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The South African Economy, 1652-1997

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# *The South African economy, 1652-1997*<sup>1</sup>

By JOHN ILIFFE

Since the publication in 1981 and 1983 of two textbooks widely used in South Africa,<sup>2</sup> the writing of the country's economic history has been vigorous but fragmented. Historians working in Afrikaans have concentrated mostly on political issues, while African, Indian, and Coloured scholars are only beginning to make an impact, so that research within South Africa has centred at the English-speaking and formerly white universities with strong British and American ties. Four main approaches can be identified. A liberal and institutional emphasis, with a bias towards business history, has dominated the Economic History Society of Southern Africa and its *South African Journal of Economic History*, first published in 1986. Liberals have generally attributed South Africa's distinctive social order to pre-capitalist legacies which have obstructed the growth of a colour-blind industrial capitalism. Their weakness has often been to assume that economic history is synonymous with the history of modern economic growth, relegating Africans to a background factor of undifferentiated conservatism.<sup>3</sup> By contrast, a radical and largely marxian approach, especially strong at the University of the Witwatersrand and in the British-based *Journal of Southern African Studies*, has seen South Africa's racial order as both a product of capitalist industrialization and functional to it, arguing that 'the particular path of industrialization in South Africa is attributable in large measure to an abundant supply of disenfranchised, low-wage, unskilled black labour'.<sup>4</sup> Radical historians, however, have neglected institutional history, so that it was possible in 1996 for the head of South Africa's only independent department of economic history to publish a survey of the field without citing a single contribution to the *South African Journal of Economic History*.<sup>5</sup> Amid this contention, historians of Natal have pursued a distinctive agenda,<sup>6</sup> while scholars in Cape Town, with access to the rich

<sup>1</sup> In preparing this essay I have been grateful for assistance from the South African Library, Cape Town, and the libraries of the Universities of Cape Town, Natal (Durban), South Africa (Pretoria), and the Western Cape. William Beinart, Wayne Dooling, Saul Dubow, Shafiqur Rahman, Robert Ross, and Nigel Worden commented most helpfully on a draft.

<sup>2</sup> Nattrass, *South African economy*; Coleman, ed., *Economic history*.

<sup>3</sup> As in Jones and Müller, *South African economy*.

<sup>4</sup> Bonner, Delius, and Posel, eds., *Apartheid's genesis*, p. 4.

<sup>5</sup> Freund, 'Economic history'. For the controversy between liberal and radical historians, see Saunders, *Making*.

<sup>6</sup> Guest and Sellers, eds., *Enterprise and exploitation*; Guest and Sellers, eds., *Receded tides*.

archives of the old Cape Colony, have concentrated on the seventeenth to nineteenth centuries and drawn inspiration from American studies of slavery and its aftermath.

The political and intellectual conflicts of the apartheid period underlying these contrasting approaches are far from dead, but recent work has shown growing sensitivity to the complexity of the South African past as archives have opened and detailed research has replaced theoretical dispute. Arguments based on policy statements and legislative enactments have been superseded by studies of events on the ground. Abstractions about fractions of capital have given way to disaggregated analysis of the state and its interactions with private business. Rural research is no longer an area of weakness. Gender<sup>7</sup> and mentality are no longer neglected, but the history of population<sup>8</sup> and the family (except, ironically, the slave family) has been less studied, transport and consumption need modern treatment, there are virtually no overall statistical estimates prior to Union in 1910, and later statistics are often questionable. Moreover, South Africa's economic history is a less clearly defined target than it seemed in the early 1980s. The relevant comparisons are debatable: liberal historians drew parallels with Australia and Canada, radicals implicitly contrasted mining-enclave economies such as Zambia and Bolivia, and recent economists have had their eyes on South Korea. The one point on which liberals and radicals agreed—that South Africa had achieved a rapid and successful industrialization—is in dispute as growth rates compare ever less favourably with those of other middle-income developing countries, so that recent work has been concerned to explain failure more than success. At least the search for take-off points and single-factor explanations has ended. South African industrialization now appears gradual, complex, incomplete, and yet traumatic in its costs. As the fragments of the story are fitted together, its chief comparative interest is that an industrial revolution based on electricity and steel has taken place under the eyes of social scientists and within a rural society exceptionally resilient to proletarianization. The most distinguished work of the last decade has focused on these points.

## I

Under Dutch rule the Cape Colony's wheat crop increased steadily until the 1770s, wine production expanded after 1740 to a peak in 1787, and thereafter pastoralism flourished especially on the eastern frontier.<sup>9</sup> This is evident from the remarkably detailed records surviving at Cape Town and The Hague; recent publications have included the cadastral calendar for 1677–1731, listing transfers of real property, and a list made in 1729 of the occupation and circumstances of each colonist, correlated with the

<sup>7</sup> Scully, *Liberating the family?*; Van der Spuy, 'Slave women'; Bozzoli, *Women of Phokeng*; Berger, *Threads of solidarity*.

<sup>8</sup> Katzenellenbogen, 'Historical demographic investigation'.

<sup>9</sup> Van Duin and Ross, *Economy*.

1731 *opgaaf* roll, the regular census of persons, stock, and production.<sup>10</sup> These sources place the Cape Colony among the best-documented slave societies of its time. Worden has shown that slavery was highly commercialized, yielding levels of profitability comparable with those in the New World, but that slaves were widely dispersed in small holdings. This, together with the predominantly male composition of the labour force and its uniquely diverse origins (from India, Indonesia, Mozambique, and the Indian Ocean islands) prevented the emergence of a protective slave culture and instead fostered authoritarian methods of control.<sup>11</sup> Shell has questioned this, stressing instead hierarchy among slaves, paternalistic control within the master's *familia*, and the confinement of female slaves to domestic work,<sup>12</sup> but the two perspectives are not incompatible. Slaves are now known to have been only part of a larger workforce, notably in Cape Town and outlying districts such as Swellendam but also on long-settled farms such as Klaver Valley, one of the few whose internal records have been partially recovered.<sup>13</sup> Recent research has focused on British amelioration of slavery between 1823 and emancipation in 1838, for petitions of this period allow slave voices to be heard more directly than in the criminal records which are their only other source. The petitions show slaves attempting to defend a distinct moral economy and a claim to family life which threatened the slaveowners' *familia*.<sup>14</sup>

Most recent accounts have depicted emancipation as a non-event. Slavery was already in decline, especially after British withdrawal of protective duties on Cape wine in 1825. Deliberate denial of access to land, capital, and water-sources allowed only a minority of ex-slaves in frontier districts to become independent peasants. Many escaped permanent farm labour, preferring casual employment and reliance on harvest earnings, but such a bifurcated workforce suited farmers well.<sup>15</sup> After a brief hiatus in 1838-40, estate production was maintained, most former slaves remained agricultural workers, and a new legislative structure of exploitation was imposed. Yet research has shown that this structure met strong resistance and that emancipated slaves found more profound satisfaction in their freedom, mobility, bargaining power, family life, and personal dignity than historians had hitherto appreciated.<sup>16</sup>

The *trekboer* economy of the eighteenth-century frontier has attracted less recent research, the highlight being, rather, the publication in English of the first volume of van der Merwe's classic trilogy.<sup>17</sup> Attention has focused rather on the colonists' subjugation of the indigenous Khoisan peoples, first on the northern frontier, then in the Overberg east of Cape Town, and finally on the eastern frontier, a process vividly described in

<sup>10</sup> Guelke and Shell, 'Deeds' book'; Guelke, Shell, and Whyte, 'De la Fontaine report'.

<sup>11</sup> Worden, *Slavery*.

<sup>12</sup> Shell, *Children of bondage*.

<sup>13</sup> Bank, *Decline*; Viljoen, 'Khoisan labour relations'; Host, 'Capitalisation'.

<sup>14</sup> Worden and Crais, eds., *Breaking the chains*; Ludlow, 'Missions'.

<sup>15</sup> Ross, "'Rather mental than physical'"; Rayner, 'Wine and slaves'; Wilson, 'Changing rural economy'; Ludlow, 'Missions'.

<sup>16</sup> Marincowitz, 'Rural production'; Dooling, 'Agrarian transformations'; Scully, *Bouquet of freedom*.

<sup>17</sup> Van der Merwe, *Migrant farmer*.

R. J. Gordon's travel accounts, now published after 200 years in obscurity.<sup>18</sup> Khoisan were already important as servile labourers by the 1710s, they formed the majority of agricultural workers in the Overberg, and their emancipation in 1828 was often as restricted as that of the slaves.<sup>19</sup> Such incorporative enslavement or enserfment of local populations expanded across the Orange River from the 1790s and later into the South African Republic, surviving until at least 1870.<sup>20</sup>

Khoisan were also under pressure from Bantu neighbours to the east and north,<sup>21</sup> themselves influenced by Indian Ocean commerce, especially in ivory. Adoption of maize from the Portuguese may explain the archaeological evidence of Bantu demographic growth and the susceptibility to drought which probably underlay the early nineteenth-century turmoil known as the Mfecane, although another reason for this was the expansion of slaving across the Cape frontier.<sup>22</sup>

## II

For earlier historians, nineteenth-century South African economic history centred on Afrikaner trekkers and mineral discoveries, but recent work<sup>23</sup> has emphasized the British capitalism which took control of the Cape Colony in 1806 and incorporated it into a dynamic imperial economy. British merchants quickly captured Cape Town's commerce and reconstructed the city. British settlers introduced into the Eastern Cape in 1820 often turned to trade with Africans, an important source of capital accumulation throughout the century. During the 1830s they moved into Merino sheep farming, which made the Eastern Cape the economic growthpoint.<sup>24</sup> Their headquarters in Grahamstown became the base for expropriation of African land and livestock, drawing the unwilling imperial government into wars of conquest which enriched settler commerce throughout the century. Their thrusting acquisitiveness accompanied the Afrikaner expansion beyond the Orange, for the trekkers' ox-wagons not only sought out empty land but were commercial lifelines to the Cape.

After wine-farming collapsed during the late 1820s, Western Cape agriculture remained unstable, heavily indebted, subject to frequent land sales, unevenly mechanized, served by an impoverished and restless labour force, and periodically devastated by the business cycles highlighted in the recently published reports of the Standard Bank.<sup>25</sup> After mid-century a 'free trade in money' replaced customary restraints on usury as banks

<sup>18</sup> Penn, 'Land, labour and livestock'; *idem*, 'Northern Cape frontier zone'; Guelke and Shell, 'Landscape of conquest'; Viljoen, 'Khoisan labour relations'; Newton-King, 'Enemy within'; Raper and Boucher, eds., *Robert Jacob Gordon*.

<sup>19</sup> Elbourne, 'Freedom at issue'.

<sup>20</sup> Eldredge and Morton, eds., *Slavery*.

<sup>21</sup> Jolly, 'Interaction'.

<sup>22</sup> Hamilton, ed., *Mfecane aftermath*.

<sup>23</sup> Admirably summarized in Keegan, *Colonial South Africa*.

<sup>24</sup> Beck, 'Legalization'; Bouch, 'Mercantile activity'; Wickins, 'Pastoral proficiency'.

<sup>25</sup> Marincowitz, 'Rural production'; Dooling, 'Agrarian transformations'; Mabin and Conradie, eds., *Confidence*.

and merchant houses supplanted kinsmen and local notables as sources of agricultural credit. Commercial men or European immigrants often pioneered agricultural innovation, while in the South African Republic (the later Transvaal), where land records dating back to the Great Trek are beginning to be used to reveal the history of settlement, it was often public office or off-farm resources that enabled notables to accumulate land.<sup>26</sup>

Central to radical revisions of South African economic history was evidence that African smallholders in close contact with the white economy—Mfengu in the Eastern Cape, mission dependants in Natal, sharecroppers in the Orange Free State—became entrepreneurial farmers during the nineteenth century when markets opened, only to be crushed later by state-supported European competition. Further evidence of this has accumulated, especially in Lesotho and Natal.<sup>27</sup> Indian immigrants to Natal also enjoyed a period of smallholder expansion until checked in the 1920s, although many pursued advancement through trade, education, or industrial employment.<sup>28</sup>

### III

Although no longer the dominant subject of research that it was in the 1970s, mining has attracted much detailed study. Despite difficulties of access to archives, two histories of the early Kimberley diamond field have shown how its unique geology fostered monopoly, the small diggers' opposition to monopoly fostered racialism, and racialism subjected black workers to the authoritarian controls of the compound system.<sup>29</sup> Kimberley was the point of transition from the complex racial order of pre-industrial South Africa to the harsh oversimplifications of the twentieth century. While these studies have clarified the intricate negotiations which gave De Beers control of the Kimberley field, Newbury has illuminated the equally complex relationship between producers and merchants which preserved De Beers' control of the world diamond market for a century, demonstrating especially the need first to convince Afrikaner nationalist governments that such control was in South Africa's interests and then to escape the government's embrace when it became an international pariah.<sup>30</sup>

Less has been written since the mid-1980s on gold mining, where many sources have remained closed. With regard to the industry's role in stimulating imperial intervention during the last quarter of the nineteenth century, research has demolished both the purely strategic explanation of Carnarvon's confederation scheme of 1876 and the distinction between

<sup>26</sup> Beinart, Delius, and Trapido, eds., *Putting a plough*; Keegan, *Rural transformations*; Bergh, 'Die Vestiging'; *idem*, 'Grondregte'.

<sup>27</sup> Eldredge, *South African kingdom*; Lambert, *Betrayed trust*.

<sup>28</sup> Freund, *Insiders*; Bhana and Brain, *Setting down roots*; Padayachee and Morrell, 'Indian merchants'.

<sup>29</sup> Turrell, *Capital and labour*; Worger, *South Africa's city of diamonds*.

<sup>30</sup> Newbury, *Diamond ring*; *idem*, 'South Africa'.



deep-level and outcrop mines in explaining the Jameson Raid.<sup>31</sup> Further search of Bank of England and British government records has found no serious evidence that concern to protect gold supplies motivated British aggression in 1899, although those committed to the view have found this merely frustrating.<sup>32</sup> There is widespread agreement, however, that Kruger's government was generally supportive of the mining industry and won much sympathy among white mineworkers. The miners have been a second focus of study. Radical historians demonstrated the structural position which fostered racialism among white mineworkers. Recent studies have revealed the poverty which many suffered and the appalling conditions in which they laboured, with an average working life of seven years before silicosis injured them fatally. Mineowners deliberately concealed the extent of this disease, just as they long denied that mining was chiefly responsible for spreading tuberculosis among black workers.<sup>33</sup>

The understanding of African labour migration to mines (and other workplaces) gained during the 1970s is generally still accepted—especially the complexity of reasons for migration, their changing character over time, and the pervasive aim to use mine wages to 'build the homestead' in the countryside.<sup>34</sup> More has been learned about the migrant culture in mine compounds which long preserved 'a fierce commitment to rural family life and resistance to proletarianisation'.<sup>35</sup> This included acceptance of much management paternalism, a preference for ethnic leadership at compound level, and the institution of 'mine marriage' between senior men and youths by which both sought to maximize access to the male role of homestead head denied to them as migrants.<sup>36</sup> A somewhat similar account of early Natalian farms has suggested that labourers displayed an 'African work ethic' with its own time sense, preference for paternalistic relations, and methods of fostering worker solidarity and exerting pressure on employers.<sup>37</sup> However, these analyses have also been criticized for showing migrants' rural backgrounds as 'fixed and static' although many came from societies 'marked by years of colonial and missionary encounters' and might, for example, take advantage of the mines to acquire literacy and Christianity.<sup>38</sup> Meanwhile oral research has begun to penetrate the experience of digging gold 3,600 metres beneath the earth in a temperature of 92 degrees Fahrenheit.<sup>39</sup>

While diamonds and gold have held centre stage, historians of Natal have conducted valuable research on coal mining, a more dispersed industry which grew up in Natal and the Transvaal from 1886 to supply the gold mines and came to be of crucial economic importance, for cheap labour producing cheap coal—the cheapest in the world during

<sup>31</sup> Cope, 'Strategic explanations'; Katz, 'Outcrop'.

<sup>32</sup> Ally, *Gold and empire*; Marks and Trapido, 'Lord Milner'.

<sup>33</sup> Katz, 'Underground route'; *idem*, *White death*; Packard, *White plague*.

<sup>34</sup> See Crush et al., *South Africa's labour empire*.

<sup>35</sup> Jeeves, 'Identity'.

<sup>36</sup> Moodie, with Ndatshe, *Going for gold*; Harries, *Work, culture*.

<sup>37</sup> Atkins, *The moon is dead!*

<sup>38</sup> Maloka, 'Basotho and 'the mines', p. 8.

<sup>39</sup> Molapo, 'Job stress'; Guy and Thabane, 'Technology'.

the 1970s—generated the cheap electricity which powered South Africa's industrialization.<sup>40</sup>

#### IV

With regard to manufacturing industry, after much argument about points of breakthrough to sustained growth, all are coming to be seen as stages in a more gradual process. Before the First World War manufacturing at the regional level originated from two directions: the gradual development of food-processing and consumer-goods industries, and the heavy industries supplying the gold mines with cement, chemicals, mechanical repair, and especially electricity through the world's largest coal-fired power station.<sup>41</sup> Equally important, but less studied, was the construction of state-owned railways, first in Cape agricultural districts during the 1870s, then to Kimberley in 1885, to the Witwatersrand during the 1890s, and expanding into a branch network before and after the First World War.<sup>42</sup> Although built largely with imported materials, the railways provided a market for coal, created demand for electricity and steel, and gradually integrated the widely separated regional economies, concentrating heavy industry on the Witwatersrand. 'South Africa had found its Ruhr.'<sup>43</sup>

Recent research has concentrated especially on the two decades after 1914. The protective stimulus given to manufacturing by the war has been exaggerated, but the postwar Smuts government began to plan an industrial economy, creating a parastatal Electricity Supply Company (Escom) which became the core of the national economy and the generator of over 60 per cent of Africa's electricity.<sup>44</sup> Radical historians gave special prominence to the largely National Party government of 1924, seeing its protective tariffs as an assertion of national against imperial capital essential to the breakthrough from mining to manufacturing. Subsequent research has shown that although certain industries such as clothing benefited from protection, tariffs were generally low, they protected agriculture at the expense of processing industries, and they scarcely applied to key sectors such as steel and engineering for fear of raising mining costs.<sup>45</sup> Yet the largely National Party government was politically responsible, against mining opposition, for creating the parastatal Iron and Steel Corporation (IsCOR) as a basis for further industrial growth. Archival research has shown that both Escom and IsCOR collaborated with private capital rather than challenging it. Escom secured customers by selling electricity to existing private suppliers. IsCOR divided the South African market with the European Steel Cartel at the expense of consumers.<sup>46</sup>

<sup>40</sup> Guest, 'Commercial coal-mining'.

<sup>41</sup> Mendelsohn, *Sammy Marks*; Christie, *Electricity*.

<sup>42</sup> Heydenrych, 'Railway development'; Heydenrych and du Plooy, 'Railway development'.

<sup>43</sup> Freund, 'Social character'.

<sup>44</sup> Christie, *Electricity*; Clark, *Manufacturing apartheid*.

<sup>45</sup> Clark, *Manufacturing apartheid*; Freund, 'Social character'.

<sup>46</sup> Clark, *Manufacturing apartheid*; Cross, 'Britain, South Africa'; *idem*, 'Political economy'.



Private industry also advanced during the 1920s, notably the garment industry, which employed many women, and motor-car assembly, one of several fields in which subsidiaries of overseas manufacturers provided a new source of entrepreneurship.<sup>47</sup> The impact of motor transport and electrified consumer durables has yet to be studied, but both contributed to the peak rate of economic growth which South Africa enjoyed after leaving the gold standard in 1933. It has been argued that this growth involved little structural change and that engineering, for example, remained a jobbing industry until wartime armaments manufacture introduced mass production techniques, but there is evidence both that engineering was developing substantially before 1939 and that scarcity of machinery hampered wartime development.<sup>48</sup> Nevertheless, wartime expansion of the engineering and metal trades took South Africa into a further stage of industrialization.

After 1948 the National Party's industrial policy was heavily influenced by political and military considerations, although study of the records (largely in Afrikaans) has scarcely begun. Security clearly dictated a new generation of highly capitalised parastatal enterprises, notably the Sasol oil-from-coal plant of the 1950s and expansion of the national power grid during the 1970s to cover most white farms. The railways were Afrikanerized during the 1950s and Iscor increasingly so after 1961. Political considerations gave the textile industry—largely a post-1945 innovation—a low-wage, labour-intensive sector located partly in or near Bantustans, while African entrepreneurship and the informal sector were deliberately repressed until the late 1970s, although informal enterprise was an important element in township economies.<sup>49</sup> Kaplan has revealed the influence of the Defence Resources Board, which set up more than 20 sectoral committees in the early 1950s to examine local production of strategic materials. The electronics committee was responsible, through South African Posts and Telegraphs, for stimulating a telecommunications industry which became the core of the electronics sector.<sup>50</sup> Further research is needed in this area, as also into attempts to expand manufacturing by strategies such as the local content quotas introduced into motor-car assembly in 1964. Some politically motivated initiatives distorted industrial development. The petrochemical industry, for example, chiefly served the interests of Sasol, the main upstream supplier, rather than those of downstream plastics manufacturers.<sup>51</sup> In the private sector, too, the economic environment favoured very large enterprises such as the huge pulp and paper plants which by 1990 produced 16 per cent of South Africa's manufacturing GDP. By contrast, the state seldom provided the industrial direction available in some East Asian countries.

<sup>47</sup> Berger, *Threads*; Duncan, 'Foreign and local investment'.

<sup>48</sup> Lewis, *Industrialisation*; Webster, *Cast in a racial mould*; Alexander, 'Industrial conflict'.

<sup>49</sup> Smuts, 'Growth of Black business'; Preston-Whyte and Rogerson, eds., *South Africa's informal economy*; Crush and Ambler, eds., *Liquor*.

<sup>50</sup> Kaplan, *Crossed line*.

<sup>51</sup> Crompton, *Industrial strategy*.

When it tried to do so, its interventions revealed the great complexity of the task.<sup>52</sup>

## V

All viewpoints agree that, with the exception of the wool industry, the modernization of South African agriculture was a consequence rather than a cause of industrialization. White farming was subsidized at the expense of mining taxes and high food prices, so that the rapidly growing population was fed—if often poorly fed—from local production. But this entailed the proletarianization and impoverishment of rural Africans. Studies of their resilience constitute a major contribution to the comparative history of industrialization.

State support for white agriculture is well documented and recent work has chiefly added details of the aid given during depression in the 1930s.<sup>53</sup> More original are indications that land degradation through overuse, long bewailed by agriculturalists, was partly mythical, as in many parts of Africa, and that environmental history demands more subtle treatment.<sup>54</sup> The best-documented sector of white farming has been Natal's sugar industry, which profited immensely from Union in 1910 and was dominated first by a 'sugarocracy' controlling large mills and then by urban-based conglomerates which bought them.<sup>55</sup>

Sugar planters relied on migrant labour. Elsewhere white agriculture gradually proletarianized local Africans who in the early twentieth century had still retained access to land, except in the Western Cape. Among the most prosperous at that time had been sharecroppers growing maize with ox-ploughs on poorly capitalized white farms on the highveld. Their resistance to proletarianization has been described from oral sources by van Onselen in a masterpiece of modern economic history: a biography of Kas Maine, 'the head of a rural household amidst an industrial revolution in a racist society', who pursued his obsession with grain-farming for 35 years on 15 farms until Nationalist policy and agricultural mechanization drove him into the Bantustans.<sup>56</sup> More commonly, for Africans on European land, the commercialization of white agriculture with state support first reduced sharecroppers or cash tenants to labour tenants, then tightened the conditions of labour tenancy, next converted the labour tenant to a labourer paid partly in kind, and finally reduced him to a proletarian. The process varied immensely in time and detail, seeping rather than sweeping through the countryside.<sup>57</sup> It had little to do with legislation, but rather was concerned with local struggle between farmers and tenants, increasingly linked with wider political or near-

<sup>52</sup> Black, *Industrial strategy*.

<sup>53</sup> Minnaar, 'Effects'.

<sup>54</sup> Beinart, 'Soil erosion'.

<sup>55</sup> Lincoln, 'Culture'.

<sup>56</sup> Van Onselen, *Seed is mine* (quotation on p. 479).

<sup>57</sup> Beinart and Bundy, *Hidden struggles*, p. 3.

millennial movements, and sometimes, as in Natal and the Transvaal during the 1920s, 'brutal and bloody'.<sup>58</sup>

Simultaneously the African reserves were reduced from relatively prosperous peasant areas to remote and overpopulated labour reservoirs. Much uncertainty surrounds the dating of this decline, which became grave in different regions at periods ranging from the 1880s to the 1970s, and research has shown that a minority of viable African smallholders survived even apartheid.<sup>59</sup> Those who succumbed generally went to towns rather than white farms, creating a labour shortage which apartheid sought to meet by state direction of fully proletarianized labour. Studies of its implementation, however, suggest only partial success, for less well capitalized white farmers continued to attract workers by offering labour tenancy rather than pure wage-work.<sup>60</sup> But shortly after apartheid was introduced, mechanization converted scarcity of agricultural labour into a glut. Between 1946 and 1960 the number of tractors in use on South African farms increased from 20,292 to 120,920. Combine-harvesters appeared on Transvaal maize farms in the 1950s and became the norm in the 1970s, along with weedkillers and other new technologies, enlarging average farm sizes by 75 per cent, more than doubling maize yields, and reducing seasonal harvest workers by nearly 70 per cent and permanent workers by a smaller proportion.<sup>61</sup> Farm employment probably peaked in the late 1960s. Thereafter the authorities concentrated on moving unwanted workers into Bantustans. As in industry, tax laws and interest rates favoured capital-intensive enterprises, perhaps with the security risks of large farm labour forces in mind, while drought and worsening terms of trade between agriculture and industry drove weaker farmers into debt. By 1990 at least one-third of white farmers survived only by state aid. The profits—again as in industry—went largely to conglomerates supplying agricultural inputs.<sup>62</sup>

The history of rural families probably echoed this dispossession, but this is one of the neglected aspects of South Africa's history. In the 1970s most anthropologists held that the effective unit of rural society amid widespread poverty and labour migration was not the nuclear family but the household, defined as a permanent income-sharing group whose membership fluctuated in response to earning opportunities. (Kas Maine, for example, dispersed his household in bad times and regrouped it in prosperity.) Labour migrants brought home cash to 'build the homestead', often a three-generation household in which grandparents helped a wife to care for her children in her husband's absence. Frequently the links within households were female, for one broad trend of social change during industrialization was that a kinship system once strongly structured by relationships among men became (except among the elite) increasingly

<sup>58</sup> Bradford, *Taste of freedom*, p. 55.

<sup>59</sup> Beinart, 'Transkeian smallholders'.

<sup>60</sup> Schirmer, 'Reactions to the state'.

<sup>61</sup> De Klerk, 'Seasons'.

<sup>62</sup> *Idem*, 'Accumulation crisis'; Bedford, 'Development'.

based upon relationships among women.<sup>63</sup> By the 1990s, however, social disintegration was so acute that anthropologists were discarding even the household as an analytical unit and writing instead of 'domestic fluidity' and 'institutional incoherence', where the poor moved quickly into and out of sheltering units as survival dictated.<sup>64</sup>

## VI

Although monopoly and oligopoly are commonplace in late-industrializing market economies, they have been so extreme in South Africa as to compel special attention. In 1987 four conglomerates—Sanlam, Mutual, Anglo American Corporation, and Rembrandt—controlled 83 per cent of all companies listed on the Johannesburg Stock Exchange.<sup>65</sup> Characteristically, they combined mining, manufacturing, and financial interests.

The first step in this direction was the unique control of South African banking established by the two imperial banks, Standard and Barclays.<sup>66</sup> Their chief rivals before 1980 were Nedbank, originally a Dutch foundation, and Volkskas, an Afrikaner nationalist savings bank.<sup>67</sup> None of these was initially an investment bank of continental type. That role fell chiefly to the mining houses which financed and managed groups of gold mines and provided the models for South African corporate structure, although little serious business history on this subject has yet been written. While some mining houses such as Anglovaal diversified into manufacturing from the start, and many launched enterprises ancillary to mining, diversification came chiefly in the 1960s and 1970s, when Anglo American, in particular, acquired a dominant position in many economic fields. Meanwhile insurance companies represented a third form of corporate power, notably Old Mutual, launched in Cape Town in 1845, and Sanlam, an Afrikaner nationalist company eager to secure footholds in other areas of the economy.<sup>68</sup>

During and after the Second World War these corporate sectors interpenetrated with one another and with parastatal bodies. Sanlam moved into coal mining, secured valuable Escom contracts, sought to enter the diamond business, was fended off by De Beers, and was compensated by a stake in gold-mining for fear of Nationalist reprisals. Anglo American, in its turn, challenged Iscor's domination of the steel industry.<sup>69</sup> Many industries such as cement, petrochemicals, and timber, pulp, and paper were in effect partitioned among the conglomerates, themselves in some cases controlled by their founders through relatively small shareholdings and a degree of pyramiding unacceptable to most stock exchanges.<sup>70</sup>

<sup>63</sup> See, e.g., Delius, *Lion amongst the cattle*, p. 153; Coplan, *In the time of cannibals*, p. 168.

<sup>64</sup> Spiegel, 'Introduction'. For poverty, see Wilson and Ramphela, *Uprooting poverty*.

<sup>65</sup> Jones, ed., *Financial enterprise*, p. 19.

<sup>66</sup> *Idem*, *Great imperial banks*; Webb, *Roots of the tree*.

<sup>67</sup> Verhoef, 'Nedbank'; *idem*, 'Afrikaner nationalism'.

<sup>68</sup> Lewis, 'Character'; Innes, *Anglo American*. I have not seen Koen, 'Sanlam'.

<sup>69</sup> Verhoef, 'Nationalism and free enterprise'; Cross, 'Afrikaner nationalism'.

<sup>70</sup> Fourie and Smith, 'South African cement cartel'; Crompton, *Industrial strategy*; Jones, ed., *Financial enterprise*, ch. 1.

Disinvestment by American and European firms during the 1980s extended conglomerate power without adding much indigenous technological capacity. Anglo American bought Ford's business and most of Barclays'. Sanlam acquired large stakes in motor manufacture, computer hardware, and electronics.<sup>71</sup> But the major developments of the 1980s were in finance. Deregulation of banking and the erosion of distinctions between banks, building societies, and insurance firms led to amalgamation into four major financial groups, each associated with a conglomerate.<sup>72</sup> The insurance societies, in particular, exercised unusually overt power. Sanlam sought direct managerial control of its acquisitions, perhaps as a consequence of its nationalist origins, while generally the mining houses may have provided a corporate model. Critics complained that conglomerates dominated by financial (especially insurance) interests were particularly unlikely to provide innovative entrepreneurship. The conglomerates might have replied that they mobilized finance rather than interfering in operations.<sup>73</sup> Study of innovation by conglomerates might illuminate this issue.

## VII

For future historians of South Africa, the nature of the late twentieth-century economic crisis accompanying the collapse of apartheid will be a central problem. The contemporary economic literature contained three main analyses of the crisis, each with its view of the past.

One analysis held that after 40 years of almost uninterrupted growth South Africa's economy entered a structural crisis in the mid-1970s, characterized by stagnant output (especially in manufacturing), high inflation, weak exports, weak currency, low reserves, low savings, and high unemployment.<sup>74</sup> The cause was reliance on 'racial Fordism': mass production of consumer goods for an internal market so limited by the unequal racial distribution of income that production and employment could expand further only by drawing in imports for which South Africa's small, protected, and uncompetitive manufacturing sector could not pay.<sup>75</sup> Even African wage increases from the mid-1970s and the entry of Africans into semi-skilled, routine white-collar, and semi-professional jobs under apartheid had not adequately enlarged the market because these developments had been outweighed by (and had encouraged) structural unemployment.<sup>76</sup> A solution to the crisis required the redistribution of income and assets, but also a reform of industry by means of a state-led industrial policy on South Korean lines using planned rationalization, selective tariffs, and the deepening of local technological and design capacity.

<sup>71</sup> Duncan, 'Foreign and local investment'; Draper, 'Disinvestment'.

<sup>72</sup> Verhoef, 'Dynamics'.

<sup>73</sup> Lewis, 'Character'.

<sup>74</sup> Black and Stanwix, 'Manufacturing development'; Joffe et al., *Improving manufacturing performance*.

<sup>75</sup> Gelb, ed., *South Africa's economic crisis*, ch. 1.

<sup>76</sup> Crankshaw, *Race, class*.



A second view of the crisis accepted this analysis of its immediate nature but argued that it was more deeply rooted in the dominant 'minerals-energy complex' which, especially since its amalgamation with the financial institutions, was not committed to industrial modernization. In this view, no coherent industrial policy was possible so long as economic and political power were radically separated.<sup>77</sup>

The third position, by contrast, denied the existence of a structural crisis. In one version, this view questioned whether economic growth under apartheid, although impressive by comparison with developed economies, had been more than mediocre when compared with the developing economies among which South Africa properly belonged. From this perspective, South Africa's retardation began with apartheid and was only deepened in the late 1970s by international depression and in the 1980s by sanctions.<sup>78</sup> Alternatively, those who denied a structural crisis but remained impressed by the economic achievements of early apartheid attributed decline in the 1980s to political isolation, militarization, high taxation, low savings, and pursuit of monetarist policies without accompanying budgetary restraint.<sup>79</sup> For both versions of this view there was nothing fundamentally wrong with the structure of South Africa's economy, or at least nothing which could be changed quickly without even worse effects in stimulating inflation or deterring investment.<sup>80</sup>

Although all three views of the past were represented within the African National Congress regime of the late 1990s, practical constraints dictated economic policies conforming largely to the third position.

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<sup>77</sup> Fine and Rustomjee, *Political economy*.

<sup>78</sup> Moll, 'Did the apartheid economy "fail"?'

<sup>79</sup> Heyns, 'Aspects'. For the official view of monetary policy, see Gidlow, *South African Reserve Bank*.

<sup>80</sup> Moll, 'Growth'; Natrass, 'Gambling'.

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