team of Kazakh geologists had suggested.⁴³ Their skepticism had to do with the poor state of Soviet drilling technology. Although the Soviet Union was a major producer of steel, it failed to manufacture the high-quality steel required for rotary drills used elsewhere in the world. In order to address this issue, the Soviet Union invented a turbodrill. This machine, though, could be used for drilling in soft ground such as that in the Volga-Urals oil basin, but lost its effectiveness in the corrosive environment of the northeastern coast of the Caspian Sea, and was not useful for drilling deeper than 500–700 meters. These technological limits conditioned the state of mind of Soviet officials, as was noted by foreign observers.⁴⁴ Only after prolonged debates, Kazakh geologists managed to convince the Ministry, and Embanefit was allowed to drill three exploratory wells.

In December 1979, the first well was finally tested and to everyone's delight it delivered the very first Tengiz oil. "Dosmukhambetov was not mistaken," Iskuzhiyev commented, "there was a true underground sea of oil." It took a "colossal" effort to make this discovery happen, he stressed.⁴⁵ The novelty of the experience and the geological complexity of the field were only part of the difficulties they faced. Most problems originated in the hyper-centralized organization of the Soviet industry, which is the main reason why it took them almost 3 years to drill the first three wells. Every operation had to be approved by central authorities, who then authorized the shipment of required supplies. Almost every type of oil equipment had to be brought from other Soviet republics. Tatiana Mikhailovna, a Russian woman from Kulsary who worked in procurement at Embanefit, defined the process as "hozhdeniye po mukam" or a "journey through torment."⁴⁶ From the 1970s onward, Embanefit also depended on equipment imported from France, Germany, and Canada.⁴⁷ The request for technology from the other side of the Iron Curtain had to be approved by the Chairman of the Soviet Council of Ministries himself, a process that greatly delayed the project. As Tatiana Mikhailovna told me, sometimes they received the wrong products as a result of the long bureaucratic chain involved in the requisition and procurement procedures.

This created constant delays and scarcity, which led to the formation of informal arrangements and networks in the local oil industry. Exchanges of favors and materials between production divisions, enterprises, and projects helped mitigate the pain of the "journey," or, as James Scott has argued, helped "circumvent some of the colossal waste and inefficiencies built into the system."⁴⁸ Moreover, production and the fulfillment of state targets came to depend on this informal economy as much as on the Soviet state itself. Informal relations extended far outside regional boundaries, connecting the local oil industry with industrial centers in Russia and Ukraine, which produced steel pipes, drills and drill bits, rails, and motors. These relations outlived the Soviet state given that they were useful to local contractors who supplied pipes and rails from Dnepropetrovsk to TCO and its subcontractors, beating others in terms of cost and delivery time. During the Soviet period, working at Embanefit was not merely about handling industrial operations, but also about negotiating with central authorities. These tasks required leadership skills and social foundations that supported these behaviors. Everyone I asked about their experience in

the local oil industry during the Soviet period acknowledged how absurd it was and described it as something imposed from the outside. However, during the Soviet period, the bureaucratic constraints that determined the pace of work could not be easily separated from local industrial culture and social life.

The intensity of these informal economic relations, where equipment, work hours, meters drilled, and personnel were loaned and repaid, hidden and reported elsewhere, obtained and lost, all of which were coordinated outside the purview of the state, generated a sense of control among the local *munayshilar* over their industry. Similar to the sense of control among the drilling crews, it was feeding into sentiments of identity and community of the *munayshilar* and marked their relationship to oil. The closure of the old projects was a practical reminder of the finite nature of oil. Divorced from market incentives, local *munayshilar* developed a distinct sense of ownership and even care for this nonrenewable resource. They hoped that oil would support generations of *munayshilar* and their communities. For instance, with the beginning of the Tengiz project, local professionals, including Kulbaev, went to Canada to buy drilling and well casing equipment. “Our choice of technology was grounded in a theory that this oil field was not to be exploited by barbarian means,” Kulbaev told me, pointing out that their goal was to extend its lifespan. When Chevron arrived, he said, the company immediately dug out that equipment and threw it out. For Kulbaev, this underscored a fundamental difference between them and Chevron, a capitalist enterprise, in terms of how they approached the resource. They equipped wells so that they could produce 500–600 tons of oil in 24 h from each one. By contrast, as Kulbaev said with evident disapproval, Chevron pumped on average 10,000 tons from one well in 24 h.

So the presence of “big oil” was not treated as a sign of instant prosperity: what motivated the discovery of Tengiz was the renewal of the local industrial tradition and a shared expectation that the richness of local geology would bring about social prestige to the local oil industry. It was regarded as a great honor to host a “flagship” enterprise developing a field that was “unparalleled” in terms of geological complexity, as Lukpan Seysimbekov, a retired *munayshi* from Kulsary explained to me. The local expectation was that such recognition would bring additional resources for the local oil industry as well as social infrastructure and consumer goods for its loyal workforce, their families, and communities. However, this is not what the Soviet state had in store for them.

THE TENGIZ OIL FIELD

Situated some 100 km from Tengiz, Kulsary is a former herding encampment. In 1939, it was reorganized as a collective farm; in 1945, Embanefit struck oil in the vicinity of this settlement, which made it an important regional center of oil production that by 1970 was populated by over sixteen thousand people.⁴⁹ When I first arrived in Kulsary in 2004, I soon learned that it was named after a local man from the Aday lineage who lived there in the late nineteenth century. Kapen Kidibasov, a retiree working as a journalist in his spare time, told me the story of this man as he knew it. Kulsary was a wealthy owner of herds and *at bege* or horse trainer. As such, he had a respected position within the local society; but he is mostly remembered for his ability to foresee the future. One night he had a strange dream. His horses were falling into the abyss, dragging him along as he tried to stop them from disappearing underground. He woke up realizing that it was just a dream and his horses were still there. But he still heard a knocking sound that was coming from underground, which he interpreted as the sound of the whole world rushing to meet in his homeland. Kulsary's prediction proved to be right, the journalist said, pointing his finger in the direction of Tengiz where tens of thousands of people from many countries were working that year.

The globalization of Tengiz is usually associated with the arrival of Chevron in 1993; and yet the development of this field was an international endeavor from the very beginning. From 1981 to 1983, drilling was conducted by 20 brigades, 10 of which included local workers from Embanefit and others arrived from Volgograd, recruited from two oil enterprises, Prikaspiyburneft and Nizhnevolzhskneft.⁵⁰ For 2 years, these brigades worked to map the Tengiz field, and this led to the discovery of Korolev, a smaller oil field to the northeast of Tengiz.⁵¹ In 1983, Tengizneftegaz, an enterprise dedicated to the development of these two fields, was established. Tengiz's geology and high sulfur content required a complex infrastructural setup, something that was not well thought out at the beginning; so in 1985, during an initial stage of deep drilling, high-pressure forced liquid to the surface, causing an explosion at one well, similar to what happened at the Deepwater Horizon platform in 2010. Looking for opportunities in the Soviet Union, Chevron used this incident to approach Soviet authorities, but the company's proposal for a joint development of the field was declined. The Kremlin disagreed with the suggested profit-sharing scheme and contracted other firms: the Bauman

State Technical Institute in Moscow designed a supporting infrastructure for drilling; the Hungarian State Engineering Company built an on-site processing plant separating oil and compressing sour gas; the German company Lurgi, and Lavalin and Kremco from Canada supplied drilling rigs, casing pipes, and other well equipment.⁵²

In preparation for oil production, Tengizneftegaz built a new pipeline (Tengiz-Guryev-Grozny) and extended the railway to connect Tengiz to the network.⁵³ It also built a water pipe to carry water for over 500 km from Kygach, a tributary of the Volga River, to Tengiz.⁵⁴ These expansive industrial operations required significant labor input. In 1987, Tengizneftegaz had 10 thousand employees, over 50% of whom were oil workers, engineers, and support staff from Russia.⁵⁵ The incoming Russian workforce was housed at a makeshift camp, named the Tengiz Rotation Shift Worker Village (or *poseolok*, henceforth the Tengiz Village), which was set up near the field. Russian brigades worked at Tengiz for two or four weeks after which they were replaced by other Russian brigades. This shift work or concentrated work schedule was treated as a temporary arrangement: the Soviet state intended to provide incentives in the form of housing and high pay rates for the Russian oil workers to *zakrepitsa* or “fix their position” in Kulsary, i.e., resettle them permanently.⁵⁶ Thus, by developing Tengiz the Soviet state wanted to accomplish two goals: replace the rapidly depleting supplies from the Volga-Urals basin, and accommodate an excess of industrial labor, created by the region’s declining oil production.

In the early 1980s, Kulsary contained small clay and brick houses and several two-story wooden office buildings, but lacked asphalted streets and a centralized sewage system. It was ill-suited to provide even temporary accommodation for incoming workers. Housing was a major problem among local populations as well. Composed of treeless grasslands, the region did not produce construction materials, except clay. Historically, the indigenous population lived in *agash yui* or yurts, and used clay to build tombs and subterranean huts. Starting in the mid-1930s, Embaneft tried to improve the housing situation for its workforce, but it never had enough resources to import bricks, lumber, and pipes from other regions.⁵⁷ Svetlana Kulbaeva, Kulbaev’s wife, who participated in the interview along with her husband, described the problem through their family’s experiences.

When we arrived in Prorva in the mid-1960s we shared a room with another eight people. We treated this room as a two-room apartment because the stove divided it into two [sections]. We burned fuel oil for heating and baked

bread ourselves. When we moved to Karaton, life did not become easier because there was no kitchen in the clay house we lived in; it was the same in Sarakamis. It was only when we moved to Kulsary in 1976 [when her husband was already a chief engineer] that we could build a [proper] house and make a garden.

Tengizneftegaz was extravagantly well-funded compared with Embanefit. In 1986 alone, the enterprise's budget equaled \$16 billion.⁵⁸ Tengizneftestroy, a subsidiary of Tengizneftegaz in civil construction, was to transform Kulsary from a rural calamity into a modern Soviet town. Mandated to erect new *mikrorayons* or urban residential neighborhoods for the incoming oil workforce, Tengizneftestroy contracted firms (*domostroitelniye kombinaty*) that manufactured standard apartment blocks in Kuibyshev, Alma-Ata, and Aktyubinsk, the cities in Russia and Kazakhstan that sourced the labor for this civil construction. By 1989, Kulsary's population doubled, exceeding 32 thousand people. Local residents were angered by the fact that after decades of industrial operations, this was the first time that the oil industry was addressing the housing shortage and the poor living conditions, and was doing so for the Russian workforce and not for them.

Furthermore, all incoming workers were paid a 60% supplement added to their wages, which was a Soviet practice designed to compensate employees for working in a hazardous environment and away from home. Construction brigades arrived almost complete, and managers at Tengizneftestroy preferred not to hire locally anyway, to avoid disputes over pay rates, as I learned from former managers in Almaty,⁵⁹ given that local residents were not entitled to the lucrative wage supplement. This situation unfolded within the context of rising unemployment rates in Kulsary and elsewhere in the region, due to fewer opportunities at Embanefit and the nonexistent service sector. Unemployment affected especially young people, as many of them were no longer able to obtain entry-level jobs in the oil industry or related enterprises.⁶⁰

Economic discrimination was thus an important issue in shaping local criticism of the state, new enterprises, and incoming workers. However, there was an even bigger issue in the minds of local inhabitants. The urban changes that were supposed to transform Kulsary was based on a model used during the development (*osvoenie*) of the oil fields in Western Siberia. This model included base-towns with a relatively complex social infrastructure that served to attract the incoming workforce and their families to

stay in the region. Their permanent presence was regarded as a positive contribution to the social development and economic diversification of the remote region.⁶¹ A similar model of *osvoenie* had been used in Kazakhstan before, a prime example of which was the Virgin Lands campaign, as well as mining projects, which brought millions of people to this Soviet republic in the 1950 and 1960s. As a result, by the 1970s, ethnic Kazakhs constituted less than 40% of the total population in their republic.⁶² During the same decade, Russian became the language of instruction for 78% of students at universities and at most urban schools in Kazakhstan.⁶³ With minor exceptions, Russian-speaking populations came to dominate cities in Kazakhstan. Likewise, the *osvoenie* of Tengiz was not confined to the oil field itself: it was to change the local society's existing cultural setting and social fabric.

Having thousands of construction workers occupying Kulsary and the prospect of the Russian oil workers settling permanently overwhelmed the community. Local residents feared that Kulsary would follow the path of Kazakhstan's cities. One of them shared his memories with me, comparing Kulsary to Guryev and Shevchenko (present-day Aktau), cities that he visited as a young man in the early 1970s. "Those were cities in Kazakhstan; and yet, we did not see a single Kazakh on the streets!" he exclaimed. "And the Kazakhs we met all spoke Russian," he continued, adding that proper Kazakhs lived at the outskirts in clay houses similar to those in Kulsary and "had nothing while the Russians had all the goods and conveniences." Since the early 1960s, the Soviet state used oil to upgrade the transportation system and improve living conditions in major cities across the Soviet Union.⁶⁴ Most Soviet revenues from oil exports were used to purchase food items and other consumer products abroad.⁶⁵ Kulsary did not receive any benefits, which is why I assumed that my interlocutor would express his grievances about the unfairness of oil revenue distribution and the loss of "their oil" to other regions and political interests. Instead, he talked about his community and its advantages and not about what was missing. Life in Kulsary was built around traditional values, he stressed, such as: living in proximity to one's kin in a close-knit community, tending to animals, and using the Kazakh language at home and in the workplace.

Unemployment and discrimination augmented the community's fear of cultural destruction, which led to a guerilla war conducted by local youth. In June 1989, some young men set fire to several apartment buildings in Kulsary, and then attacked on horseback the workers as they tried to

escape. Their goal was to drive them away and to stop the construction of the new *mikrorayons*. OMON (or militarized police) units were dispatched to get the situation under control, but the organized attacks on the oil and construction workers at their homes, and during their commute to the train station in Kulsary, continued for 2 months. This was not what seasoned *munayshilar*, who had worked so hard to find the “big oil,” expected to happen. By the end of summer, all the construction workers had left Kulsary. According to the stories that both Kulsary residents and former Tengizneftestroy employees in Almaty told me, they left out of fear for their wellbeing. In Kulsary, workers’ departure was treated as a victory, reinforcing a sense of social cohesion and community pride that local residents relayed in their conversations with me. Safety was indeed a big concern for workers; however, construction brigades never came back for a different reason.

In January 1988, the state issued a new Law on Enterprises as a measure against the crisis of the centrally planned economy. According to this law, industrial enterprises were to be self-funded by reinvesting their profits in production. In less than 2 years, this legislation, aiming at reviving the failing Soviet economy, led to a loss of 1.6 million jobs across the Soviet Union as many enterprises could no longer maintain their existing workforce.⁶⁶ This legislation pushed Tengizneftgaz to focus on its core activities in order to reach the production stage as soon as possible. The enterprise used social struggle as a pretext to terminate civil construction in Kulsary. Coincidentally, in August 1989, Mikhail Gorbachev signed a protocol of agreement for the joint development of Tengiz with Chevron.⁶⁷ This deal never materialized: in 1991, Nursultan Nazarbaev, the future President of independent Kazakhstan, finally claimed Tengiz. To the Kremlin’s disappointment, he signed a new protocol of agreement with Chevron in 1992.⁶⁸ The battle for Tengiz thus relocated, now involving high political forces and overseas commercial powers. But in 1990, in anticipation of foreign investment, the Soviet state abandoned Tengiz. Within months, Tengizneftgaz’s workforce had shrunk by four thousand employees as many Russian workers headed home. The local residents, at last, had Kulsary back to themselves—at least temporarily. They occupied the newly built apartments that stood empty; the welcome idea that one of their own had predicted that the whole world would rush to meet in their homeland was yet to capture the local imagination.

CONCLUSION

In this chapter, I have discussed the ways in which Kazakh communities engaged with the Soviet oil industry that was brought to this region in the first half of the twentieth century. Participation in the oil industry during the Second World War transformed changed local society following a Soviet plan to transform industrial and agricultural workers. After the war, this industry became a social institution with a broad range of cultural effects, including the creation of a sustained social class of oil workers within the indigenous communities—the *munayshilar*. Focusing on Soviet industrial praxis and the specificity of the socialist oil complex. I have explored the *munayshilar*'s commitment to the oil industry that conferred a respected social status upon them. It is important to note that this status was recognized and carried meaning only within the local oil-producing communities. As Rogers asserts, the oil industry was not an iconic or powerful industry in the former Soviet Union. If the oil industry or oil labor mattered at all, he notes, “it was in a very specific, geographically bounded context that was not exemplary beyond itself.”⁶⁹ The situation in Soviet Kazakhstan supports this claim. For example, it was only in 1995, i.e., in the aftermath of socialism, that Dosmukhambetov, Iskuzhiev and another six local oil specialists finally received state recognition for their discovery of Tengiz, one of the largest oil fields in the world.⁷⁰ The question is then, why were the *munayshilar* so proud of what they did, and even referred to oil as their “wet nurse?”

As I have argued in this chapter, participation in the Soviet oil industry was important to them because by being associated with the main industrial enterprise in the region, local communities could assert control over the local social environment, in the presence of a powerful Soviet state that had previously generated considerable destruction locally in the region. This participation gave rise to particular subjectivities in which oil, community, and tradition were intricately interwoven to stand for a way of life, grounding the Soviet oil industry in local realities and motivating the local *munayshilar* to prospect for “big oil” in the early 1970s. In the late 1980s, however, Kulsary resisted the Soviet plan to develop Tengiz, which threatened the community's integrity and its way of life. Soviet Tengiz thus taught this community to guard its social boundaries, informing the community's future attitudes and behaviors. With the arrival of Chevron in 1993, industrial operations significantly increased at Tengiz. Between 2004 and 2008, TCO sustained the operations of nearly 100 companies,

clustered within a two thousand kilometer perimeter, which included work sites and accommodation for the workforce. This organization originated in a corporate strategy to wall oil production off from local interference, creating problems for the local workforce.⁷¹ And yet, this organization was widely approved in Kulsary. Local officials rejected the idea of TCO subcontractors being based in Kulsary. As one of them pointed out to me, oil enterprises come and go, but their community was there to stay.

Kulsary residents praise themselves for preserving the social cohesion of their old community. At the same time, shifts in the mode of production, legal arrangements, and the labor regime in the aftermath of socialism generated significant changes once again, transforming industrial praxis, social classes, and their identities. What happened to the *munayshilar* and their proud family dynasties? Unlike Russia, Kazakhstan did not generate oil oligarchs: the state opened the oil industry to foreign capital, simultaneously consolidating resources in the national oil and gas company. This property regime limited the accumulation of oil capital in private hands.⁷² Nevertheless, the former Soviet *munayshilar* came to occupy respected positions in corporate and political structures in the early 1990s, and were able to pass their social capital on to the next generation. However, it is no longer the hard work in the mud and dust of the oil fields that defines their professional identity. Oil has been transformed from a working-class mission into a corporate endeavor, so the present-day *munayshilar* are engaged in problem-solving, brokering, and other activities in engineering, finance, and politics relating to Kazakhstan's oil industry and its transnational interests. Many of them live in Astana, the region's new capital that now hosts the headquarters of KazMunaiGaz, the national oil and gas company, and the head offices of multinational oil corporations operating in Kazakhstan. Kulbaev and his wife are among the few families of the dynastic *munayshilar* who still (at the time of my fieldwork) kept their home bases in Kulsary, the birthplace for many of them. Kulsary finally got asphalted streets, but it remains a site of oil production, just as it was during the Soviet period, now populated by a new breed of roughnecks and entrepreneurs. However, the translocal identities of individual *munayshilar*, cherishing the memory of their lineages and places of origin, suggest that in Kazakhstan, the roads that led them to occupy leading position in the oil industry began in poswar Soviet Kulsary and in other formerly pastoral nomadic communities in this western frontier region on the northeastern shore of the Caspian Sea.

NOTES

1. K. Igilik and K. Dzhakiev, *Embi munayina 100 zbilida* (Atyrau: Ak Zhaik, 1999), 122.
2. Assel Yelimesova, “Pervootkryvateli Tengiza: Oringazy Iskuzhiev,” *KazMunaiGaz*, October 2, 2009, available at http://www.kmg.kz/press/company_news/publication/2290#.VxaxSbfQcdV.
3. This literature is too large to acknowledge here fully. In addition to the works already noted in this chapter, I would include Terry Lynn Karl, *The Paradox of Plenty: Oil Booms and Petro-States* (Berkeley: University of California Press, 1997) and Fernando Coronil, *The Magical State: Nature, Money, and Modernity in Venezuela* (Chicago: University of Chicago Press, 1997) for oil and state-building; Kenneth Omeje, ed., *Extractive Economies and Conflicts in the Global South: Multi-Regional Perspectives on Rentier Politics* (Aldershot: Ashgate, 2008); Susana Sawyer, *Crude Chronicles: Indigenous Politics, Multinational Oil, and Neoliberalism in Ecuador* (Durham, NC: Duke University Press, 2004) for indigenous social movements; and Timothy Mitchell, *Carbon Democracy: Political Power in the Age of Oil* (London: Verso, 2011) for the history of energy and political culture.
4. For a comprehensive discussion of some of these issues in post-Soviet Kazakhstan, see: Pauline Jones Luong and Erica Weinthal, *Oil Is Not a Curse: Ownership Structure and Institutions in Soviet Successor States* (Cambridge: Cambridge University Press, 2010); Wojciech Ostrowski, *Politics and Oil in Kazakhstan* (London and New York: Routledge, 2011).
5. Leslie Dienes, Istvan Dobozi, and Marian Radetzki, *Energy and Economic Reform in the Former Soviet Union: Implications for Production, Consumption and Exports* (Basingstoke: Palgrave Macmillan, 1994), 38.
6. In 1971, Kazakhstan’s total annual output was 69 million tons a year. Theodore Shabad, “The Soviet Potential in Natural Resources: An Overview,” in *Soviet Natural Resources in the World Economy*, eds. Robert G. Jensen, Theodore Shabad, and Arthur W. Wright (Chicago: University of Chicago Press, 1983), 265. Within this volume, Embanef produced a meager three million ton (N. A. Marabayev Munayshi Public Foundation at: <http://www.munayshy.kz/index.php/2010-06-23-15-17-21/2010-06-23-15-17-44/2010-08-01-12-33-06>). For a comparison, the fields in Western Siberia produced 148 million tons in the mid-1970s, and the Volga-Urals oil basin delivered 222 million tons (Shabad, “The Soviet Potential in Natural Resources”, 265).
7. Douglas Rogers, “The Materiality of the Corporation: Oil, Gas, and Corporate Social Technologies in the Remaking of a Russian Region,” *American Ethnologist* 39, no. 2 (2012): 287.

8. Michael Watts, "Securing Oil: Frontiers, Risk, and Spaces of Accumulated Insecurity," in *Subterranean Estates: Life Worlds of Oil and Gas*, eds. Hannah Appel, Arthur Mason, and Michael Watts (Ithaca: Cornell University Press, 2015), 211–236; Michael Watts, "Resource Curse? Governmentality, Oil and Power in the Niger Delta, Nigeria," *Geopolitics* 9, no. 1 (2004): 50–80. For a succinct discussion of the capitalist oil complex see: Douglas Rogers, *The Depths of Russia: Oil, Power, and Culture After Socialism* (Ithaca: Cornell University Press, 2015), 37.
9. Rogers, *The Depth of Russia*, 49.
10. Maria Slavkina, "Istoria prinyatia reshenia o promyshlennom osvoenii Zapadnoy Sibiri," in *Ekonomizhskaya istoria. Obozrenie*, ed. L.I. Borodkin, Moscow, #10 (2005), 147.
11. Rogers, *The Depth of Russia*, 50. The worthlessness of oil (and illegal bunkering) was also conditioned by the lack of access to the international black market of oil. Fuel and other petrochemicals, on the other hand, were routinely siphoned to be used or bartered domestically. But I am not aware of artisan-produced diesel or fuel oils in Kazakhstan, a practice discussed, for example, by Elizabeth Gelber, "Black Oil Business: Rogue Pipelines, Hydrocarbon Dealers, and the 'Economics' of 'Oil Theft,'" in *Subterranean Estates*, eds. Appel, Mason, and Watts, 274–290, that she observed in Nigeria.
12. Willard Sunderland, *Taming the Wild Field: Colonization and Empire on the Russian Steppe* (Ithaca: Cornell University Press, 2006), 3.
13. Sunderland, *Taming the Wild Field*, 2–3.
14. Julia Paley, "Introduction," in *Democracy: Anthropological Approaches*, ed. Julia Paley (Santa Fe: School for Advanced Research Press, 2008), 17.
15. Rogers, "The Materiality of the Corporation," 287.
16. Nurbulat Masanov, *Kochevaia tsivilizatsia kazakhov: osnovy zhizhnedeyatel'nosti nomadnogo obshchestva* (Almaty: Sotsinvest and Moscow: Gorizont, 1995), 74–76.
17. Kazakhstan was first an Autonomous Soviet Socialist Republic within the Russian Soviet Federative Republic. In 1936, it became a Soviet Socialist Republic within the Soviet Union.
18. The information on Embaneft in this paragraph comes from Ravil Cherdobaev, *Neft' Kazakhstana* (Astana: Aldongar Public Foundation for Cultural Development, 2012), 72; A. Kalibekova, *Obrazovaniye tresta Embaneft—80 let* (Almaty: Asem-System, 2004); and E.A. Kozlovskiy, *Gornaya entsiklopediya* (Moscow: Sovetskaya entsiklopediya, 1984–1991, electronic edition available at <http://www.mining-enc.ru/el/embaneft/>). In Soviet Kazakhstan, 97% of all industrial enterprises were controlled by Moscow. See Nursultan Nazarbaev, *Kazakhstanskiy put* (Karaganda, 2006), 109.

19. Cherdobaev, *Neft' Kazakhstana*, 79.
20. Collectivization and sedentarization cost more than a million lives, corresponding to 29% of the total number of ethnic Kazakhs in this Soviet republic. For a concise discussion of this period, see: Paula Michaels, *Curative Powers: Medicine and Empire in Stalin's Central Asia* (Pittsburgh: University of Pittsburgh Press, 2003), 164–170.
21. Peter Rudolf Meffert, “The Population and Rural Economy of the Kazakh Soviet Socialist Republic” (Ph.D. diss., Stanford University, 1987), 165.
22. Cherdobaev, *Neft' Kazakhstana*, 79.
23. Wilhelm Tieke, *The Caucasus and the Oil: The German–Soviet War in the Caucasus 1942/43* (Winnipeg: J.J. Fedorowicz Publishing, 1995).
24. Yelena Yessenova and Boris Cherdobaev, *Atyrau munay onden zauitina 70 zbil* (Almaty: Aldongar Public Foundation for Cultural Development, 2015), 17, 45. Embanefit's annual production of oil between 1941 and 1945 was 800 thousand tons, increasing to two million tons by 1968. T. Shaukenbayev, *Ekonomika of neftyanoy promyshlennosti Kazakhstana* (Alma-Ata: Kazakhstan, 1974).
25. Here I draw on James C. Scott's discussion of public forums and their significance in the Soviet strategy to create order in the Soviet countryside. James C. Scott, *Seeing Like a State: How Certain Schemes to Improve the Human Condition have Failed* (New Haven: Yale University Press, 1998), 195–196.
26. Michael Hardt and Antonio Negri, *Empire* (Cambridge, MA: Harvard University Press, 2001), xiii.
27. *Munaysbi* (oil worker) is a singular form of *munaysbilar* (oil workers).
28. Rogers, *The Depth of Russia*, 46–47.
29. Michael Burawoy, *Manufacturing Consent: Changes in the Labor Process Under Monopoly Capitalism* (Chicago: University of Chicago Press, 1979), 209.
30. Myrna I. Santiago, *The Ecology of Oil: Environment, Labor, and the Mexican Revolution, 1900–1938* (Cambridge: Cambridge University Press, 2006).
31. A. Span, *Nasibkaliy Marabayev: Priznanie*, trans. B. Zhumakiyeva (Almaty: TOO Almaty Print, 2008), 53.
32. Famine generated large numbers of orphans and destitute youth who went to Soviet boarding schools set up for them across Kazakhstan. A biographic account of the late Nasibkaliy Marabayev, who began his career at Embanefit, illustrates this situation in the Guryev *oblast* quite well by providing biographical details of his peers and superiors who joined the industry after boarding school. Span, *Nasibkaliy Marabayev*.
33. Alison Fleig Frank, *Oil Empire: Visions of Prosperity in Austrian Galicia* (Cambridge, MA: Harvard University Press, 2009), 5.

34. Wendy Z. Goldman and Donald A. Filtzer, *Hunger and War: Food Provisioning in the Soviet Union During World War II* (Bloomington: Indiana University Press, 2015).
35. Santiago, *The Ecology of Oil*; Robert Vitalis, *America's Kingdom: Mythmaking on the Saudi Oil Frontier* (Stanford: Stanford University Press, 2007).
36. Yessenova and Cherdobaev, *Atyrau munay ondu zavitina 70 zbil*, 54.
37. Span, *Nasibkaliy Marabayev*, 36.
38. Mandana Limbert, *In the Time of Oil: Piety, Memory, and Social Life in an Omani Town* (Stanford: Stanford University Press, 2010).
39. Ibid.
40. Adil Amantayev, "Chistaya postel dlya buravikov," *Ak Zhaiq*, July 29, 2004.
41. Cherdobaev, *Neft' Kazakhstana*, 154.
42. Yelimesova, "Pervootkryvateli Tengiza."
43. Ibid.
44. James Meredith, *Impact of Oil Exports from the Soviet Bloc. Supplement: A Report of the National Petroleum Council's Committee and Working Subcommittee*, volume 1 (Washington: National Petroleum Council, 1962), 114–115; John P. Hardt and Marshall I. Goldman, *The Enigma of Soviet Petroleum: Half-Full or Half-Empty?* (London: Allen & Unwin, 1982), 149–150. Western oil specialists believed that the task of finding oil there required more advanced seismic and drilling technologies than the Soviet Union had at the time. Russian oil specialists who were interviewed in the 1970s assessed their drilling capacities as very low, which determined the 500 m limit for drilling. Arthur A. Meyerhoff, "Soviet Petroleum: History, Technology, Geology, Reserves, Potential and Policy," in *Soviet Natural Resources in the World Economy*, eds. Robert G. Jensen, Theodore Shabad, and Arthur W. Wright (Chicago: University of Chicago Press, 1983), 355–356. At the same time, Meyerhoff, who interviewed these specialists, acknowledged the quality of training of Soviet geologists, their advancement in theoretical knowledge and their seismic-refraction methods to determine the structure and boundaries of a prospective oil deposit (Meyerhoff, *Soviet Petroleum*, 316). Perhaps it is this training and skills that helped Kazakh geologists discover Tengiz.
45. Yelimesova, "Pervootkryvateli Tengiza."
46. In *The Depth of Russia*, Rogers provides ethnographic examples of similar creative machinations and defiance of the central authorities in the Soviet oil industry in the Volga-Urals oil basin.
47. Valeriy Neverov and Alexandr Igolkin, "Rossiyskaya neft' v mirovoy politike" *Ekonomicheskaya gazeta*, 41 (1992): 4.
48. Scott, *Seeing Like a State*, 203–204.

49. *Promyshlennost Kazakhstan za 40 let* (Alma-Ata: Kazakhskoye gosudarstvennoye izdatelstvo, 1957).
50. Igilik and Dzhakiev, *Embi munayina*.
51. Cherdobaev, *Neft' Kazakhstana*, 158–159.
52. Dienes et al., *Energy and Economic Reform in the Former Soviet Union*, 47.
53. Cherdobaev, *Neft' Kazakhstana*, 145.
54. Yelimesova, “Pervootkryvateli Tengiza.”
55. Todd Levy, Masket Taubaev, Maria Karazhigitova, and Linsi Crain, *15 Zhil TengbizChevroil* (Atyrau: Caspian Publishing House, 2008), 47.
56. The construction of this plan was done by Hungarian workers who were accommodated in a camp that they built for themselves outside Kulsary. It is now named the TCO Village.
57. Atyrau Oblast State Archive, fond 7, opis 38, 1–2. Available at: <http://www.munayshy.kz/index.php/2010-06-23-15-17-21/2010-06-23-15-17-44/2010-08-01-12-33-06>.
58. Proekt osvoyeniya mestorozhdeniya Tengiz (Kazakhstan). <http://www.nefte.ru/projekt/sl.htm>.
59. Formerly Alma-Ata; the name was changed to Almaty in 1993.
60. Statistics on unemployment in the Soviet Union by regions are absent. William Moskoff, *Unemployment in the Soviet Union* (Lake Forest College: The National Council for Soviet and East European Research, 1992), 9. I rely on the information provided by old-time Kulsary residents, which is consistent with general data. Unemployment in the late 1980s in the Soviet Union was reported at two million people. Most unemployed concentrated in Kazakhstan, in the Central Asian republics and in Transcaucasia. See World Bank, *A Study of the Soviet Economy*, vol. 3 (Washington: World Bank, 1991), 144, and Moskoff, *Unemployment in the Soviet Union*, 8. The same sources report that unemployment disproportionately struck young workers.
61. I. N. Stas, “Discussiya o stroitelstve gorodov neftnyannikov zapadnoy sibirii (po materialam konferentsii 1966 g. v g. Tumeni),” *Vestnik S UDK* 947.1 (5712.12). PbGU, series 2, no. 2 (2015): 13–23.
62. See the 1995 UNDP Report on Human Development in Kazakhstan: United Nations, *Kazakhstan. The Challenge of Transition. Human Development Report 1995*, 17. Available at www.undp.org/undp/rbec/nhdr/Kazakhstan.
63. Azamat Sarsembaev, “Imagined Communities: Kazak Nationalism and Kazakification in the 1990s,” *Central Asian Survey* 18, no. 3 (1999): 324; see also Marlene Laruelle and Sebastien Peyrouse, *Les Russes du Kazakhstan: Identités Nationales et Nouveaux États dans l'Espace Postsoviétique* (Paris: Maissonneuve & Laros, 2003).
64. Slavkina, “Istoria prinyatia reshenia.”
65. Maria Slavkina, “Ostrye grani ‘chernogo zolota,”” *Rodina*, 416, no. 4 (2016), available at www.rg.ru.
66. Moskoff, *Unemployment in the Soviet Union*, 4.

67. Dienes et al., *Energy and Economic Reform in the Former Soviet Union*, 47; Jonathan Aitken, *Nazarbaev and the Making of Kazakhstan: From Communism to Capitalism* (London: Bloomsbury Academic, 2009), 169.
68. For a discussion of that period, and the Russia–Kazakhstan disputes over Tengiz, see Aitken, *Nazarbaev and the Making of Kazakhstan*.
69. Rogers, *The Depth of Russia*, 61.
70. Decree # 403, dated April 4, 1995 and issued by the Cabinet of Ministers of the Republic of Kazakhstan bestowed them with the 1994 State Award for achievements in science, technology and education for their discovery of Tengiz (Levy et al. *15 Zhil TenghizChevroil*, 30).
71. Saulesh Yessenova, “The Tengiz Oil Enclave: Labour, Business, and the State,” *POLAR: Political and Legal Anthropology Review* 35, no. 1 (2012): 94–113.
72. Luong and Weinthal, *Oil Is Not a Curse*.

Doubly Invisible: Women's Labor in the US Gulf of Mexico Offshore Oil and Gas Industry

Diane E. Austin

INTRODUCTION

Betty¹ and I got our bowls of gumbo and sat down at one of the school cafeteria-style tables in the church hall to enjoy the Lenten luncheon. Betty and I had spent a lovely day at her home in the historic section of Thibodaux, Louisiana just the week before. A lifelong resident of Thibodaux who raised three children and worked as a substitute teacher, Betty had been eager to share her observations of her community and how it had been affected by the offshore oil and gas industry in the US Gulf of Mexico. She had invited me to the luncheon to introduce me to others who might be interested in talking to me. As we sat down across from Carolyn,² Betty introduced her as a woman who did interesting artwork—painting ostrich eggs. Carolyn and I chatted a bit about her art and where she obtained the ostrich eggs, and then Betty told her why I was in the area. Carolyn told me she had been the first female production operator offshore in the Gulf of Mexico and that it had taken more than 3 years to get anyone to hire her. I asked how she came to work offshore, and she said she had wanted to get out of the Mississippi cotton fields. After a bit more chatting, she agreed to talk again another time. When I called her, though, she was hesitant to talk because she did not want to dredge up hard feelings or cause

D.E. Austin (✉)

School of Anthropology, University of Arizona, Tucson, AZ, USA

problems for anyone because “that was all water under the bridge.” I replied that she could talk about whatever she wanted to, and she agreed to get together. We met at a restaurant in Thibodaux and talked about our personal lives and trajectories. During that meeting and several more at her home, Carolyn shared many stories and experiences. She did not want to be recorded but allowed me to take notes during our conversations.

As I got to know more women, I learned that Carolyn was not alone in her reluctance to “dredge up” the past. Nor was the indirect manner through which I found and came to interview her unusual. While a few women learned about our efforts to document the history and effects of the offshore industry and reached out to me and my colleagues, in most cases we relied on trusted friends and family members who encouraged women to participate. The reasons for this are complex and have to do with the special place that the offshore oil and gas industry holds in the social, political, and economic lives of communities that have been central to it since the middle of the twentieth century—men, too, hesitate to talk with researchers until they or members of their social networks get to know us. But, they also stem from the particular roles women play in those communities and the industry, and the fact that, despite decades of campaigns to bring more women into the industry, their numbers remain low and their presence often uneasy.

Like Carolyn, many offshore workers have interesting and important stories to tell. My experiences with them range from single encounters to friendships that have spanned almost two decades. To date, over 700 people have participated in oral history interviews that have been recorded, transcribed, and placed in university and community archives by me and my colleagues. Of these, just over 100 interview participants have been women, including wives and prominent community residents such as Betty. The participants represent only a fraction of the people who have worked in this industry or have been affected by it. At the start of the twenty-first century, around 35,000 people were estimated to work offshore in the US Gulf of Mexico.

It is impossible to know how many people work offshore on any given day, much less how many did so in a given month, year, or decade. Exploration, development, and production take place over open water on thousands of platforms and the many rigs, helicopters, and vessels operating in the Gulf. At the same time, much of the work associated with that activity, such as the leasing, construction of rigs and vessels, and development of drilling fluids and muds, takes place onshore and stretches

across the Gulf Coast region from Texas to Florida (heavily concentrated in Texas and Louisiana). Some companies work exclusively for the oil and gas industry and some work entirely offshore, but many work both onshore and offshore or also manufacture, sell, or transport machinery and equipment for other industries.

This is true for the energy companies (operators) as well as the service firms with whom they contract. Many of them hire contract or contingent labor, and those contracting companies provide workers to a number of industries. People may spend their time with a single firm (staying even as it is absorbed by another one) or they may move from one firm to another as they are laid off or fired, or seek higher wages or better benefits elsewhere. Consequently, some people spend their entire careers offshore, others work for service companies that have offshore and onshore crews and go back and forth between them, and others work offshore for a while but then return to onshore positions. Thus, even the decision to consider someone an offshore worker or not is always a bit arbitrary. These factors also contribute to the challenges for labor organizations and others concerned about the conditions of labor in the Gulf of Mexico offshore industry.

The purpose of this essay is to provide a glimpse into the world of a small group of women who lived in southern Louisiana and worked offshore in the Gulf of Mexico between 1970 and 2000. The essay draws upon my experience in southern Louisiana and upon hundreds of ethnographic and oral history interviews my colleagues, students, and I conducted between 1999 and 2015 with men and women who have worked offshore, onshore in the industries that support offshore, and in the communities that are hubs for offshore activity.³ It focuses on the stories and experiences of the 14 women in that sample whose work took them onto rigs, platforms, helicopters, and service vessels in the Gulf of Mexico. Human resource managers and offshore workers have reported a noticeable increase in the number of women engineers working offshore over the years, but many engineers live in large cities such as Houston, beyond the study area; the sample includes only one woman engineer.⁴

LABOR IN THE US OFFSHORE OIL AND GAS INDUSTRY

The oil and gas industry moved off the coast of California and into the Gulf of Mexico in the 1930s. Exploration in the Gulf was halted during the Second World War by German U-boat presence, and the offshore industry did not advance until the war ended. In southern Louisiana, oilfield

employers, and especially the major oil companies,⁵ provided among the best paying and most stable work available, and employees earned higher pay working offshore than in comparable jobs onshore. Yet, few women made it into the oil and gas industry, and it was not until the 1970s that working offshore became an option for women.⁶

Labor demands spurred changes in the offshore workforce. By 1970, US oil and gas fields had matured and were in decline, and the government eliminated import quotas. This brought the United States squarely into the global energy market to face the extreme geopolitical and market volatility of the 1970s and 1980s.⁷ The Middle East oil embargo against Israel's allies in 1973, the drop in production by the Organization of Petroleum Exporting Countries (OPEC), and the quadrupling of oil prices through 1974 had immediate effects in the United States as drilling activity expanded rapidly, particularly in the offshore waters of the Gulf of Mexico and on Alaska's North Slope.⁸

The increased labor demand coincided with a period of significant changes in US federal policy. President John F. Kennedy established the Presidential Commission on the Status of Women in 1961. The US Congress passed the Equal Pay Act of 1963 to eliminate wage disparity based on sex. The following year, the Civil Rights Act addressed discrimination in employment, voting, public accommodations, and education.

The confluence of social expectations, legal requirements, and a booming industry facing worker shortages led companies to actively recruit and hire women to work offshore. This was especially true for the major oil companies as they were quite visible to regulators. Education and training programs, such as the petroleum technology programs at the University of Southwestern Louisiana (USL) in Lafayette⁹ and Nicholls State University in Thibodaux, Louisiana, began more actively recruiting women students. Nevertheless, male employers and workers continued to resist the hiring of women and the small numbers of women who worked offshore were largely confined to jobs in housekeeping and the galley.

In the 1980s, the global downturn in oil and gas prices brought accelerated industrial growth to a rapid halt and resulted in layoffs, bankruptcies, and major industry reorganization. Negative effects of the downturn reverberated throughout the Gulf of Mexico region; into the twenty-first century the period is identified as "the bust." Women with low seniority feared they would be laid off, though some companies kept their less expensive junior personnel. Kim was born and raised in Lafayette and worked in the industry from 1983 until 2005. She talked about the effects

of the downturn. "That was when they first started doing a round of huge layoffs in the industry, as well as early retirement programs for the more senior people. I remember going to work and thinking, 'Oh my gosh, you know, I got in just in time.' And then I started thinking, 'Okay, last one in, first one out.' But, they kept the younger hires and it seemed like they were going after the older people."

The major oil companies did no significant new hiring until at least the 1990s. Despite the success of some women executives to "break the glass ceiling," as one journalist has dubbed it,¹⁰ the proportion of women working offshore—and especially outside of clerical and housekeeping positions—remained very low; well into the twenty-first century men and women who participated in interviews remembered only a handful of women who worked in their companies through the 1990s, frequently recalling the "first" woman with whom they had worked. This pattern reflects a national trend where, despite early gains, especially in professions and managerial occupations, the closing of the gender gap slowed by the late 1990s.¹¹

THE OFFSHORE LIFESTYLE

The offshore oil and gas industry shares many characteristics of onshore exploration and development. Work availability is subject to industry cycles, wages vary based on skill and demand, and some jobs are among the most dangerous in the United States. According to the US Bureau of Labor Statistics, for example, the death rate for drilling workers between 2003 and 2007 was eight times the national average for all workers, with roughnecks facing the greatest risks.¹² The oil and gas industry has seen a major shift in employment from operators to contractors, and from long-term to contingent labor. Contract companies may work for few or many operators, in one or many industries, and on few or many rigs or platforms at a time. They and their employees must be versatile and adapt to both the physical and social environments in which they work. This has resulted in more precarious circumstances for many contract employees who provide the "just-in-time" labor that companies need when they get a new contract to construct or repair a vessel, drill a well, or fix a broken pipeline. Key factors that influence the effects of the offshore industry on individuals and households, as cited by workers and their family members, include the stability and vulnerability of employment, wages, and opportunities for advancement, patterns of work scheduling, and safety.¹³

Offshore, work is done on relatively small, isolated metal structures over open water, often many miles from shore, or on the vessels and helicopters that transport workers and equipment. The structures range from decades old rusting steel platforms operated by skeleton crews to modern drilling/production units operated by hundreds of company and contract employees. Transportation to and from work is one of the main hazards workers face. Because of the time, expense, and danger involved in transport, and the increased distances as the industry moved farther offshore, over the years companies reduced the number of trips by shifting from the standard 7 days at work and 7 days off (7-and-7) offshore schedule, with each day divided into two 12 h shifts, to employing workers on hitches of 14-and-14, or longer.

Offshore work poses particular challenges. People have to work together and live in close quarters, often sharing bunks with the individuals who hold their jobs on alternate hitches or shifts. In addition, various people come and go on shorter rotations: to conduct inspections, make repairs, and install specialized equipment. As a result, the routines of daily life can be and are frequently disrupted. And, in contrast to places like the North Sea, where government, industry, and labor all have played a role in negotiating working conditions and compensation for offshore work, labor unions have never gained a foothold.

THE WOMEN

The women whose stories anchor this essay represent a variety of backgrounds, jobs, and experiences in the offshore oilfields of the US Gulf of Mexico. Ten of the women entered the industry by the start of the 1980s downturn and the remaining four entered between 1982 and 1996. All 14 women are white. Given that the US states along the Gulf of Mexico are within the US south, the participation of women in the offshore oil and gas industry there has been significantly influenced by southern attitudes, policies, and practices.¹⁴ While there would be much to learn from the stories of African-American women,¹⁵ as will be discussed in greater detail below, white women first gained entry into offshore positions closely behind African-American males; at the time, African-American females were still struggling to get hired in the oil and gas industry at all. As noted on the Bernstein Litowitz Berger & Grossmann LLP website, even into the 1990s, the oil and gas industry was “generally considered to be seriously behind in minority employment.”¹⁶ Between 1970 and 2000, other

non-white groups such as Native Americans, Hispanic Americans, and Asian Americans comprised very small proportions of the overall regional population, and even men from these populations were rare in most off-shore jobs.

The women interviewees worked for oil companies—primarily in production—or for service companies. Two women worked on drilling rigs, one for a mud company and the other employed by a catering company, but notably absent are drillers and many workers, from roughnecks to crane operators, who keep drilling rigs running. Drilling is the most labor-intensive, volatile, and dangerous phase in oil and gas operations, and although technology has made the tasks less physically demanding and safer, few women have found jobs on drilling rigs, especially outside the galley.

Amy, who worked offshore as an operations assistant on a production platform for 8 years starting in 1989, summed up the sentiments of many: “Drilling is very dangerous, so it’s sort of like the cowboys of the Gulf. They’re the rough and rugged. I’ve never worked in drilling, but my husband has... It’s a real man that goes out to drilling. Not that production men aren’t real men, but it’s more of an operator, overseer to make sure everything’s going smoothly.... I would imagine drilling [is] a tougher breed.” In 2003, she observed, “It has been all men up until probably the late ‘90s. Now they’re startin’ to have some lady drilling engineers and drill reps that go out. But [it has been] really a guy’s kind of place [where they] tease you, harass you. Whereas in production you had such a mix of people; you may have foreigners, you may have young people, old people...”

WOMEN'S ENTRY INTO OFFSHORE WORK

The women whose stories are featured in this essay, whose entry offshore spanned a period of more than 25 years, all reported being among the few women in their position or at their place of work. Julia, born and raised in Baton Rouge, Louisiana, first went offshore in 1976 with a degree in petroleum engineering. She observed, “People were supposed to have women. And there weren’t enough women. So pretty much every company I applied to had to offer me a job. ... but it was hard because I didn’t know who really wanted me. Legally, because they didn’t have enough women working for them, they had to say they had tried.” In 2010, Bill, whose wife, Kim, joined him in his business selling offshore leases in 1985, echoed the sentiments of many, “It’s a male dominated field. It’s purely a

tip of the hat to whatever employment discrimination laws that you may have. Same thing with minorities. I mean it was purely token... It was a good ol' boy, you know.... Women could certainly handle it—Kim's a shining example of that—but it was LONG and slow, I think, coming to where women were really accepted in the industry.”

Of the 10 women interviewees who entered the oilfield by 1981, all but one noted that the company for which they worked had to hire women. But that does not explain why the women made the choices they did. Given the expansion of opportunities for women at that time, why did they seek work offshore? Women reported being drawn to work offshore for the same reasons men did—money and time off. In addition, women were attracted by the excitement in the oilfield that enticed many men, especially because in the small towns of southern Louisiana, women's employment options were limited.¹⁷

Grandfathers, fathers, uncles, and brothers facilitated entry, either directly through their contacts, or indirectly as role models. Even when the men did not intend for their female relatives to get into the industry, their knowledge of the industry and contacts proved significant. College education was becoming more important, but even people with degrees started out in entry-level positions and worked their way up. Growing up in the early years of the women's liberation movement, several of the women benefitted from their fathers' decisions to treat their daughters the same as their sons, or from employers' or coworkers' positive attitudes toward women. Many women took advantage of the training offered by companies and schools. The following excerpts illustrate the complex and varied ways that family, societal expectations based on gender, company needs, and individual aspirations coalesced in women's decisions to work offshore.

Lillian was home from college in Texas in 1973 trying to find a job and make enough money to go back to school. Her father, who had worked at a major fabrication company since moving his family to southern Louisiana from the Midwestern US in 1960, told her of a catering company that was hiring women. To show him she was serious about getting a job, she applied. She went to the personnel office every day for a month until her father convinced a superintendent to give her a chance for at least one hitch. She was sent out on her first job in the galley with several other women and was the only one to stay with the company. Having studied chemistry in college, she got the mud engineer to show her how to run the mud tests and was hooked. “I thought, ‘Wow, this would sure beat making two dollars an hour as a galleyhand’.” She studied mud manuals and would

run the mud tests and compare her results to the mud engineer's. "But I did something else probably every women's libber in America would hate me for. When it was cold and miserable, and I was off-duty, I made brownies and hot chocolate and took it up on the drill floor 'cause I knew how miserable they were. In exchange for that, every time they came in the galley when I was on-duty, they told me how deep we were, the mud pressure, the casing pressure." She later was invited into the 7-and-7 program at Nicholls State University, where students attended classes during their 7 days onshore, and earned her Associate's degree in Petroleum Technology, while working on a production platform.

Julia changed her major from education to engineering in 1976: "[I was] bored. I'm a sophomore in college, and it hit me that this is not what I came to college for, this is not challenging, and I don't want to do this... [I saw an opportunity] to make more money and have more time off... I was good in math and science. I felt like engineering would be challenging. My older brother was a petroleum engineer, and I looked up to him. And I can tell you when I walked on that rig floor, I was fascinated. And I still am." She noted, "There was also a lot of new technology because people had money. Like in a war, you develop weapons, when you have an economy that's gonna drill wells, [you have] lots of new techniques, new drilling fluids, new production facilities, all kind of new tools and stuff came out because of that. So that was all exciting." She and her husband quit their jobs and started a consulting business in the 1980s when oil prices dropped.

In 1977, companies were still struggling to hire women when Jill, a native of Lafayette, asked an engineer with her employer's drilling department to help her get work offshore. He tried to dissuade her, but she argued that she wanted to work 7-and-7 and make better money, so he called a contract company to get her an interview. Her father and brother-in-law worked for drilling companies, but she noted, "[N]ow you have to remember I was a secretary, so I went in high heels and a little business suit and I weighed like 95 lb. I'm five feet three. The guy looked at me and thought, 'No way!' [Chuckling] I said, 'No really, I wanna work offshore. I know I can do this.' He said, 'I tell you what, we need to hire women, and so I'm gonna hire you, but I don't give you six weeks to last.'" Jill worked for almost 2 years as a mudlogger. "[I am] very proud to say I was one of their best mudloggers and I proved that guy wrong. And I loved the job, REALLY loved the job. I thought it was SO interesting. I realized that it was about the only job I could have done offshore, 'cause

it IS a lot of physical, very dirty work. My work got dirty sometimes, but it wasn't terribly physically demanding."

In addition, the 1980s downturn put many people out of work; some women sought employment when their husbands lost their jobs or had their hours or pay cut.

Amy was born in Port Sulphur, Louisiana, in 1959. Her father worked first as a diesel mechanic for Gulf Oil and then on offshore vessels. Commenting on her experience as a young wife: "We reached a point in our young married lives where my husband just couldn't make good money doing insurance jobs or sales jobs, so he went to work on a drilling rig and worked 7-and-7. The money was nice for working half a year. At some point he needed surgery and we knew we would need extra money, and an income comin' in, while he recuperated, so I sought out oilfield work, too, through a contract company... So [in 1989] I went to work as what's called an 'operations assistant' or a secretary offshore on a production platform."

Sharon was raised near Dallas, Texas, and had wanted to fly since childhood. "Actually, I applied for a job as a stewardess when TWA was up in Chicago about 25 years ago. Didn't get accepted and the guy says, 'Well, I can give you a million and one reasons why you're not going to qualify as a stewardess. Just off the record,' he says, 'Your appearance just doesn't quite fit up to our image of stewardess.' I said, 'That's all right, 'cause I really want to fly them, not just stand around in 'em'. [Laughter]" She flew helicopters for the timber and tourist industries before meeting some offshore pilots from Mississippi and heading to the Gulf Coast region in 1996.

WOMEN'S EXPERIENCES OFFSHORE

Navigating Physical and Social Spaces

Each woman's encounter with the offshore environment was as unique as the process she went through to get there, but commonalities in the physical and social conditions across structures and vessels led to many shared experiences. Much of the work required manipulating heavy equipment, everyone had to get on and off rigs and platforms, and the living quarters on

the platforms and vessels were small and shared. Especially in the early years, women had to convince their potential employers that they could not only do the work but also live offshore and among mostly men.

Claire grew up in Carencro, Louisiana; her father worked for an oilfield fabrication company. She completed her degree in secondary education in 1974. After teaching a few years, she became frustrated with the school system and convinced an oil company to hire her. Describing her first trip out to the production platform, she recalled, "I remember going [to the dock], and you're kind of scared because you don't know what anything's going to be about. The weather was too windy so we couldn't do the helicopter, so we had to do the crew boat. On the crew boat I also remember that I could not allow myself to be seasick because I felt like if I was to show weakness as a female, it just kinda was gonna be used against me."

Amy's discussion of trying to physically keep up on the production platform captures the tensions the women experienced. "I was a whole 105 pounds at the time and didn't have the strength of a man. I had always been taught in my training that if somethin's too heavy, you don't lift it, you ask for help. And I was in this line and when they started passing five-gallon water bottles, I just looked at the person handing it to me like, 'I can't really do this.' He just looked at me and said, 'You're one of us.'... There was such a feeling of inadequacy at that point that I couldn't tote my weight... It's very much a job that a woman can do, I'm not trying to give that impression, but physically I was a weakling. ... So for that reason, for those reasons, I chose to move into something that was a little more ladylike, but still had the opportunity to keep the schedule, keep the good pay and benefits."

By the 1990s, as the industry moved farther offshore, vessels, rigs, platforms, and other equipment had increased in size. While initially this created greater problems for women (and small males), as the equipment became too large for even men to handle safely, automation and mechanization reduced the differences between what men and women could do.

Space is at a premium on rigs and platforms, and most of it is devoted to the machinery and equipment needed to locate and extract oil and gas from deep within the Earth. When women first went offshore, most workers shared living quarters; roustabouts slept many to a room and shared bathrooms, and only supervisors had rooms to themselves. Some women fought to bunk with men of their own status to avoid conflicts with

their coworkers. Citing concerns from wives as well as male workers, most companies separated the women from the men and would not allow them into men's quarters, which meant that the women frequently displaced senior personnel. Where possible, companies sent two women offshore at a time and placed them on opposite shifts so they could share a room.

In 1976, Julia's employer took several measures to accommodate her when she was undergoing her engineering training offshore. The company constructed a portable building with a bed, sink, and closet which they moved from platform to platform for her to use. On the rig, the drilling foreman had to give up his room because it had a bathroom, "...but all of 'em were real nice about it." The company also assigned a man to make sure she was safe offshore. "But I didn't know that. He told me he was there to watch the facilities. If I had known he was protecting me, I would've felt awful.... I felt like I was doing it all on my own. [Laughs]"

While some companies made special efforts to house their new women employees, even into the late 1990s lack of adequate living facilities on some rigs and platforms meant lost opportunities for women working for service companies.

The women responded to the challenges by being flexible, knowing their limits, and finding ways to work around those limits. Lynda had grown up in the Bahamas and was in graduate school in Oceanengineering when she started working as a cook and deckhand on offshore service vessels. Though the males on her vessel were initially hesitant about her being on board, she quickly established herself: "I remember the first time I was on board and we pulled into a dock and I handled the stern line without being told. [Chuckles] And the guys kind of went, 'Oh, okay.' It wasn't like they had to break me into the job." Onshore, too, she simply demonstrated she could do the work. "I remember we pulled into Dulac, [Louisiana] and there was a hardware store across the street, and the engineer gave me a list of pieces to buy to fix something. I had to go back there in the storeroom where they had all the pieces for the shrimp boats, find them, identify them, bring them up to the front. [Chuckles]... I think the guy was laughing when I was out there picking all the pieces of pipe, but also, I think the culture of south Louisiana where the women did work on the shrimp boats did help out. It was not unusual to have a woman go in and know what she wanted for the engine room."

Concerns with safety have been a major factor keeping both men and women out of the oil and gas industry. Offshore workers are routinely exposed to loud noise, heavy equipment, and large moving objects, as well

as the dangers associated with helicopter and boat travel. They also experience fires, hurricanes, and blowouts. Several of the women reported having seen coworkers seriously injured or killed, and five of the women interviewees became involved in safety. Tyrelle worked offshore for a major oil company for 21 years, advancing from maintenance specialist to instrument technician. She was chosen as the only female instructor at her company's fire school at Grand Isle where she trained people how to protect themselves and help minimize danger for other employees. Shortly before she was injured so badly she had to quit work as a gauger on a production platform, Lillian and a male coworker began to develop a safety training program—a task she returned to after the *Deepwater Horizon* explosion in 2010.

Despite the dangers and sometimes unpleasant working conditions, many of the women emphasized the awe they experienced offshore. Though several of the women noted that men, too, appreciated the beauty, the women said they were not afraid to bring it up. Carolyn wrote poems and took photographs, sharing them with others who were interested. While flying crews to and from the rigs and when on the platforms, Sharon pointed out the cloud formations, colors on the horizon, and wildlife: "The guys just sit quiet, then over time they get used to me speaking of this.... It's awesome. It's just incredible. And [the guys]'ll come to get me and I'm pointing, 'Look at the dolphins, look at the dolphins.' And they'll stop and they catch themselves and then they'll start looking. A few days later, they come back and go, 'I have gotten to where I just lean over the guard rail and look for the dolphins ever since you've been out here.'" Claire provided an ear to men who wanted to share: "The roustabout kind of had a little feminine side to him and he wrote poetry. Well, he could never reveal his poetry to the other guys because there's this male testosterone thing there."

Managing Reactions and Interactions

Because women have always made up such a small portion of the offshore workforce, most of their interactions have been with men. The Gulf of Mexico has long been recognized for its "cowboy culture,"¹⁸ and from their initial hiring interviews onward, the pioneers confronted stereotypical expectations about both male and female behavior, and sometimes hostility, often from senior personnel.¹⁹ During the interview she referred to as her final "interrogation," Carolyn was asked if it would bother her if some

of the men did not use the correct fork when eating. Claire's interviewer reminded her that she would not be able to run out to the store if she forgot her tampons. The challenges continued on the job. Both women described seeing men lined up their first day at work, as Claire noted, "like they're waiting, either to check me out or to watch me fail or fall or scream or cry."

Many women learned they were either with or just a step behind African-American males. Claire observed, "The only ones that really made me feel good were the other two roustabouts because they were new to the thing too and they were black, so I felt an affinity with 'em. They were the underdogs too, you know, in our society." Like other women who persisted and were promoted, Carolyn was challenged each time she moved to a new position. "One of the things when I became an operator, I had to bid for the job. [The supervisor] told me it was a sad day because a woman was becoming an operator. It was just a notch under the foreman. I said, 'Bro, females and blacks are here to stay.' It was changeover day. He gave my seat [in the helicopter] to a contractor. I had to wait till the next chopper, so I was late."

Plenty of women—just like many men—did not last more than one hitch offshore. Women who did continue and showed they could "carry their weight" also carefully navigated their relationships. In the same way that women established reputations based on their ability to handle offshore work and the physical aspects of their environment, they also became known for their ability to handle men. Several women reported problems with men who made unwanted sexual advances—and with females who had accepted such behavior. In 1973, when cleaning bedrooms on her first rig while it was still in the shipyard, Lillian was cornered by the toolpusher, slapped him, and quit on the spot. He saw her leaving and told her, "You can't do that, it's three kilometers across this shipyard. You'll get raped and killed." I said, "What's the difference getting raped and killed out there or on this rig?" And I just proceeded to start walking across the shipyard."

Four years later, after Jill had been working offshore for more than a year had nothing but positive experiences, she was cornered by a company man in his office. She told one of her coworkers, who reported the incident, and the company sent out investigators. "I believe the man got fired. They came out there and they did all kinds of interviews with people. It turned out he had been harassing the other women in the galley. But it was the only, only time in all my offshore experience that happened, and it was [Slight pause] bizarre, I can't say I was scared, I was like, so shocked."

Tyrelle noted most of the guys were welcoming but a few were resistant to women offshore. However, even in the late 1970s, her company had no policies for dealing with a hostile work environment. Though faced with supervisors who behaved inappropriately, she was “too ashamed to say anything” and did not want to “stir up anything because that would only make it harder.” One time she tried to report an incident and the situation became much worse. When her life was threatened she recruited a coworker to serve as her bodyguard until the man who threatened her was removed from the platform.

Several women noted that their biggest problems came from contract workers who were not regularly connected with the rig or boat to which they were assigned. Not only did Lynda's coworkers come to her defense, but, like Lillian, she took action that earned her a reputation. “[T]hey were sitting down in the galley, grinding their cigarette butts out on the clean galley floor, making obscene comments about me. So I went into the tool box, pulled out some onions and some liver, started fixing lunch. [Pause] They spent the rest of the ride hanging over the side. [Chuckles] Everybody thought that it was hilarious.... I remember one came back, and he looked at the other guy that was with him, a new guy, and he says, ‘Don’t mess with the cook, she’s mean.’”

Several women found the men's behavior offshore was better than what they had experienced doing clerical work onshore, noting, for example, that offshore men would refrain from cursing—and admonish others who did not. Having worked as a secretary, Jill had prepared herself for the worst, “I was terrified in a way to go out there because we all had heard these stories about these roughnecks and how crude they could be and all. I was very scared about maybe the harassment I might get, so I bought clothes that were very big on me, and I had determined that I would conduct myself very carefully, that I would be kind to everyone, but I would really watch my behavior and not curse and not tell any off color jokes or things like that, things that they did in the office all the time. Amazingly, I go offshore and... I always felt I was treated more like a lady than I ever had been in my life... I knew I had kinda arrived, if you will, or they weren't lookin' at me as some kind of oddity anymore, when they started playing some of the jokes on me that they played on the other men.”

Prior to coming to the Gulf, Sharon had flown helicopters in many all-male environments and found the pilots she worked with in the oilfield to be very supportive. She also was aware of how important it was to engender trust in her passengers. “These men come and go into a very

unfriendly environment,” she noted. The challenge was to make them feel like they were in capable hands while distracting them from the ride. “So I get to babbling a lot,” she commented, “talking, enjoying, and the next thing they know, they are on their platform and they haven’t even realized it. I want them to be comfortable...and not even realize that ‘She has got a lot to deal with up here and she is handling it.’”

OFFSHORE WORK IN THE CONTEXT OF WOMEN’S LIVES

When the oil and gas industry moved into southern Louisiana in the 1930s, it took advantage of a labor force characterized by poverty, low levels of literacy, and limited alternatives. Workers also offered diverse skills, entrepreneurship and willingness to take personal and financial risks, and an ethic of hard work and loyalty, and they came from large families with strong social networks.²⁰ By the 1970s, the industry was firmly a part of the region’s culture.²¹ It coexisted alongside the fishing sector, and many men moved between the two, buffering the economic cycles.²² The women differed from men in this regard; they took over family responsibilities when they were not working.

Balancing Work and Family

While employed offshore, women interviewees were responsible for their own children, their nieces and nephews, and their aging parents. Many men, too, had responsibilities at work and home, but the women interviewees were more likely to have had to arrange the care of family members in their absence. They described a range of strategies for meeting their family needs, for example, coordinating childcare among their husbands, parents, and babysitters. Though the concentrated work schedules common to offshore work created childcare challenges, and especially for couples who both worked offshore, some families found that the long periods at home improved the quality of their interactions. For families with long experience in the industry, and in communities that are industry hubs, flexible childcare arrangements were not unusual.

Coworkers played a major role in women’s experiences, regardless of company policies. Tyrelle had worked offshore for 10 years when her son was born in 1988; she worked up until a month before his birth. She was working on a platform with one other person, and when he complained to the supervisor that he was worried he would have to deliver the baby,

Tyrelle was moved to the main platform. She did not receive maternity leave but was able to use her sick days and returned to work 9 weeks after her son was born; at that time, male employees got one full paid day off if their wife had a baby and three paid days off if she had a C-section. For the first couple hitches when Tyrelle returned offshore, she was breastfeeding, so she would pump and store milk offshore to take home. Though it was hard for her to be away from her son a week at a time, she was able to spend entire days with him during her weeks home. She found it particularly challenging to find a sitter when her son started school and relied on her parents and family members to help care for him.

Several women interviewees opted to homeschool their children and were able to offer their children opportunities to travel and apply their learning in the family business which, though challenging at times, offered great rewards. Others quit working offshore when they began to have children of their own or when their aging parents needed extra support. However, many women, like their male counterparts, took jobs offshore to support themselves and their families and, if they left the industry, generally could not find work that paid as well. Two women specifically noted that one of the benefits of working offshore was that it relieved them of some of the domestic responsibilities they were expected to perform and allowed them to escape the confines of small-town expectations.

The transition between onshore and offshore could be rough. Both men and women developed rituals that helped them ease that transition. Donna²³ worked offshore from 1996 to 1999 and described coming in from a diving job, "Usually I'd always take a couple of days off after I came in. One day to rest, one day to do laundry and pack my bags again. I'd get back in my house or jump in my truck and go to Lafayette and shop, buy myself something. Just the fact that you know you can do it."

For both women and men, maintaining family ties has required more than delaying work or leaving the oilfield after a few years. Sarah's story is a familiar one: "I really took a lot of heat because I did not want to move into a management position because then they controlled where you live, and when you reported to work." She recalled a boss telling her "The closer you stay to the well, the more you control your career."

Leaving

The 14 women in the sample worked offshore from 1.5 to 41 years; 10 of them had worked offshore more than 5 years at the time they were

interviewed. Sarah noted that few women who worked in production remain in the field for long or finish their careers offshore. Instead, they move into administrative or supervisory positions or transfer to safety or office jobs. She also observed that women had a harder time than men getting another job if they lost one.

As the women aged, both the physical challenges of the work and the many competing demands they faced in their lives increased. Injuries, threat of injuries, and other health concerns were the leading causes the women cited for leaving offshore work. Some women, like many of their male colleagues, moved to onshore positions where they took a pay cut but could continue working, at least for a while. Amy moved to an onshore position after 8 years offshore, citing various health concerns, such as noise exposure. "I knew that if I ever wanted to have children I wanted to be able to hear them cry and not have my hearing so impaired. Even with hearing protection there is some hearing loss that's incurred typically. And so I knew that if I wanted to have my goals as a woman and as a mother, that I could make this oilfield work much better if I went in the office than out in the sun and the elements and things."

Donna, too, stopped going offshore after 8 years: "My knees. They just went bad on me. I couldn't handle climbing up the stairs, squatting, bending... At the beginning, the women had to prove themselves 110%. When I first started, it was nothing but a men's field, and that was the way it was supposed to be. It was supposed to be hard. They would say if it was easy they'd have women doing it. Then it dawned on me, why am I doing this [trying to prove myself]? Why am I hurting myself?"

Despite the challenges of the work, leaving was not without some regrets. Carolyn had worked offshore for 11 years and summed it up, "I left when it was time to leave. It was time for a younger woman to come out. I hated to leave. I hated not going back to the water. I miss the water, the rough water, hanging on by the seat of our pants. It was something to be out there in rough water. [When I decided to leave, I thought,] 'I'll miss this cold and lonely place.'"

Like many of their male counterparts, some women who were attracted to challenges in the industry were turned off by the automation. Claire described the change on production platforms, "The old technicians were hands-on people because the old equipment had to be looked at individually and you had to go to each tree and do different things, whereas the [new platforms had the latest equipment] and the new technicians were behind computers and screens and just sat there. That didn't seem too

appealing to me.” After her mentor’s son was killed in an accident offshore and she had two close calls herself, Claire decided it was time to leave the industry.

Lessons for Life

Working offshore provided more than a job, or even a career, for many women. Women who had the courage to enter and succeed in a male-dominated environment found strength to take on other challenges. Given the predominance of the offshore oil and gas industry in southern Louisiana, women’s experiences offshore helped them understand their spouses, their students, and their clients in ways that would not have been possible had they not been there themselves. Working and living with others in close quarters provided women opportunities to develop skills they might not have had elsewhere. Most of the women commented on the importance of working together. Claire contrasted the teamwork of the offshore platform to a typical school environment, “I think this was the first time where I had a job where it was like I was part of a team. And after this whole experience of my life, I feel like whenever you approach projects and you’re a team, it feels so much better than if you’re just alone doing the thing. It feels so good, you’re working as a team, there’s human, there’s camaraderie, and stuff like that, and so I felt like that was a really good experience for me.... I was so happy when they needed me.... I mean that felt real good. To belong. A sense of belonging!”

THE TWENTY-FIRST CENTURY: WHAT HAS CHANGED AND WHAT STAYS THE SAME

This essay has focused on the experiences of women working offshore in the Gulf of Mexico in the latter half of the twentieth century. Despite the successes of some women, workplace changes, and efforts to recruit women, particularly in professional positions such as engineering, women still made up only a small fraction of the offshore workforce in 2016. Sharon L. Harlan and Brigid O’ Farrell distinguished between the pioneer era in women’s employment when individuals and minorities struggled individually for access to predominantly male jobs, and the post-pioneer era after equal employment opportunities were institutionalized; they found that organizational barriers impeded women’s access to and advancement in traditionally male jobs.²⁴ While the women whose stories are told here

demonstrate it is possible to overcome barriers, significant change will require more than the efforts of individual women pioneers or even innovative companies.

As late as 2014, after having worked offshore for 17 years between 1980 and 2014, Sarah noted that, in her experience, a man and woman with the same years of experience would walk onto a new rig, and the people already there would assume that the man knew what he was doing and how to do it well while the woman would have to prove herself to every new supervisor and in every new location.²⁵ The continued imbalance in the number of males and females working offshore has had subtler effects as well. One of Sarah's greatest challenges was not having access to the close relationships that many men shared. While concerns about mixing work and pleasure are present in any job, in the offshore environment, where everyone was a coworker, women spent long periods of time alone. Most importantly, in the isolated offshore environment, men and women must rely on one another to solve problems. When social bonds are contingent, or weak, safety is compromised.

As she advanced in her career, Sarah relied on her male coworkers to defend her work ethic and ability to others who might question her presence on the rig, but their efforts generally did not extend beyond that structure. People working for contract companies are exposed to many environments and groups of people, so it is not surprising that women can experience a range of work environments, from the "cowboy culture" which characterized the industry in the boom years to the more female-friendly "safety culture" of the twenty-first century. And, as illustrated by the sample of women highlighted in this essay, despite some commonalities, the women come to the industry from a variety of backgrounds and with different expectations. Thus, even on platforms recognized in the 1990s for their commitment to disrupting masculine environments, encouraging men and women to acknowledge their physical limitations and theirs' and others' feelings, admit their mistakes, and focus on the goal of safety and well-being for all workers, women made up only about 10% of the workforce more than a decade later and were found mostly in housekeeping and catering.²⁶

The restructuring of the offshore oil and gas industry in the 1990s and into the twenty-first century led to significant changes in many aspects of the industry as it operates in the Gulf of Mexico, including an expansion of the use of contract companies and contingent labor; continued globalization of the industry, with both operators and service companies working

across national and regional boundaries; and increased attention to safety and the promotion of worker-friendly policies.²⁷ The *Deepwater Horizon* disaster, which began in April 2010 with the blowout of the Macondo Well 80.5 km southeast of the Mississippi Delta, led to additional changes. These changes, followed by a drop in oil prices, sent individuals and companies scurrying to respond.

Lessons of the past are still relevant. Andrew Clark²⁸ concluded that people value many aspects of work, both the external rewards such as pay and promotion as well as the intrinsic ones such as relationships, and that men and women may differ in what they value most. Gloria Miller noted that the strategies women adopt in masculine environments may result in short-term individual gains but fail to change the masculine values of the company or industry overall.²⁹ In a global survey, 25% of women who worked offshore reported not feeling welcome in the industry.³⁰ At the 2013 Offshore Technology Conference, US Secretary of the Interior Sally Jewel observed that the population of the country is far more diverse than that of the industry and remarked that the industry had a lot more work to do.³¹

CONCLUSION

This essay has explored the question of women in the offshore oil and gas industry in the Gulf of Mexico. It has focused on the period from the early 1970s, when companies began to hire women to work offshore, through the 1990s, and has examined women's motivations to take jobs offshore, their experiences offshore, and the circumstances that affected the duration of their work. Several factors, including the labor shortages in the industry as activity rapidly increased, the incorporation of gender workplace equality into the broader civil rights discourse of the 1960s and early 1970s, and the desire on the part of women for greater employment options, led to significant pressure on companies to hire women. Yet, while oil companies actively recruited women, and women actively sought nontraditional employment, offshore work remained largely out of reach for women.

Why look at women? Even as technology has reduced the physical demands of offshore work, and as other male-dominated industries have seen significant increases in the number of female employees, the offshore oil and gas industry has struggled to attract and keep women. It faces another transition, one being dubbed "The Great Crew Change," as many

people retire and companies search for the next generation of workers. The women's stories provide a look at how the offshore oil and gas industry has confronted difference and change. They illustrate the range of responses they encountered, from supportive to indifferent to hostile.

In addition, the industry is facing renewed calls for increasing safety, most recently as a result of the *Deepwater Horizon* disaster. Safety culture and disaster preparedness depend on workers, their attitudes, and their accumulated knowledge and expertise. Some companies have successful policies and practices to protect workers, but the industry as a whole, with its cycles and heavy reliance on contract workers, continually challenges individual efforts. Women can and do change men's behavior; an environment that is friendly and supportive of women is also likely to be supportive of men—and safer.

NOTES

1. Betty participated in an oral history interview with the intent that it be placed in university and community archives, so I use her real name. Unless specifically noted, all names are real and the recordings and transcripts of the interviews can be accessed in the archives of the Offshore Oil and Gas History Project ("Archives," accessed March 31, 2016, <http://www.gulfoil.bara.arizona.edu/oral-history/archives>).
2. A pseudonym.
3. This work has been funded by the US Department of the Interior's Minerals Management (MMS), renamed the Bureau of Ocean Energy Management (BOEM) in 2011. The studies have extended from Brownsville, Texas to Gulf Shores, Alabama and incorporated ethnographic, historical, and demographic research to examine the social impacts of the industry on individuals, families, and communities.
4. Research on female oilfield engineers includes Gloria E. Miller, "Frontier Masculinity in the Oil Industry: The Experience of Women Engineers," *Gender, Work and Organization* 11, no. 1 (2004): 47–73; and Clem Herman and Suzan Lewis, "Entitled to a Sustainable Career? Motherhood in Science, Engineering, and Technology," *Journal of Social Issues* 68, no. 4 (2012): 767–789.
5. Major oil companies include the largest publicly owned oil and gas companies that, through recent mergers, now make up "supermajors" such as ExxonMobil, ConocoPhillips, Chevron, and Shell.
6. Diane E. Austin, "Women's Work and Lives in Offshore Oil," *Research in Economic Anthropology* 24 (2006): 163–204.

7. Daniel Yergin, *The Prize: The Epic Quest for Oil, Money and Power* (New York: Simon & Schuster, 1991).
8. Diane E. Austin and Thomas McGuire, "The Great Crew Change? Structuring Work in the Oilfield," in *ExtrACTION: Impacts, Engagements and Alternative Futures*, ed. Kirk Jalbert et al. (New York: Routledge, 2017).
9. Renamed the University of Louisiana at Lafayette (ULL) in 1999.
10. Rebecca Ponton, "Breaking the Gas Ceiling," 2013, accessed March 31, 2016, www.breakingthegasceiling.com/magazine-article/.
11. See, for example, Ariane Hegewisch and Heidi Hartmann, *The Gender Wage Gap: 2014*. Institute for Women's Policy Research Publication C433, September 2015 and Kim A. Weeden, "Profiles of Change: Sex Segregation in the United States, 1910–2000," in *Occupational Ghettos: The Worldwide Segregation of Women and Men*, ed. Maria Charles and David B. Grusky (Stanford, CA: Stanford University Press, 2004), 131–178.
12. National Institute for Occupational Safety and Health (NIOSH), *Oil and Gas Extraction: Occupational Safety and Health Risks*, last updated December 13, 2012, www.cdc.gov/niosh/programs/oilgas/risks.html.
13. Diane E. Austin, Thomas R. McGuire, and Rylan Higgins, "Work and Change in the Gulf of Mexico Offshore Petroleum Industry," *Research in Economic Anthropology* 24 (2006): 89–122.
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