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# Barriers to Entry and Expansion: Understanding the Constraints to Inclusive Growth


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The preamble to the South African Competition Act, No 89 of 1998 ("the Act") stipulates that the economy "must be open to greater ownership by a greater number of South Africans" and that a development-focused competitive environment which balances the interests of workers, owners and consumers will benefit all South Africans. In this context the specific provisions of the Act seek to restrain particular trading practices which undermine the attainment of these goals by assessing and preventing mergers and acquisitions which substantially prevent or lessen competition, and prosecuting firms that seek to abuse positions of market power to the detriment of competition and therefore also of consumers. Ultimately, competition policy is about promoting market access and economic participation, economic efficiency, and consumer welfare.

> A key outcome of this research will be to contribute to developing practical steps towards building institutions and improving policy formulation and implementation around inclusive growth and fostering competitive rivalry

The work of the Centre for Competition, Regulation and Economic Development (CCRED) involves, among others, building and sharing knowledge about barriers to entry and expansion and the development of firm capabilities in the South African economy. This speaks in particular to the creation of an environment that allows for the entry of small and/or local firms to domestic supply and value chains and graduation up those value chains in the context of the growing international discourse surrounding inclusive economic growth and economic participation. In

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**DID YOU KNOW!**

**Since 1994, nearly 5 000 farms, comprising 4,2 million hectares, have been transferred to black people, benefitting over 200 000 families.**


the South African context, this should include a conceptualisation of Broad-based Black Economic Empowerment (BBBEE) as black-owned and -controlled firms entering markets and competing vigorously with established incumbents in a manner that is consistent with the National Planning Commission's vision of a vibrant entrepreneurial South African economy.

The South African experience is one of concentrated industries in key sectors such as mining and energy that have developed on the back of substantial state support. High levels of concentration and market power affect the economy in two ways. First, where firms in positions of market power as monopolists or in cartel arrangements employ anticompetitive practices to prevent the entry of more efficient rivals (including small and local firms); second, where firms in positions of market power lessen or prevent competition in a market in such a way that consumers are denied the benefits of dynamic rivalry among firms in the form of better prices, quality and choice.

These two effects are, of course, interrelated and it is important to emphasise that these practices directly undermine the attainment of economic development, economic transformation and social justice. In crude terms, if new local businesses cannot access markets or if their costs are raised indirectly by the anticompetitive behaviour of established rivals, these firms will not be profitable. If these entrants are not profitable, they cannot compete on the basis of innovation effort, achieving economies of scale and scope, or building capabilities through learning-by-doing; and they certainly cannot compete with incumbent firms on pricing and quality. Critically, these firms also cannot contribute to employment creation and the objectives of downstream industry development outlined in the country's industrial policy strategy. This breakdown in the processes of competitive rivalry ultimately results in a lack of competition which means downstream firms and the man on the street respectively pay much more for their inputs and goods. This is not acceptable in the context of high inflationary pressures and income poverty.

The adverse effects of concentration are perhaps more directly felt when anticompetitive practices take place in important consumer goods sectors such as food products or in sectors critical to the growth of the economy such as in the case of construction products. There is a growing body of knowledge in this regard including recent studies on the severe effects of cartel conduct on the pricing of precast concrete products (Khumalo et al., forthcoming 2014) and of flour (Mncube, 2013).

Ultimately, it is in the interest of incumbent firms to prevent rivals from competing with them. The CCRED study on barriers to entry will use firm-level case studies to understand the barriers to entry faced by new entrants that have succeeded to enter different economic sectors or have simply failed to do so. Our interest is particularly in those instances where the barriers to entry have arisen from anticompetitive practices by incumbent firms or regulatory failure. Useful examples which the study is likely to assess include low-cost airlines, milling and baking, telecommunications, food retail and banking. A key outcome of this research will be to contribute to developing practical steps towards building institutions and improving policy formulation and implementation around inclusive growth and fostering competitive rivalry.

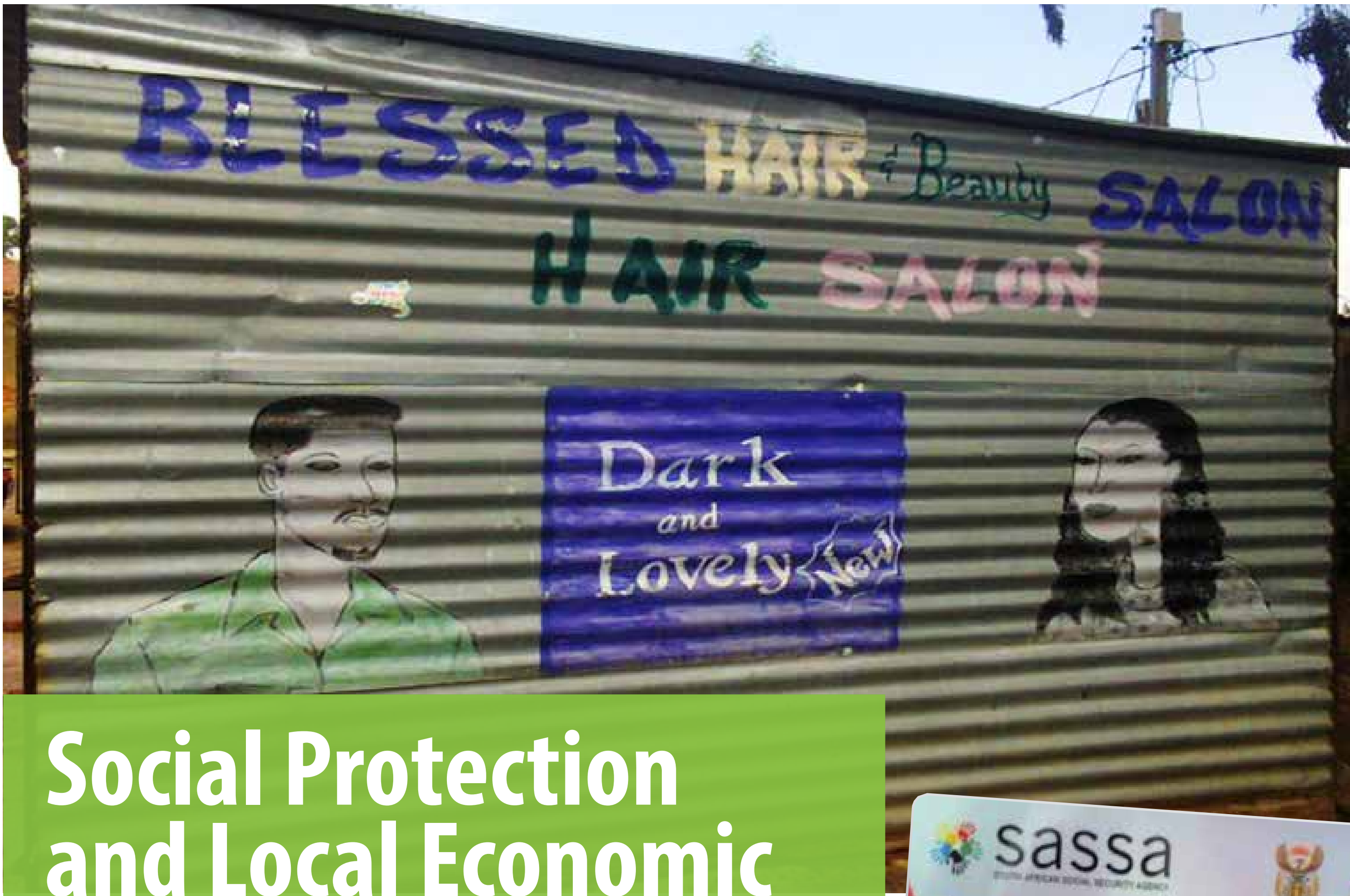
There is currently a shortage of research on what barriers individuals and firms need to overcome in order to gain access to productive sectors of the economy. This work fits in with the broader objective of enhancing the availability of credible research in the growing fields of competition policy and regulation, and within the broader context of economic development. It is envisaged that this research should be shared with policymakers, organisations within the broader research community and practitioners to stimulate debate and to aid further decision making and policy implementation.

## Referrences

*Junior Khumalo, Jeffrey Mashiane & Simon Roberts 'Harm and overcharge in the South African precast concrete products cartel' (forthcoming, 2014), Journal of Competition Law and Economics.*

*Liberty Mncube 'The South African wheat flour cartel: overcharges at the mill' (December, 2013) Journal of Industry, Competition and Trade.*

*To contribute on SPII Talk as a guest author please contact Brian Mathebula at brian@spii.org.za.*




# Social Protection and Local Economic Development: Graduation Pilot Project-Reflections from the field


The *Social Protection and Local Economic Development: Graduation Pilot Project*[1] is in its fourth month of implementation. This is a 24-month pilot project that is building on the achievements of the Bangladesh Rural Advancement Committee (BRAC) graduation model. The BRAC graduation model aims to create pathways for the poorest to move out of extreme poverty. In order to achieve this, the model focuses on carefully sequenced safety nets, livelihood strategies and access to finance. The term 'graduation' has become synonymous with providing ongoing support over a specific period of time, with the purpose of moving people from extreme/ultra-poverty. The graduation period is typically 18 to 36 months. Sceptics of the graduation model argue that certain people should not graduate from social protection schemes,[3] and it is with this notion in mind that the project aims to build on the learnings of international graduation models. SPII's graduation model aims to build on South Africa's social grant system, which has over 16 million recipients.

The project targets micro and survivalist enterprises in households that receive a Child Support Grant (CSG) in Evaton. It is envisaged that after 24-month project participants will graduate from their survivalist nature into resilient enterprises, and that their incomes will breach the means-tested CSG threshold. It is important to note that the aim of the project is not to graduate people from their CSGs, but rather to increase income at a household level, with the hope that the CSG will be able to perform its developmental role, which is the targeted beneficiary.[4] The project

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## DID YOU KNOW!

The largest opposition party, the Democratic Alliance (DA), polled 16.66% at the last national election in 2009. While this reflected a steady growth of the party's share of the vote in recent elections, it paled in comparison to the ANC's 65.9%.

and but doesn't want to be excluded from the project and asked whether his unemployed wife who would be running the business could participate instead.

The first of the key interventions[5] took place on the 28 January until the 4 February 2014, and was a Life Skills Training Workshop organised for the treatment group at the Bokamoso Skills

is made up of 300 participants who have been divided into a treatment and a control group. The treatment group receives the interventions.

This input into SPII Talk aims to share the experiences so far in the project from both fieldworkers and the research team. One of the exciting learnings during the four months of the project is who participates and who does not participate within the selected households. For instance, during a planned visit to the enterprise owner by the enterprise coach, the project participants indicated that he the enterprise owner had found a job

and Economic Development Centre in Evaton. The venue for the workshop was selected as being strategically placed for the sake of easy access, consideration of transport costs, and also being a familiar place that locals could identify and be comfortable with. The purpose of the Life Skills Training workshop is to boost the morale and build confidence about the future. The key themes that emerged from the training workshop were 'reviving hope' and 'boosting confidence' and the main focus was on the role of mentorship and inspiration in people's lives. Below are some quotes coming from the project participants after the workshop.

"Workshop ya maele a bophelo, e butse mahlo aka ho diphoso tse ngata tseo ke neng ke na le tsona le kgwebong ya ka tseo ke neng ke di etsa".
(The Life Skills Training opened my eyes to a lot of faults that I had and also the business mistakes that I was making,
(Participant No. 102))

"Ke ithutile ho hongata, hobane ke kopane le borakgwebo le bommakgwebo ba bang mme ka thola maele a matjha a kgwebo".
(I gained more from experience by meeting with other business people and also new business ideas
(Participant N0. 123))

"Thuto ya bohlokwa ke tsotello ya botho, botho ba hao jwalo ka motho le hore jwalo ka motho o ba le tjhebelo pele ya bophelo ba hao jwang."
(The most important lesson is self-conscious, self-concept and how should I focus on my life (Participant No.109))

What we have learned during the four months is the importance of the regular mentoring and coaching and the rapport that is built between the fieldworkers and the enterprise owners. The pilot project intervenes at an enterprise level, with the enterprise owners that live in a household that has someone receiving a CSG. What we found during the regular visits is that some of the project participants did not have an official South African identity document because they had been lost or stolen


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*Some of the businesses owned by project participants*

DID YOU KNOW!

On average, the South African economy grew at 3, 2% a year between 1994 to 2012 despite the global recession.

> The Life Skills Training Workshop also touched on financial literacy and business management, which paved the way for the next set of key interventions to follow

and as a result, they could not open bank account. The result was that they were not able to assess formal-sector financial services or other services that require identification.

One of the key interventions in the graduation model is financial inclusion. The aim is to improve access to finance by poor or lower-income households. South Africa's major banks were invited to the Life Skills Training Workshop to specifically speak about their financial products that are designed for low-income earners and new entrants into the formal financial-sector services. After the respective presentations of their financial products, they set up information desks at the venue to allow one–on-one consultation with the participants.

A great deal of interest was shown from the project participants on the financial-service products offered by Capitec (Global One Account) while others were eager to enquire and open the Nedbank Stokvel[6] Account as well. The banks stressed the importance of being familiar with basic banking procedure, from bank charges to basic procedures of transactions like mobile banking. The inclusion of financial institutions is done to introduce access to finance and to promote a savings culture amongst participants. The Life Skills Training Workshop also touched on financial literacy and business management, which paved the way for the next set of key interventions to follow.

The Life Skills Training workshop is to be followed by the second key intervention of the project which is the Basic Business Management Skills Training Workshop.[7] The evaluation of these interventions is done by five

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**DID YOU KNOW!**

The mean minimum wages for all industries was R3 500 per month in 2012, the lowest being agriculture at R1 614 and the highest being transport at R4 778.

Group 1 at the Life Skills Training Workshop


Information desk set up by Nedbank

field workers who are regular monitors and mentors of the participants. Jane Heisey (2013) writes on the importance of regular monitoring and mentoring and mentions that "field workers visit each participant on a weekly basis in most cases and implementing organizations agree that coaching is a vital element for success of the program."[8] The weekly visits by field workers to participants are done to assist participants throughout the project as it progresses and help to address challenges faced by these participant in their businesses during the weekly visit.

Use of mobile banking technology allows participants to open bank accounts after the workshop

On a sad note, as has been widely documented in all media spheres, the upsurge in service delivery protests around the country also affected our pilot area. On the 10-12 February 2014, there were violent service delivery protests in the area, which forced people who operate their businesses on public walkways to stop operations. On this particular day, one of the fieldworkers who was meant to meet with an enterprise owner for the weekly visit, was told that the participant had been admitted into hospital after being stabbed at his business premises during the service delivery strikes.

"I want to learn about financial literacy, customer care and marketing" (Household N0. 200).

*To find out more about the project please contact, Brian Mathebula and Matshidiso Motsoeneng at brian@spii.org.za and matshidiso@spii.org.za .*

[1] Please visit www.spii.org.za to read more about the 24-month pilot project.

[2] BRAC is a non-government organisation (NGO) working in 70 000 rural villages and 2 000 urban slums in Bangladesh. Its main focus is on healthcare, microfinance, schooling, legal services and marketing facilities. See www.graduation.cgap.org.

[3] See Devereux, S.(2013), "Transformative graduation"? www.vulnerabilityand poverty.blogspot.com.

[4] For the majority of the poor, and consequently those who receive grants, food, energy and transport make up the bulk of monthly expenditure. According to the Living Conditions Survey on Households (StatsSA, 2011) in the bottom two deciles spend around 42% of income on food, close to 20% on housing, electricity, water and other utilities. and nearly 8% on transport.

[5] The project is made up of 300 participants who are divided into a treatment and a control group. The treatment group receives the interventions.

[6] A stokvel is a form of an interest free savings scheme in which individuals form groups to put away money over specified periods of time and distribute the money again at a specified period such as at the end of the year for the festive holiday season.

[7] This is a workshop to educate participants on the basics of owning and running a business.

[8] See http://www.cgap.org/blog/impact-research-and-role-coaching-poverty-reduction.

# Reaching the Poorest: Global Learning Event 2014

*Reaching the Poorest: Global Learning Event, Paris*

On 18-21 February 2014, Brian Mathebula, researcher on the Social Protection and Local Economic Development (LED), Graduation Pilot Project, attended the CGAP-Ford Foundation Graduation Program information-sharing event in Paris. The meeting was organised for graduation model practitioners, researchers and policy makers from across the globe to share experiences around the model, its financial implications and what it would take to go to scale. Since 2006, the Graduation Program has partnered with local organisations and government to adapt the approach in ten pilot projects in eight countries. Presentations on the impact of the pilot project on participants indicated that there was overwhelming evidence that the graduation model works. However, it was acknowledged that there was need for contextual analysis prior to implementation. Critical to the graduation model moving forward is filling the research gaps that exist with regard to the better understanding of why certain families graduate and why some do not. Researchers and policy makers alike acknowledged that there was a need for a concerted effort to claim the victories from the successes of the graduation model.

# SADC Basic Income Grant Analysis

SADC WIDE BASIC INCOME GRANT

Our right • Our wealth • Our share

## Our right, our wealth, our share

The overall objective of this analysis is to demonstrate, based on economic analysis, the costs involved in introducing and institutionalising a Southern African Development Community-wide Basic Income Grant (SADC BIG) that is wholly or predominately funded through the extractive industries to promote economic justice, reduce poverty and inequality, and stimulate human and economic integration and development in the region.

The analysis aims to identify the size of a BIG grant that would be feasible or acceptable in terms of cost and affordability. Through the different scenarios analysed, we aim to show that the SADC BIG idea is affordable and can, over time, be scaled up.



cont pg 8

**DID YOU KNOW!**

*The number of discouraged jobseekers nearly doubled to reach 2.24 million by the end of 2013.*

*Pictures sourced from NamBIG*

## Methodology

Five scenarios are analysed to establish both the individual countries' affordability for a BIG as well as that of the region (SADC). These scenarios were pegged from 33% to 200% of the International Labour Organisation (ILO) US$1/day extreme poverty line. The range is equivalent to between about US$10 to US$60 per individual per month. The rationale for this range was to demonstrate cost levels as a proportion of Gross Domestic Product (GDP) that governments would be more likely to agree to if the total resources required for such an undertaking are taken into consideration.

## Key finding

A monthly basic income of US$15 paid to all residing in SADC (total population estimate of 297 million) will have a net cost of US$54.12 billion annually. This translates to about 5.2% of SADC GDP Purchasing Power Parity (PPP). Anything above this has the potential to render BIG unaffordable considering that governments have other programmes and priorities that require a portion of the social budget.

## Scenario analysis

As already highlighted, five scenarios were analysed for the purpose of this paper for all 15 SADC countries to demonstrate cost or affordability levels. The proposed amount of US$15 (Scenario 2) was regarded as the maximum that the majority of the individual countries could afford if the cost of a BIG is limited to the 3%-5% of GDP threshold. This amount was calculated as about a half of the ILO extreme poverty line of US$1 per day.

A look at Scenario 1 (based on about US$10 per individual per month) would on average cost the SADC states approximately 3.4% of total SADC GDP. At the current exchange rate of the US dollar to the South African rand (ZAR), this would translate to about R100 – an amount that was proposed by the South African BIG Coalition in 2001. At this amount, analysis undertaken for the Taylor Commission revealed that BIG was affordable and that South Africa's tax structure had the potential to finance the entire cost of the programme without recourse to deficit spending. While this amount could be considered to be too small to make any significant impact, the empirical evidence arising from the Namibian BIG Pilot at Otjivero attests to the rapid impact of such a scheme on a community.

Scenario 2 is proposed as a relatively sufficient amount for the introduction of a universal SADC BIG amounting to, on an individual basis, 50% of the US$1/day extreme poverty line. However, when considered from a household perspective and assuming that BIG is used as combined income, a household of four will have a total income of US$2/day. Using this assumption and looking at data from the World Bank Development Indicators, approximately 32.4 million households (129.6 million people) from 9 of the 15 member states could be taken out of destitution by a SADC BIG Scenarios 3-5 are based on the assumption that anything above 10% of GDP dedicated to a social cash transfer scheme was deemed less likely to receive positive response from governments considering the substantial resources required to fund such a grand scheme. At US$30 per month (Scenario 3), SADC would have to mobilise about US$108 billion (10% SADC GDP (PPP)), while this increases to up to US$216.5 billion (20% SADC GDP (PPP)) under Scenario 5. While the sizes of the grants under these three scenarios will significantly impact the lives of the majority of SADC people living in poverty, economic reality dictates that a campaign for a SADC BIG at such high levels may not necessary achieve the expected goal. However, we do not rule out the possibility of scaling up the proposed US$15 per individual per month, once the benefits of such a scheme are fully realised.

*Full report will be made available on our website on 10 March 2014*

*To find out more about the research please contact Taku Fundira at taku@spii.org.za*

[9] *This value should be adjusted for inflation based on the 2013 value at the time of roll-out.*

[10] *It should be noted that at any size of government, countries have some choice as to what portion of public resources to invest in social security;; however, according to the ILO, "nowhere does total social assistance benefit expenditure exceed 5 percent of GDP, hence the decision to put a 3 -5 percent threshold". See World Social Security Report. 2010/11. Providing coverage in times of crisis and beyond. ISBN 978-92-2-123268-1. p. 3.*

[11] *One of the key proposals of the committee was to introduce a basic income grant as a means of providing social security to all and alleviating poverty. The BIG would thus function as a mechanism to include the unemployed and those working in the informal economy in the social security system.*

[12] *Samson, M. et al. 2001. The fiscal impact of a basic income grant in South Africa. Submitted to the Committee of Inquiry for Comprehensive Social Security. Cape Town: EPRI.*

[13] *See http://www.bignam.org.za.*

*Join the Movement -*

# SADC Basic Income Grant Campaign

*"Our Right, Our Wealth, Our Share"*

**The SADC member states are characterised by high levels of poverty and some of the highest levels of inequality globally, albeit endowed with high levels of mineral resources. It is against this background that the SADC BIG Coalition is calling for the introduction of a SADC-wide universal cash transfer in the form of a BIG that will be funded by a tax on extractives and also other funding options, such as increasing taxes on high net worth individuals (HNWI).**

The rationale for such a scheme is based on the notion of economic justice of broadening access to the proceeds of such activities beyond the current narrow circle of national and international beneficiaries and shareholders of the mining companies and aligned elites, to each and every resident of the SADC sub-region. Furthermore, the rationale behind this campaign is to call for the broadening of social welfare schemes that already exist in most SADC member states through the SADC BIG as current programmes exclude a majority of young unemployed people and unemployed working-age population.

A universal scheme would also ensure transparency and a greater even-handedness on the distribution of resources, reducing the risk of capture by politicians to win political support for their own gain. It would promote solidarity and contribute to the regional integration and movement of people and to social and economic policies as provided for in SADC treaties and protocols.

It is envisaged that such a scheme will help alleviate the worst of the destitution currently faced by millions of poor people, and reduce the critical and unsustainable levels of inequality. Furthermore, given the fact that extraction depletes the levels of natural resources, such a scheme would introduce an intergenerational justice between those who oversee the extraction and the development of future generations.

Currently the campaign is endorsed by wide-ranging number of organisations in Southern Africa: churches, social justice organisations, human rights organisations, community-based organisations, trade union organisations and faith-based organisations.

## SADC-WIDE BASIC INCOME GRANT COALITION PLATFORM

**Goal: To ensure the roll-out of a universal SADC BIG to all SADC citizens including refugees, economic migrants and asylum seekers by 2020**

The SADC BIG Coalition shares a common vision to eradicate poverty and reduce inequality in SADC. Key to the achievement of this vision is the need for a universal SADC BIG which is accessed by all SADC residents; further to ensure that residents share in the natural resources of the region.

We, the organisations in the SADC BIG Coalition, call for the introduction of a universal Basic Income Grant as a key

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intervention to combat poverty, to improve the lives of the majority of SADC citizens and to garner solidarity to include social cohesion within the sub-region.

At least 43.6% of the population in SADC live in poverty. On average, they survive on USD1.25 per person per month. BIG would provide rapid and sustained relief to all SADC citizens by

- providing everyone with a minimum level of income
- enabling the nation's poorest households to better meet their basic needs
- stimulating equitable economic development
- promoting family and community stability
- affirming and supporting the inherent dignity of all.

**BIG should be founded on the following fundamental principles:**

- **Universal coverage:**
  It should be available to everyone, from cradle to grave, and should not be subject to a means test.
- **Relationship to existing grants:**
  It should expand the social security net. No individual should receive less in social and assistance grants than before the introduction of BIG.
- **Amount:**
  The grant should be no less than US$15.00 per person per month on introduction and should be inflation indexed.
- **Delivery Mechanisms:**
  Payments should be facilitated through public institutions. Using community post banks would have the additional benefit of enhancing community access to much-needed banking services and promote financial inclusion.
- **Financing:**
  A substantial portion of the cost of the grant should be funded through a tax on extractives. Other funding options include progressive recovery through the tax system above the income tax threshold. This would demonstrate solidarity by all SADC citizens in efforts to eliminate poverty. The remaining cost should be borne by the fiscus. A range of new measures should be introduced to increase revenue so that the additional cost can be accommodated without squeezing out other social expenditure.

We, the SADC BIG Coalition partners, commit ourselves to working together with all stakeholders to make BIG a reality in Southern Africa. We invite and call upon all stakeholders to join our effort and to become a member of this coalition.

## COALITION PARTNERS

- Unemployment People's Movement – South Africa
- Studies in Poverty and Inequality Institute (SPII) – South Africa
- Benchmarks Foundation – South Africa
- Lesotho Coalition for Social Protection – Lesotho
- Zimbabwe Council of Churches – Zimbabwe
- World Vision South Africa – South Africa
- LifeLine Southern Africa – Malawi
- Conselho Cristao de Mozambique – Mozambique
- Southern Africa Green Revolutionary Council – South Africa
- Malawi Centre for Social Concern – Malawi
- Zambia Centre for Trade Policy and Development – Zambia
- Women's Legal Aid Centre – Tanzania
- Mozambique Civil Society Platform for Social Protection – Mozambique
- Zimbabwe Council of Trade Unions – Zimbabwe
- Economic Justice Network – South Africa
- Zambia Platform for Social Protection – Zambia
- Southern African Trade Union and Coordination Council
- Africa Network for the Prevention and Protection against Child Abuse and Neglect – Malawi
- Consortium for Refugees and Migrants in South Africa – South Africa

*To find more about the SADC BIG campaign please email Thabileng Mothabi at thabileng@spii.org.za*

# Budget Evaluation and Monitoring Forum


Health care, education and social security specifically were raised as areas of concern. One of the recommendations that was included in the speech was that South Africa should introduce a universal Basic Income Grant

On Tuesday, 24 February 2014, SPII participated in the launch of the People's Budget Speech, outside of Parliament, in Cape Town. The event was hosted by the Budget Evaluation and Monitoring Forum, a CSO network on whose steering committee SPII serves. The speech, which can be found on the SPII website, set out the demands that BEMF had collated from many network members in recent months. The framing theme of the speech was that the state was issuing overdrawn cheques to South Africans, especially poor South Africans. Not only was taxation not being most effectively used as a mode of redistribution, but the state was also delivering poor services with the money that it did have to spend. Health care, education and social security specifically were raised as areas of concern. One of the recommendations that was included in the speech was that South Africa should introduce a universal Basic Income Grant, as well as closing down access to tax havens which permit billions of rands to leave the country. Officials from the National Treasury attended on behalf of the Minister who was not able to, and received a copy of the speech. As a follow up to this intervention, SPII is co-hosting a workshop with BEMF and NALEDI and the National Treasury at the end of March to further explore ways in which our recommendations could guide future policy development.

*People who are interested in attending should contact Fortunate@spii.org.za.*

# FORTHCOMING EVENT:

**28 March 2014:** Civil society/ National Treasury Workshop on the National Budget, hosted by SPII, BEMF, NALEDI and National Treasury.

Please contact Fortunate Mabuza at SPII should you wish to have any information about any announcement or events partnering SPII.

Contact her on fortunate@spii.org.za.

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