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**Challenging the ‘celibate miner’ thesis: Race and sexuality in early workplace-based AIDS activism**

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**Abstract:**

This paper argues that racialized stigmas around black sexuality were a key barrier to the receptiveness of the National Union of Mineworkers’ (NUM) leadership and the Chamber of Mines to early AIDS research and advocacy. A 1988 study by Karen Jochelson *et al* on AIDS in the mines held that migrancy made miners vulnerable to HIV infection.<sup>1</sup> The study initially gained a hostile reception from both the NUM and the Chamber. For differing reasons, both refuted it in the late 1980s, arguing that miners were largely celibate while on the mines. Eventually, through further advocacy, both came to accept miners’ vulnerability to HIV infection.

**Introduction**

From 1999-2002 South African President Thabo Mbeki famously questioned whether HIV was the cause of AIDS, the safety and efficacy of AIDS treatments, the extent of the epidemic and the accuracy of HIV tests. This body of beliefs was called ‘AIDS denialism’ by his opponents on the issue in civil society such as the Treatment Action Campaign (TAC). Mbeki branded his opponents on the issue as convinced that Africans were “promiscuous carriers of germs” with a “devotion to the sin of lust”.<sup>2</sup> As has been argued elsewhere, by the author and other AIDS policy commentators, Mbeki’s AIDS ‘denialism’ can be understood as a reaction to the history of racism around AIDS and African sexuality in South Africa and internationally.<sup>3</sup>

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<sup>1</sup> K. Jochelson, M. Mothibeli, J.P. Leger, “Human Immunodeficiency Virus and Migrant Labour in South Africa”, *International Journal of Health Services*, 21, 1.

<sup>2</sup> Forrest, D. & Streek, B. (2001) ‘Mbeki in bizarre Aids outburst’, *Mail & Guardian*. October 26 2001. Available at <<http://archive.mg.co.za>>

<sup>3</sup> M. Mbali, “Chapter 14: HIV/AIDS policy-making in post-apartheid South Africa” in (eds) J. Daniel, A. Habib and R. Southall, *State of the Nation: South Africa 2003-4* (Cape Town, 2003); D. Fassin, *When Bodies Remember: Experiences and Politics of AIDS in South Africa* Transl A. Jacobs and G Varro (Berkeley, Los Angeles and London, 2007); D. Posel, “Sex, death and the fate of the nation: Reflections on the politicization of sexuality in post-apartheid South Africa”, *Africa*, 75, 2 (2005), pp.125-153.

This paper builds on this earlier line of inquiry to argue that this type of racial defensiveness about AIDS existed in an earlier period within internal struggle circles in South Africa. In particular, it discusses how the leadership level of the National Union of Mineworkers (NUM), the main national mining union, were opposed to the dissemination of early research by Karen Jochelson and colleagues on the ways in which some mineworkers' sexual practices placed them at risk of HIV infection. They incorrectly interpreted this early study describing multiple-partnered relationships as racist. Despite being incorrect in interpreting this bit of research as racist, their stance needs to be understood against the backdrop of racism and segregation on the mines and the prevalence of racist and xenophobic discourses around AIDS in wider South African society and its media in the period.

Instead, the NUM leadership agreed with the Chamber of Mines (representing the mines) in following the 'celibate miner thesis'. This held that migrant miners were celibate while in town and were faithful to their wives in rural areas and were, therefore, largely not at risk of HIV infection. The Chamber had different reasons to assert this thesis. They asserted it to avoid having to take responsibility for the fact that the living conditions on the mines contributed to the spread of AIDS and, as a result, having to spend on developing family accommodation. They also wanted to present their workers as being 'responsible' and law-abiding, to maintain the flow of cheap labor to the mines.

It goes on to describe how although both the Chamber and NUM had different reasons for adopting the thesis they were bound in a Faustian pact to remain silent on the issue, which inhibited efforts at collaboration on the issue. Both the Chamber and the NUM were well placed to take early leadership on the issue. Both had access to early research on the epidemic and factors leading to its spread. The mining industry was a significant contributor to the economy and a large employer with a well-developed medical infrastructure. The NUM was the most powerful union in the country at the time and was central to anti-apartheid organizing in the Congress of South African Trade Unions (COSATU) and the Mass Democratic Movement. So the failure of both to fully acknowledge patterns of sexuality causing the growth of the epidemic and to respond in a collaborative way represents a significant opportunity lost.

To make this case, the paper draws upon preliminary and ongoing archival research conducted at the AIDS Law Project's Archive held at the South African History Archive, the archives at COSATU House, archival material held at the NUM's resource room and interviews with AIDS researchers and mid-ranking NUM officials who were central to the controversy over the early research by Jochelson *et al.*

In the late 1990s, the NUM and COSATU would affiliate themselves with the Treatment Action Campaign (TAC) and come out strongly against the President's espousal of AIDS denialism. Similarly, both the Chamber and the NUM have in recent years concluded the Mining Charter which commits the mines to providing family accommodation on the mines. However, the history outlined shows how sensitivity to early racist stigmas around AIDS paralysed the development of research-based, effective responses to AIDS by 'struggle leaders' in an earlier period.

### **Background: early AIDS and the first studies**

In general, the early history of AIDS on the mines is significant in the history of the development of epidemiological knowledge on epidemic because the first major studies on HIV prevalence among South African men were conducted on the mines. In late 1982, the first two cases of AIDS in white gay men were identified in South Africa. Probably as a consequence of Africans' poorer access to healthcare, the first black AIDS case was only identified in 1985.<sup>4</sup> Similarly, for much of the 1980s, there was little research on the heterosexual transmission of AIDS, except for studies conducted by the Chamber of Mines in 1986 and 1987. Reliable data on HIV prevalence in the general population only became available in 1988 from blood donors and antenatal clinics in the Southern Transvaal.<sup>5</sup>

Ruben Sher was a white immunologist who was associated with the identification of the first cases of HIV in 1983 and the first studies of HIV prevalence among white

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<sup>4</sup> South African History Archive (SAHA), AIDS Law Project (ALP), Box: ALP 4.1-4.8  
File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995, C. Ijseelmuiden; C. Evian; J. Matjilla, M. Steinberg and H. Schneider, "AIDS in South Africa" in *AIDS in Society*, 1993, Jan-Feb 4 (2):1, 10-1 reproduced in "Medical Research Council: Retrospective Literature Search. This bibliography was produced for Ms. J. Stein, pm the topic Miners MM 1794 & 1794/1 MNR by the Information Systems Division using Medline and Popline" dated 28 March 1995, p.9.

<sup>5</sup> K. Jochelson et al, "Human Immunodeficiency Virus", pp.161.

gay men and mineworkers.<sup>6</sup> Sher discovered about the emergence of a new disease called AIDS during a trip to the United States in 1982. His son got sick with another illness and so he had to go there to seek treatment for him towards to end of 1982. During his visit to the United States he started to read about the strange new disease causing immune-malfunction which seemed to mainly afflict young gay men and it piqued his interest. He visited the Centers for Disease Control (CDC) in Atlanta and met inspiring and determined young virologists and immunologists working in the field. At this stage, the cause of AIDS had not yet been identified. HIV would only be identified as the cause of AIDS in 1984 by scientists in France and the United States.<sup>7</sup>

He told the scientists he met at the CDC that lots of gay men worked for South African Airways (SAA). Moreover, these young air stewards were mobile and may have had American sexual partners in the course of their travels. He then got the idea to study this group to see whether any of them had AIDS. So on his return to South Africa, he met with some gay doctors including Dennis Sifris to discuss the possibilities of doing such research. Soon after Sher's return to the country in late 1982 there were two young gay men that died of unusual chest infections both of whom had worked for SAA. The newspapers heard about the story and decided to ring Sher to find out what they knew about the men's deaths. Sher 'put two and two together and figured out that they had died of AIDS'.<sup>8</sup> On January 4<sup>th</sup>, the Cape Town newspaper the *Argus* reported in an article entitled "'Homosexual' disease kills SAA staff". AIDS had arrived in South Africa.<sup>9</sup>

The South African Institute of Medical Research (SAIMR) was a key site of early AIDS research. Sher set up an AIDS department there with the Director's blessing. The institute had bled over 200 gay men for another study on Hepatitis B and stored their serum. When they decided to test this stored serum for HIV with the newly

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<sup>6</sup> Interview with Ruben Sher.

<sup>7</sup> E. Vilmer *et al*, 'Isolation of new lymphotropic retrovirus from two siblings with haemophilia B, one with AIDS', *The Lancet*, 323, 8380 (1984), pp.753-757. Safai *et al*, 'Seroepidemiological Studies of Human T-Lymphotropic Retrovirus Type III in Acquired Immune Deficiency Syndrome', *The Lancet*, 323, 8392 (1984), pp.1438-40.

<sup>8</sup> Interview with Ruben Sher.

<sup>9</sup> SAHA, GALA, GASA, GASA/GASA 6010 Box: Media Scrap Books, "Scrap book kept by Leon Eksteen who died in August 1986. He was the 5<sup>th</sup> Capetonian to die of AIDS", "Homosexual disease kills SAA Staff", *Argus*, 4<sup>th</sup> January 1983.

developed tests in 1985, they found that 11.8% of the samples were HIV-positive.<sup>10</sup> Indeed all the patients identified as being the first few cases of this new epidemic, infectious disease in South Africa were white gay men. While heterosexuals were increasingly infected during the 1980s, as late as 1990 less than one percent of the country's sexually-active population was estimated by the government to be infected.<sup>11</sup>

Indeed, for much of the 1980s, AIDS was seen by South African epidemiologists as primarily affecting gay men. By 1989, of the 98 cases voluntarily reported to the government's main AIDS policy-making body the AIDS Advisory Group, 81% were reported to have fallen into the "homosexual/bisexual category".<sup>12</sup> Similarly, in the mid-1980s it was estimated that 10-15% of gay men in Johannesburg were infected with HIV.<sup>13</sup> The male/female ratio was 24:1 and only 7 black patients had "heterosexually acquired African AIDS".<sup>14</sup>

It was in this context that the Chamber of Mines conducted an HIV screening program on black and white employees on gold and platinum mines in 1986.<sup>15</sup> Sher was a collaborator in conducting this study.<sup>16</sup> According to Jochelson and Sher, over 100 000 blood samples were collected from black and white employees and a sample of 29 961 samples were tested according to country of origin and race.<sup>17</sup> The study found a low HIV prevalence among migrant workers from South Africa and a higher infection rate among Malawian miners (3.8%).<sup>18</sup> In 1987 the Chamber tested HIV disease prevalence among Malawian miners and patients at STD clinics and found that it had risen to 10%.<sup>19</sup>

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<sup>10</sup> Interview with Ruben Sher.

<sup>11</sup> Department of Health, *National HIV Survey*, p.13.

<sup>12</sup> R. Sher, "HIV infection in South Africa 1982-1989- A review", *South African Medical Journal*, 76 (1989), pp.314-8.

<sup>13</sup> *Ibid.*, pp.314-8.

<sup>14</sup> B. D. Schoub *et al*, "Epidemiological considerations of the present status and future growth of the acquired immune immunodeficiency syndrome epidemic in South Africa", *South African Medical Journal*, 74, (1988), pp.153.

<sup>15</sup> Jochelson *et al*, pp.160.

<sup>16</sup> Interview with Ruben Sher.

<sup>17</sup> *Ibid.*, Jochelson *et al*, pp.160.

<sup>18</sup> *Ibid.*

<sup>19</sup> *Ibid.*

This had important impacts on early public debates about AIDS. Whereas, the first media reports and public discourses about it depicted it as a gay plague, from the mid-1980s these began to be replaced with reports depicting AIDS as a *swaart gevaar* (a black peril). Catherine Campbell and Brian Williams have characterized the government's response to the 1986 and 1987 studies as follows:

“As a result of this study the previous government of South Africa took a very strong line insisting that all foreign workers who were HIV positive should be repatriated...HIV was added to the list of diseases for which people could be excluded from the country, requiring a certificate to show that one was not HIV-positive to gain admittance”.<sup>20</sup> Indeed, in October 1987 the government enacted regulations under the Health Act 63 of 1977 and the Admissions of Persons to the Republic Act, 59 of 1972. Under these regulations individuals could be compelled by a Medical Officer of Health to undergo an HIV test they also allowed for the compulsory treatment and quarantine of people living with HIV.<sup>21</sup> In addition, a foreigner with HIV or AIDS became a prohibited person who could be deported. These regulations were never applied.

The Chamber of Mines and NUM agreed that HIV-positive Malawian miners already in employment should not be repatriated. However, despite rejecting this most egregious form of discrimination, in practice, the Chamber adopted a softer type of discrimination with a similar outcome. The Chamber insisted that Malawians be subjected to pre-employment HIV testing.<sup>22</sup> Hastings Banda, the President of Malawi refused.<sup>23</sup> The Chamber remained resolute in its refusal to accept untested miners. According to Crush *et al* in practice this led to wholesale discrimination against all Malawians irrespective of HIV status as

“Malawians going home on leave were blocked from returning to the mines. By the beginning of the 1990s, the Malawian component in the mines fell to under 1000”.<sup>24</sup>

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<sup>20</sup> South African History Archive, AIDS Law Project (ALP) Collection, Box: ALP 4.1-4.8, File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995, C. Campbell and B. Williams, “HIV/AIDS and the productivity sectors in the SADC region: A case study of the South African mining industry”, Soc Sci Med, in press (dated 1 Nov. 1996), first draft, p.11-12. This was later repealed in 1991, see: South Africa History Archive, ALP Collection, Box AG3077: ALP “Memoranda and papers on AIDS M2.1-M2.18, Zackie Achmat and Edwin Cameron, “AIDS and Employment- A study of Legislation and practice in enterprises concerning employment of persons with HIV or affected by AIDS”, p.6-7

<sup>21</sup> Congress of South African Trade Unions (COSATU) archives, HIV/AIDS Box, Christa van Wyk, “Chapter 3: AIDS in the Workplace: legal aspects”, in ed. J.de Jongh van Arkel, *Living in an AIDS culture*, (Pretoria, 1991), p.30-1.

<sup>22</sup> Interview with Ruben Sher. J. Crush, A. Jeeves and D. Yudelman, *South Africa's Labor Empire: A History of Black Migrancy to the Gold Mines* (Cape Town, 1991),

<sup>23</sup> Crush et al, *South Africa's Labor Empire*.

<sup>24</sup> *Ibid.*, p.120.

Sher remembers that the NUM were “not very happy” with the study’s findings and that he was “declared a *persona non grata* in Malawi”.<sup>25</sup>

This meant that from an early period AIDS was associated with African foreigners. It was a short discursive leap for AIDS to be linked with returning ANC exiles by the apartheid government and the Afrikaner ‘white right’ in the early 1990s. For instance, at the 1990 Maputo Conference on Health in Southern Africa, progressive health activist Antony Zwi asserted that anonymous pamphlets, probably produced by the government, had been circulated claiming that all returning *Umkhonto we Sizwe* (MK) combatants were ‘AIDS carriers’.<sup>26</sup> Similarly, the Conservative Party had argued against de-segregation by arguing that it would place whites at risk of HIV infection.<sup>27</sup> The association of the ANC in exile with AIDS was not only made by the white right, even more ‘liberal’ white-owned newspapers such as *The Star* reported in 1988 that three ANC members in exile had died as “AIDS victims”.<sup>28</sup> According to an ANC spokesperson, the organization was deeply concerned about cases of AIDS in the organization, was taking steps to educate its cadres and viewed the problem of AIDS in the ANC as having been “blown out of all proportion to smear the organization”.<sup>29</sup>

### **Background: The shape of the mining industry and the NUM in the period**

The contribution of gold mining to the economy steadily declined over the 1980s and early 1990s, however, it remained extremely important in South Africa’s economy.<sup>30</sup> Mining’s most significant contribution to the economy lay in what it gave the country in foreign exchange earnings. Gold alone contributed to almost 30% of foreign exchange earnings. Another 20% of foreign exchange earnings came from primary

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<sup>25</sup> Interview with Ruben Sher.

<sup>26</sup> Centre for Health Policy, University of the Witwatersrand, Anthony Zwi and Deborah Bachmayer, “HIV/AIDS in South Africa- Towards an Appropriate Public Health Response”, Proceedings of the Maputo Conference on Health in Southern Africa”, p.69.

<sup>27</sup> SAHA, Cameron, Box A, File B.1: Press clippings- Local, “Aids- the end of denial”, *The Star*, Monday November 5<sup>th</sup>, 1990.

<sup>28</sup> “Three men die of Aids, but no big problem, says ANC”, *The Star*, 25 January 1988, p.7.

<sup>29</sup> *Ibid.*, p.7.

<sup>30</sup> By 1995 gold mining only made up 5% of GDP, however, all kinds of mining came to make up 18% of the total contribution including direct and indirect multipliers. SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995. Roger Baxter, Chamber of Mines “The Economics of the South African Mines”, in *Research Needs and Priorities for the Management of HIV/AIDS Transmission in the Mining Industry* dated 10 November 1995. p.32

mineral exports excluding gold. If one included processed minerals such as steel with primary products, this contribution to export rose to over 60%.<sup>31</sup>

The NUM became the most powerful union in the period, placed at the very centre of 'struggle politics'. This was due to the power of the industry in general, as reflected in the size of its workforce and was facilitated by the reforms catalyzed by the Wiehahn Commission. These reforms allowed for the legal registration and recognition of black trade unions. Had the NUM taken up the AIDS issue effectively, there can be little doubt that it would have catapulted the issue to the very centre of resistance politics in South Africa. The NUM, formed in 1982 was South Africa's largest union over the period. Initially, the union had been aligned to the black consciousness-aligned Council of Unions of South Africa (CUSA). Following requests from black mineworkers for assistance from in forming a union, Cyril Ramaphosa was selected by CUSA to assist in the formation of a black mineworkers union. Ramaphosa had become involved in the South African Student Organization's black consciousness politics at the University of the North in Turfloop and had been involved in the Soweto Uprising of 1976. Prior to joining CUSA he had worked as a legal clerk and completed a law degree by correspondence.

As the decade wore on the NUM became increasingly drawn towards the very centre of popular resistance politics in South Africa. It split from CUSA, as it adopted a more non-racial politics and with its 230 000 membership it was central to the formation of the Congress of South African Trade Unions (COSATU). The leadership of the NUM and COSATU explicitly linked themselves to the liberation struggle. For instance, at the 1985 launch of COSATU, Ramaphosa argued that "the struggle of workers on the shop floor cannot be separated from the wider political struggle for liberation in this country".<sup>32</sup> The political emphasis of that founding conference was upon the central demands of the ANC and UDF with calls for: the lifting of the state of emergency; the withdrawal of troops from the townships; the release of political prisoners; the un-banning of all restricted individuals and organizations and support for international sanctions against South Africa.<sup>33</sup>

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<sup>31</sup> *Ibid.*, P.33.

<sup>32</sup> V.L. Allen, '*Organise or Die!*': *The History of black mineworkers in South Africa, Vol. III*, p.165.

<sup>33</sup> *Ibid.*, p.166.



With the decline in township resistance as a result of repression, COSATU came to play a prominent role in the struggle, led by the NUM.<sup>34</sup> In the later part of the 1980s, they were the only legal mass-based anti-apartheid organizations, who could legally protest under the cover of the post-Weihahn Commission reformed labor legislation and could legally access to funds which could be distributed to anti-apartheid causes. This meant that, for instance they could bankroll the living expenses of newly released ANC/SACP stalwards such as Goven Mbeki and Harry Gwala.<sup>35</sup> They could also assist financially and logistically with re-establishing ANC offices in Johannesburg upon Mandela's release from jail, the return of exiles and the un-banning of the ANC.<sup>36</sup>

Similarly, in relation to the mining industry, Mark Heywood of the AIDS Law Project at the Centre for Applied Legal Studies at the University of the Witwatersrand argued in the mid-1990s that the mining industry was particularly well placed to respond to the growing epidemic. It had 900 000 employees in the Southern Africa region, an extensive medical infrastructure and a unionized workforce who could form the backbone of a peer-education program.<sup>37</sup> In addition to which, in theory, its recruitment arm The Employment Bureau of Africa (TEBA) could extend such a program into rural areas and to employees' families.<sup>38</sup>

As it turned out, I would argue that endemic racism on the mines was a key barrier to this vision of effective union and management cooperation on AIDS in the period. Racism on the mines was endemic, and often underpinned by violence, which complicated interracial collaboration in general, let alone on a sexually transmitted disease that was saturated with racial stigma, such as AIDS.<sup>39</sup> In addition, as discussed above, Malawians mineworkers living with AIDS had been threatened with

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<sup>34</sup> *Ibid.*, p.191.

<sup>35</sup> *Ibid.*, p.496.

<sup>36</sup> *Ibid.*, p.499.

<sup>37</sup> SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.1; ALP SA Regional Seminar on HIV/AIDS in the Mining Sector 1995, "HIV/AIDS in the Southern African Mining Sector" by Mark Heywood *AIDS Analysis Africa Southern Africa Edition*, Vol.6 No.5 Feb/Mar 96, p.5.

<sup>38</sup> *Ibid.*, p.5.

<sup>39</sup> Racism, often expressed in violent and coercive ways had existed on the mines over a very long period. Keith Breckenridge has described ways in which violence underpinned racial hierarchies in an earlier period. K. Breckenridge, "The Allure of Violence: Men, Race and Masculinity on the South African Gold Mines, 1900-1950", *Journal of Southern African Studies*, 24, 4 (1998), pp.669-693.

deportation by the South African government and were gradually phased-out of employment by the South African mines. Also, as discussed above, AIDS was used by racists to discredit returning exiles. The NUM's racially-defensive response to AIDS discussed further below needs to be understood both in this wider context of racist and xenophobic framings and responses to AIDS and in relation to racism on the mines themselves and within wider society.

Many facilities on mines were racially segregated with different changing rooms and catering facilities for black and white mineworkers.<sup>40</sup> This racial inequality even played itself out in times of disaster, sickness and death. In the aftermath of the infamous 1986 Kinross mining disaster black and white mineworkers were sent to separate hospitals and mortuaries providing services of a radically unequal quality.<sup>41</sup>

In relation to generalized racism on the mines Allen has argued that

“White miners, most of whom were Afrikaners, perceived themselves to be custodians of the natural superiority of the white race in their dealings with black mineworkers who they regarded as a motley group of hapless ineducable individuals...The subjugation and even violence, against black mineworkers was perceived as a natural consequence of their inferiority.”<sup>42</sup>

### **The celibate miner thesis: Why the NUM's leadership asserted it**

In 1989, a study by the Chamber of Mines argued that

“80% of employees are not, as commonly believed, promiscuous, and therefore not likely to spread the infection...[W]ith proper housing and feeding and the generally responsible behavior of the vast majority of mineworkers, we believe that the industry and its employees will play a very minor role in the spread of HIV infection in South Africa”.<sup>43</sup>

Essentially, the study argued that the vast majority of miners were celibate while on the mines and only enjoyed sexual relations with their wives during short vacation trips home.

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<sup>40</sup> Allen, “*Organize or Die!*”, p.199-201

<sup>41</sup> *Ibid.*, p.246.

<sup>42</sup> *Ibid.*, p.189-9.

<sup>43</sup> The findings of this study were quoted in Jochelson et al's 1991 paper: K. Jochelson, M. Mothibeli, J.P. Leger, “Human Immunodeficiency Virus and Migrant Labour in South Africa”, *International Journal of Health Services*, 21, 1 P.157 . It is referenced as follows: C. Ijesselmuiden, W.Z. Mashaba, N. Padayachee, *Interview survey of black mineworkers' awareness of AIDS and Sexually Transmitted Diseases, and of behaviour patterns potentially affecting the transmission of these*. Chamber of Mines Research Organisation, Consultancy Report Project No. G119B (TEO3) HRL No. 4/89, 7. Johannesburg, June 1989.

From the early days of the National Union of Mineworkers (formed in 1982) enjoyed close links with the Sociology Department at the University of the Witwatersrand (also known as Wits) in Johannesburg.<sup>44</sup> Indeed, from the formation of the NUM, the Wits Sociology department's Sociology of Work Programme (SWOP) had investigated how the racist organization of work on the mines was a causative factor in industrial accidents. In the late 1980s, Oxfam Canada- which had funded several anti-apartheid organizations- made funding available to SWOP to look at AIDS on the mines. Using the relationship the unit had established with NUM through their research into underground safety, sociologists from Wits approached the NUM to ask for their approval to conduct a study looking at factors which made miners vulnerable to HIV infection. While Jean-Patrick Leger managed the project, Karen Jochelson did most of the background reading for the study and jointly did interviews with Monyaola Mothibeli an ex-miner and former member of the NUM. The project coordinators were different ages, races and genders. This sometimes created methodological difficulties in conducting the research. For instance, Mothibeli was an African man who was 20-30 years older than Karen Jochelson and he was not accustomed to discussing sex with a younger white woman.<sup>45</sup>

In the course of 1988, fieldwork began with the blessing of the NUM, who allowed the research to go ahead due the pre-existing close relationship with researchers at SWOP discussed above. The study also gained initial acceptance as its second author Mothibeli was an ex-miner and a former member of the NUM. In 1988, fieldwork began in Welkom. Interviews were conducted in Sotho with English translations. Informants were asked about their family, marital and sexual experiences, their STD history and their attitudes towards AIDS.

The study found that migrants engaged in all sorts of extra-marital relationships which placed them at risk of infection including cash-based sexual transactions with prostitutes, casual, short term relationships with unmarried women or married and divorced women and longer term relationships involving domestic obligations for both parties.<sup>46</sup> In the mining towns the high ratio of men to women encouraged

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<sup>44</sup> Allen, *'Organize or Die!*', p.239.

<sup>45</sup> Interview with Karen Jochelson, The King's Fund, London, November 8<sup>th</sup> 2006.

<sup>46</sup> Jochelson et al, "Human Immunodeficiency Virus", p.165.

prostitution and also meant that sometimes men would go to towns further away for sex. Just over half of the men (53%) reported having been infected with an STD once. Thirteen of the 18 asked about condom usage reported not using condoms. This echoed another survey of 429 miners which showed that 66% never used condoms.<sup>47</sup>

So the study found that there was a group of men who had “multiple relationships with changing partners” and who were “reluctant to use condoms despite previous STDs”.<sup>48</sup> It went on to argue that the migrant labor system had “institutionalized a geographic network of relationships for spreading STDs” and that once HIV had entered the mining community it would spread to and within surrounding urban areas, to and within rural areas and across national borders.<sup>49</sup>

It is worth noting that the study largely reiterated what several other historical and anthropological studies around the same time showed about miners’ sexualities. For instance, in 1988- the same year that the research for the Jochelson *et al* study was conducted- Dunbar T. Moodie *et al*, published research on the history of Xhosa-speaking miners’ sexualities based on extensive oral histories. This research showed that some miners engaged in commoditized (and less commonly commercial) relationships with ‘town women’ and also homosexual ‘mine marriages’ from at least the 1940s.<sup>50</sup>

Similarly, in his later (1994) study of the history of African migrant laborers from Mozambique on the mines in the late nineteenth and early twentieth century, Patrick Harries argued that

“Many women lived by exercising skills, such as beer brewing, learnt in the rural areas, and it was common for them to enter into temporary sexual relations with migrant workers whose gifts supplemented their informal incomes. For the miner far from home these women...provided sympathy, support, an important leisure activity, and a crucial sexual outlet. But the gratification of a heterosexual relationship, however brief, was accompanied by the prospect of a more lasting venereal disease”.<sup>51</sup>

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<sup>47</sup> Jjesselmuiden *et al*, cited in Jochelson *et al*, “Human Immunodeficiency Virus”.

<sup>48</sup> Jochelson *et al*, “Human Immunodeficiency Virus”, p.169.

<sup>49</sup> *Ibid.*, p.169.

<sup>50</sup> T. D. Moodie, V. Ndatshe and B.Sibuye, “Migrancy and male sexuality on the South African Gold Mines”, *Journal of Southern African Studies*, 14,2 (1988), pp.228-256.

<sup>51</sup> P. Harries, *Work, Culture and Identity: Migrant Laborers in Mozambique and South Africa, c.1860-1910* (Johannesburg, 1994), p.114.

The researchers at SWOP had in the past presented their research on underground safety at a big event attended by the Chamber and the NUM. They were considering doing the same with the study on AIDS upon its completion. When news of this reached Cyril Ramaphosa, then the head of the NUM, he phoned Eddie Webster about the matter. In an interview, Webster recounted how Ramaphosa expressed his opposition to the study being released the discussion that followed:

“‘There’s no way you need to publish something like this’, he said ‘It’s offensive, it focuses on the private life of the members, indeed, it’s racist. Why are you focusing on the black miners, why not focus on the sex lives of the white managers’”.<sup>52</sup>

The NUM was opposed to the study being published. Following negotiations it was agreed that the research would be ‘sanitized’ by words such as ‘promiscuous’ being changed to ‘multiple relationships with changing partners’. The researchers had initially wanted to publish the study in a South African journal but eventually as a result of pressure against doing this from the NUM, it was published in the Canadian *International Journal of Health Services*, which blunted its political impact in South Africa.<sup>53</sup>

In 1989, the research was presented by Jean-Patrick Leger and Karen Jochelson at Wits University, where further criticism was leveled against the research by the leadership level of the NUM. The original paper had quotes from male mineworkers and their female partners. The researchers were interested in how their informants’ words captured women’s roles and how it reflected on men’s status. According to Jochelson, following her presentation

“All hell broke loose. Cyril Ramaphosa was angry. He asked ‘What right does a white woman have to talk about black sexuality’. He said it would look like miners could not control themselves and that it would feed into racist perceptions of African men. He said that miners had a difficult life and that we needed to look into socio-economic conditions on the mines”.<sup>54</sup>

May Hermanus, was then the NUM’s health and safety officer.<sup>55</sup> The Cape-born Hermanus was a Geologist and Metallurgist by training, she met Jean Leger (one of

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<sup>52</sup> Interview with Eddie Webster on September 25<sup>th</sup> 2006 at Spiro’s Restaurant in Mellville, Johannesburg.

<sup>53</sup> Interview with Eddie Webster.

<sup>54</sup> Interview with Karen Jochelson.

<sup>55</sup> This account of May Hermanus’s history of work with the NUM is derived from an interview with her: Interview with May Hermanus, February 15<sup>th</sup> 2007.

the researchers on the study) through having given expert technical advice to unions and community organizations in accident inquiries and disputes over mining safety. As a member of the Workplace Information Group (WIG), she was approached by Howard Gabriels and Ramaphosa of the NUM about whether she would like to become their Health and Safety Officer. This was an offer she accepted in 1987.

She recounted in an interview with the author that the dissemination of the research was blocked by the NUM not so much because of what it contained but because of “the way miners were portrayed in the study”.<sup>56</sup> The NUM felt that it showed the women’s perspective in a way which was not balanced by the miner’s perspective. While she did recall the vituperative disagreement over the research, she did not recall Leger, Jochelson and Webster’s account of the union’s leadership as asserting that migrant miners were mostly celibate for the eleven months they were at work on the mines. However, she did recall that Moodie et al’s study highlighting as it did male same-sex sexuality on the mines “inflamed the whole thing further”.<sup>57</sup> Along with the Jochelson et al study it created an overall feeling in the union that researchers were “focusing on miners’ sex lives when workers rights were under pressure and the state had the view that miners were responsible for HIV/AIDS”.<sup>58</sup> That being said, the Jochelson *et al* study influenced Hermanus’s thinking but she felt that Catherine Campbell’s later research in Carltonville was superior as it addressed how working and living conditions on the mines influenced miner’s sexuality and was based on more interviews with miners themselves.<sup>59</sup>

According to Hermanus, the NUM saw AIDS as a threat to its membership and “A really serious effort was made inside the trade union on issues around AIDS”.<sup>60</sup> This effort included AIDS awareness workshops, which Hermanus remembers as having been easier than expected for her to conduct as a woman as there was a sense of “comradeliness” at the time. The NUM’s also drafted its own critique of the Chamber of Mines’s policy which asserted the rights of people living with HIV to

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<sup>56</sup> Ibid.

<sup>57</sup> Ibid.

<sup>58</sup> Interview with May Hermanus.

<sup>59</sup> C. Campbell, *Letting them die: Why HIV/AIDS prevention programs fail* (Oxford, 2003).

<sup>60</sup> Interview with May Hermanus.

secure employment, benefits and promotion opportunities. In practical terms its central demand was for

“the transformation of the hostel system into more comfortable units which are managed humanely, improved visiting rights for miners’ families, the availability of other housing options for miners who would prefer not to live in hostels, the use of TEBA...facilities in outreach and support programs aimed at nurturing mining communities and so on”.<sup>61</sup>

On the other hand, at the time (in 1988/9) it was hard for the researchers involved to understand why the study’s publication in South Africa was blocked, by the NUM’s leadership, but now some, such as Eddie Webster now see it as having been an important precursor to South African President Thabo Mbeki’s denial of HIV a decade later.

“...the NUM was very unhappy with it...which subsequently, I, you know, I didn’t understand at the time, but now I do because of the President’s behavior...They were in a sort of denial, I couldn’t work it out, I couldn’t understand it, because our argument was...It is very careful to say that this is a structural problem to do with migrant labor as a system and that’s the evil, not the men themselves.”<sup>62</sup>

It is worth noting that the key leaders in the NUM were not the only anti-apartheid activists who viewed dominant framings of AIDS as racist in ways which shared key commonalities with Mbeki’s later denial of HIV. In late 1988, Jabulani Nxumalo, known as “Mzala”, a member of the ANC and South African Communist Party (SACP) published two articles in the ANC journal *Sechaba* questioning key elements of HIV science on the grounds that it was racist and stigmatized Africans. Mzala had participated in the 1976 Soweto Uprising and shortly thereafter left South Africa to join Umkhonto we Sizwe (MK).<sup>63</sup> He received training in politics and “other specialized subjects” in the Soviet Union, German Democratic Republic (Communist East Germany) and went on to serve in Swaziland and Angola. Mzala died of an unnamed “protracted illness” at the age of thirty five in London.<sup>64</sup> Mzala is described in an SACP obituary as having been a voracious reader who loved a good debate:

“In the course of debating, which he loved more than anything, Mzala’s mouth would acquire a wry half grin, especially if he did not agree with his opponent’s point of view.

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<sup>61</sup> M. Hermanus, “HIV/AIDS Policy in the Mining Industry”, *South African Journal on Human Rights*, 9, 1 (1993), pp.115.

<sup>62</sup> *Ibid.*

<sup>63</sup> V. Angamuthu, “ANC activist Mzala dies in London”, *Sunday Tribune*, 3 March 1991, p.11.

<sup>64</sup> *Ibid.*

Once fired by a topic, Mzala would not relent. He would want to pursue the topic to Its [sic.] very end, much to the exasperation of others.”<sup>65</sup>  
By all accounts, he was a man who was clearly not afraid to take controversial positions, as he was perhaps best known for publishing a book highly critical of Inkatha’s Mangosuthu Buthelezi.<sup>66</sup>

In his first article in *Sechaba* on AIDS entitled “AIDS-misinformation and racism”, Mzala questioned the thesis that the disease had African origins and had jumped species via the process of zoonosis from monkey to humans because

“As this belief began to take root, racists all over the world found yet another justification for the racist prejudice they have always practiced or wished to practice against Black people”.<sup>67</sup>

Referring to the phasing out of Malawian miners, he highlighted that the mines’ failure to similarly screen of white miners and the assumption that they were automatically “protected from contamination with AIDS” was racist.<sup>68</sup> Instead, Mzala argued that AIDS originated as a disease in the United States and was not an “indiscriminate killer” but only affected homosexuals, those who had had blood transfusions from an infected person and intravenous drug users.<sup>69</sup> Lastly, he questioned the accuracy of the ELISA tests.<sup>70</sup>

His second article on the topic entitled “AIDS and the Imperialist Connection” presented the hypothesis that AIDS was developed in laboratories of the “military-industrial complex”. While careful not to assert this as if it were a proven fact, Mzala asserted that “it seems most reasonable that, when investigations are conducted on the origins and development of HIV, laboratories of the military-industrial complex should not be excluded”.<sup>71</sup>

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<sup>65</sup> Mark Gevisser’s personal papers, “Jabulani Nxumalo ‘Mzala’”, p.1.

<sup>66</sup> Angamuthu, “Mzala dies in London”.

<sup>67</sup> Mzala, “AIDS- Misinformation and Racism”, *Sechaba*, October 1988, pp.24. This argument would later be also be produced by Zimbabwean scholars Richard and Rosalind Chirimuuta who were based at the London School of Hygiene and Tropical Medicine, they were later cited in the *Castro Hlongwane* document of which the late Peter Mokaba officially claimed authorship. R. Chirimuuta and R. Chirimuuta, *AIDS, Africa and Racism* (London, 1989). P. Mokaba, *Castro Hlongwane, caravans, cats, geese, foot & mouth and statistics: HIV/AIDS and the struggle for the humanization of the African*, Available at [www.mg.co.za/mokabadoc](http://www.mg.co.za/mokabadoc).

<sup>68</sup> Mzala, “AIDS- Misinformation and Racism”,

<sup>69</sup> *Ibid.*, pp.27.

<sup>70</sup> *Ibid.*

<sup>71</sup> Mzala, “AIDS and the imperialist connection”, *Sechaba*, November 1988, pp.28.



To return to trade unionism inside the country, some of the NUM's sensitivity around "stigmatizing" terminology used around the epidemic emerged in NUM publications in anti-apartheid publications. For example an article in *Critical Health* authored by "the NUM" put forward the argued against using "derogatory" terminology such as "promiscuous" and "sociological terms like 'multiple partnerships'" which it felt was blamed "AIDS victims" for contracting the virus.<sup>72</sup> It went on to argue that it obscured the "social reality" of

"social problems like the homeland policy, forced removals, labour migrancy, the hostel system and the black education system to put up with circumstances where health...depends on the position one holds in society".<sup>73</sup>

A similar debate developed between Helen Schneider and Judith Head in *AIDS Bulletin* in 1993. Schneider critiqued Head's article which according to Schneider's characterization of it, seems to have reproduced some elements of the 'celibate miner thesis'. She claimed that Head drew on the work of Randall Packard and Paul Epstein questioning whether "African promiscuity" explained the rapid spread of HIV and offered an alternative hypothesis that the spread of HIV was facilitated by reduced immunity caused by stress, repeated infections, malnutrition and poverty.<sup>74</sup> Head had apparently critiqued the Jochelson *et al*, citing another study showing that only two percent of mine workers had visited a prostitute in the last month.<sup>75</sup>

Schneider responded by arguing that

"The central problem with Head's argument, however, is that she seems to be setting up a false debate between those who support the idea of promiscuity as the main factor underlying the African AIDS epidemic and those who don't. In rejecting promiscuity she rejects examining sexuality in any way".<sup>76</sup>

She went on to highlight the body of research which existed showing the relationship between the sexual patterns and the massive disruptions in South African society from the late nineteenth century, thereby rejecting an explanation either based on exoticized notions of Africans as excessively 'promiscuity' or simply seeing AIDS as a product of socio-economic conditions on the mines. In this vein, Schneider critiqued Head's

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<sup>72</sup> This article was probably authored by May Hermanus who was then the NUM's health and safety officer. National Union of Mineworkers, "AIDS: whose responsibility", *Critical Health: Health before profit!- Organizing for health & safety- #2*, 33 (November 1990), p.26.

<sup>73</sup> *Ibid.*, p.26

<sup>74</sup> H. Schneider, "Explanations of AIDS- A reply to Judith Head", *AIDS Bulletin*, 2, 1 (March 1993), p.16. P. Epstein and R. Packard, "Epidemiologists, social scientists and the structure of medical research on AIDS in Africa", *Social Science and Medicine*, 33, 7 (1991), pp.171-94. Unlike Mbeki's denialism they did not deny that HIV was the viral cause or that the epidemic could be sexually transmitted.

<sup>75</sup> *Ibid.*, p.17.

<sup>76</sup> *Ibid.*, p.16.

use of the two percent figure, by referring to Mamphela and Bonzaier and Jochelson's work showing that in many networks of short term relationships involving the exchange of money and gifts the female participant was conceived of by all parties as being a 'girlfriend' as opposed to being a prostitute.<sup>77</sup>

### **The celibate miner thesis: Why the Chamber asserted it**

The Chamber had different motives for asserting that miners were celibate. The most obvious was that the early AIDS research described above implied that the hostels and the migrant labor system destabilized families and placed miners at risk of infection. If miners were celibate and faithful to their wives in the rural areas, then there was no need to provide expensive family accommodation in town, so it is unsurprising that the industry was defensive about the ways in which the social conditions on the mines made mineworkers vulnerable to infection.<sup>78</sup> In addition to which the Chamber wanted to protect their access to labor and so they had every motive to present their workforce as healthy and law-abiding.<sup>79</sup>

Where AIDS was discussed as a problem there was a tendency by representatives of mine management and the Chamber to individualize responsibility for AIDS and to trivialize it. In a paper presented at a 1995 conference on AIDS on the mines, Fleur Plimmer, who was then the head of the NUM's Health and Safety Unit said that she had heard an industry representative at a conference argue against compensating workers for contracting AIDS on the mines because "In the mining industry, we do not concern ourselves with sports injuries".<sup>80</sup>

While the mines did have prevention programs they were hampered by the fact that "They were developed by white people sitting in offices with no proper consultation

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<sup>77</sup> *Ibid.*, p.17.

<sup>78</sup> Interview with Eddie Webster. SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.1; ALP SA Regional Seminar on HIV/AIDS in the Mining Sector 1995, "HIV/AIDS in the Southern African Mining Sector" by Mark Heywood *AIDS Analysis Africa Southern Africa Edition*, Vol.6 No.5 Feb/Mar 96, p.5.

<sup>79</sup> Interview with Karen Jochelson.

<sup>80</sup> SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.1; ALP SA Regional Seminar on HIV/AIDS in the Mining Sector 1995, F. Plimmer "What are the problems and how can they be overcome?" presented at the EDI/World Bank Southern African Regional Seminar on HIV/AIDS in the mining sector, p.2.

and input from the very people that they are supposedly aimed at”.<sup>81</sup> They were also very didactic and used questionable methods such as screening videos, most of which were in English, while many mineworkers were illiterate and not completely fluent in English.<sup>82</sup> Unsurprisingly, as a consequence mineworkers often had a poor understanding of AIDS as a disease and how it was spread.<sup>83</sup>

### **Overcoming The ‘Faustian Pact’**

Eddie Webster argued that in the period:

“...there was this faustian pact, whereby NUM didn’t want this to surface, they were in denial and this was for a very complex set of reasons, which I’m now clearer about...and the mining industry wanted to maintain this system of exploitation”.<sup>84</sup>

Webster also argued that Hermanus was key to ending the NUM and Chamber’s “conspiracy of silence” and to the NUM developing a more consolidated response to AIDS. He claimed that “Eventually under her leadership they did take up the issue of AIDS”.<sup>85</sup> Certainly, there is ample evidence of difficulties the NUM and Chamber had in collaborating over AIDS, right up until the mid-1990s. Mark Heywood’s paper on the same 1995 conference mentioned that the Chamber and NUM agreed to form a committee on AIDS on the mines. The Chamber reneged on this agreement due to not wanting to be stigmatized as being the ‘AIDS industry’.<sup>86</sup>

Agreements were made on paper which were hard to get implemented in practice at the mine-level. For instance, in relation to the same agreement discussed by Heywood above, Fleur Plimmer the NUM’s health and safety officer argued that

“The AIDS agreement between the Chamber and the NUM is quite good on paper but has yet to be implemented properly. There is no point in conferences when at the mine-level very little is happening. While we debate what should be done the virus is spreading.

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<sup>81</sup> Ibid. , p.10

<sup>82</sup> SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995, “AIDS Awareness Programmes on the Mines” by Cecil Macheke

<sup>83</sup> SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995, Chapter 5: “HIV/AIDS Research in the South African Mining Industry”: “The psychosocial context of HIV transmission on the gold mines: Implications for HIV education programmes” by Catherine Campbell, p.55-59.

<sup>84</sup> Interview with Eddie Webster.

<sup>85</sup> Interview with Eddie Webster.

<sup>86</sup> Heywood, “HIV/AIDS”, p.6.

Policies can be developed at conferences, but these need to be implemented at mine level”.<sup>87</sup>

### **Concluding remarks**

This paper has outlined an earlier example of a refusal by ‘struggle leaders’ to accept the findings of AIDS research due to sensitivity to racism around AIDS, which pre-dates Mbeki’s ‘AIDS denialism’. It has described how the leadership level of the NUM were opposed to an early study’s findings and their dissemination. This study focused on the ways in which some mineworkers’ sexual practices placed them at risk of HIV infection. They incorrectly viewed this study as racist. This misdirected, but well-meaning, desire to protect mineworkers from racist stereotyping around AIDS was so strong that it drove them adopt the same position on AIDS as their bitter enemies the Chamber who denied mineworkers’ sexuality with much more exploitative motives.

Both agreed on a counter-thesis offered by the Chamber of Mines, which has been referred to as the ‘celibate miner thesis’ by the study’s coordinators. This thesis held that mineworkers were celibate while in town and were faithful to their wives in rural areas and were, therefore, not at risk of HIV infection. While the NUM asserted this thesis in a misguided attempt to defend African sexuality, the Chamber asserted it for different reasons. They did so to deny that living conditions on the mines contributed to the spread of AIDS to avoid having to spend on developing family accommodation. Moreover, presenting their workers as being law-abiding and responsible also helped them to maintain the flow of cheap labor to the mines.

Although both the Chamber and NUM had different reasons for adopting the thesis, they were bound in a ‘Faustian pact’ of silence on the issue, which inhibited the development of collaborative initiatives on AIDS. Both the Chamber and the NUM were relatively powerful in both their sectors and were well placed to take early leadership on the issue. So the failure of both to respond in the late 1980s represents a significant opportunity lost in the history of the epidemic.

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<sup>87</sup> SAHA, ALP, Box: ALP 4.1-4.8, File: AG3077 M4.2: ALP Research Needs and Priorities for the Management of HIV/AIDS in the mining industry 1995, “Employee perspectives on HIV/AIDS in the mining industry” by Fleur Plimmer of the NUM, p.44.

In a much later period, this was reversed for reasons which require further investigation. In the late 1990s, both the NUM and COSATU would affiliate themselves with TAC and came out strongly against Mbeki's espousal of AIDS denialism. Similarly, both the Chamber and the NUM have committed to establishing measures to improve the standard of housing on the mines, including the conversion of hostels into family units in the new Mining Charter.<sup>88</sup> Despite these later developments, I have tried to show how, as in a much later period, sensitivity to early racist stigmas around AIDS paralyzed the development of research-based, effective responses to AIDS by 'struggle leaders'.

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<sup>88</sup> "Broad-based Socio-economic Empowerment Charter for the South African Mining Industry", Available at [www.thedti.gov.za/bee/beecharTERS/MiningCharter.pdf](http://www.thedti.gov.za/bee/beecharTERS/MiningCharter.pdf).