

people. Evidence was also found that some companies would rather make use of non-permanent employment that increase permanent staff.

Investigate the link between growth in atypical labour and employer perceptions relating to LRA requirements around retrenchment as well as the link between growth in atypical labour and the minimum wage structure of this sector

A number of issues, beyond the scope of this study need to be investigated before any conclusions can be made. For example, it must be clearly established to what extent atypical employment growth is driven by the need for flexible manufacturing rather than perceptions around labour legislation and wage rates. It is also not clear to what extent company behaviour will change in terms of employing more people on a permanent basis should these factors change. These issues require further research.

Responsibility: Industry associations, FRIDGE

Ensure consistent and comprehensive implementation of agreements reached in the MEIBC

Although not explicitly researched, some evidence was found of companies not complying with agreements reached. Needless to say, this results in an uneven playing field between companies, which is an issue that needs to be addressed.

Responsibility: MEIBC

BIBLIOGRAPHY

- ABSA (2002). South African sectoral outlook 2002-2007. Second edition. South African financial sector forum.
- Ahlberg J, Pitakanens A, Schorsch L, 1999. Forging a New Era for Steel. McKinsey Quarterly 1999, No 4, pg 82-91.
- Automotive Industry Development Centre. (2002). Automotive Sector. Centre for Scientific and Industrial Research. Pretoria.
- Automotive Stainless Steel Industry Development Initiatives. SASSDA/SSCDI
- Bell, T., Madula, N. (2001). Where has all the growth gone? South African manufacturing industry 170-2001. National Institute for Economic Policy, occasional paper series, No. 21.
- Business Day, 2 March, 2000
- Business Day, 11 January 2002
- Business Report 13/02/03
- Blueprint Consulting. (1998). The capital equipment cluster – final report, phase 1, South Africa.
- Blueprint Consulting. (1998). Executive briefing: capital equipment cluster, South Africa.
- Barnes, J. (2002). A value chain analysis of the key exporting sub-sectors of the SA automotive components industry. dti PSP. Pretoria
- BIFSA. (2002). BIFSA Annual Report
- Black, A. (2001). Globalisation and restructuring in the SA automotive industry. Journal of International Development, Vol 13, No 6, 2001
- Black, A. (2002). The Export 'Success' of the Motor Industry Development Programme and the Implications for Trade and Industrial Policy, University of Cape Town.
- Black, A. (2002). What the South Africans will be looking for and what they have to offer. University of Cape Town. Memorandum
- Black, A., Mitchell, S. (2002). Policy in the SA motor industry. The South African Journal of Economics. Vol. 70:8 December 2002
- CASE. (2002). the Merseta Secondary Data Analysis of Workplace Skills Plans and Annual Training Reports. Braamfontein
- CASE. (2002). Review and Update of the the Merseta Sector Skills Plan. Braamfontein.
- CETA. (2002). Annual Report
- Creamer Media Online. (24/01/02). Currency gains hit exporters hard.

- CSIR. (2002). Advanced Manufacturing and Logistics Technology Strategy - Metals & Minerals. Pretoria
- Department: minerals and energy Republic of South Africa. (2000). Minerals economics directorate 2000/2001. Pretoria
- Dewar, K. (2002). Edwards, L. (2002). A Firm Level Analysis of Trade, Technology and Employment in South Africa. University of Cape Town
- Edwards, L (2000). National enterprise survey: investment behaviour in knowledge intensive sectors. The EDGE institute.
- Engineering News Online. (24/01/03). Currency gains hit exporters hard.
- Engineering News Online. (07/03/02). Domestic demand shows robust growth.
- Engineering News Online. (07/03/02). Fragile Recovery. [<http://www.engineeringnews.co.za>]
- Engineering News Online. (08/09/02). Stainless-steel demand boosted.
- Engineering News Online. (10/08/01). Hope for SA tank-container industry
- Engineering News Online. (21/01/03). Wire association earmarks six potential export markets.
- Engineering News. (2003). "Capacity warning from structural-steel sector". Spicer, D. (13/02/03)
- Engineering News (2003). Plan to set up aerospace coalition bid for US work. News today 20th May, 2003.
- Engineering News Online. (26/02/03). Eskom to spend R50bn on upgrade of power stations.
- Engineering News Research Unit. (2002). Special Report – SA Steel, First Edition
- Engineering News Research Unit. (2003). Special Report – Automotive SA 2003, First Edition
- Engineering News Research Unit. (2003). Special Report – Road SA 2003, First Edition
- Engineering News Research Unit. (2003). Special Report – SA Steel, First Edition.
- Engineering News, 14 October 2001
- Engineering News, 25 January 2002
- Fine, B. (1998). Vertical relations in the South African steel industry. National Institute for Economic Policy, occasional paper series, No. 13.
- Frimpong, Mensah (1998) 'Revisiting the South African minerals sector – the challenges ahead'. Paper presented to the TIPS Annual Forum, Glenburn Lodge, Muldersdrift
- Horton, C. (2003) "Company Monitor, Dutch Multinational Companies"
- IDC. (2000). The Downstream Carbon Steel Industry.
- International Metalworkers Association, 2001. Enterprise restructuring and work organisation – research paper.

FRIDGE Metals and Engineering Industry Study – Bibliography

International Labour Organisation, sectoral activities programme. (2002). Lifelong learning in the mechanical and electrical engineering industries. Report for discussion at the Tripartite Meeting on Lifelong Learning in the Mechanical and Electrical Engineering Industries. Geneva.

International Iron and Steel Institute. (2002). World steel in figures.

Iscor Limited, Annual Report 2002

ITR analysis of Metal Bulletin – www.isr.gov.au

Kaplan, D. (2002). A review of industrial performance and the prospects for the short to medium term. Mimeo. Department of Trade and Industry.

Macroeconomic Impact on the South African Economy of Duty-free exports to the United States which fall under GSP and its extensions to AGOA. Conningarth Economists, June 2002

Makhaya, T., Roberts, S. & Taka, M., "Special Report: SA Steel 2002 First Edition", Engineering News Focus

Moneymax. (25/07/02). BER upbeat about South African economic prospects.

NALEDI (2002). Towards the Sector Job Summit for NUMSA: the basic metal industry. Confidential NALEDI report.

NALEDI (2003). Performance review Confidential NALEDI report

NALEDI. (2002). Towards the Sector Job Summit for NUMSA: The Light and Heavy Engineering Sectors. Confidential NALEDI report.

PBMR. (2002). Commercialisation of the Pebble Bed Modular Reactor. PBMR Pty. Ltd.

Phillips, G. (2002). A case of globalise or die? The impact of increasing multinational ownership and control in South Africa's automotive sector on jobs and job creation. Confidential NALEDI report.

Price Waterhouse Coopers. (2003). Budget Summary.

Samson M., MacQuene K., van Niekerk I. (2001). Capital/skills-intensity and job creation: an analysis of policy options. Economic Policy Research Institute.

SA Steelnews, 2002

Sella, D., Salter, D. (2003). Fabricating Industry Development Centre. FIDC

Seria N, (2003). "Production boom lifts SA growth prospects", Business Day, 12/02/2003

SP² Advisory Services (2003). Funds on Friday – the SA Rand, which way now? Vol 263, 9th May.

SteelTrade Homepage. (13/12/02). Steel giant responds to criticism over steel prices. [<http://www.steeltrade.co.za>]

Teljeur, E., Stern, M. (2002). Understanding the South African Construction Services Industry: Towards a GATS Negotiating Strategy.