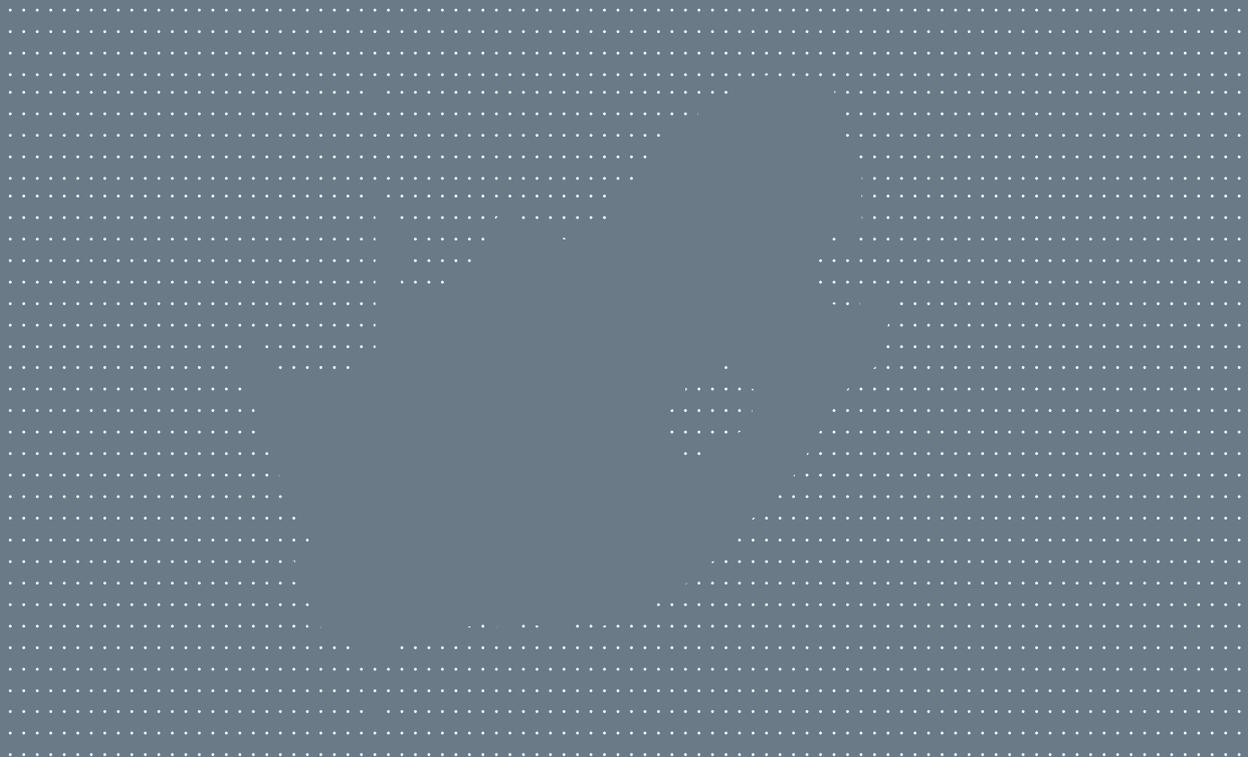


THE

GROWTH AGENDA

Priorities for mass employment and inclusion

JOBS



GROWTH SERIES
Report 2



CENTRE FOR
DEVELOPMENT
AND ENTERPRISE



About CDE

The Centre for Development and Enterprise (CDE), an independent policy research and advocacy organisation, is South Africa's leading development think tank. Since its establishment in 1995, CDE has been consulting widely, gathering evidence and generating innovative policy recommendations on issues critical to economic growth and democratic consolidation. By examining South African and international experience, CDE formulates practical policy proposals outlining ways in which South Africa can tackle major social and economic challenges. CDE has a special focus on the role of business and markets in development.

CDE disseminates its research and proposals to a national audience of policy-makers, opinion formers and the wider public through printed and digital publications, which receive wide media coverage. Our track record of successful engagement enables CDE to bring together experts and stakeholders to debate the policy implications of research findings.

The CDE Growth Agenda Series

Series editor: Ann Bernstein

Reports in the Growth Agenda series are based on CDE's many policy initiatives, commissioned research and think pieces, as well as consultations and workshops with experts and stakeholders. They were written and edited by Ann Bernstein, Antony Albeker and Professor Alexander Johnston. The entire project has been guided by a reference group of CDE Board members, supplemented by other senior advisers. We are grateful for the advice and assistance of many other people in helping CDE to produce this series of reports.

We acknowledge that this report draws extensively on the work of Nicoli Natrass, professor of economics at the University of Cape Town. Any errors or omissions are CDE's responsibility.

This document and the six other reports in the Growth Agenda series are available from CDE; they can be downloaded from www.cde.org.za.

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The Growth Agenda

Priorities for mass employment and inclusion

For the past two years the Centre for Development and Enterprise (CDE) has been working on a major project to identify national priorities for faster economic and employment growth.

More than 20 years after apartheid far too many South Africans live in poverty, largely because far too few have jobs. This has serious implications for our society; South Africa's considerable democratic achievements are being put at risk by the political, social and economic consequences of low growth, unemployment, poverty and inequality.

As we have worked on the project – commissioning research, taking soundings and consultations, testing ideas with stakeholders – concerns about the country's trajectory have deepened and been more widely expressed by people from all walks of life. There is a broadening consensus that we are in deep trouble; this is an opportunity to focus on priorities for action.

This report is one of the CDE Growth Agenda series of publications. We have identified the catalytic priorities which form the essential building blocks for a fundamentally new approach to accelerating growth and employment in South Africa. These priorities comprise a basis for encouraging a wide conversation across South Africa, by offering a diagnosis of what is going wrong and focused recommendations for getting the country back on track.

The CDE Growth Agenda series consists of seven reports:

- Summary overview: Insights and key recommendations
- Jobs
- Accelerating inclusive growth
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- Skills
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- An export processing zone for the Nelson Mandela Bay Metro

“The bottom line is this: South Africa needs accelerated growth that is urban-led, private sector-driven, enabled by a smart state, and targeted at mass employment.”

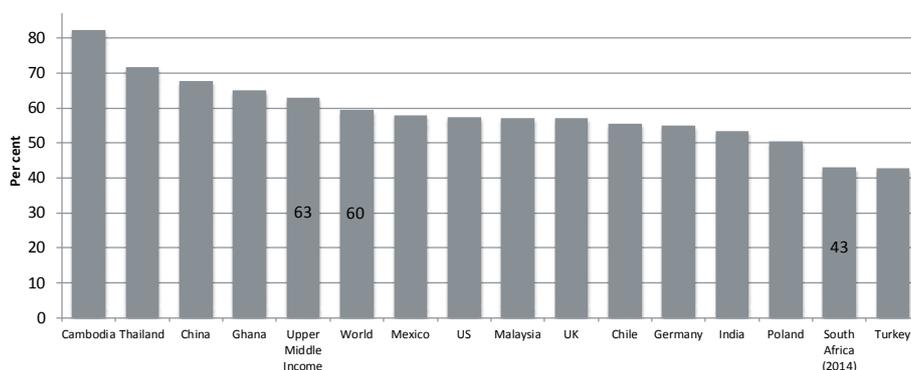
JOBS

INTRODUCTION

At 35 per cent, South Africa's unemployment rate is among the highest in the world. A much more useful indicator of the degree to which an economy is providing its citizens with productive work is the proportion of the working-age population that is in employment.

The global norm is for three out of five adults to be in work. In South Africa, the figure is two out of five – a third lower than the global average. The implications are far-reaching: if South Africa had the same number of jobs per adult as the rest of the world, nearly 6 million more people would be working.

Figure 1: Proportion of adults in employment - 2010



“South Africa’s missing 6 million jobs lie behind the country’s most pressing problems.”

Source: World Bank database

South Africa's missing 6 million jobs lie behind the country's most pressing problems: our stubbornly high levels of poverty and inequality, our many social crises, and our increasingly tense and dysfunctional politics. Ultimately, though, the 6 million missing jobs represent tragedies of unfulfilled human potential. On current trajectories, things will only get worse: as the National Development Plan (NDP) calculated in 2012, population growth means that to get to 60 per cent employment by 2030, South Africa would need to create 11 million new jobs.

“People without jobs are generally unemployed for long periods, with 66 per cent of the unemployed having not worked for longer than a year.”

KEY FACTS ABOUT SOUTH AFRICA'S LABOUR MARKET

South Africa has a population of about 52 million. About 36 million people are of working age (between 15 years and 64 years). Of these, 15.8 million have work, yielding an employment rate of 44 per cent. This proportion has remained essentially unchanged over the past five years.

About 5.4 million people are unemployed and actively looking for work, while a further 2.2 million would accept a job if they were offered one, but have given up looking ('discouraged workers').

People without jobs are generally unemployed for long periods, with 66 per cent of the unemployed having not worked for longer than a year.

There is a strong link between education and unemployment. Of the 4.2 million adults who have tertiary qualifications, 77 per cent are employed. For those adults who have a matric as their highest qualification, only 52 per cent are employed, while for those adults who have not completed high school, as few as 34 per cent have jobs.

Fewer women (38 per cent) are employed than men (50 per cent), and fewer Africans (41 per cent) are employed than whites (65 per cent).

At 54 per cent, the unemployment rate in the former Bantustans is much higher than in areas outside them, where the rate is about 30 per cent.

The South African economy is not creating enough jobs for unskilled workers: between 2001 and 2012, the economy gained 2.5 million jobs; of these, 1.1 million were highly skilled, 800 000 were medium-skilled and only 600 000 were unskilled.

Inadequate demand for unskilled workers occurs simultaneously with inadequate supply of skilled workers: numerous estimates suggest that there are large shortages of skilled workers in South Africa, and that there is a significant and rising premium paid to skilled workers.

Unlike other developing countries, where it is the norm that one third of the working population is employed in agriculture, the figure for South Africa is just 5 per cent.

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LOW GROWTH, FEWER JOBS

Mass unemployment in South Africa first emerged in the late 1970s. Since then, it has grown steadily because neither the rate of economic growth nor its composition (i.e. which industries are driving growth and whether growth is labour- or capital-intensive) has been conducive to absorbing new entrants to the jobs market, let alone reducing the backlog.

For most of the 25 years between 1975 and 2000, economic growth was lower than population growth, resulting in much too little growth in demand for labour, and increasing numbers of people in unemployment. Moreover, the amount of labour used for every unit of output fell as the economy changed and as production techniques became increasingly capital- and skills-intensive. The

mining and agricultural sectors, which traditionally employed large numbers of workers with limited educational attainment, were particularly badly affected. Overall, what employment growth there has been was disproportionately concentrated in semi-skilled and skilled categories.

The fact that the South African economy has become increasingly skills-intensive has had disastrous consequences for millions of poor households. Their lives have been malformed by the legacy of apartheid education, as well as the failure of the post-apartheid state to significantly improve the quality of schooling for the vast majority.

Important as educational reform is, we need to acknowledge that, even if it is successful, it will take a generation to reshape the workforce. As a result, if we are to improve levels of employment, we need to understand why the economy has failed to accommodate people with limited education. In particular, we need to recognise the role played by poor choices in economic strategy as well as labour market policy.

The shift away from unskilled labour

South Africa's labour market policies since 1994 have been based on the conviction that it is impossible and/or undesirable for domestic firms to compete against low-wage, labour-intensive firms elsewhere in the world. This has been translated into labour market policies shaped by the 'decent work' agenda.

While this term has various meanings internationally, in South Africa it is taken to mean secure and well-paid jobs, enforceable rights to limited hours of work and generous overtime pay, plus high levels of protection for worker organisations, and extensive rights to strike.

Clearly, the decent work agenda is driven by the goal of aligning the world of work and the rights of workers with the values of the South African Constitution. Its strategic intent, however, is to place the economy onto a high-productivity growth path that would create the types of well-paid and secure work that unionists and policy-makers hope to deliver.

This approach helped shape the Reconstruction and Development Programme (RDP), the ANC's 1994 election manifesto, which described collective bargaining over wages and working conditions as 'the basis for enhanced productivity in the economy', and called for the legal extension to all workplaces of minimum wages set by unions and employer organisations in bargaining councils. At about the same time, the trade union-aligned Industrial Strategy Project argued that industrial policy should be 'premised on the need to move South African firms out of their low-wage, low-skill, low-productivity vicious circle in which they are out-competed by the second-tier newly industrialising countries.'

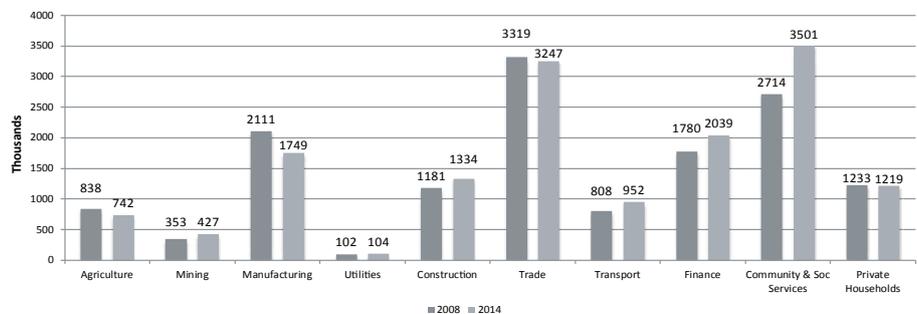
In effect, what was being advocated was a process of raising the cost of labour, in order to force employers to create only jobs that would be sufficiently productive to offset those higher costs. Firms in which jobs were less productive than this standard would have to close, move into different kinds of activity, or use different production processes, staffed by more highly skilled employees.

“The fact that the South African economy has become increasingly skills-intensive has had disastrous consequences for millions of poor households.”

This approach has effectively ruled out the establishment of low-wage, labour-intensive industries that could create significant numbers of jobs. Prohibiting employers from offering low wages has taken a whole range of potentially viable economic activities off the table. This was done without any evidence that high-productivity, high-wage jobs could be created in sufficient numbers to absorb the millions who want to work, and in a context where considerable difficulties have been encountered in expanding the number of skilled workers.

Between 2008 and 2014, the economy gained almost 900 000 net jobs. However, more than 750 000 of those jobs were created in the category 'community and social services', which includes jobs in the public service (see Figure 2). It seems clear that, under present circumstances, the South African economy is effectively incapable of creating large numbers of jobs in the productive economy.

Figure 2: Employment by sector in the South African economy - January 2008 to December 2014



Source: CDE 2016, based on data supplied by Prof Neil Rankin.

“Under present circumstances, the South African economy is effectively incapable of creating large numbers of jobs in the productive economy.”

Employment costs and their consequences

In line with the decent work agenda, the post-apartheid labour market regime has significantly strengthened workers' bargaining position *vis-à-vis* their employers. This was done by:

- Defining basic conditions of service with which employers must comply;
- Making it more difficult and expensive for employers to dismiss workers;
- Maintaining a legal regime that emphasises centralised wage bargaining at industry-level bargaining councils; and
- Providing considerable space for unions to organise and to strike.

In addition, policy-makers can intervene directly in wage-setting processes where workers are deemed to be vulnerable. This emanates from the Labour Relations Act (1995), which:

- Requires the Minister of Labour to extend agreements reached in bargaining councils to all firms in an industry if half of its workers and employers were involved in reaching the agreement; and

- Allows the Minister to set minimum wages in industries where employment is precarious and workers find it difficult to organise.

Finally, South Africa may soon have a national minimum wage, which, if unions have their way, will significantly increase wages paid in some sectors.

THE SOUTH AFRICAN CLOTHING MANUFACTURING SECTOR

Clothing is one of the most labour-intensive manufacturing sectors in the world. The variety of styles and materials, together with the mechanics of sewing together pieces of cloth, mean that large numbers of people are employed relative to the value of the goods produced, with much of the work not easily replicated by machines.

These factors mean that in some parts of the industry, wages of low-skill workers account for over 50 per cent of costs. This is exactly the kind of industry South Africa needs to nurture in order to employ large numbers of relatively unskilled peoples.

These factors also mean, however, that it is possible for firms to relocate very rapidly in response to changing costs. In recent years, employment has plummeted from about 120 000 people in 2002 to about half that today. Some of this has to do with increased global competition, but a key factor has been the concerted push by big unions and employers to raise wages in outlying areas such as Newcastle in KwaZulu-Natal. In the past, firms in these areas were able to employ workers at wages that were about half the minima applicable in urban areas. As this differential has fallen (it is now about 25 per cent), so has the competitiveness of firms located in these areas.

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“South Africa may soon have a national minimum wage, which, if unions have their way, will significantly increase wages paid in some sectors.”

Arguments in favour of this dispensation assume that, left to their own devices, employers would pay their workers as little as possible and dismiss them too readily. It is doubtful that profit-maximising firms would do this, and they would certainly be unable to do it in a tight labour market. But even if this premise is accepted, it must also be accepted that policies which seek to protect workers raise the costs of employment.

One defence of this approach is that labour relations in South Africa are inherently fraught, that an alternative system would be more prone to industrial conflict, and therefore cost employers even more. But if this is true, our labour market regime is failing in its own terms. In fact, the past few years – punctuated by the tragedy at Marikana, and a long and violent strike in the metals industry – have been characterised by increased conflict in the workplace.

An important aspect of this is the way in which labour market stability has had the effect of entrenching dominant unions. This has left little space for competitors, and has created new tensions. This has been apparent in growing conflict between Cosatu-affiliated unions and the Association of Mineworkers and Construction Union (AMCU), but the root cause of the problem is that being

recognised as a majority union has very significant political, organisational and financial advantages. By raising the stakes of becoming the majority union in firms and industries, our labour market institutions have created new sources of disruption and conflict, with huge costs to productivity and the economy.

Employment costs and workers' earnings

The ultimate goal of the current labour regime is to increase workers' incomes. However, it also increases the costs of employment in ways that are not translated into higher wages.

Procedures for disciplining or dismissing employees, for example, are time-consuming and expensive. This raises employers' costs, but does not raise workers' monthly wages, though it does protect workers from losing their jobs. Similarly, strikes, which are steadily becoming longer, more frequent, and increasingly violent, impose a range of costs on employers that cannot be recovered, and are not passed on to workers. These include, among others, the costs of lengthy negotiations; lost production and sales; disruptions in supplier and customer relations; damage to company property; and heightened security. The effect of factors of this kind is that the total costs of employment have risen more rapidly than wages.

“Our labour market institutions have created new sources of disruption and conflict, with huge costs to productivity.”

Ultimately, these measures have to be tested against their stated purpose, namely to increase workers' earnings. Statistics show that the biggest rises in earnings have been among people with the highest incomes. At the same time, inflation-adjusted incomes of the bottom 60 per cent of earners are no higher today than they were in the mid-1990s. Arguably, our labour market regime is delivering the worst of both worlds; increased costs for employers, and no real gains for most workers.

Moreover, the rising costs of employment have had highly undesirable impacts on patterns of employment, including the mix between skilled and unskilled work. Firms are changing their production systems in ways that require fewer, more highly-skilled workers.

Rising labour costs are also impacting negatively on patterns of investment, the more so because it is unclear when and how this trend will end. Precisely because there is no way of knowing where labour costs will settle, it is more difficult for actual and potential investors to calculate whether investments will be viable.

The most important consequence of South Africa's labour-market regime has been to influence employers and investors into focusing their energies and capital on a much more limited set of job creating activities. The clear losers are the millions of unskilled people – notably new entrants to the labour market – who cannot find formal work. For them, government's approach to the labour market has offered very little unless they defy the odds and find a well-protected, well-paid job. And many, if not most, would take jobs at lower wages. How do we know this? Because government's own policies prove it to be true.

The EPWP and its implications

Since 2004, government has allowed two schemes to employ people on short-term contracts at wages lower than those prescribed for the rest of the economy. Ironically, both are public sector schemes – the Expanded Public Works Programme (EPWP), and the Community Work Programme. It is on the basis of these that government and ruling party have proudly claimed that 6 million ‘employment opportunities’ will be created over a five-year period.

While there is a role for initiatives such as these in countries with large numbers of unskilled people and high levels of unemployment, their presence in South Africa also serves to demonstrate the inappropriateness of the labour-market regime that applies to the rest of the economy. Among other things, they show that there are many thousands of people who would willingly accept jobs that pay less and offer less security than the ‘decent jobs’ required by our labour market policies. Indeed, people line up in large numbers for menial jobs that pay less than R80 a day, and do little to enhance participants’ sense of self-worth and dignity.

Ironically, these jobs are considerably worse than jobs paying similar amounts would be in the private sector. For example, these ‘employment opportunities’ offer neither job security nor prospects for upward mobility, while most offer little or no training. The EPWP, in other words, creates work that contradicts every stated goal of the ‘decent work’ agenda, but attracts large numbers of people.

The key question is this: why do we allow the public sector to create these kinds of jobs, but refuse to allow the private sector to do so?

RECOMMENDATIONS

South Africa needs a jobs strategy that will employ far more unskilled and inexperienced workers. It should facilitate the entry and survival of firms that could compete in labour-intensive manufacturing and services sectors in the global economy. Given that levels of competition in these industries are very high, a strategy of this kind must accept that labour costs have to be minimised and wages must conform to global norms. Allowing the entry of these kinds of firms, producing new kinds of goods and services, could have a dramatic impact on South African employment levels. This strategy should have five main elements, which are addressed below.

1. Prioritise employment

Government needs to acknowledge that job creation is South Africa’s single biggest economic priority, and accept the full consequences of committing to that goal.

While rapid employment growth will not solve all of South Africa’s problems, it is a prerequisite for successful development. A job is more than just an income. It is a rung on a developmental ladder; a foundation of family life and for creating better prospects for one’s children; an opportunity to learn new skills and to accumulate savings. A job is also the most direct route to securing a better position in social, economic and political life.

“The EPWP creates work that contradicts every stated goal of the ‘decent work’ agenda, but attracts large numbers of people.”

Compared to subsisting on social grants, employment results in inclusion in the process of growth and a first step to individual empowerment. Given that the public sector cannot realistically grow any more, employment growth in the private sector must become the metric against which all policies are measured.

In a context of mass unemployment and low skills levels, there is a trade-off between the number of jobs an economy can create and the statutory standards imposed on employers. At present, the South African trade-off reflects an undue preference for 'decent work' that significantly constrains the possibility of creating larger numbers of unskilled jobs.

By definition, labour-intensive industries create jobs that are less productive than capital- and skill-intensive industries. A labour-intensive growth path means accepting that new jobs will have lower levels of output per worker than existing jobs, and that these can come into existence only if employers' costs in these industries match lower levels of output. Policy-makers need to accept that this is central to expanding employment.

This does not mean that the earnings of existing employees need to be reduced. This would be socially, politically and economically disruptive, and more likely to lead to an economic recession than an economic boom. What it does mean, however, is that policy space needs to be created for new, low-wage, labour-intensive activities to emerge and thrive.

“A job is the most direct route to securing a better position in social, economic and political life.”

2. Accelerate economic growth

Employment growth is closely correlated with economic growth; put differently, jobs are created when economies grow and vice versa. While choosing the right job-creation strategy is essential, the first and overarching priority should be to find a higher growth path for the South African economy as a whole. This will require addressing some vital policy challenges, dealt with in other studies in this series. These include making the economy more competitive; providing South Africans with higher skills levels; attracting more skilled immigrants and allowing more effective urbanisation and urban growth. Each of these is essential if South Africa is to achieve the rate of growth we need to address unemployment.

3. Reduce the costs of employment by reforming wage-setting institutions

South Africa's wage-setting mechanisms are designed to strengthen the bargaining position of workers and they have the effect of driving up labour costs. In doing so, they make South Africa an increasingly uncompetitive place for many kinds of economic activity. If we are to develop an effective job creation strategy, we need to make some key reforms in these areas.

- Sectoral determinations (and other statutory minimum wage levels) should be kept to a minimum. Critically, they should be determined only after careful consideration of their adverse effects on employment. This should also apply to a national minimum wage.
- The practice of extending bargaining council agreements to non-parties should end. If this is not achievable, the granting of exemptions from

agreements should be widened and should include the automatic exemption of firms that employ fewer than 50 people or are less than two years old; and presumptions in favour of exempting firms that have 50 to 100 employees or are less than five years old.

- The youth employment tax incentive currently subsidises employers' costs when they take on young workers. This is an important intervention and one that should be assessed carefully to determine its impact. If it proves to be effective, consideration should be given to expanding it in sensible ways.

4. Reduce the cost of employment by reforming labour relations

A country's labour relations system is part of its social contract, so radical reform of South Africa's labour relations system would be socially disruptive. However, it could be reformed significantly in ways that would make a major difference to labour market outcomes. These reforms should include:

- Making it less onerous for employers to dismiss unsuitable workers by:
 - penalising those who bring frivolous cases against their employers and former employers to the CCMA; and
 - reviewing and clarifying the procedures to be followed before a dismissal can be declared unfair, to bring greater certainty to the process.
- Creating a separate regime for young workers that would extend the existing exemptions in labour laws governing probation. This should include providing unfettered rights to dismiss young employees in the first six months of their employment; while compensating for increased job insecurity by providing them with more generous access to unemployment insurance.
- Reforming labour laws to reduce the length of strike action, and make strikes less violent. These measures should include:
 - developing mechanisms for divesting violent strikes of their protected status;
 - increasing the space available to unions which represent a minority of workers to negotiate with employers, instead of granting majority unions monopoly status through agency shop provisions;
 - ensuring that the police act more swiftly and effectively against acts of violence and intimidation during strike action, and that unions are made to pay for damage to public and private property caused by their members;
 - ensuring that negotiated agreements cannot provide that employers agree to withdraw charges against striking workers who have broken the law, or reinstate those who have been dismissed for this reason; and
 - ensuring that strike ballots are held before every strike, that they are secret, and that they are repeated at appropriate moments during strikes.

“The practice of extending bargaining council agreements to non-parties should end.”

5. Enable the emergence of new labour-intensive economic activities

All the proposed reforms would enable new forms of economic activity, but further reforms would help to accelerate the development of new clusters of labour-intensive industries and firms. One of these would be the establishment of an export processing zone (EPZ) at Port Elizabeth, aimed at attracting new labour-intensive firms manufacturing goods for export only. (*See the CDE Growth Agenda series Report 7, An EPZ for the Nelson Mandela Bay Metro.*)

Firms located in the EPZ would have access to duty-free imports and should be exempt from South African labour legislation, thus allowing them to determine their own wages and working conditions with their own employees. Wage levels would probably be significantly lower than those in South African manufacturing, and closer to those paid by the EPWP. Since their products would be exported, firms in the EPZ would not compete with domestic firms producing goods for the South African market, and the lower wages paid in the EPZ would not impact adversely on higher wages elsewhere in the country.

As evidenced by the EPWP, there are large numbers of unemployed people in the region who would be amenable to working for lower wages. There are also many workers who have worked in manufacturing before, and who would be relatively productive, allowing firms in the EPZ to compete in international markets.

In essence, an EPZ in the Port Elizabeth area would be an experiment with a new form of economic activity, with considerable potential to enhance exports and create employment. Costs to the government would be limited, as no subsidies would need to be offered. The efficiency of the EPZ would be increased if it was developed and managed by a private firm, which would therefore have an interest in ensuring that it succeeds.

Besides duty-free imports, and exemptions from some labour laws, the EPZ would need no special concessions. Moreover, since it would be aimed at enhancing employment intensity, firms in the EPZ would not need to access the existing investment incentives available to manufacturers, which lower the costs of capital and therefore tend to reduce labour intensity. Should this work, similar zones could be established elsewhere in the country.

“Unions must pay for damage to property caused by their members.”

CONCLUDING REMARKS

No-one disputes that South Africa needs millions of new jobs. However, the current labour market regime and the policy model underpinning it is ill-suited to achieving significant employment growth. It is not possible to create millions of jobs for a relatively unskilled workforce while insisting on a set of rules that drive employment costs relentlessly upward. Those costs – wage and non-wage – have made firms much more reluctant to take on staff, particularly those with few skills and little education. As a result, the economy has become less employment-intensive and increasingly dominated by large, capital-intensive firms. This approach has no hope of raising employment levels to those commonly found in other middle-income countries.

Policy-makers need to address this flawed thinking about the labour market, and the regulatory regime that has emerged. Workers must be protected, and South Africa's wage-setting machinery must be fair to all parties. But ways must be sought of achieving this without serving as a disincentive to create employment.

Employment can grow far more rapidly, especially now when rising labour costs in China are driving companies to look for new bases, which may lead to the large-scale relocation of employment around the globe. If we are to take advantage of this once-in-a-generation opportunity, major reforms are needed – and they are needed now.

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