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South Africa's Subimperial Futures: Washington Consensus, Bandung Consensus, or Peoples' Consensus?

South Africa has long dominated its neighbours. As the essays in this issue chart, the post-apartheid epoch has certainly not brought about the withering away of the power of South African firms or the South African state. Indeed this project makes a major contribution to the study of both South Africa and the region by providing, for the first time, close and careful studies of how new relationships have been formed as South African firms have expanded across the region and continent. This work thus begins to provide what none of the studies in the last quarter century have: the material to build up, from concrete studies of South African capital and local actors, the regional and incipient continental network centred on South Africa.

How these relationships coalesce and where they are heading remains very much an open question. It is easy to make imprudent projections of the South African-African relationship. Over fifteen years ago, as part of a project involving a group at Binghamton University and a group at the Centro de Estudos Africanos at Eduardo Mondlane, I worked on an assessment of the future of southern Africa with the expected passing of the coercive relationships constructed under the apartheid regime (Wallerstein, Vieira, Martin 1992). At the time I and others (Martin 1991, Davies and Martin 1992,) laid out three plausible scenarios. The first marked out a potential path of regional restabilisation, complete with ties of uneven development, accompanied by falling contract labour migration but enhanced South African capital expansion. The second scenario suggested a break-up of the region as individual states re-oriented to the North under conditions of structural adjustment. A third alternative entailed the de-centring of South Africa with continuing, and potentially more rewarding, regional relationships.

While some projections were prescient – including continuing uneven development and a rise in conflict and xenophobia over migrant flows in the absence of apartheid boundaries – hindsight suggests we proceeded with two unqualified assumptions: One, we placed too much emphasis on and faith in the decisions of states inherited by national liberation and mass democratic movements, and two, we assumed stability in North-South relations. These were not unreasonable assumptions; they are still shared by many today. Past scholar activists now serving the ANC government as well as those opposing it share, for example, a heavy focus upon state action and Africa's location along a fixed, North-South axis.

Looking forward, however, these assumptions seriously misled us. For what was unforeseeable in the 1980s and even 1990s is now, I would argue, not only discernible but quite critical to build into our analyses: a radical shift in the world economic and political order. I am *not* referring here to any generalized 'globalization' or 'empire' phenomena, but rather two quite concrete transitions: (1) the rise of East-South relationships over North-South ones, and more specifically the demise of Europe's and North America's dominion over Africa, and (2), due to growing resistance, the end of the neoliberal Thermidor and the emerging search for a stable, post-liberal, social world.

These twin processes will shake and remake imperial networks across Africa, including South Africa's pivotal position. Yet there is little sign that either the South African state or South African capital, focused as they are on short-term calculations and policies, recognize the depth and implications of these ongoing transformations. Both remain dedicated to the continuation of the apartheid regime's commitment to Europe and North America, and in particular the policies and practices of neoliberalism. This posture stands in sharp contrast to the stance of similarly-situated Asian and Latin American states, and promises over the long-run to considerably undermine South Africa's dominant position in the region and the continent.

From North-South to East-South?

South Africa's pivotal role as an intervening node on North-South relationships – as indicated by the unwieldy concepts of a 'sub-imperial' or more precisely 'semi-peripheral' position in the world-economy – was constructed through conscious state action in the interwar period. It was in this chaotic period that South Africa emerged as an industrializing and polarizing centre by diverting trade, investment, and political flows that had previously run directly along bilateral, North-South lines. Creating centre-hinterland ties across southern Africa was very much a South African state-led endeavour against open, underdeveloping ties to the regional colonizer Britain on the one hand, and the countervailing creation of underdeveloping relationships with surrounding colonial territories on the other hand (Martin 1990a, 1990b). Only South Africa's singular status as an independent white state, operating amidst a world depression and the sharp demise of Britain, made this possible. Apartheid, the post-war economic boom, and an open alliance with the US-led world order supported (but did not advance) this new region through the last half of the twentieth century.

This world order and the complacencies it has sustained were shaken apart in the last quarter of the twentieth century. Over twenty-five years of structural adjustment, the collapse of US hegemony, and attacks on the developmental state across Africa have shattered the legitimacy and structural pillars of the post-war liberal order. As the Afro-pessimists keep reminding us, there doesn't seem to be much place for Africa in today's chaotic world-economy beyond a supplier of primary products. Fifteen years ago policymakers talked of Africa 'falling off the policy map' and the disappearance of any development, much less industrialization, agenda. Today the discussion of Africa in Europe and the US, particularly in business and foreign policy circles, is largely circumscribed around oil and raw materials, terrorist havens, and celebrity and charity aid most often targeted at quelling, in the words of Western analysts, the continent's 'tribal', 'fundamentalist', and 'genocidal' wars.

What *has* startled and unnerved Northern business and government observers is the unheralded arrival of a new challenger to European and US domination of the continent: East Asia. As the opening pages of the World Bank's 2007 study on *Africa's Silk Road* put it,

> Since 2000 there has been a massive increase in trade and investment flows between [sub-Saharan]

> Africa and Asia. Today, Asia receives about 27 percent of Africa's exports, in contrast to only about 14 percent in 2000. This volume of trade is now almost on par with Africa's exports to the United States and the European Union (EU) – Africa's traditional trading partners; in fact, the EU's share of African exports has halved over the period 2000-05 (Broadman 2007: 2).

The World Bank exaggerates, as do the pages of the Northern press and policy journals that are littered with a racially- and colonially-tinged discourse on China's 'African Safari', China's role as 'The New Colonialist', or China's 'Scramble for Africa' (for example, *Economist* 2006, 2008; Walt 2006). Data on the continent's imports for the last twenty-five years present a less dramatic picture, even taking into account the recent commodity price increases (see Martin 2008: 365): trade with Europe and the US has been declining for over a generation and still outweighs East Asia's share. The long-term trend is nevertheless evident: the demise of the centrality of Europe and, except for oil, the United States (Klare and Volman, 2006).

What has *not* changed is the nature of Africa's external trade: Africa with few exceptions continues to produce what it cannot consume and consumes what it does not produce. Indeed measures of export diversification record over a fifty percent *decline* for the continent in the midst of the current commodity price bubble (African Development Bank and OECD 2008: 658). Exports to Asia replicate Africa's relationship with the North: they are predominantly composed of primary products, from oil, to minerals, to cotton. Africa's imports from Asia follow a similar pattern, being composed primarily of light industrial products and rising from very low figures in the 1980s to actually surpassing imports from the US and approaching import values with Europe (Martin 2008: 365).

Asia is also much more important as a trading partner for Africa than Africa is for Asia. While China, India and Asia as a whole are beginning to dominate Africa's imports and exports, Africa in 2005 took only 2.5 percent of China's exports and less than 2 percent of Asia's exports, and represented but 3.4 percent of China's imports and less than 2 percent of Asia's imports. Nor is this figure increasing: the share of both imports and exports is less than it was in 1980, with the export share falling by over half (calculated from IMF 2007). This reveals a pattern of unequal exchange and power, common for so long with Europe and North America.

Investment flows are lower and harder to track over time (for example, Broadman, 2007, 86-94, 289-304). They are however rapidly increasing from a very low base. By 2006 Chinese investment in Africa had risen to approximately $12 billion by some estimates, as compared to bilateral trade of $56 billion; Indian investment adds another $7 billion (Bajpaee 2008). Most visible are projects in resource-rich states by Chinese firms, with over 800 Chinese state firms estimated to be operating in China. In the Sudan, for example, the state-run oil company PetroChina is the second-biggest shareholder, after Malaysia's Petronas, in the Sudanese oil-consortium Petrodar; the China National Offshore Oil Corporation (CNOOC) has been made billion-dollar investments in Nigeria; and Beijing has loaned over $2 billion to Angola.

Expansion extends beyond resource extraction and loans to infrastructure and construction as well. In late 2007 it was announced for example that China would rebuild Congolese railways, mines, and roads at a cost of $12 billion in exchange for the right to mine copper to that value. By some estimates Chinese firms are winning 50 percent of all new public works projects in Africa (*Financial Times,* 2008). Significant investments in the financial sector have also emerged, as in the late 2007, \$5.5 billion purchase by the Industrial and Commercial Bank of China of a 20.5 per cent stake in South Africa's Standard Bank, and the China Development Bank's partnership with Nigeria's United Bank for Africa. The sight of Chinese businessmen, miners, labourers and traders is now common across the continent; the Chinese state-run Xinhua News Agency estimated last year that over 750,000 long-term Chinese migrants were living in Africa (Berger, 2007).

These relationships prefigure a significant shift away from the institutional channels that have so securely tied Africa to the North. Africa's richer states now bypass international financial institutions and northern banks, for example, and arrange loans directly from China which allows them, as in the Angolan case, to avoid the structural adjustment conditionalities imposed by western states and the IMF. Asian multinationals and Chinese state firms similarly provide competitors for western multinationals in the mining, oil, and even merchandise trade sectors.

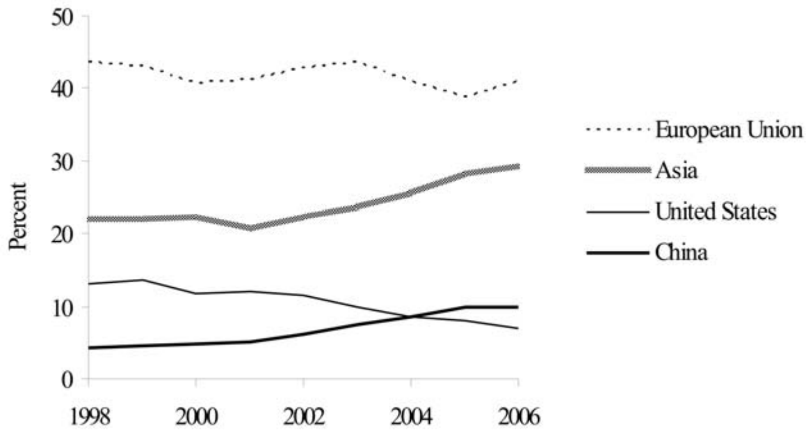
There is a countervailing cost here however: despite Asia's and especially China's revolutionary history, it is clear that Africa's new relationship with Asia and China in particular has not benefited trade union or social justice movements. As African activists and scholars have argued (Manji and Marks 2007, Rocha 2007, Riebeiro 2007, Askouri 2007), China is no better friend of local movements than western states, with China supporting repressive regimes from the Sudan to Zimbabwe. Overall, the practices of Chinese firms and state agencies have paid little heed to local demands for human rights, labour union rights, transparency, or environmental protection. This has fuelled local small businessmen's and opposition leaders' denunciation of Chinese businesses in Lesotho and Zambia for example. Workers at Chinese firms have also increasingly gone on strike against poor pay and working conditions, most notably at the Chambisi mine in Zambia where after 49 workers died in 2005 due to unsafe working conditions, riot police were called out to quell a 2005 strike.

Transnational movement linkages with China have proven very difficult to construct. Such relationships have in other cases proven critical, as in African-European movement collaboration in relation to the Sudan, the Niger Delta, or Zimbabwe, or, closer to home, the coordinated blocking by African activists and trade unions of the unloading of arms bound for Zimbabwe from the Chinese ship 'An Yue Jiang'. Such alliances have yet to be made with Chinese civic organizations or movements, a process rendered very difficult indeed by the Chinese government's controls over local civil society organizations, social movements, unions, and the media.

South Africa Faces East

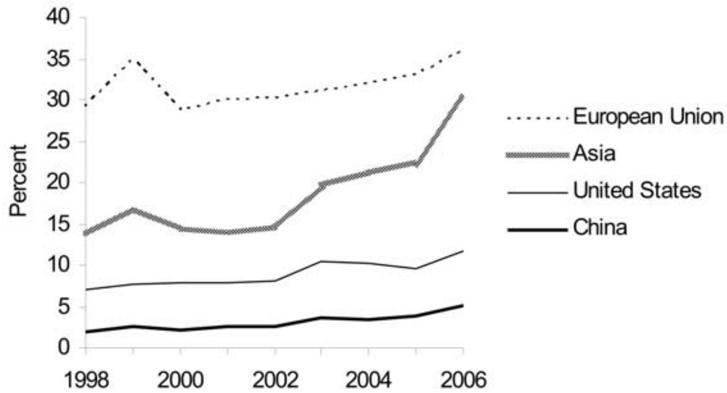
By contrast to the rest of the continent, South Africa possesses industrial, commercial, infrastructural and financial power. Yet South Africa has also witnessed a steady reorientation from the North to the East as a number of early studies have suggested (Taylor, 2007; Naidu, 2006, 2007). As figure 1 illustrates, South Africa's imports from China over the 1998-2006 period more than doubled (from 4 percent to 11 percent), and increased 50 percent from all of Asia to reach 30 percent of South Africa's total imports. Exports to Asia and China, comprised mainly of primary products (and more recently machinery and transport equipment) more than doubled as figure two charts (from 14 to 30 percent for Asia and from less than 2 percent to over 5 percent for China).

Figure 1: South African Imports: Europe, US, Asia, China



Source: IMF, 2007.

Figure 2: South African Exports: Europe, US, Asia, China



Source: IMF, 207.

South African investment in China has also been growing from a very low base, although we lack a comprehensive survey or data (see among others Broadman 2007; Naidu, 2007: 470-73).

Where South Africa stands apart from other African states, of course, is that it has long been situated at the heart of regional and increasingly continental networks. As the case studies in this special issue document, these have expanded in recent years – but not with such strong results as might have been expected prior to the fall of the apartheid state. South Africa's imports from Africa over the period 1998-2006 doubled from 2 to over 4 percent of total imports, but this has largely been due to increases from oil producers Nigeria and Angola. Exports to Africa as a percentage of total exports have barely changed since 1998 (at around 13-14 percent). Exports to SADC states have actually *declined* to around 10 percent of South Africa's total exports. As these figures suggest, industrialized South Africa faces potential competitive pressures from the industrialized East that are unlike those of Africa's primary producers.

Regional and continental investment and trade may be small proportion of total South African ex/imports and investment, but these aggregates hide the fact that African markets have long represented a significant market for South Africa's more advanced industrial, financial, commercial, and mining firms. For South Africa's manufacturers the SADC region is still key: it takes between 10 and 20 percent of manufactured exports as Table 1 illustrates.

Table 1: South African Manufactured Exports, 2005

(SITC) Manufactures Category	SADC % of total
Chemicals	19.2 %
Manufactured Goods	5.1 %
Machines, Transport Equip.	12.0 %
Manufactured Articles	17.1 %

Source: UN, 2007

Other African states are rarely competitors here, but this is not the case for China and India. As Europe and the United States de-industrialized, Asia and particularly China have become, like South Africa, exporters of both low- and middle-range industrial goods – and produce these goods with much larger and lower-cost labour reserves. South African advantages in the mining and commercial fields may be more enduring than in consumer manufactures, but are, in the long-run, equally vulnerable to expanding Asian investment. Studies of Latin America manufacturing in the face of the Asian challenge are not reassuring: like South African manufacturers, Latin American firms face higher labour costs while lacking Chinese firms' access to low-cost human capital and technology, generous government assistance, and a state able to constrain labour and civil society demands (Moreira 2007).

The competitive pressures are no less present in relation to investment: Asia and China in particular are the major destinations of global inward foreign direct investment, and are also increasingly a source for outward foreign investment for the South, including most notably Africa (Kaplinksy and Messner, 2008). China's pursuit of a level, 'free trade' playing field, shorn of European and US protectionism, can nevertheless have real advantages for African producers of cotton, rice, groundnuts, etc. Yet as has been seen in Lesotho and South Africa, manufacturers of clothing and even processed food stuffs can easily be displaced as manufacturers (including Asian-owned firms) shutter their doors and often move to China (Kaplinksy and Morris, 2008). Chinese competition in the construction field, Asian competition in retail trade, and growing Asian financial and banking investments indicate the breadth of the challenge for South African firms.

It thus bears stressing that the effect of the gravitational pull of East Asia is qualitatively different for South Africa by comparison with almost all African states in two fundamental ways. One, while South Africa like other states and regions is re-orienting from North to East, this shifts not just primary-product export markets, but poses a fundamental challenge to much more advanced industrial, financial and commercial producers. Growing African ties with the East are likely to bypass or be at the expense of South African capital. Second, these shifts can displace, as can already be seen in the commercial, mining, and financial sectors, South Africa's historically privileged, and underdeveloping, ties with the region. It is thus not simply that the hold of the North is declining as the East rises: it is clearly the case that the region as an integrated social and economic formation may well break apart – at South Africa's expense.

Against these trends it is possible to hold out the possibility of a more complementary relationship with East Asia and China in particular. The emergence of an East Asian zone founded on dense networks circulating around China offers one such hope, based as it is in China's imports from neighbours of both primary products *and* sophisticated electronic components and capital goods. There is little evidence to date however of such a relationship emerging between South African industrial producers and China, notwithstanding several South African licensing and direct investment deals in China. The contrast of Western capitalist development with an ostensibly less or non-exploitative Asian pattern of development – as in Giovanni Arrighi's (2007) account of the Chinese path of 'development without dispossession' utilizing equitable links between the national economies of East Asia – offers yet another prospect to consider. As with the hopeful projection of a 'Bandung' of progressive Southern states and elites, there is little evidence to date, however, of such even and mutually beneficial relations emerging on the basis of a radically new pattern of national, regional, or transnational accumulation. Certainly increasing inequality and social protest in China itself point toward quite different processes at work.

Regional Scenarios: Washington Consensus, Bandung Consensus, or Peoples' Consensus?

Caught between powers to the North and East, what might be the future of South Africa's historic subimperial role in the region? Taking into account the nature of local elites' and movements' responses suggests three, long-term possibilities.

The first might be termed a 'Washington-Pretoria Consensus'. This would be defined by a continuation of South African regional hegemony, based on the historic alliance with Europe and North America. This is the most plausible, short-term projection. This neoliberal alliance between the North and African states and their ruling elites has been forged over the course of the last generation, as structural adjustment, privatisation, and export-oriented policies were adopted across the continent in the 1980s. The emergence of an ANC government in the mid-1990s only cohered this trend, as the South African state committed itself to neoliberal orthodoxies. The benefits were to be two: development by invitation as a junior partner of Europe and the US, and an open door to the region. This permitted, as Richard Saunders (2008) and others (Games 2004) have documented, a surge of South African investment in the region after 1997. African states' privatisation of state enterprises and the relaxation of controls on foreign investment proved particularly timely for South African expansionism.

The key forces militating against this scenario are quite straightforward. It assumes above all a continuation of the power of the US, Europe, and international financial institutions. As indicated by the fate of AGOA and trade with the EU on one hand, and the competitive expansion of Chinese and Indian networks on the other, there are strong forces pulling Africa states and markets away from the North and towards the East. Neoliberal policies may have secured wider regional and continental operations for South Africa, but they have also done so for China, India, and East Asia as a whole. As Africa tilts East, South Africa may thus become increasingly isolated, a process propelled by the South African government's continuing commitment to a de-legitimized relationship with Europe and the United States. For both African states and movements – for very different reasons – South Africa may become a less and less attractive partner. For movements, South African may easily come to represent an intractable promoter of rigid neoliberal policies and autocratic governments, while for individual states and their elites far more attractive opportunities may be offered by Eastern (if not Northern) firms and states. The dilemmas, to put it mildly, of South African leadership of the African Union, the African Parliament, and NEPAD document these centrifugal forces very well. For many African elites and leaders from Sudan in the North to Angola and Zimbabwe in the South, China offers an attractive alternative. Under these conditions one could easily envisage a dissolution of the region as we have known it.

These tendencies suggest a second, long-term alternative: a 'New Bandung Consensus'. This requires one to accept, which is all I can plausibly do here, that the Washington Consensus is dying and the search is on for a new, social regulatory world that can incorporate increasingly frustrated elites and unruly populations across the South (see for example Porter and Craig, 2004, Cammack, 2004, Goldman 2005). The indicators of this process are widespread, from the collapse of the Doha round of the WTO and the IMF after the 1997 Asian crisis, to the remarkable election of populist and even 'anti-globalization' governments, particularly in Latin America. Seen from the Asian side of the Indian Ocean, such a prospect offers China and potentially India the means to secure their geopolitical and geo-economic rivalry with the North through an alliance with the Global South. State elites are key here, as they were with the original Bandung: can such an alliance secure their position and minimal levels of social peace and development?

The obstacles are legion. For South Africa, it is not too difficult to see a movement toward such an alliance through the emergence of a more populist leadership less tied to alliances with the North and more attentive to growing grassroots discontent. Despite this, neoliberal policies may well continue, as they would benefit both Chinese and South African businessmen. There are also clear advantages to the South African state if it could secure a position as a leading power in this group – as has often been raised in various discussions of a Brazil-Russia-India-China-South African axis in representing the Global South in world trade fora. One doesn't have be triumphalist about the prospects for a new Bandung (see Palat 2008 for a negative assessment) to perceive that China, India, Brazil, Venezuela, Russia, and Bolivia, among others, have begun to lay the basis for a social and economic order beyond neoliberalism by implementing new social programmes and asserting control over natural resources. For some this portends a new version of Polanyi's analysis of the mid-twentieth century counter-movement to free trade and the self-regulating market (Silver and Arrighi 2003). Ideologically one might expect a considerable emphasis on Africa's and Asia's shared history of suffering under European colonialism and neo-colonialism.

Such a path would do little to lessen growing inequalities and indeed protest across southern and continental Africa due to the deregulation of local markets, the privatisation of state operations, and polarizing, uneven development. To the extent that African as well as worldwide 'anti-globalization' movements accelerate, the alliances underpinning scenarios one and two become increasingly fragile. Under these conditions a more chaotic and even nationalist environment could witness the break-up of the region and South Africa's semi-peripheral role in relation to either the North (scenario one) or the East (scenario two). This raises in turn the possibility of a 'Peoples' Consensus', with the policies of state and regional organizations being driven by increasingly unruly, popular discontent. Anti-capitalist and trans-nationally linked movements – as can be seen in current land, anti-privatisation, AIDS, squatter, and other movements in the region – could well accelerate their attack on neoliberal and corrupt governments, opening up the possibility of not only alternative developmental initiatives but also greater cooperation in confronting underdeveloping and undemocratic forces from either the North or East. Today's Latin American examples offer signs of such possibilities.

The forces pushing both this last scenario and the New Bandung Consensus scenario raise the prospect of one last radical transformation: a significant disruption of the racial hierarchies through which regional and global accumulation operates. These have long been formed, even in their latest multicultural guise, around a white North-black South continuum. The emergence of East-South hierarchies, explicitly posed in opposition to past North/South colonial-racial relationships, disrupts this essential feature of daily life and daily accumulation across the region and the continent. South Africans are all too aware of this problem, despite a growing black elite; appeals to class solidarity cannot obscure the continuing, lived experience of racial and ethno-national hierarchies, including accelerating ethno-national and xenophobic conflict. How past hierarchies, so essential to North/South inequalities, will be recast as African-Asian relationships deepen and North/South ones recede is a critical question that has hardly been posed. Unlike past African-Asian relations, where both partners have shared a subordinate position within the North/South colonial frame, global racial hierarchies will in the near future entail the inclusion of rising Asia's own racial constructions in relation to Europe and the US as well as within Asia itself (Dikötter 1992, 1997; Dirlik 2008; Tanaka 1993).

Each of these scenarios offers a very different path for the states, firms, and peoples of southern Africa and indeed the continent. If South African subimperialism was built through alliances among white supremacist states and Euro-American capital, the conditions to maintain such a system are, for the many reasons charted above, rapidly disappearing As we look toward the future, the prospect of a very different regional, continental, and world order is in front of us. The very uncertainty of what might emerge to replace today's social and economic order, given the continuing social costs of apartheid and neoliberalism, is, in itself, to be welcomed.

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