

Escaping paternalism: transfer of managerial models by foreign industrialists to South Russia in the late 19th – early 20th century*

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The paper presents a research into the processes of adapting managerial models transferred by foreign industrialists to South Russia in the pre-Soviet times. The peculiarities of the functioning of Western models in a foreign (East-European) environment are studied through examples from the history of operations management of industrial enterprises based on memoirs and unpublished sources housed in local Ukrainian archives.

Keywords: *industrialization, operations management, paternalism, modernization, Russian Empire.*

By the middle of the 1880s, the Russian Empire entered into a period of rapid industrial development [1]. Industrialization led to a series of globally characteristic historical changes, such as mechanized production, urbanization, transformation of the urban landscape, revolution in the field of transport and infrastructure – processes, which can generally be characterized as social and economic modernization.

South Russia (included the provinces of Ekaterinoslavskaya, Khersonskaya, Tavricheskaya, Kharkovskaya and the Don Host Oblast) has been a prominent industrial area since the late 19th century due to its resources, and played a leading role in the technological modernization within the region. Foreign entrepreneurs arriving there were the primary catalysts in the first steps of a development towards a rational, modern society.

Foreign industrialists (entrepreneurs and managers) mainly coming from Western Europe played a prominent part in establishing

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the conditions of industrialization in Russia [2]. The prominent role played by foreign investment and industrial technologies in the Russian industrialization process has been known for scholarship both in Russia and abroad. Scholars, however, have paid surprisingly little attention to the history of managerial systems and managerial revolution in the Russian Empire, including transfer of managerial models by foreign industrialists. Management and the layer of managers emerged as an important economic and social factor in the development of modern, large-scale business activity and in the modernization of Russian society in general. It constituted a new element in the system of labour relations as well: the owner-worker binary model of labour organization was replaced by the new model of owner-manager-worker [6]. New management strategies involved more than the organization of work and production, these went hand-in hand also with a restructuring of social relations. Western industrialists working in the South Russian social environment distanced themselves from the locally traditional paternalistic relations and aimed at establishing modern, pragmatic and rational structures in this respect too.

This paper presents an analysis of the role of foreign industrialists as agents in importing the Western European ways of productive management and the "spirit of capitalism", in contrast with the traditional paternalistic model of Russian entrepreneurship ethos and labour ethic.

THE PATERNALISTIC VS LAISSEZ-FAIRE MANAGEMENT STYLE

Management styles – characteristic ways of making decisions and relating to subordinates – can be categorized into two main contrasting styles from the point of the level of rationality: paternalistic or laissez-faire styles.

Paternalism is the interference of the state or an individual with people against their will, and justified by the claim that the person interfered with will be better off or protected from harm. The issue of paternalism arises with respect to restrictions by the law such as anti-drug legislation, the compulsory wearing of seatbelts, and in medical contexts by the withholding of relevant information concerning a patient's condition by physicians. At the theoretical level it raises questions of how persons should be treated when they are less than fully rational [7].

Industrial paternalism is a type of labour relations that functions according to the samples associated with the patriarchal community or a large family. Such relationships are characterized by the primacy

of the collective over the individual, rigid internal hierarchy, and non-monetary forms of motivation [8].

Researchers suggest such main indicators of industrial paternalism as the existence of non-production-related activity, a charismatic leader, the lack of free access to the information about key aspects of the functioning of organization, wage levelling, the prevalence of non-monetary relations, the existence of a certain ideology with developed apparatus [8].

The opposite of paternalism can be determined as the concept of *laissez-faire* management style, characterized by a situation when the leader's role becomes peripheral and the staff members manage their own areas of business. This management style is characterized also by pragmatism (focusing on achieving specific benefits), rationalism, the decentralization of the management and the transparency of decision-making.

When discussing the style of the management in a historical period, it is necessary to analyse both sides – the industrialists and the workers – and their interaction too. Analysing modernization in terms of relations between labour and management is just one of its possible aspects. The process of modernization was certainly not linear and one-dimensional. Focusing on the transfer from paternalism to pragmatism and rationalism implies creating a highly reduced model of the situation. In this case, the aim of examining the activity of industrialists along the dimension of paternalism vs. *laissez-faire* types of relations is to contribute to our understanding of how Western models worked in a different environment.

FOREIGN INDUSTRIALISTS

Foreign entrepreneurs pursued economic activity in the Russian Empire already before the Industrial Revolution. From the late 1880s however, we can talk about a movement of entrepreneurs, managers and workers to the Empire as a mass phenomenon. It is not a coincidence that during the late 19th and early 20th century the Donbas was called "the tenth Belgian province". "*Foreigners are migrating to Russia with a huge capital! The Belgian are the main masters in South Russia!*" – wrote Vladimir Gilyarovskiy, journalist and writer, in his essay bearing the title "Iron Fever" in 1899 [9].

Most of the largest metallurgical and machine building plants, especially in the 1890s, employed a large number of foreigners. The share of foreigners among all the employees in South Russia, however,

was not that significant. According to the approximate data collected by the Department of Trade and Manufactures of the Ministry of Finance, in the climax of the Russian industrialization the proportion of foreign top-managers in South Russia did not exceed 10% (see table 1). Although in high-tech production, such as iron-making and machinery building, it increased up to 28%, most of the managers were Russian even there.

Table 1. The ratio of Russian and foreign productive top-managers in 1890 [10]

Provinces	Russians managers		Foreign managers		% of foreigners
	With technical education	Without technical education	With technical education	Without technical education	
Ekaterinoslavskaya	14	324	13	17	8,2
Including iron-making and machinery building plants	13	34	8	8	25,4
Don Host Oblast	25	1229	-	6	0,5
Including iron-making and machinery building plants	11	2	1	-	7,1
Tavricheskaya	3	241	3	17	7,6
Including iron-making and machinery building plants	2	37	1	8	18,8
Kharkovskaya	23	322	9	13	6,0
Including iron-making and machinery building plants	4	4	5	1	42,9
Khesonskaya	45	341	50	70	23,7
Including iron-making and machinery building plants	7	10	10	5	46,9
Totally: South of Russia	110	2457	75	123	7,2
Including iron-making and machinery building plants	37	87	25	22	27,5
European Russia	957	16717	417	903	6,9
Russian Empire	1199	20843	525	1199	7,3

The largest iron-making and machinery plants, however, were mostly managed by foreigners – this can be an explanation for the perception of the dominance of foreign managers manifest in some sources.

Explaining a similar situation in the American industry, Peter Drucker wrote: *"What determines the structure of society is not the majority but the leaders. It is not majority behaviour that is the typical behaviour in a society but the behaviour that comes closest to the social ideal"* [11]. According to Peter Drucker's judgment, it is not the static mass that determines the society, but the dynamic element, not the average but the representative. In South Russian industry, this latter was constituted by the large corporations managed mainly by foreigners, especially in the first stage of their development.

In many cases even if the director of the plant was Russian, he had been educated abroad. One of the most outstanding Russian engineers, the top-manager Aleksey Goryainov is a characteristic example. Before being appointed to the position of the director in the Alexandrovskiy South Russian plant in Ekaterinoslav (1887), he attended courses in Belgium and France. The director of the Kharkov Locomotive Plant, Pavel Rizzoni visited the machine building factories of Usines Bouhey and The Société Alsacienne de Constructions Mécaniques in France in 1895, prior to launching the Kharkov plant [12].

The main aim of such trips was to learn about innovations in metallurgy and engineering, but also to get acquainted with modern managerial approaches. Russian engineer Ivan Bardin, who spent more than year in the USA as a simple worker in the early 20th century, confessed that *"In America I got acquainted with the large-scale mechanized production of iron and steel, with the new open-hearth, domain and rolling mills, I saw absolutely new mechanized metallurgical process in the USA. America has expanded my technical horizon, gave me the knowledge how to run the affairs of a large factory; how to organize machinery and tractor production in a new way"* [13].

Foreign specialists had mainly prosaic reasons to come to the Russian provincial cities characterized by "boredom, monotony, exceptionally dull life" [14]: the promise of a fast career and high salary, much more they could have received than in Western Europe.

Companies spent large sums for administrative and engineering services. The main advantage of employing a foreign manager over a Russian one apparently lied not only in the higher professional level of the former, but in his superiority in the field of ethics. The general perception of the level of Russian dishonesty, however, appears to be an

overestimation. Foreign managers were often described as persons for whom the administration of a public corporation was a profession, not a "fief to be plundered" [5].

Both Russian and foreign industrial companies had to face the problem of internal and external corruption at all levels, but its extent can be estimated rather differently on the basis of various sources.

However, as the mining engineer Alexander Fenin wrote: *"... among South Russian engineers, professional ethics required irreversible loyalty to the owner. Throughout my long career, when I was in touch with hundreds of mining engineers whom I observed under everyday conditions, I never came across dishonest people, with only one or two exceptions. Such people immediately became social outcasts"* [14]. Similar illustrations can be found in many other memoirs too, such as in that of Eduard Kriger-Voinovskiy, the Minister of Railways of Russia: *"cases of dishonesty among the management and employees of the railway were rare"* [15].

On the other hand, incompetent people occurred among foreign engineers as well. The factory inspector Aleksey Klepikov wrote about one of these managers: *"This was a foreigner, a Frenchman, a complete ignoramus in his profession. The owners paid him a lot. He did not have any knowledge neither in chemistry nor in coloristic and used recipes from foreign recipes. Of course, he was doing his business very badly. He was a typical representative of the type of alien-cheaters you cold previously often meet in Russian factories. He was made pay penalties and fired before his contract expired"* [16].

There was one more field where Russian managers could perform better – that of the relations with the state and the society. One of the highest compliments that could be paid to a foreign manager was that he knew "how to treat officials correctly". Such cases were, however, rare exceptions, so the best solution was to employ local managers, which generally meant entering into a cooperation with Russians, who were more efficient in solving external questions such as negotiating with the government for contracts, obtaining official permissions, and dealing with locals.

For example, in the "New Russia Company Ltd." an honourable figure was assigned as a head responsible for the negotiations with the government: Prince Sergey Kochubei. His rights and responsibilities were settled in the statute of the company. He was an honorary director, but only "with the right of presence and advisory opinion". He did not have any fixed obligations, nor any responsibilities [17].

Foreign managers lived separately from the workers and there existed a language barrier between them and the locals [18]. This barrier was not just a problem in the communication between the managers and the workers, but between the foreign and local managers as well. For example, the representative of the British company "Vickers" cooperating with the shipyard "Naval" in Nikolayev wrote in his letter addressed to the director of the company and the owner of the shipyard that *"because of the difficulties with the language sometimes one could really be annoyed ..."* [19].

The language barrier was a common problem. Most of the foreign top-managers of large enterprises could not speak Russian and communicated with the local workers through special representatives [20]. In other cases, it was the "body language" that helped to solve the problem through the method of learning by doing. For example, in the Nikopol iron plant, according to the memories of a worker, the communication between the foreign managers and the Russian workers took place as follows: *"Kennedy [an American engineer] was a great specialist <...> he did not speak Russian, still, we learned a lot from him. When he was frowning, it meant that something was wrong. He took a wrench, unfastened the screws, checked if they were all right and tightened them again. When one could understand, based on this pantomime, what he was looking for, one went to him and said "I see, Mister!". He gave the wrench back, and he checked if everything was done the proper way. He himself knew how to use a hammer, a scrap, how to change a truss, how to handle the plumbing. He never lost his temper. When he became angry, his face turned red, but you could never hear him raising his voice. Even if his clothes became dirty, it did not take more than an hour and he returned wearing clean ones"* [21].

The language barrier favoured the decentralization of management and meant a gradual deliverance from paternalistic relationship in industrial management.

After 1900, sources suggest a massive trend of replacing foreign managers with Russians [22]. However, despite of the processes of Russification in the management, basic managerial approaches in industrial corporations remained Western, because new Russian managers were brought up in a "westernized" environment. They inherited approaches from their predecessors, passed trainings, studied literature from the West.

Foreign entrepreneurs copied the structure and principles of management of the Western-European companies. Most of the foreign

corporations were founded from the beginning as a modern type of entrepreneurship according to Alfred Chandler's classification [23]. In most cases, stock companies in Russia owning industrial enterprises were founded as completely new enterprises without any precedents. Stock companies were more attracted by the technology industry, which sounds fairly reasonable, as building machine and metallurgy plants required large-scale long-term investment, usually not possessed by a sole entrepreneur. The solution lied in associating capital, technology, and management.

Owners of the new, large factories were not able to manage directly the group of employees, and stock company management acquired a professional character.

Such enterprises were characterized by a complex structure that demanded a hierarchy of salaried executives – professional managers. Due to decentralization, a modern enterprise by itself favoured to reduction of paternalism, although not excluding it completely.

The joint-stock form of entrepreneurial activity arrived to Russia as an already fully formed institution after several centuries of development by European lawyers and merchants [24]. The adoption of this type of business organization by itself can be considered as a transfer of Western innovation.

The level of paternalism can also be estimated based on the social responsibility politics of the corporate. There were many examples, when factories and plants managed by foreign managers spent money on building schools, hospitals, and churches. What were their reasons for spending money on CSR? Were they motivated only by economic/utilitarian reasons, e.g. so as to attach workers to the factory by offering them satisfaction of physiological needs (according to A. Maslow's definition), or also by social aims such as creating a new middle-class (Fordism), a class of consumers, a class of workers indifferent towards labour movements? Russian entrepreneurs could also be motivated by a sense of public duty, patriotism. What was the motivation, however, of foreign entrepreneurs and managers, a-priori indifferent to anything besides the profit, to – with the words of Milton Friedman – "spend someone else's (viz. the owners') money for a general social interest"?

Most of the examples from case studies confirm that both foreign and Russian managers of big enterprises were rather "economists" than "socialists", willing to spend on social programs enough to attach skilled workers and to keep the efficiency wage policy. Still, it is possible to find examples of non-operating expenses for social programs initiate foreign industrialists.

HUMAN RESOURCES OF LABOUR

A researcher studying the economic history of South Russia unavoidably has to encounter an interesting "paradox". The second half of the 19th and the early 20th century was characterized by a rapid growth of the population and contemporaries were speaking about agrarian overpopulation and the "extra" manpower [25]. Still, entrepreneurs complained about a lack of workers [26]. The problem was recognized by Russian publicists and scientists too. The "Complete geographical description of our fatherland" (1910) says: "... *the Donetsk coal industry almost always experiences, but especially in the summer, a lack of workers. The government even offered to provide coal-industrialists with up to 10 thousand prisoners, but this proposal was rejected by the owners of the mines*" [27].

This contradiction can be explained by the specific character of the labor market in the region. The southern labour force can be described with an unskilled and migrating character as compared to that in Moscow or Saint-Petersburg. Gustav Hartmann, the founder of the locomotive plant in Lugansk complained that "*since all Russian iron plants were fully loaded with work at this time, we managed to employ only few well-skilled workers for the rolling mill*" [28].

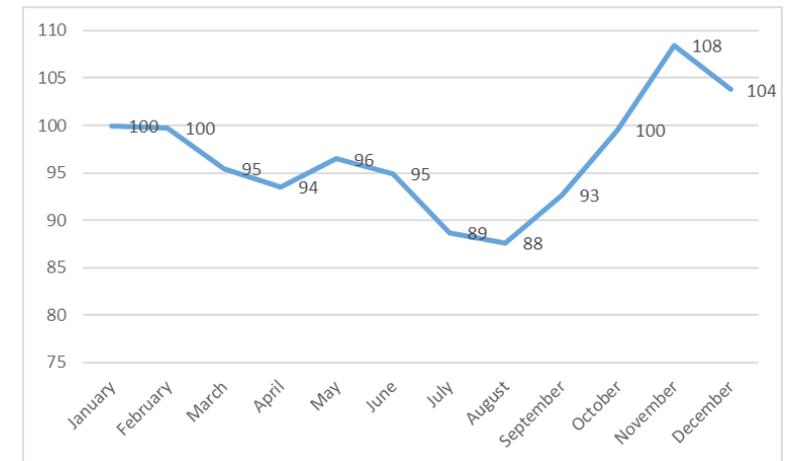
Many large enterprises in South Russia were founded literally in the steppes, thus, they were not able to find enough workers among the locals and had to employ migrating labour force [29]. The majority of the workers were peasants by birth and their "preindustrial" life took place within peasant community, which was paternalistic by definition [30].

The new industrial workers (and yesterday's peasants) tried to stay in touch with the countryside even when being employed in industrial enterprises [31].

Most factories ceased to operate during the intensive farming season prior to the industrialization. Even in the early 20th century, many among the small factories worked seasonally. According to a special poll created through factory inspection in 1909, middle-size and large factories operated about 266 days per year [32].

The essential flow-out of workers in agriculture took place during spring and summer months (see Plot 1).

Plot 1 Monthly fluctuations of workers in the Donbas region in 1900-1915 (January = 100) [33].



Seasonal work contradicted to the financial interests of the entrepreneurs after the beginning of the development of heavy industry. Moreover, ceasing the operation of the equipment in certain types of production, such as that of a blast furnace, entailed serious technical and financial consequences.

Companies resorted to different methods of keeping workers from seasonal migration: increasing their salary during the summer months up to 1.5 times more [27], constructing houses for the workers, creating other means of social infrastructure such as churches, hospitals, schools, baths, etc. There were even more radical attempts too, for example, workers of Hughesovka ironworks belonged to New Russia Company were not allowed to plant even a vegetable garden [34].

The labour ethic of the majority of industrial workers can be characterized as a traditional one with strong paternalistic anticipation. This traditional type of labour ethic meant working until the satisfaction of the basic needs, without seeking to accumulate money and goods [30].

The miners' song describes this way of life: [34]

*I received a pay
Exactly twenty-two roubles,
Two roubles gave at home,
Well, twenty – for drinking
Being jolly, soul and body
All the pay have flown away*

The mine foreman Eugenie Kolodub wrote: *"Sober locals use to earn well and live in their buildings properly. Among the local drunkards one can find many professionals. From the other side they are bad workers. They are ready to work only when compelled by hunger and cold and when they do not have anything left <...> We had several periods of increasing and decreasing the wages. It was sometimes increased to three times more than the normal earnings. But one could observe neither the welfare nor the increase of civic consciousness among them even in these periods. Then the more they earn, than less days they were working" [35].*

Complains about drunkenness as a terrible vice in the everyday life of the workers occur in all the memoirs written by the engineers, mine workers and factory inspectors. Drunkenness led to more and more frequent absence from work, and if it became a mass phenomenon, it could obstruct the operation of the entire plant or factory. Entrepreneurs were fighting against this by closing wine shops and even by breaking the law, as they did not hand their wages to the workers in each month, but only twice a year. As another solution, the money was directly sent to the workers' families [14].

Such steps could be classified as paternalistic, which were provoked by the backwardness culture of the Russian workers. Foreign managers met particular conditions there characterized by the persistent manners of the traditional society and were enforced to adjust Western approaches to the local conditions.

CONCLUSIONS

The analysis of the sources confirm that foreign entrepreneurs imported to Russia modern managerial practices and models too besides capital and advanced technologies. It appears that the role of foreign managers was especially important in the initial stage of the industrialization of Russia. Although there were companies that wanted and could afford to hire foreign managers after 1900 too, foreigners were in general successfully replaced by Russian managers. Many Russian engineers and managers adopted operational managerial practices borrowed from the Western colleagues, and there appears to be no difference in their efficiency from the latter ones as it is reflected by the comparison of data.

Examining the activity of the managers along the dimension of paternalism vs. laissez-faire types of relations sheds light on some aspects of how Western models worked in a different, Eastern European environment. Among the main indicators of industrial paternalism

defined by scholarship, one can find the presence of non-production-related activity, a charismatic leader, the lack of free access to the information about key aspects of the functioning of organization, wage levelling, the prevalence of non-monetary relations. In contrast, the laissez-faire management style is characterized by the peripheral role of the leader and staff members managing their own areas; also by pragmatism (focusing on achieving specific benefits), rationalism, the decentralization of the management and the transparency of decision-making.

The relations between the layer of managers and the owners of the industrial enterprises appear to be closer to the laissez-faire style due to the system of ownership within the heavy industry – stock companies dominating the area required the distribution of management tasks that is the existence of a professional layer.

Concerning their relations with the workers too, we can identify attempts of the managers to introduce laissez-faire approaches, such as the motivation with money and a shared responsibility. Due the traditional patterns of the environment the worker came from, however, this approach did not work, and managers had to use methods pertaining to the paternalistic types of relations to handle the situation. Social responsibility measures in this context, aiming at tying the workers more closely to the industrial enterprise, acquire a new interpretation possibility as compared to the western context.

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Куліков, Володимир У боротьбі з патерналізмом: управлінські практики іноземних промисловців Півдня Росії наприкінці ХІХ – на поч. ХХ ст. У статті представлено результати дослідження процесу адаптації управлінських моделей, принесених іноземними підприємцями та менеджерами до російських реалій. На основі спогадів промисловців та інших джерел розглядаються особливості функціонування Західних моделей в іншому (східноєвропейському) середовищі на прикладі історії операційного менеджменту великих промислових підприємств Півдня Росії в період Другої індустріальної революції.

Ключові слова: індустріалізація, операційний менеджмент, патерналізм, модернізація, Російська імперія.

Куликов, Владимир В борьбе с патернализмом: управленческие практики иностранных промышленников Юга России в конце ХІХ – нач. ХХ века. В статье представлены результаты исследования процесса адаптации управленческих моделей, перенесенных иностранными предпринимателями и менеджерами в российские реалии. На основе воспоминаний промышленников и других источников рассматриваются особенности функционирования западных моделей в иной (восточноевропейской) среде на примере развития операционного менеджмента крупных промышленных предприятий Юга России периода второй индустриальной революции.

Ключевые слова: индустриализация, операционный менеджмент, патернализм, модернизация, Российская империя.