

SABPP LABOUR MARKET SCENARIOS 2030:

People and Work – How will the South African Labour Market Change over the next 14 years?



Introduction and background

Projections concerning the South African labour market into the future are almost invariably gloomy. It seems that unemployment will not reduce significantly and the shortage of skills which hampers strategy execution for many South African organisations will not improve any time soon as the education system from early childhood to university fails to meet the needs of both young people and employers. One of the major factors influencing how the labour market develops is the economy, and at present, debate over the economy is marked by entrenched ideological differences between politicians, business leaders, union leaders and other key stakeholders, and an apparent inability to dialogue constructively to find an accepted way forward.

Human resource (HR) practitioners working at higher levels of organisations are required to participate in the strategy formulation processes of the organisation, not only to implement agreed strategy. In order to play this role, they need good frameworks and good analysis of the environment to be able to advise the executive team on probable developments affecting the labour market in general and individual employees of today and of the future. The 2013 SABPP HR Management System Standard requires organisations, in relation to Strategic HR Management, to “Analyse the internal and external socio-economic, political and technological environment and provide proactive people-related business solutions.” At present, many HR Executives acknowledge a lack of depth in their environmental scanning.

Human beings have a cognitive bias (the continuity bias) which is a temptation to assume that the future will be much like the past. Yet we are constantly surprised by events and discontinuities. Whilst we cannot predict or control the future, we can build stories of possible futures - scenarios. “However good our futures research may be, we shall never be able to escape from the ultimate dilemma that all our

knowledge is about the past, and all our decisions are about the future.”¹ The development of alternative scenarios to describe what could happen under certain circumstances allows us to work out the impact of those scenarios, to work out how to adapt to these possible futures and to influence the key drivers of those futures.

Thus the strategy teams of organisations can use scenarios as the basis for their strategy formulation – either to take action now or to have a contingency plan for if the probability of one of the scenarios increases or decreases significantly. We probably won’t get the story of the future exactly right, but we will get the idea of the future.

In March 2016, the SABPP convened a group of 50 senior HR practitioners, academics and consultants under the facilitation of Clem Sunter, recognised within South African and globally as a top scenario planner, to think about how the labour market could evolve under different scenarios.

The scenario formulation process

Frans Cronje, in his book *A Time Traveller’s Guide to Our Next Ten Years*, cited above, explains that, due to the complexity of political, social and economic systems, they can only be understood in the framework of complex systems theory (which was developed in the natural science disciplines). Extremely complex systems are characterised by:

- A very large number of participants (stakeholders);
- These participants interact regularly with each other;
- Through that interaction they direct feedback into the system based on how satisfied they are with their circumstances in that system.

In any given situation, it is likely that some of these stakeholders will be satisfied and therefore prefer to maintain the status quo, but others will not have their expectations met and will want to change to system to improve their circumstances. Obviously, this leads to conflict and the resolution of this conflict depends on relative power within the system. Disruption of a complex system can be sudden and dramatic and most often not predicted. Therefore a wide view of the components of the complex system must be developed.

As outlined in the various books of Clem Sunter and Chantel Illbury², the process of creating scenarios is an outside- in process and starts with looking at the *Rules of the Game* – these are patterns which can be seen now and are fairly certain to apply over a period of 20 – 30 years. One example would be the aging of the population in Europe and Japan.

Having thought about those as constants or assumptions, the process continues with identifying *Key Uncertainties* – patterns which can be seen now but we have no idea which way they will develop. An example of this would be the enormous wave of migrants moving across the world and in particular

¹ From Scenario Thinking to Strategic Action”. I. Wilson. *Horizon*, 2000. Cited on p. 234 of *A Time Traveller’s Guide to Our Next Ten Years*. F. Cronje. 2014. Tafelberg.

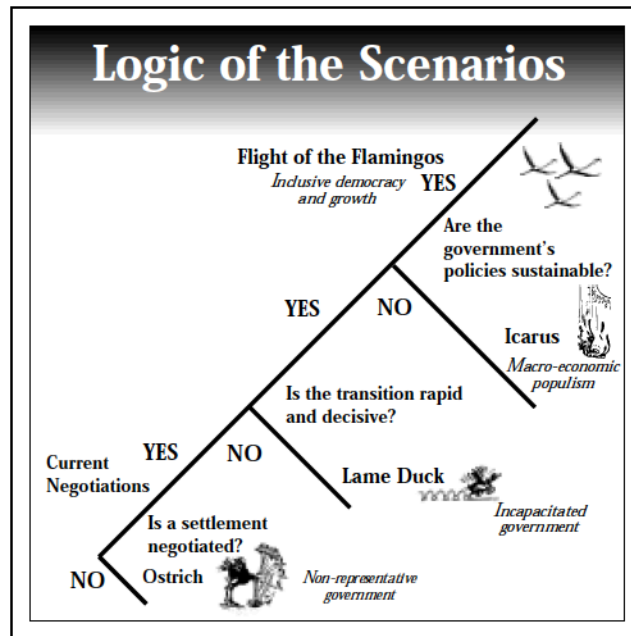
² *Mind of a Fox Trilogy*, 2011, Human and Rousseau, Tafelberg; *Flagwatching*, 2015, Human and Rousseau, Tafelberg

from the Middle East moving to Western Europe – at this point (March 2016), it is very far from clear for how long the wave will continue and how Europe will handle the matter, but the issue has huge consequences in many different ways.

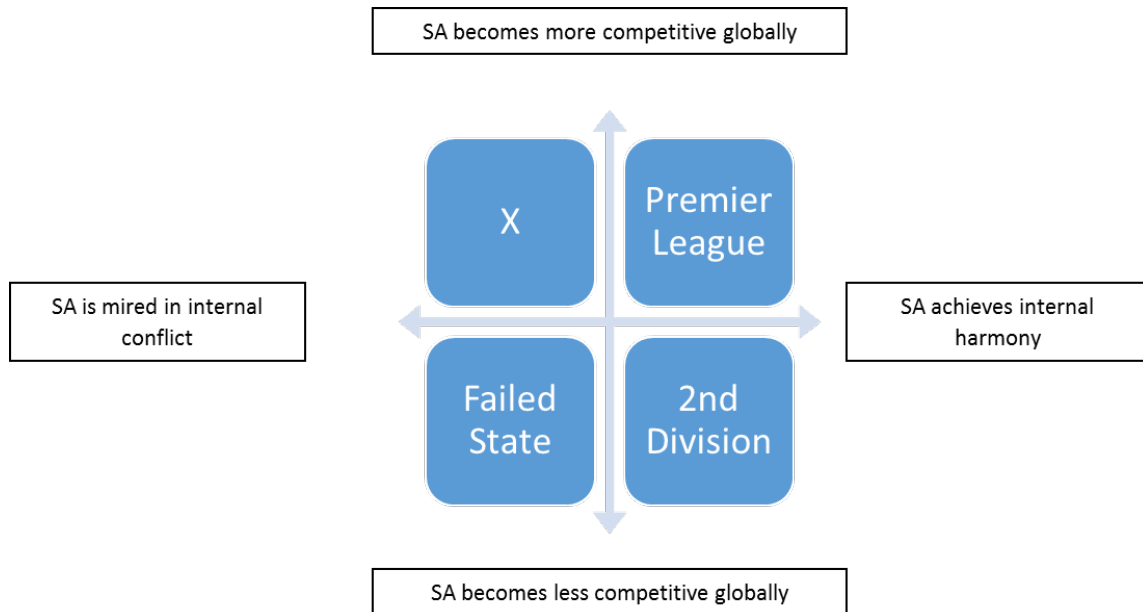
From this discussion, the group synthesises two polarities to describe the two key trends which will frame four possible stories of the future; these stories are fleshed out; “flags” are identified which will indicate in which direction the future is developing; and finally the group agrees on probabilities for each of the 4 scenarios as evaluated at present.

Recent South African scenarios

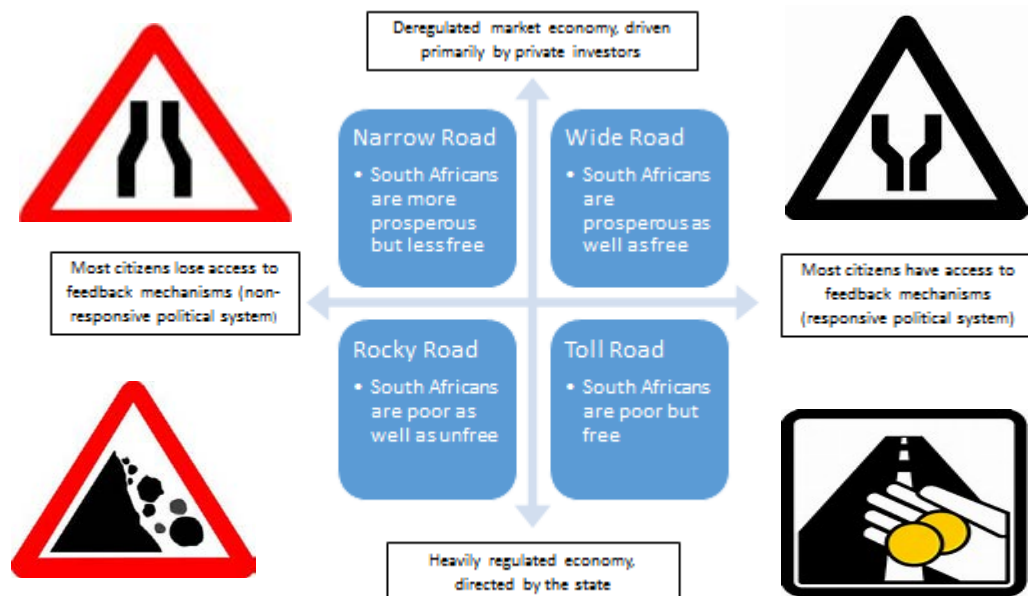
In the early 1990’s, an un-precedentedly representative group of South Africans from all political persuasions, business and civil society leaders put together the first set of SA scenarios – the now famous Ostrich and Flamingo scenarios, which supported leaders to enter constitutional negotiations in good faith, resulting in the transition to democracy in 1994. These scenarios, in summary, were as follows:



Chantel Illbury and Clem Sunter wrote a set of general South African scenarios during the 2000's³, framed as follows:



In 2014, Frans Cronje identified the following politico/economic scenarios for South Africa:



³ Mind of a Fox Trilogy

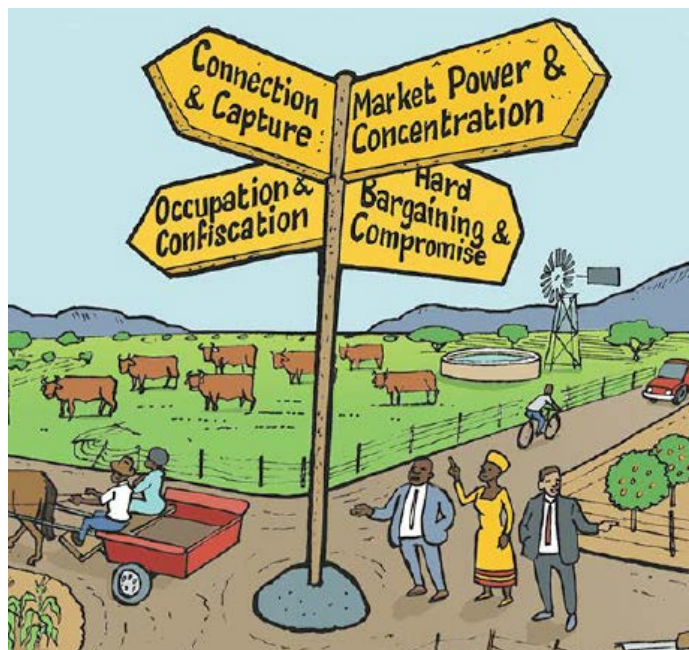
In 2016, the SA Institute of Risk Management (IRMSA) published the second edition of its SA Risk Report⁴ which contained the results of a scenario planning workshop with Clem Sunter, combined with the results of its second risks survey. Their scenarios are shown below:



Note: the axis of SA Vulnerable and SA Resilient was defined as whether the National Development Plan was implemented or not.

⁴ Available as a free download from www.irmsa.co.za

Also in 2016, an NGO in the land reform sector produced a set of land reform scenarios⁵ as shown below:



Flags

“Flags” as described earlier, are key trends (or unfolding events) – which, if watched closely, will indicate which of the possible scenarios are becoming more or less likely to eventuate. Clem Sunter says: “Over the past 12 years, I have realised that our clients get quite frustrated if you offer them only a suite of different scenarios for whatever economy, market or industry they are contemplating the future of. It is like offering different pathways without any signposts to suggest which one you are on, and where it is heading. Thus, I now put as much effort into identifying flags that would indicate you are moving from one scenario into another one as we do into developing the theme of the scenarios themselves. Flags can range from tipping points that might precipitate a different chain of events (like a jump in interest rates) to ones which are a sign that you have already switched scenarios (like a rise or drop in the unemployment rate). I tend to consult experts in the field under consideration (whether it is the global economy, a country's political future or the stock market) about the flags they are watching out for. The purpose of flags is to remove the tint from the glasses we all wear when we look at the future. The tint may be caused by emotional make-up of being a natural optimist or pessimist, or by simple bias. The fact is that as the flags rise, they cannot be ignored.”⁶

⁵ Available as a free download from landreformfutures.org

⁶ <http://www.clemsunter.co.za/scenariosflagsprobabilities.html>

Flags from other scenarios

It is important to consider issues identified by other scenario development groups when considering the SA labour market, as the labour market does not evolve in isolation.

In their Flagwatching book referenced earlier, Chantel Illbury and Clem Sunter describe some major global flags as:

Rules of the Game	Key Uncertainties
The Religious Flag – competition between the major religions of the world	The Red Flag – Russia’s intentions and actions
The Grey Flag – population aging	The Anti-Establishment Flag – fury of the middle class against super-rich, who get richer by the day as real economies fail to grow while financial markets explode
The Green Flag – climate change	The Porous Border Flag – Middle East migrants to Europe
	The New Technology Revolution – a new major wave of technology is due - will this come from smart energy, smart medicine or something else

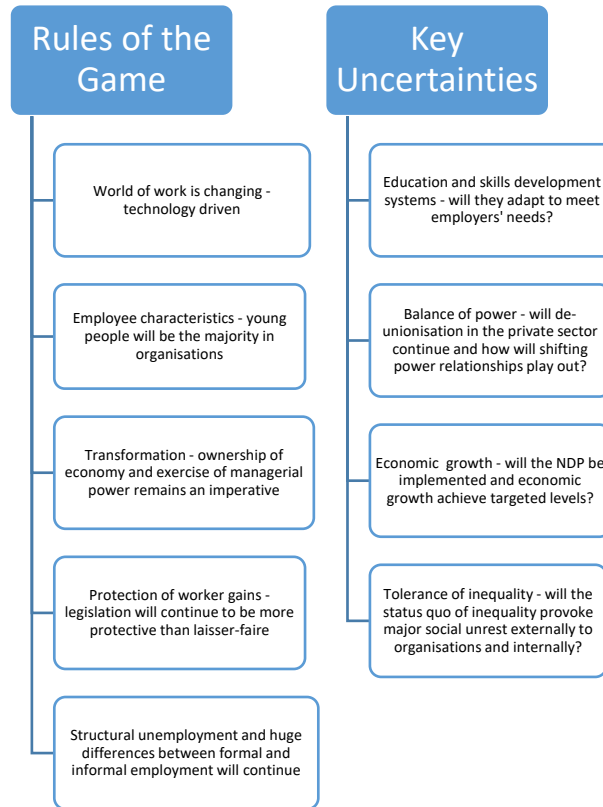
Major South African flags as identified by IRMSA were:



SABPP'S Labour Market Scenarios

The following is the result of the working group in March 2016.

Rules of the Game and Key Uncertainties for the SA Labour Market



(See also Appendix 1 for the list of issues identified in the group work at the workshop, which have been summarised into the table above.)

The items identified in the figure above derive in large part from a “changing world of work”. The next section describes some of the features of this new world.

What do we mean by “the new world of work”?

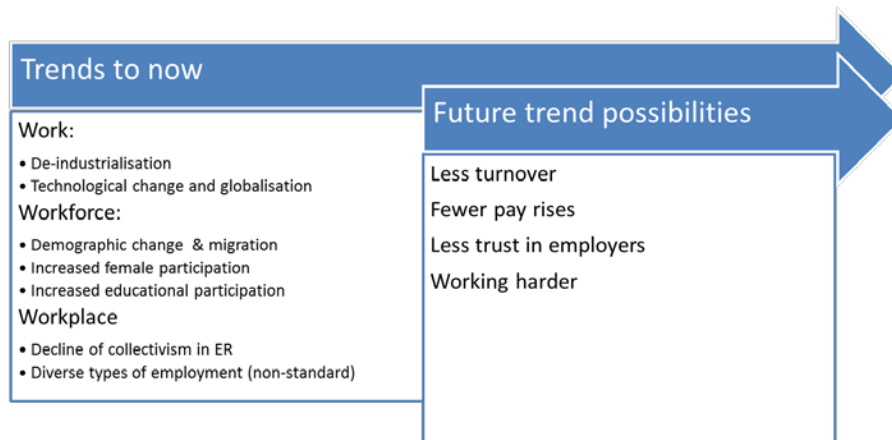
There are many publications on the nature of the new world of work and the drivers which will shape that new world. Three of these are highlighted here to illustrate the general agreement on key features of that world of work.

In the 2010 book *The 2020 Workplace*⁷ the authors identified three major drivers as follows:

⁷ J.C. Meister & K. Willyerd. 2010. HarperCollins.



The UK’s Chartered Institute for Personnel and Development (CIPD), in their 2013 publication “Megatrends – the trends shaping work and working lives”⁸ identify important trends affecting the work itself, the workforce and the workplace as below:

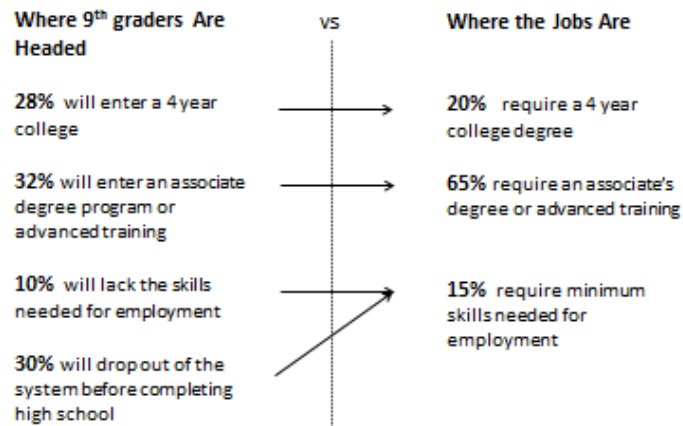


The major shifts in the demand for well-educated people are illustrated in the 1997 book *Workforce 2020 : Work and Workers in the 21st Century*⁹ which uses data from the United States.

⁸ www.cipd.co.uk

⁹ R. W. Judy & C d’Amico, 1997. Hudson Institute

The Workforce Gap



Changes in the workplace since 1997 would most probably change the demand percentages (the right hand column in the above figure) so that the 4 year college degree requirement would be higher.

Clearly, the supply situation in South Africa (the left hand column in the above figure) would be different. The White Paper of the Department of Higher Education and Training¹⁰ has set a target of 1.6 million students at university (from 937 000 in 2011) and 2.5 million students in TVET colleges by 2030 (from 345 000 in 2010 and estimated 650 000 in 2013). These figures represent 25% and 39% respectively. Assuming a demand situation which is less knowledge intensive than the US, it can still be seen that the gap will be extremely high.

Research by the Oxford Martin Programme on Technology and Employment¹¹ has identified that new technologies are not creating many jobs; that technology has increased the range of tasks skilled workers can perform; that new “high touch” (as opposed to “high tech”) jobs are being created; and that many new personal service jobs are being created.

“With falling prices of computing, problem-solving skills are becoming relatively productive, explaining the substantial employment growth in occupations involving cognitive tasks where skilled labour has a comparative advantage, as well as the persistent increase in returns to education. The current trend is towards labour market polarization, with growing employment in high-income cognitive jobs and low-income manual occupations, accompanied by a hollowing-out of middle-income routine jobs. [However] Our model predicts a truncation in the current trend towards labour market polarisation, with computerisation being principally confined to low-skill and low-wage occupations. Our findings thus imply that as technology races ahead, low-skill workers will reallocate to tasks that are non-susceptible

¹⁰ 2014. www.dhet.gov.za

¹¹ <http://www.oxfordmartin.ox.ac.uk/research/programmes/future-tech>;
http://www.oxfordmartin.ox.ac.uk/downloads/academic/The_Future_of_Employment.pdf

to computerisation – i.e., tasks requiring creative and social intelligence. For workers to win the race, however, they will have to acquire creative and social skills.”

The trends identified by the CIPD imply that employees in the future will be (even) more pressurised and the workplace climate will be less supportive.

More positive qualitative aspects of the future world of work are identified by Meister and Willyerd in 2010 as below. Some of these factors are already evident in South African workplaces, whilst others are possibly less likely to emerge.

1. You will be hired and promoted based upon your reputational capital.
2. Your mobile device will be your office.
3. Recruiting will be done on social networking sites.
4. Web commuters will force corporate offices to reinvent themselves.
5. Companies will hire entire teams.
6. Job requirements for CEOs will include blogging.
7. Your corporate curriculum will use video games, simulations and other reality games as key modes of delivery.
8. The world will be networked and you will need a networked mindset.
9. Outsourcing will be replaced by crowdsourcing.
10. Corporate social networks will flourish and grow inside companies.
11. You will elect your leader.
12. Work-life flexibility will replace work-life balance.
13. Corporate social responsibility will be a key business driver and used to attract employees.
14. Diversity will be a business imperative.
15. The lines between marketing, communication and learning will blur.
16. Social media literacy will be required for all employees.
17. Building a portfolio of contract jobs will be the path to obtaining full-time employment.
18. Corporate app stores will offer ways to manage work and personal life better.

These aspects apply more to knowledge workers than other workers, for whom the new world of work could be less attractive if it is characterised also by a lack of job security and fluctuating incomes.

Whilst the actual work and workplace will change, as outlined above, the nature of the workforce itself will change, as the CIPD points out. Popular descriptions of the attributes of the so-called “millennials” concentrate on their values (civic-minded, family-focused, favour lifestyle and experience over money and prestige) and wants (being able to express themselves, constant challenge) as well as their education level. However, one aspect not often covered is their financial situation – as the result of their higher education level, millennials often start their careers carrying debt from their student days. They also face a shortage of jobs and as a result, their ability to save and buy their homes is very constrained. They are used to cheap credit. They understand that their financial long-term future is uncertain, especially as governments will be unable to fund their retirement. Hence there is often a preference to spend today rather than save for tomorrow.

Additional material on the future world of work will be sourced, developed and published by the SABPP over the coming periods.

The National Development Plan

Policy goals of the National Development plan are to:

- Maintain fiscal discipline and macro-economic stability;
- Achieve sustained GDP growth of 5.4%;
- Reduce unemployment to 14% by 2020 and to 6% by 2030;
- Overhaul the civil service to improve efficiency and implementation;
- Promote market competitiveness;
- Reduce the cost of living;
- Reduce impediments to investment;
- Create jobs via entrepreneurship and reduced regulation as well as a public works programme.

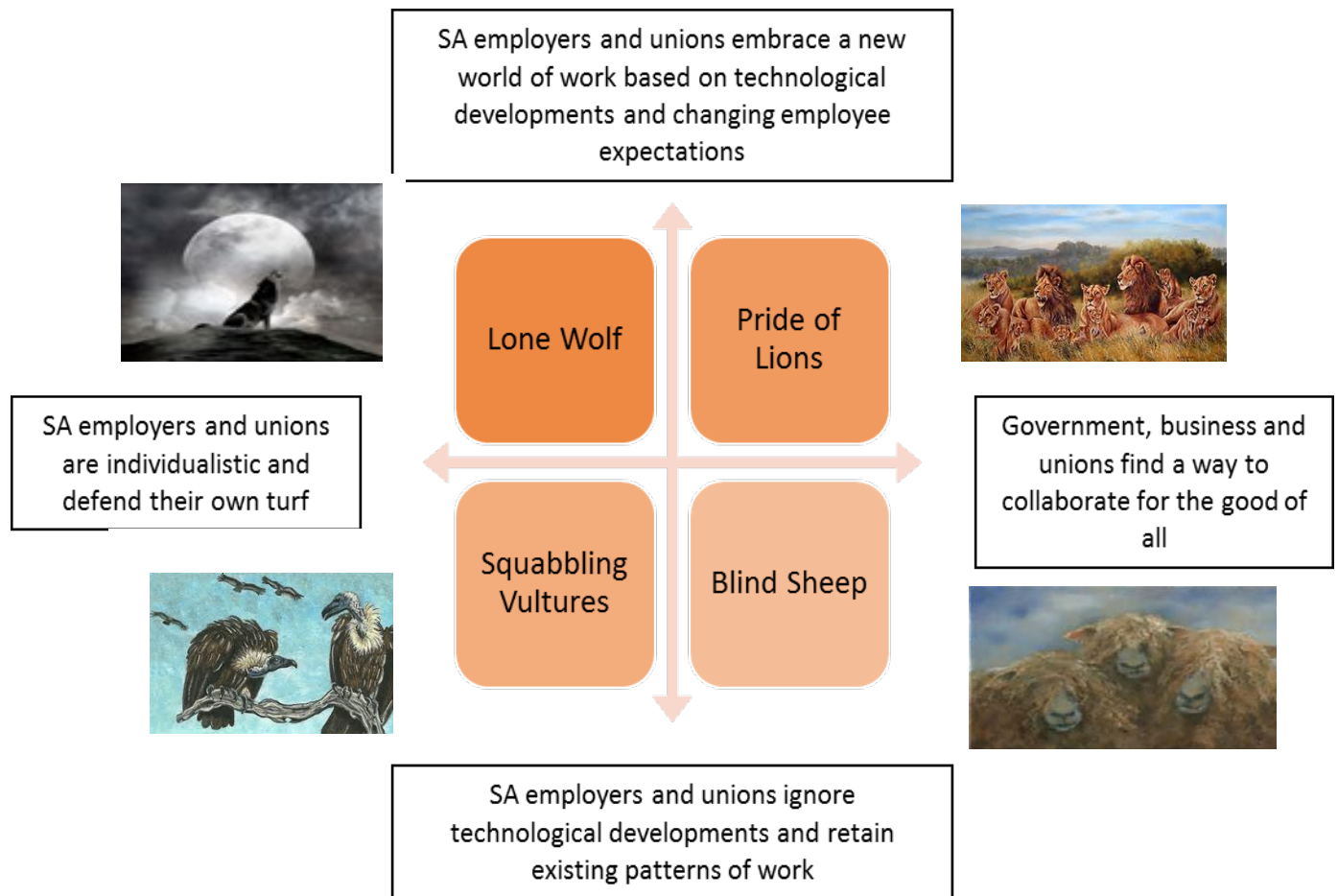
The “new world of work” trends outline above will challenge the achievement of these goals considerably, demonstrating that some creative solutions will need to be found by all stakeholders.

Four possible scenarios for the SA labour market through to 2030

Applying the Rules of the Game and Key Uncertainties to the South African labour market, the two key axes of possible change were identified as:

- The extent of adoption or denial of the new world of work by South African employers and unions;
- The extent to which labour market stakeholders can collaborate to find new ways to jointly influence the future. One of the immediate key uncertainties discussed here was the adversarial nature of relationships between employer and organised labour created by the legislative framework for collective bargaining and the need to amend labour legislation to curb the right to strike in the light of the high level of intimidation and violence taking place and the need to remedy the financial devastation occasioned by protracted strikes which are no longer in the best interest of the parties. The current status quo gives unions an unfair advantage.

Combined, these two axes produce the following four possible scenarios:



The possible situation under each of these four scenarios is described in the next four sections.

Lone Wolf

In this scenario, many employers are innovating and making fundamental changes to how work is done. More outsourcing and use of free-lance employees leads to decreases in employment among large employers. The number of start-up businesses is increasing, but the transition of these to medium size enterprises is reducing and failures are increasing. Game-changer business models such as Uber and AirBnB are emerging rapidly and traditional businesses fail to find a suitable response and may exit the market altogether. The structure of the labour market changes, skewing even more to the ICT and service industries and unskilled people are trapped into low-wage unprotected employment.

Economic growth is accelerating but unemployment and income inequality of the employed is also accelerating, leading to high levels of social and industrial unrest. No suitable model of pay and benefits has been found to protect people who are forced to move out of the formal sector into informal employment.

Unions have found themselves occupied almost exclusively on trying in vain to protect the job security of their members and traditional industries in the mining and metals sectors disappear. As unions lose

membership and credibility, new “one man band” unions spring up and cause continued unprotected strike action due to lack of expertise and infrastructure.

Employer organisations fragment and lose bargaining power. The collapse of central bargaining councils results in many employee benefit schemes being transferred to large insurance companies, and many workers lose track of their benefits as a result.

The government tries to keep control through tightened labour legislation, which is increasingly avoided by new enterprises.

Corruption and anti-competitive behaviour flourish.

The education system improves to some extent but mismatches to the labour market continue to result in lack of employment for young people leaving the system.

Squabbling Vultures

In this scenario, a resistance by all parties to recognise the fundamental, technology driven changes to the world of work results in continued low economic growth as South African products and services become less attractive and less competitive to the rest of the world. Lack of consumer led economic growth leads to higher inflation, less employment and more poverty as people’s incomes fail to keep up with the high cost of living. Corruption and anti-competitive practices flourish.

The NDP continues to exist only on paper. Business insists on a free market approach, resists government intervention and pulls out of centralised bargaining structures. Broad-Based Black Economic Empowerment (B-BBEE) fails to be broad based and continues to benefit the connected few. As a result, high levels of corruption continue. Unions, losing members and losing political influence, become more confrontational and their approach brings some businesses to their knees, causing more unemployment. Government continues to try to use legislation and control to protect workers but is unable to counteract the consequences of poor economic growth. The collapse of bargaining councils, as with the Lone Wolf scenario, results in many employee benefit schemes being transferred to large insurance companies, and many workers lose track of their benefits as a result.

The education system fails to improve and each year hundreds of thousands of young people leave school with no prospects of employment. Employers find ways around immigration restrictions to bring in skilled and professional workers and illegal immigrants continues to flood into South Africa.

Blind Sheep

In this scenario, economic growth also continues to be low due to the inability of the private sector and State Owned Enterprises to adapt to the new world of work. Clinging to the status quo, the parties (government, business and unions) recognise their mutual interdependence and reach social compacts which move towards co-determination, in an effort to reduce industrial and social unrest. Labour market institutions remain largely unchanged in structure and purpose, but dialogue within them is characterised by cooperation and willingness to abandon fixed negotiating positions, recognising the severity of the economic situation.

Jointly governed labour market institutions bring some changes to the education system to match the needs of employers, but this is done within the old concept of the world of work, resulting in the skills produced missing the requirements of the new world of work.

Due to the increased levels of trust between social players, corruption decreases and the private sector accepts that anti-competitive behaviour is detrimental to the economy.

This scenario could also be described as moving the deck chairs on the Titanic and the collaborative, trusting nature of relationships is unsustainable due to the continued low economic growth – the new partnerships see no results and therefore fragment.

Pride of Lions

In this scenario, economic growth accelerates on the back of an innovative and adaptive private sector, supported through social compacts between government, business and labour which have found new ways of dealing with protection of vulnerable employees, new ways of encouraging employers to employ and train young people, and new ways to match the education system to the needs of the new world of work. **Full shift towards co-determination.**

The new structures and collaborative approach enable flexibility as the structure of the economy and completely new business models emerge, flourish and are in turn transcended and disappear. To reach these social compacts, the parties have abandoned fixed, ideologically based approaches and have found new ways to accommodate genuine and fundamental interests of different segments of the population.

Government has implemented the NDP, South Africa has an efficient and politically independent civil service and as a result, service delivery has improved and the lives of poor South Africans continues to improve, albeit slowly. Once again, the South African people have found a way to navigate a seemingly impossible transition.

Flags to watch

Embracing the new world of work:

NDP implementation of “new world of work” recommendations

Level of technological innovation by SA employers (public and private)

Adaptation of secondary and tertiary education to “new world of work” including practical, vocational training

Ability of informal sector businesses to transition to the formal sector

Freedom of movement of employees between formal and informal types of work

Reaching an inclusive, collaborative approach to labour market development

Resolution of centralised bargaining structures in favour of “new world of work”

Adoption of co-determination practices at employer level

Corruption and anti-competitive practices

Agreements on industrial action rules leading to decrease in violent strikes

Power of organised business, labour and government used to reach and implement transformative agreements

Conclusion

“These scenarios are not forecasts of what will happen or proposals for what should happen. They are stories about what could happen under different circumstances. They are designed to trigger thinking about a future that is coming at us faster than we will be able to respond if we don’t make time for the courageous conversation.”¹²

Whilst the purpose of depicting the labour market scenarios was to assist organisations to think about the future and how it could affect each organisation so that they can prepare contingency plans, the outcome of the scenarios makes it clear that organisations should take an active role in shaping the future.

These “courageous conversations” will ask that the various parties respond effectively through committing to real engagement and being prepared to accept outcomes other than those which each party prefers. A deep grasp of the socio-political environment is required. This real engagement will require time and the skills to build durable long term relationships. Through these relationships, a new way forward could be found. Professor Clayton Christensen of Harvard Business School, an important business theorist, has advocated for organisations to innovate and grow, not relying solely on profits and returns on assets, but on market-creating innovation, with job creation and job sustainability coming from market innovation.¹³ Michael Porter supports this, articulating a Shared Value model in which business “sees societal problems as opportunities for business innovation and competitive advantage”¹⁴.

The SABPP workgroup concluded that, at present, South Africa finds itself somewhere in the Squabbling Vultures scenario, although there are increasing calls for moves towards collaboration. The SABPP calls on stakeholders to reflect on the scenarios and to commit to collaboration in order to influence the future.

The development of scenarios should not be an academic or theoretical exercise, it should lead to action. Therefore the next steps envisaged by the SABPP are to finalise this document through consultation, first with its members, then with other interested parties. From there, wider dissemination can be done. In addition, workshops will be developed for SABPP members to assist them in using these scenarios in application to their own organisations.

A special word of thanks to Dr Penny Abbott, Research & Policy Advisor at SABPP for consolidating all the inputs from delegates contributing to this paper. The SABPP office would also like to thank Clem Sunter for facilitating this process for us, and we want to thank all HR Managers for their contribution. Comments can be send to the SABPP Head of Knowledge & Innovation, Lathasha Subban on lathasha@sabpp.co.za or phone number (011) 045 5400 by

¹² Brian Whittaker, Executive Director of Vumelana Advisory Fund, convenor of the Land Reform Futures scenario team

¹³ For an interesting South African example of the application of his thinking, see “Creating win-win solutions for businesses” by Owen Skae, Director of Rhodes Business School. Business Day 2nd March 2016.

¹⁴ Creating Shared Value. Michael E. Porter and Mark R. Kramer. Harvard Business Review. Jan-Feb. 2011.

10 June 2016. The final Labour Market 2030 Report will be launched at the 4th Annual HR Standards Conference on 27-28 July 2016 in Midrand.

APPENDIX 1

MARCH 3RD GROUP WORK

GROUP 1

Rules of the Game	Uncertainty
Regulatory environment/labour legislation	Legislation changes
Economic/social inequality	Remuneration strategy/social development/ min wage/inflation
Social media/ technology/mechanization/automatisation	Speed/ability to mobilise. Effect on job security.
HR Standards	Adaptability
Transformation / NDP	
Anti-establishment	Degree of dissatisfaction and response (safety and security)
Corporate governance	Corruption
Leadership	Future ideology
Employee wellness (HIV/AIDS). Basic health care	NHI?
Enterprise development	Infrastructure/investment/growth
Education	Alignment of education to skills gaps
Migration	Urbanisation / closing of sectors
De-unionisation	Collective bargaining
Generation gap	

GROUP 2

UNLIKELY TO CHANGE / WE UNDERSTAND THE TREND	UNCERTAIN HOW IT WILL CHANGE
Labour market segmentation – general structure will remain unchanged, small group of talent (scarce skills, millennials, generation Z, digital disruption); bigger group of semi/unskilled people less affected; very large group of unemployed and unemployable people.	Will generation Z be the same as millennials or not – will organizational cultures be able to adapt
World of work is changing	How will conflict between global flexible staffing trends and social pressures for decent work be resolved?
Inadequate social wage – pressure on employers for higher cash wages	How will employer-paid benefits fill the gap? Will NHI work? Will Government provide social infrastructure be adequate?
SA will continue to attract African immigration	Government policy on skilled immigration (which

but will lose talent	positively influences job creation) uncertain
	Balance on power on social partners and involvement of new, non-traditional players in negotiations (communities, students) – is this Do It Yourself power? Will unions adapt?
	Labour legislation – min wage / strike rules – not sure
	Governance requirements around executive pay – will they be tightened?
Education system will not meet labour market needs	Fees must fall campaign – what result?
High crime rate and economic crime rates increasing	
	What will the extent of the implementation of the NDP be? This will impact the economy
Structure of the economy is changing	Will job creation ideological differences be resolved? Will job creation efforts work?
Transformation agenda	

GROUP 3

Millenials	University graduate unemployment - # of graduates increasing, but job market shrinking
Need for practical learning (business partnerships with SETAs)	
Inflation linked increases	
Unemployment and low productivity	
Migration	
SA flags(IRMSA)	
Focus on core skills jobs (lost the ability to create artisans)	
Regulations / policies governing labour	
	Green flag
	Will infrastructure be adequate?
	What type of economy will we have (more capitalist or more socialist)
	Will we be able to deliver on social responsibilities?

GROUP 4

Legislative framework	Leadership
Politics in labour movement	Unionism
Technology/automation	Quality of education
Grudge employment (hiring for sake of meeting quota)	Relevance of skills

Inequality	Morals/ethics
Scarcity of resources (migration)	Sandwich model
Enlightened workforce	Limited resources
Lack of tolerance of competition	Cultural intolerance
Higher salary cost	NDP implementation
	Investor distrust over legislation
	Drought
	SA companies - disinvestment
	Economic growth model – what is 5%

GROUP 5

Digital economy – remote vs physical working	
Relevance of education to requirements of labour market	
Transformation agenda for SA – economy and socio-political	Role of organized labour?
Leadership in a collaborative manner (politics, labour, private sector) vs adversarial	How are the roles of gov/labour/politicians going to play out? VUCA
(Over)regulation of labour market – balance between regulation and protection (co-determinism)	Meltdown in relationships

FLAGS TO WATCH

1. Leadership that adapts or not
2. GINI coefficient, economic growth, unemployment level
3. Corruption/transparency index
4. Formation of new businesses
5. GDP growth
6. Strength of Rand
7. Unions – collective bargaining to co-determination
8. Number of new “uber” models
9. Movement towards German model
10. Sustainable engagement
11. Practical education
12. Initiatives to grow entrepreneurship in business
13. NDP implementation and buy in
14. Foreign Investment
15. Adaptation of secondary and tertiary education to new world of work
16. Progress of informal sector
17. Volume of free-lance work
18. Incidents of political/social unrest/strikes and responses
19. Freedom of movement between informal and formal work

20. Virtual office numbers