Where is the *development* in SA's developmental state?

And where is the road to sustainable job creation?

– By John Matisonn

Journalist and author Matisonn began political reporting in 1974. He was foreign correspondent in Washington for the Rand Daily Mail and reported for National Public Radio in the US. He has been published in the New York Times, Financial Times, Washington Post, The Observer and many others. After four years as a broadcast regulator in the Mandela administration, he became the UN's Chairperson of the Electoral Media Commission in Afghanistan. He has published two books on South Africa's political transition process.

The ruling party defines South Africa as a 'developmental state', but with its rising job losses, growth that is lower than most of its African neighbours and rising inequality can that really apply? What's missing, asks JOHN MATISONN

The term "developmental state" was first used by the US political scientist, Chalmers Johnson, in his seminal book, *MITI and the Japanese Miracle* (1982) to describe a state that leads the drive to industrialise, decrease inequality and protect its people from the negative consequences of foreign corporate exploitation. Since then, China has become the best example of a successful developmental state,[1] followed by Thailand, Taiwan, Malaysia and South Korea.

If South Africa could come close to matching the achievements of any of these states it would be well on the way to tackling its desperately serious unemployment crisis as well as the threats of poverty and inequality. Why has this not happened, given that it is ANC policy that South Africa, too, is a "developmental state"?

Instead, not only has unemployment risen steadily from the teens to 42.1% on the expanded definition, but South Africa's Gini coefficient, the measure of inequality, is the worst in the world on record and has risen from 59.3 in 1994 to 63 by 2023. It fell to its lowest point by the end of the Mandela years, 57.8 in 2000, after which it rose to a peak of 64.8 in 2005. Since then it has stabilised at around 63.

On many indices, South Africa is doing worse than most of its neighbours and most of Africa in terms of unemployment and economic growth. While we can legitimately question the accuracy of data in other states, our comparative record cannot be characterised as adequate.

There are three main excuses given by both academics and politicians to explain why comparisons to Asian developmental states are inapplicable. Coming from both left and right, these critiques are:

- Japan and the other Asian states are homogenous – their populations are not as diverse as ours is in education levels, cultures or economic expertise and their development cannot be replicated in Africa.
- South Africa cannot follow the Asian route of cheap manufacturing of clothing, textiles and electronic goods because South Africa's strong unions and their alliance with the ruling party has made its wages too high to compete with Asian

workers who have fewer rights.

- Asian countries are more authoritarian and less democratic than ours and can impose their will in a way a democratic state can't.

This article aims to show that these responses fail to examine the true nature and lessons of the developmental state and to delve deeply enough into the specifics of the South African economy to ascertain the missed opportunities best suited to grow and provide jobs in the current global environment. In fact, the tools of developmental states have been applied successfully in countries outside Asia, including Africa. More important, these responses misunderstand the nature of successful developmental states and what they can teach South Africa.

Since our comparative position is worse than other countries operating in the same global conditions, our exceptionally poor performance for 15 years cannot be explained by global trends in politics and trade, or the impact of the Covid lockdown. State Capture and electricity failure are two major causes. Yet it is likely that even without those two massive failures, job creation would remain tepid.

The greatest economic reformer in history, Deng Xiaoping, leader of the Chinese Communist Party throughout the period of China's rapid transformation that brought an astonishing 800 million people out of poverty, tried to pass on the lessons he learnt to his African counterparts. From what he said to them it is evident that he did not believe the lesson was to follow China's specific path starting with cheap manufacturing of clothing and electronics, which happened to be the path chosen by China based on then prevailing domestic and global conditions.

Deng never held office as the head of state or government, but was the *de facto* leader of the People's Republic of China from 1978 to the early 1990s. He formally retired in 1992 but was referred to in the Chinese press as the paramount leader and remained influential until his death in 1997.

Deng met with a number of African leaders to pass on what he had learnt and gave each the same advice about the lessons from China's rapid job-creating development. To Ghana's President Jerry Rawlings, he said: "We have found our own way … Don't just copy China's model. You have to walk your own path. If there is any relevant Chinese experience for you, I'm afraid it's only one thing: 'seek truth from facts.'

"You must formulate your own policies and plans according to the actual situation of your own country. During the process, you must learn the lessons in a highly timely fashion – to keep the good things and correct the wrong ones. This perhaps is the most relevant experience for you."

He made the same case to Zimbabwean President Robert Mugabe: Seek truth from facts. Don't be stuck in dogma. The problem to be solved is creating jobs and lifting people out of poverty. The reform path must be driven by the economic realities on the ground, not ideology.

Deng spent a considerable amount of time with Mugabe recounting the lessons China learnt from the effects of rigid state control and the destabilisation brought about by the Great Leap Forward and the Cultural Revolution. "We were punished for these mistakes," Deng told Mugabe (Zang, 2014; Matisonn, 2015).

He was making the case for two key things: political and security stability, and constant learning and error correction. Without stability, China's modernisation would have been impossible.

According to Deng's interpreter, Prof Zang Weiwei, Mugabe responded by scolding Deng for deviating from the policies of Mao Zedong. "We friends in the third world still hope China will uphold the socialist path," Mugabe said. Deng was irritated that his proven success and historic achievements were summarily dismissed.

It is clear from these anecdotes that Deng was not suggesting other states mimic the Chinese path, which started with large-scale production of clothing and textiles, moving into simple manufacturing and steadily up the value chain of more sophisticated goods.

In essence, what Deng appears to have focused on, and what was adopted successfully by others, was that the key to success lies in understanding the details of your existing economic capabilities and potential, and matching them to the global trends most appropriate to be harnessed to your benefit: "Seek truth from facts."

We now have examples in Africa that show it can work on our continent. Stefan Dercon, an Oxford development economist and former chief economist at the UK government aid agency, the Department for International Development (DFID), who has done extensive field research in Africa, has pointed to exceptional successes in African countries that are not rich in resources that disprove the argument that rapid job-creating growth cannot be achieved on our continent (Dercon, 2022).

He highlights three preconditions for driving economic development. They overlap strongly with Deng's: as precise as possible a grasp of your own state's specific capabilities, real time error correction and a stable polity.

"The challenge for Africans is therefore to use the Chinese model as a benchmark to develop their own model," Zimbabwean political economist Heather Chingono notes, blaming lack of capacity and innovation as among the causes of African countries' failure to grow sufficiently (Chingono, 2018).

Industrialisation, bringing the economy steadily up the manufacturing value chain, is key to the developmental state. Yet South Africa is far down a 40-year slide that former Trade and Industry (DTI) Minister Rob Davies described as "premature deindustrialisation" (Matisonn, 2019:183). On these grounds alone, South African government policy would not classify as that of a developmental state. Quite the contrary, South Africa is losing ground every year. This is despite the long-running Industrial Policy Action Plan (IPAP) of the DTI.[2] The IPAP has not 'worked' – but it is there as a developmental plan.

The same is true of mining. The volume of South Africa's mining output has also been sliding downwards for 40 years. To a degree, the severity of the slide has been masked by high commodity prices. Mining companies continued to make profits, even though they produced less tonnes of minerals and employed fewer workers each year.

Dercon's third precondition for rapid job-creating growth is a stable polity, by which he meant stable government and a level of corruption that is sufficiently contained not to constrain development. South Africa has remained relatively stable, but there are warning signs that corruption has not been contained and law and order are under growing threat from petty as well as organised crime.

Other African governments have applied developmental state principles successfully to produce rapid growth, for example in Ethiopia, Rwanda and Kenya. These countries offer lessons relevant to South Africa because they result from government decisions, not from unearned windfalls from oil or gold discoveries that may have little to do with government initiatives.

From 2009 to 2019, an African country notched up the fastest growth *in the world,* beating China in the middle of China's big surge. That country was Ethiopia, a country that could not look less like China by any measure. Yet Ethiopia consciously set out to learn from east Asian success.

What is clear from both the Asian and African examples is that choosing the sectors to fast track is critical, and will vary from country to country depending on a combination of relative sectoral domestic strength and global trends best suited to create large-scale employment.

Ethiopia's record as the world's fastest growing economy ended only when a new civil war broke out in 2020. Ethiopia adopted the simple principle of analysing the state of its economy and identifying the biggest opportunities for growth given its resources and its levels of expertise, and the global trends it could capitalise on. This track record is so remarkable that South Africans should study it and the politicians who implemented it.

Dr Arkebe Oqubay, a former mayor of Addis Ababa who became Senior Minister and Special Adviser to his country's Prime Minister, has explained how Ethiopia applied the lessons of east Asia. He understood those lessons to be to selectively focus on specific industrial sectors to shape structural change in line with a broader vision and strategy (Oqubay, 2017).

For Ethiopia, the starting point was obviously totally different from China's or South Africa's. Ethiopia had large agricultural potential and little industry. The government realised there were great gains to be made in improving and supporting agriculture. In 1994 the policy led with agricultural development. From that start support grew steadily into floriculture, which turned out to be a massive growth sector, adding value and jobs. Growth and profits from flowers helped facilitate government's infrastructure build and its other industrial policies.

The government's industrial strategy kicked in from 2003. A handful of key commitments, driven purposefully by government officials working with the private sector, were responsible for the country's runaway success. Besides steadily improving the volume and sophistication of agricultural production, its growing need to expand infrastructure led to the decision to replace cement imports with local production. Here again success was substantial.

Then came industrial parks and enhancing relevant technical knowledge. Exports in a few areas had other spinoffs, driving increasing technical sophistication, the discipline of keeping quality and prices at international standards, leading to productivity gains and increased foreign earnings that could pay for additional national strategies.

State-owned enterprises were managed differently from South Africa, leading to spectacular success with Ethiopian Airways, which has long surpassed South Africa's endlessly troubled SAA and taken over some of its routes.

The Ethiopian government adopted a policy of non-interference in the airline's affairs, and offered no bailout funding if it failed. Airline experts were free to run it as they pleased, but if they failed, the company would go under. It was a winning formula because managers were correctly incentivised. The government did support the airline when the expansion of floriculture into a major export – flown to Europe and elsewhere by plane – provided a springboard to expand its cargo capacity.

After Ethiopia, Rwanda is the next most successful African country in growth and rapid job creation. What can South Africa learn from the faster growing Rwandan economy? Rwanda also carefully chose a handful of sectors based on a keen understanding of their potential and global trends, then pursued them with dedication. As in Ethiopia, Rwanda looked to what already existed as starting points for what it could build.

Rwanda already produced coffee and tea. Its National Coffee Strategy increased job-creating value add by increasing the share of high value-added coffee – beans that are "fully washed" – from less than 1% in 2002 to 54% by 2017.

Agriculture diversified into higher paying crops like avocados, and like Ethiopia, Rwanda greatly increased its production of flowers for export. In 2015 it launched its Made in Rwanda policy, and by 2018 it exported 20 million roses to Europe. Like Ethiopia, it saw cement as an obvious place to increase volumes and efficiency, and began light clothing manufacture.

Rwanda has built a track record of increasing the range and volume of its exports, and its tourism opportunities led to a growth in various travel sector services. It improved recovery rates on its mines. For 15 years up to 2018, it has averaged 20% growth in goods exported and 25% in services. Growth has rarely fallen below 7% since 2005 (Nimusima *et al.,* 2018).

One cannot mention Rwanda without referring to its dark side – both the authoritarianism of its President Paul Kagame, and questions about its economic data, since it was puffed up by looting from the Democratic Republic of Congo (DRC), "vacuuming up Congo's diamonds, gold, cobalt, columbo-tantalite (coltan), cassiterite, and iron," according to journalist and author Michaela Wrong (2021:328). Non-mining products also crossed the border for export abroad "miraculously rebranded as Rwandan". But even Wrong concluded that Rwanda's officials involved in the looting were using most of it to advance Rwanda as well as financing the DRC war. Plunder is a source for Rwandan success.

Kenya's example has particular relevance for South Africa. After a period of State Capture, in 2002 a reform process began which led to rapid economic improvement. Kenya adopted a developmental state approach, and in June 2008 it published its programme, Vision 2030, a roadmap to build a rapidly industrialising middle-income country by 2030. It met that goal in 2015 – 15 years early.

Its key areas were communications, including rail, road and internet, increasing electricity supply and agriculture. Its greatest successes have been in infrastructure including renewable electricity, agriculture and fintech. There is lively debate among Kenyan academics about its success, but also criticism that its building projects have been monopolised by large Chinese companies at the expense of local ones.

Kenya outperformed regional average growth for eight consecutive years, with

GDP growth above 5%. Peter Kagwanja, an academic and CEO of the Africa Policy Institute (API), who was involved in the genesis of this development strategy underlines the multiple indicators of economic growth as follows: Kenya's economy has expanded from GDP of Sh 1.3 trillion in 2002 to Sh 7.8 trillion in 2017, with its GDP per capita expanding from Sh 27,000 to Sh 166,000. Its paved road network has expanded from 8,938 kilometres to 11,796. (…) The country's electric power has grown from 1,142 MW to 2,264 MW, increasing its capacity to power industrialisation and enabling to connect 5.9 million households to the national electricity grid, up from 0.48 million in 2002.

Large-scale infrastructure projects completed include the high-speed train between Mombasa and Nairobi; the modernisation of the port of Mombasa, which has tripled its cargo handling capacity in ten years; a new deep-water port is under construction in Lamu; and the expansion of airports allows twice as many passengers as in 2002 (Maupeu, 2021:45).

Does South Africa have a developmental state?

What went wrong in South Africa? Eskom's failure to meet the country's demand for electricity as well as State Capture are the obvious culprits. But developmental states deal with corruption too. Corruption exists in most states, including China and other high-growth states, but even corrupt officials feel compelled to ensure that economic growth remains robust. When it is time for promotions, China's Communist Party incentivises mayors to increase economic growth in their towns.

The South African government's 2011 New Growth Path aimed to create five million new jobs between 2010 and 2020. The 2012 National Development Plan (NDP) set the goal of "faster and more inclusive economic growth". The NDP's target was to reduce the unemployment rate from 24.9% in June 2012 to 14% by 2020 and to 6% by 2030, requiring an additional 11 million jobs, total employment rising from 13 million to 24 million and for GDP to increase by an average annual GDP growth of 5.4%.

The reality could not have turned out more differently.

South Africa added less than two million jobs in the period, rising from 14.7 million in 2012 to peak at 16.5 million in 2018, nothing near any of the targets set. Instead of unemployment falling to 14% by 2020, it rose to 32.6%. Meanwhile, GDP growth peaked at 3.1% in 2011, before the NDP was published, falling below 1% within two years.

But officials' careers do not depend on their success in delivering growth. And anyway, state officials and government politicians have never displayed a sense of urgency about development actually including the poor. The African Development Bank (AfDB) said the continued underperformance by southern Africa compared to other African regions was primarily because it was dragged down by South Africa. According to the AfDB, southern Africa had the worst economic performance of African regional economies in 2022, growing only 2.7% and projected to decelerate by 1.1 percentage points in 2023. Growth in Africa was projected to stabilise at 4.1% in 2023-24.

The projected sharp decline in 2023 largely reflects continued growth weakness in South Africa, the region's largest economy and trading partner, from 2% in 2022 to an estimated 0.2% in 2023, as the country grapples with the impact of high interest rates and persistent power outages affecting economic activity.

The economic outlook report shows South Africa's economic growth is projected to average 0.8% in 2023 and 2024 — the second lowest in the whole region — while Nigeria's growth is estimated to average 3.3% in the same period. Economic growth for Egypt and Kenya is expected to average 4.8% and 5.8% respectively. Nor is South Africa experiencing "jobless growth." Since economic growth is smaller than population growth, South Africa is falling behind in real terms.

Free State University economist Phillipe Burger once described South Africa as a "social investment state" rather than a developmental state, with its emphasis on investment in human development and enabling people to participate in skilled and thus better-paying jobs (Burger, 2013).

The government's real focus on assisting the jobless has been on programmes that can be categorised as welfare. It's most effective policy here is the social grant, which now reaches about 19 million poor South Africans. Two other important social programmes, National Health Insurance (NHI) and the universal basic income grant, which would be a monthly grant to all citizens, are under discussion.

The social grant has been extremely important to its beneficiaries, and there is a good case to be made for the NHI and a universal basic income grant, but all three are primarily welfare programmes. They are not part of most developmental states' core policies, though – if the fiscal constraints can be overcome – they have some developmental impact by contributing to the health and welfare of citizens, who put their grant money into the economy, and improved health is developmentally beneficial.

The importance of these programmes has increased to combat the "triple threats" of poverty, unemployment and inequality as the economy has failed to deliver jobs. But expanding welfare payments in a stagnant economy will eventually prove unsustainable. Job-creating growth is needed, not only to provide hope for the future but also to sustain grant funding in an increasingly inflationary environment.

South Africa's practices and outcomes do not look like those of a developmental state.

The Promise: What a successful SA developmental state would look like

Since Africa's peer countries and neighbours performed significantly better than South Africa in the same global environment, the reasons must be found in South Africa. To blame global conditions is passing the buck.

The NDP's 484 pages are replete with recommendations covering almost every government department, from education to foreign policy to energy and finance. Government departments were realigned to link outcomes to NDP goals on paper, but this generally failed to produce the reforms envisaged. Recommendations across the board, to cut the size of the foreign service, to realign the energy mix or make educational reforms have not materialised.

South Africa has extraordinary advantages over other African countries, in industrial, mining, financial and infrastructure terms. It has strong universities, and advanced agriculture. Its youthful population provides potential workers not available in more mature economies. Surely if Ethiopia, Rwanda and Kenya can apply these tools successfully, South Africa can?

The potential for job-creating growth in South Africa is enormous. But it requires that the lessons of developmental states be examined and implemented, constantly checking outcomes and correcting errors. In developmental states, the role of the state is not usually to run businesses, but to support businesses in chosen sectors as part of a long-term strategy to exploit current opportunities to build steadily greater industrial complexity.

The NDP is full of wide-ranging recommendations for multiple ministries. ANC policy documents also embody bold recommendations. But the clear lesson from high-growth countries in Africa and Asia is that a developmental state requires that government first narrow down its laundry list to prioritise carefully chosen economic sectors in the public interest. Drawing on published research and the NDP and Treasury documents, the focus should be on just three drivers of substantial growth, producing hundreds of thousands of sustainable new jobs each. These are the information economy (not to be confused with the 'Fourth Industrial Revolution'), mining and the green economy (Matisonn, 2019). A fourth, agriculture, offers similar employment rewards.

There are strong reasons why these three sectors stand out for the opportunities missed. These were the three great global economic trends of the 30 years of our democracy, and South Africa botched its opportunities in all three.

The information boom of the 1990s provided the opportunity to create hundreds of thousands of jobs, most of which would have suited young graduates or school leavers. The government was required to ensure that internet access was cheap, fast and as widely available as possible. A Treasury study anticipated an increase of 0.6% in GDP just from this sector, and private researchers expected far more. A series of government failures has dogged this sector since the mid-1990s. The government set up a blue ribbon panel of international information economy experts, but they gradually stopped attending meetings because they felt their advice was being ignored (Matisonn, 2015). Poor decisions damaged the chance of creating a more competitive market for Telkom and bringing down prices. The two main new telecommunications companies set up during this time were Neotel and Cell C, neither of which has met expectations to create competition for Telkom, Vodacom and MTN, all set up prior to 1994.

The next opportunity to repair the damage came with digital migration. By moving SABC and eTV television stations from analogue to digital, valuable frequency spectrum would be freed up and made available for broadband, increasing speed and decreasing cost of access to the internet. Almost every country in the world has done this.

The government missed its first migration deadline in 2008, then missed the International Telecommunications Union's cut-off date in 2015. The Department of Communications lacked the commitment to ensure this valuable process was completed on time. The process still was incomplete in 2023. More recent reasons for the failure included a dispute over encrypting the signal when Hlaudi Motsoeneng was Chief Operations Officer. Private manufacturers planning to manufacture set-top boxes needed by households with TVs were disappointed when deadlines were not met. The process is still under way, marred by a shortage of set-top boxes that has left many household without TV access.

As government stalled, new methods of accessing the internet emerged, and have proved the job creation potential was there. Though migration would speed things up, by 2020 jobs created by the information economy in global business services hit 250,000 – more than double the automotive industry. Of these, 50,000 serviced overseas companies, growing at the phenomenal rate of 24% a year. That should have happened more than a decade earlier. Though decades have been lost, if digital migration is completed competently, those gains can still increase exponentially.

A true developmental state would not have allowed this endless fiasco. The communications ministry has been a revolving door. On average, ministers are rotated every 14 months. There were six communications ministers in Jacob Zuma's nine years; Ramaphosa has had four in his five years. Zuma split the department into two, telecommunications and broadcasting, against the advice of sector experts. As president, Ramaphosa correctly reunited them. The essence of the information economy is that it is the consequence of the convergence of telecommunications, broadcasting and IT. Splitting it up took the country back to the pre-information economy era.

Though mining raises increasingly important climate change issues, the steady long- term decline of South African mining output has largely been caused by government missteps rather than concern for global warming.

Many think jobs declined naturally because our mines are old. That's not true. The missing factor is exploration. Exploration using new methods has found new deposits on every continent, but exploration has slowed down markedly in South Africa. Former South African mining houses join the global players to establish new mines elsewhere. Exploration contracted because South Africa is considered increasingly unattractive to investors compared to other mining countries. The Fraser Institute measures investors' perception of South Africa as a mining investment destination. By 2019, Namibia and Botswana ranked in the top two in Africa while South Africa was 12^{th} out of 15. For the last two years South Africa ranked in the bottom ten global mining jurisdictions, at 57 out of 62 in the Investment Attractiveness Index in 2022. The year before it was 75th out of 84 jurisdictions.

Even allowing for environmental concerns, mining will be important to the third great global trend South Africa has been woefully slow at responding to – the green economy.

Government handling of the green economy potential has been tragic. After promising a renewable energy programme, foreign and domestic firms established factories to make components to produce solar and wind electricity. The programme to commission green electricity began and was widely praised. Then in 2015 Eskom took the decision to stop approving new renewable electricity projects.

Germany's SMA Solar, the world's biggest manufacturer of solar power inverters, a critical component in solar power systems, had opened a multimillion-rand manufacturing facility in Cape Town in 2014. The facility included a production line and quality test centre for SMA's Sunny Central inverters, warehousing, as well as the African branch of the SMA Solar Academy training centre. After Eskom froze new renewable electricity projects, SMA closed shop in South Africa, citing government's lack of commitment to renewable energy.

Matla, a 7,500m^2 factory project opened after Energy Minister Dipuo Peters declared that South Africa should aim to install one million solar water-heating units by 2014, closed after two years. Well-known former journalist and businessperson, the late Zwelakhe Sisulu,

a former Matla director, said Eskom's new quota arrangement for low-pressure heating systems had made the manufacturing operation uneconomical.

There is no shortage of investment funds available for these sectors. The programme attracted R194 billion in investments in six years, with over R53 billion (27%) coming from foreign investors. Yet it is obvious why decision-makers in these industries feel unable to invest. Something bigger even than State Capture has gone wrong, and we will not fix it till we face it. The fact that growth and employment went backwards, and that State Capture was able to do so much damage, point to the weaknesses of the government's commitment to a developmental state, which is evident by the:

- Lack of unity of the cabinet and state-owned enterprises to achieve these objectives.
- Rapid change of ministers. Ministers serving for little more than a year barely have time to develop a plan before they are moved.
- Many of the targets were too broad and vague.
- There is little evidence that these goals were top of ministers' or their departments' priority lists.
- Perhaps most important of all, the government has not focused systematically on its failures and engaged with the best advice to reverse each failure, one by one. For all the references to prioritising, there is little evidence of it in practice.

The government has proposed a grand social compact across business, labour, government and other stakeholders as the key to unlock development. Failure to develop successful agreements with business was, in part, because the focus was national instead of sectoral. If members of the government contradict each other as described above, the business community feels burned. The 2015 Eskom decision to block renewables and the missed digital migration deadlines since 2008 have left scars. The world can't wait. Neither can South Africa's unemployed.

Prioritising three or four sectors, reaching agreements with stakeholders in which every member of the government is required to be in lockstep will move South Africa many steps forward towards a developmental state. This seems to be exactly what Deng Xiaoping had in mind when he said: "Reform is China's second revolution."

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ENDNOTES

1 On all these measures excluding social inequality, which has grown enormously.

2 See https://www.gov.za/faq/documents/where-can-i-find-latest-industrial-development-action-plan