

Emerging Insecurities: Precarization of Employment Relations in the Indian and South African Auto Industries

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There is not one but a variety of regimes of informal/precarious labour, not all vicious to the same extent. The political lesson to be drawn from this is not to rank the various fractions of the workforce in a sequence from greater to lesser vulnerability, but rather to develop strategies that underline their commonalities, to form alliances between organized and informal sectors, not to pit them against each other.
(Breman, 2013: 137)

Abstract

By comparing two different casualization regimes in the auto industry, the contract labour system in India and the employment of workers through labour brokers in South Africa, the present article engages with the idea that the precariat may be considered a new, global class in the making. While acknowledging a global, dangerous tendency to rely on casual labour as a competitive advantage, the article rejects the attempt to adopt universalizing categories. It rather invites the reader to look at the local embeddedness of casualization, and in particular at industrial development trajectories, labour market specificities and institutional settings that affect the lived experience of precarity. Ultimately, homogenizing definitions, especially those excluding the reality of precarity in the Global South, not only lead to a limited theoretical understanding of the multiple shades of casualization but may tend towards an over-simplification of global political strategies, not reflecting the complexity of grassroots dynamics of class formation and struggle.

Introduction

In the past few years, Standing's (2011; 2014; 2015) conceptualization of the precariat as a new, emerging class, and his attempt to launch a programmatic agenda to protect the rights of this global army of vulnerable workers has undeniably attracted

considerable attention and sparked interesting debates. In a sense, his provocative works have forced many young and less-young labour scholars to reconsider old conceptual categories and to face the need to innovate language and practices. Overall, this was an important development indeed. On the other hand, Standing's contributions also embody theoretical and political risks. From a theoretical perspective, the blatant assumption of the precariat as a global class in the making risks universalizing context-dependent manifestations of precarity, inflating a process of class formation that does not necessarily entail global connotations, nor an automatic commonality of class interests. From a political viewpoint, this can be associated with the risk of diluting local specificities for the sake of defining global identities and of overlooking grassroots realities of class formation and struggle. This is particularly true when it comes to the Global South, largely absent within Standing's (2011; 2014) bold statements on the global precariat (Braga, 2016; Munck, 2013; Scully, 2016).

The present article aims to engage with the debate developed around Standing's (2011; 2014) conceptualization of the precariat by responding to Breman's (2013) invitation to ground the understanding of precarious labour regimes in the multiplicity of their forms. In particular, while acknowledging the global processes described by Standing, this article aims to do the following. First, it encourages scholars to embed the nature of precarity within the analysis of specific *casualization regimes*. In turn, it claims that the evolution of historically and context-dependent casualization regimes is rooted within the structure of local labour markets. Within global processes of industrialization and de-industrialization, this also means that the nature of precarity may differ in the Global North and in the Global South (see also Scully, 2016; Braga, 2016; Munck, 2013). However, broad categories like North and South also have profound limitations, grouping together economies and political regimes at very different stages. Here, the invitation is to look as deeply as possible, analyzing specific labour markets, productive sectors, institutional settings and labour responses that shape the dynamics of class formation. Second, the present paper aims to counter Standing's (2011; 2014; 2015) bold description of a global class in the making. While the perception of a global race to the bottom often exists, lived experiences of precarity and the different status of casual workers in different countries testify to the

difficulty of building a common identity and very different processes of class formation.¹ Building on two case studies, from India and South Africa, this paper does not investigate the dynamics that led precarious workers to gain awareness of their exploitation,² but seeks to highlight broader differences between two casualization regimes that inform lived experiences of precarity. Third, the paper seeks to shed light not only on different types of casualization but also on the different structural and institutional frameworks in which these are embedded. Ultimately, these frameworks shape labour responses and bring into question the possibility of creating a “global charter” to defend precarious workers’ rights.³ Indeed, this paper does not intend to underplay the global challenges labour faces and the need to counter them through a solid, comprehensive and updated political agenda. It rather aims, through an empirical investigation of two different cases, to highlight how the understanding of commonalities and differences may contribute to a deeper awareness of the nature of the precarious employment condition and to the formulation of sounder political strategies.

Overall, the paper compares two different casualization regimes, the contract labour system in India and the use of labour brokers in South Africa, within the same manufacturing sector – the automotive industry – which is also one of the most globalized production chains. Despite global similarities and a generalized tendency to employ casual forms of labour, the two cases are also characterized by significant differences: these are related to the way the development of the national industry affected state-capital relations, to the specific structure of the local labour market and to the institutional setting in which they are embedded. These are discussed in the following sections. Ultimately, the specificities of the local labour regime and the different shades of casualization inform labour responses and forms of organizing, corporate and institutional reactions to them and the relationship between casual workers and traditional trade unions.

In the end, the present work points to the need to avoid universalizing categories, to embed the analysis of precarity within a locally determined labour regime and to look at the complexities of class formation and determination. While corporate strategies are global indeed, the scope of casualization, the lived experience of precarity and the degree of consciousness achieved by the workers are locally and historically determined. As such, they cannot easily

be generalized nor lightly compounded into all-encompassing categories. A radical, global response to the widespread attack on labour standards is needed, and urgent, but it must rest on a careful understanding of the complexities and the different shapes of precarity and casualization processes. These will vary in the North and in the South (Munck, 2013; Scully, 2016), by country, by productive sector, and so on. Political opposition to the progressive deterioration of employment conditions is a pressing matter, but it should be informed by less paternalistic, blatant slogans and a closer, more humble approach to the grassroots reality of precarious working conditions.

The Context

While in the past few years the global auto industry has seen emerging labour movements and new forms of organizing, especially in recently industrialized countries, the overall picture seems to be one of progressive casualization of employment relations and generalized onslaught on labour institutions. Besides a few strongholds of “decent” work, mainly situated in the Global North, atypical forms of employment have proliferated, labour laws and collective bargaining systems are under widespread attack, and anti-union behaviours are more and more frequent. Against these trends, traditional unions appear to hardly keep up with the changing scenario, while employers actively contribute to such a race to the bottom. Between them, state institutions too often represent a silent actor, or alternatively, proactively support corporate needs in order to secure an investment-friendly climate for their industry.

By adopting a political economy approach to labour relations, this paper aims to analyze casualization regimes that have characterized the auto industry in two emerging economies, India and South Africa. Whilst being marked by structural differences – in terms of market size, policy trajectories, competitive advantages – the two country-cases provide equally interesting insights on how employment relations in the auto industry are evolving. Ultimately, their local specificities and the different “shades” of casualization the two countries are experiencing allow for a deeper understanding of global trends, where precarious employment relations seem to be the norm rather than the exception.

On the one hand, India shows a case of extreme casualization of the workforce, indiscriminately penetrating all the previously

organized and protected productive segments. Overall, it constitutes a clear example of instrumental use of the contract labour system, fragmenting and depoliticizing labour and hampering labour organizing. At the same time, the Indian case is paradigmatic at two levels: for the degeneration of the industrial relations system towards forms of institutionalized violence, and for the emergence of new types of labour organizing, arising beyond traditional unions.⁴ On the other hand, South Africa represents one of the traditionally most protected and widely organized auto sectors in the world. However, while its powerful metalworkers' union maintains a strong hold on the industry and a sound position within the bargaining system, areas of contention and "insecurity" are surfacing nonetheless. Here, the work focuses on two main aspects: the still-frequent use of labour brokers, disguised behind service provision, and the incremental attack to the existing labour legislation channelled by the proposed labour law amendments.

In both cases, under different shapes, "insecurities" are on the rise, the system of labour relations faces serious threats, and the need to re-establish industrial relations more favourable to labour is of utmost importance. Overall, this paper claims, no advancement will be possible without a serious consideration of casualization processes, of the impact of changing labour laws on the most vulnerable layers of the workforce and of the necessary renewal of traditional union organizations in order to urgently counter such changes.

The present work builds on comparative field research based on a similar design. With regard to the Indian case, it rests on different rounds of fieldwork conducted in the Indian National Capital Region (Delhi) in 2009, 2011, 2012, 2017 and 2019. There, a questionnaire survey on working and living conditions of auto workers was carried out, and interviews and focus groups were conducted with academic scholars, business associations (CII,⁵ SIAM,⁶ ACMA⁷), unions (CITU, AITUC, HMS, NTUI), labour activists and workers. In South Africa, fieldwork took place between 2016 and 2019. This involved different rounds of interviews with academic scholars working on the auto industry, government officials, sectoral business associations (NAAMSA,⁸ NAACAM,⁹ AIDC¹⁰ etc.), the Casual Workers Advice Office (CWAO), the Outsourcing Must Fall (OMF) movement and workers based both in the Rosslyn–Pretoria area and in the East Rand (Germiston), Gauteng Province.

The World Auto Industry and the Labour Issue

Being one of the most globally integrated industries and a terrain for continuous research and development, the auto industry still represents an advanced testing ground for production management and labour organization. At the global level, it reflects the incorporation of production into complex value chains and is dominated by leading multinational firms that often influence policy directions, investment plans and the development of local suppliers (Pavlinek, 2016; Masondo, 2018). Too often, multinational OEMs also affect the labour regime operating at the level of the local supply chain, by imposing lower costs or expressly requiring flexible labour legislations. Overall, the race to secure new investments or to simply prevent production plants from localizing elsewhere, has led to increasing competitive pressure, where countries unable to compete for high value-added activities build their advantage on cheap and/or hyper flexible labour (Pulignano et al., 2008). This has been particularly evident in the case of China and India, which have heavily relied on their large pool of low-cost workers whilst establishing their industrial advantage. Overall, in order to respond to such dual pressure, almost thirty years after the conceptualization of the lean manufacturing paradigm, the global auto industry seems to have fully embraced casualization as the ultimate frontier of competitiveness (Monaco, 2017). While the presence of informal contractual arrangements and employment relations at the bottom of the chain is not a new phenomenon, the mechanisms through which casual employment is penetrating the previously protected realm of the large factory are in continuous evolution. They are subject to a dynamic cycle of reorganizations, where labour struggles and corporate strategies anticipate or react to each other. This paper describes two different cases, experiencing different levels of casualization but also different institutional settings and degrees of resistance to it.

The Early Development of the Auto Industry in India and South Africa

While the automotive industry undoubtedly shows a global character, with the same lead assemblers and large component suppliers dominating global markets and a strong standardization of manufactured models, the structure of the local supply chain, the specific institutional settings and the established employment

relations show significant geographical variations. The structure of the local industry and the institutional architecture that shape employment conditions are closely connected to industrial policies and sector strategies; in turn, these are informed not only by a country's comparative advantage but also by its historical path and the specific power relations and bargaining dynamics between state, capital and labour institutions. Looking at how the automotive industry developed in India and South Africa serves to show how the sector's trajectory was not only influenced by the size of the domestic market, by geographical factors and by available resources, but by specific policy choices and by the historically determined balance of power between state and foreign capital. In addition, as in the South African case, the historical and political setting of the post-apartheid regime shaped the institutional environment that allowed for a slower and more limited penetration of casual labour within organized manufacturing.

Despite eventually aiming at global integration through market liberalization, India followed a peculiar industrial development path. Besides the potential of its large internal market and its specific competitive advantages, it can be argued that the pace and the modes of the policies implemented, together with the state ownership of the industrial development process, allowed its industry to flourish and to achieve its current status (Singh, 2009). Before liberalizing in 1991, India went through a long period of planned industrial development, which combined private sector initiative and significant state intervention, reservation of strategic industries under state ownership and protection of small enterprises. At the same time, strict anti-monopoly regulations prevented the excessive concentration of resources and economic power (Monaco, 2014). The attempt to support the young domestic industry translated into a quite prolonged phase of import substitution, import controls and limitations on foreign participation (Auty, 1994).

Within the country's industrial development, the auto industry always played a pioneering role, epitomizing the state-capital balance that was kept before a full liberalization, and then channelling the integration of the domestic industry into international markets (Majumdar, 2012). Considered one of India's success stories, the auto industry did not flourish simply due to a favourable market size or to particularly abundant resources, but thanks to a wise use of policy tools and to a development-oriented institutional setting,

which kept the demands of foreign capital under relative control, at least until the late 1990s. In practice, the phase of protection and import substitution was relatively long,¹¹ while indigenization programs and local content requirements were rather strict.¹² Even when market regulations were relaxed, in the 1980s, foreign capital was allowed in only in the form of joint ventures (JV) with domestic companies, and local content conditions on investment and financial participation remained high (D'costa 1995; Ranawat & Tiwari, 2009). Overall, the progressive liberalization and the opening to foreign capital still occurred under the constant supervision of the state, which always controlled foreign companies' access, balanced the relation between foreign and domestic private capital, and effectively supported the latter (Khan, 2009). Regarding production strategies, the early orientation of the Indian auto industry towards small passenger cars, accessible to a wider consumer base than the luxury cars segment, was also facilitated by state intervention (D'costa, 1995; Ranawat & Tiwari, 2009), signalling the adoption of developmental priorities that were absent in the South African case. Built on a combination of social objectives and market calculations, the chosen manufacturing strategies undeniably allowed India to establish competitive niches and to make its development path more sustainable even throughout the following liberalization.

The South African automotive industry developed in a completely different context. While it started taking off as early as the 1920s, it underwent a substantial halt due to the sanctions imposed on the country throughout the apartheid era. Once isolation came to an end, in the mid-1990s, the desire to make up for the delay induced an accelerated liberalization, with a marked export orientation and an extreme accommodation of foreign capital, thus allowing it to influence the direction taken by the industry (Masondo, 2018). Overall, the post-apartheid restructuring of the industry entailed a rationalization of previous productive platforms and undoubtedly led to increasing productivity and competitiveness, but was also accompanied by a progressive loss of policy space (Black, Barnes, Monaco, 2018). The integration of the industry within an international market space was in fact achieved through a series of supply-side measures, including strong incentives to OEMs,¹³ mainly multinational, and the possibility for firms to earn import duties by increasing export. Such a rebate mechanism, still in place despite the succession of different industrial plans, basically offset

the local gains achieved through import substitution, eventually leading to lower local content, a negative trade balance and a severely imbalanced supply chain, where foreign OEMs dominate and lower tiers contracted (Monaco, Barnes, Black, 2018). The way South Africa attempted to accommodate foreign companies in order to attract investment and secure export contracts to compensate for the limitations of the small domestic market is also reflected in the pursued production strategies. As of today, the most developed segment remains that of luxury cars, while the two-wheelers, small vehicles and MHCV¹⁴ employed for public transport segments remain very narrow. Overall, ownership patterns, consumer base and work composition still heavily mirror the inequalities established during the apartheid regime, while the strong domination of foreign multinationals has rapidly replaced the old colonial influence. On the other hand, the perceived lack of ownership of the industrial development process and the persistent racial inequalities inherited by the post-apartheid national liberation project also led to a strong system of industrial relations, with powerful unions and progressive labour laws. In terms of employment relations, as we will see, this partly helped to contain the advancement of casualization.

The Current Picture: What “Competitive Advantage”?

Both the Indian and the South African auto industries liberalized in the 1990s, the former following a decade of gradual opening under Rajiv’s rule, the latter quite rapidly, once the apartheid sanctions were released. In broad terms, not only the pace and modes of global integration differed, but the ownership of the process also varied, with India managing to nurture its national champions, to build more favourable bargaining relations with multinational capital and to better protect its domestic industry. On the other side, South Africa was not only penalized by a smaller internal market but also suffered for the imbalances left as a legacy of the apartheid era. In this sense, the high concentration of capital, an exasperated export orientation that recalls the colonial resource-extraction and the uneven distribution of education and skills all affected the way the industry looks today.

At present, the Indian auto industry shows better future prospects and potential for a more sustainable growth. Its affordable and well-developed small passenger vehicle and two-wheeler segments can undoubtedly sustain increasing demand. The sector

also promises investment opportunities, employment creation¹⁵ and leeway for local suppliers. Indeed, the availability of a large pool of component suppliers around each OEM and an averagely qualified workforce provided with language, IT and engineering skills represent a positive endowment (Narayanan & Vashisht, 2008). In addition, widespread managerial capabilities and the existing institutional and financial infrastructure are seen as offering a sound base for further development (Noble, 2006). However, what also distinguishes the Indian auto industry is a competitiveness largely built on extremely low-cost labour, on the widespread reliance on casual work even within organized manufacturing (Chandrasekhar and Ghosh, 2014; Deshpande et al, 2004) and on the frequent obstruction of trade union activities (Jha and Chakraborty, 2014; Monaco, 2017). Indeed, such a “competitive advantage” binds the industry to a very low-quality development, whose sustainability can only be undermined in the long run.

Conversely, the South African auto industry might face a less rosy future and undoubtedly reveals profound structural weaknesses, but it has also been characterized by sounder industrial relations, which helped prevent an excessive deterioration of employment conditions. Today, while the industry has experienced significant improvements in terms of productivity, export competitiveness, technological upgrading and increasing volumes, the main challenges remain linked to the scarce localization and the relative underdevelopment of the supply chain (Monaco, Barnes and Black, 2018). Such weaknesses are also related to deeper structural problems left by the apartheid regime: the extreme concentration of capital and assets in a few hands, which makes market access particularly difficult for smaller firms and new entrepreneurs, and the still incipient transformation of the industry, with very limited black ownership despite the numerous BEE¹⁶ initiatives (Freund, 2007; Ponte, Roberts et al., 2007, Bell et al., 2018). Overall, since the end of apartheid, the South African auto sector has undoubtedly achieved a more “mature” industrial capacity, and it represents one of the most advanced auto industries on the African continent. However, it can still be considered “globally insignificant” (Barnes and Morris, 2008) and has not succeeded in becoming a major hub, struggling with a limited internal market, extreme distance from its export markets and still relatively low volumes (Black, Barnes and Monaco, 2018). On the other side, South Africa can pride itself on

one of the most solid systems of industrial relations and of one of the strongest metalworkers' unions in the world. Indeed, this has contributed to protecting (so far) its workforce from a race to the bottom in terms of employment relations, to containing casualization and to defending wage levels in the industry.¹⁷

Different Shades of Casualization: Contract Labour vs Labour Brokering

Despite a different market structure, a different policy development and a different institutional setting, neither the Indian nor the South African auto industry seems immune from an overall deterioration of employment relations. What is explored here is not the degree of informality along the supply chain, whereby the belonging of small component suppliers to an unorganized, unregulated realm is not a new phenomenon, but the progressive penetration of casual employment relations within the large, organized factory. In turn, the processes of casualization that have been affecting the industry must be related to three factors: the overall structure of the labour market in the country, the role and strength of existing trade unions and the institutional setting, including labour laws. It goes beyond the scope of a comparative paper to look at these aspects in detail; however, an overall picture is provided in order to frame the two cases.

The Indian labour market is not only impressive in size, having overcome the 500 million threshold in terms of active labour force, but is also extremely segmented. Besides the complexity of defining unemployment in the presence of frequent underemployment or disguised unemployment, lines of fragmentation can be traced per organized/unorganized and unionized/not-unionized segments, as well as per employment status, gender, caste and religion (Harriss-White and Gooptu, 2001; TISS, 2009; Papola, 2013). Overall, with only 7 per cent of the workforce employed in the organized sector¹⁸ and an even smaller percentage of unionized workers (about 4 per cent) (Jha, 2008; NSC, 2012), regular and protected employment may be considered the exception rather than the rule. Defining and analyzing what represents the informal does not fall within the purview of this paper. The focus of the present work is rather on a specific and alarming phenomenon, that is, the process of increasing informalization, casualization and contractualization of those segments that previously appeared as a safe zone. In this sense, the

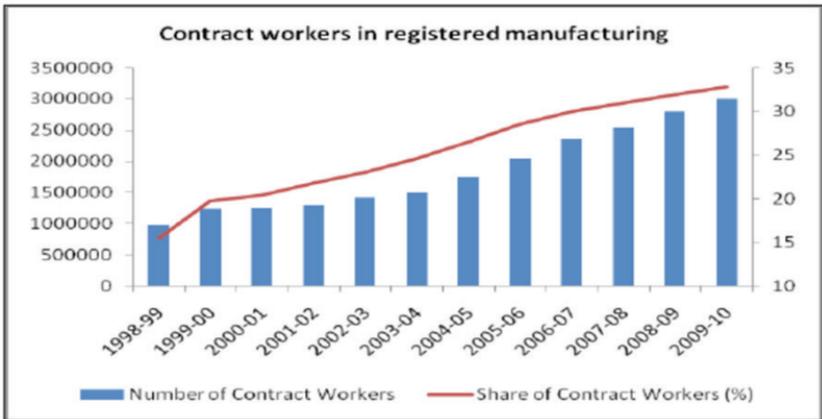
casualization of employment relations and conditions within the organized productive sectors, like manufacturing, is paradigmatic.

As reported by extensive studies, like the one conducted by Deshpande et al. (2004), the employment of informal, supposedly more flexible, labour within Indian organized manufacturing has been constantly increasing over time. In particular, the use of non-permanent workers, employed on casual terms, has become more and more frequent even within large firms (500+ employees), thus highlighting the blurred distinction between formal and informal production segments. Most importantly, the employment of casual workers has largely concerned core production activities, with no clear separation between primary and ancillary functions within the firm. Even writing before the latest wave of labour protests that particularly affected the Delhi–National Capital Region (NCR) industrial area, the authors underlined how the growing replacement of permanent workers with casual, temporary, contract labour not only allows for lower costs but for the functional management of industrial relations in an “orderly manner” (Deshpande et al, 2004:85; see also Barnes et al. 2015). Chandrasekhar and Ghosh (2014) also argue that the increasing use of informal contracts has served to match the requirements of the formal sectors, particularly with reference to contract workers. These represent a specific category of casual workers, distinguished for their “indirect” nature, i.e., a triangular employment relationship where they are hired by a third party and are not directly linked to the main company. Normally, they are supposed to be hired, supervised and remunerated by a “contractor”, which then reports to the “mother” or “client” company (AIOE, 2013; Barnes et al. 2015). Like other workers employed on casual terms, they tend to receive lower wages and fewer social benefits and, either for political or legal reasons, they have often been excluded from political representation.¹⁹

Papola (2013) highlighted how often discriminations are either created or reinforced by labour institutions or regulations themselves. In this regard, uneven access to union membership and welfare schemes (for casual/contract workers, for example) or labour laws with differential application according to firm size may widen rather than reduce workplace fragmentation, contributing to the uneven distribution of social security.

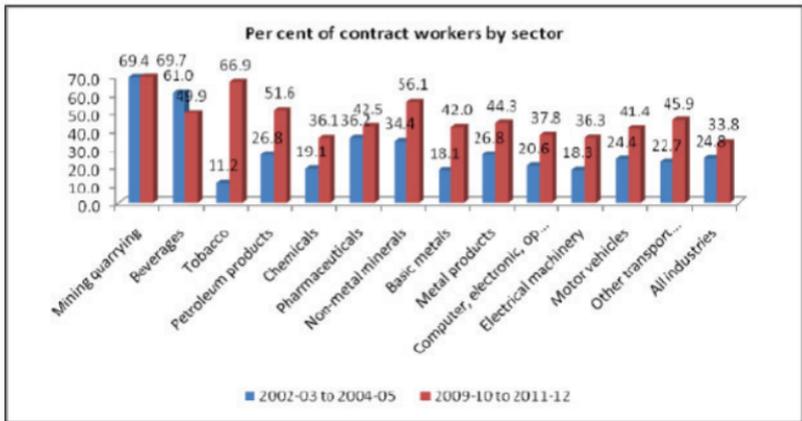
Overall, despite an existing *Contract Labour (Regulation & Abolition) Act 1970*, designed to specify where and how contract

Chart 1: Contract Workers in Indian Organized Manufacturing



Source: Chandrasekhar and Ghosh (2014:2).

Chart 2: Percentage of Contract Workers per Productive Sector



Source: Chandrasekhar and Ghosh (2014:3).

workers can be employed, violations and abuses of the law seem to be the norm (Barnes et al. 2015). Indeed, regardless of the limits posed to the use of contract labour within “core activities” and to perform tasks deemed of a “perennial nature”, such workers are frequently employed for prolonged terms and on core manufacturing operations (Papola, 2013).

Within the whole auto industry, well above one-third of the workers seem to be currently employed on a contract basis, while

in many large companies contract workers are reported to have outnumbered permanent workers.²⁰ In the NCR, for example, labour activists and union representatives reported more than 60 per cent contract workers at Honda and up to 90 per cent at Hero-Honda Haridwar, as well as up to 90 per cent casual workforce in the Neemrana area.²¹ Recently, the reported abuses of the contract labour system have also generated a number of reactions and new dynamics, in terms of both labour organizing and corporate restructuring. In the NCR, a wave of labour protests has been centred around the issue of representation and regularization of contract workers, especially following the Maruti Suzuki dispute in 2011-12 (Monaco, 2017). As a consequence, traditional union organizing claims to be embracing the demands of casual workers,²² and a number of independent contract workers' unions have emerged across the country.²³ On the corporate side, Maruti's post-strike reaction of bringing some contract workers back in-house, hiring them as "company casuals", appeared as a way to exercise more direct control rather than actually improving working and employment conditions (Monaco, 2017). Finally, recent training and skills development schemes promoted by the Modi government, like Skill India, have also been widely criticized for supplying firms with a floating pool of highly skilled graduates, hired as trainees but with no guarantee of absorption into the labour market.²⁴ This might be seen as a further stretching of casualization, with new layers of workers set on precarious conditions.²⁵

Differently from India, South Africa has a much smaller, and more protected, labour market. While the most pressing issues continue to be the extreme poverty of workers employed at minimum wage levels, income inequality and dramatically high unemployment, workers in organized manufacturing overall enjoy better remunerations and employment conditions than their Indian counterparts. However, the situation is increasingly worsening, with a widening gap between skilled workers, generally covered by permanent and protected forms of employment, and frequent outsourcing of semi- and low-skilled workers to sub-contracting companies (Englert, 2018; Theron, 2005).

The South African post-apartheid labour market was undoubtedly affected by the pressure to catch up with international markets and the ensuing, marked export orientation. The country's willingness to attract investments and technology resulted in an

accommodation of foreign capital that also translated to stricter impositions in terms of employment relations, despite the resistance of very strong unions. The way the auto industry was progressively captured by the multinational firms' lobbying power, which increasingly constrained the policy space and the state's bargaining capacity, has been discussed before (see also, Masondo, 2018). Indeed, even in the presence of the powerful metalworkers' union, NUMSA, this generated an increasing attack on labour, in order to cut costs and mitigate the confrontational industrial relations.²⁶ As in the broader socio-political space, the period between the extension of previously denied socio-economic rights and the neoliberal attempt to cut such rights was short indeed. Today, a majority of black, often low-skilled workers, who had just enjoyed the promise of wider income and social security and hoped for an improved existence, is once again threatened by increasing precarization. In this sense, as argued by Bezuidenhout (in Von Holdt and Webster, 2005), the increasing casualization of work represents "continuity through change" rather than an actual transformation of the workplace regime. Overall, the apartheid segmentation on racial lines has been replaced by a fragmentation between a skilled core and a low-skilled periphery, while inequalities persist. However, while low-skilled workers are more exposed to vulnerable employment conditions, the increasing casualization of the workforce appears more and more as a transversal issue, cutting across different categories of workers only artificially created for corporate use.

As far as the manufacturing sector is concerned, Theron (2005) describes how processes of casualization, externalization and informalization have gained terrain. Within these, while the official use of casual labour within large firms remains relatively difficult in the presence of strongly established unions (ex. NUMSA, FAWU etc.), one of the most frequent practices is the outsourcing of workers or services to external companies. The externalization of the labour process, through the establishment of a triangular employment relation between the worker, the main employer and a labour broker, has become more and more common. Budlender's (2013) comprehensive overview of studies of labour-brokered workers in South Africa (identified as engaged in a Temporary Employment Service, TES), places up to 71 per cent of the total analyzed sample within manufacturing. However, reliable statistical data at the sectoral level are still difficult to obtain. In general, labour-brokered workers

can be employed on temporary terms or on a project basis; in some cases, however, their contracts may also be rolled on for years. They usually receive significantly lower salaries than their permanent colleagues and do not have access to most of the available security benefits. Most often, such workers are not unionized.²⁷ Overall, while outsourcing generally entails the acquisition of an entire service or process from a subcontracting company, the labour broker employment relation often involves a simple change in the employer the workers report to. A detailed study conducted by Englert (2018) with the Heineken South African labour-brokered workers shows how often workers participating in the same productive process may be placed under different employers and be subject to different pay and working conditions. Regarding the automotive industry, an ongoing investigation by the author in Gauteng Province shows how the use of labour brokers within large car assembling firms is an existing phenomenon, despite large unions may tend to underplay it.

While an increasing reliance on casual employment relations must be recognized, a strong attempt to counter this trend must be also acknowledged. In comparison to other countries, the South African labour movement has been actively engaged in fighting a possible race to the bottom, and any attempt to take away labour rights, which were obtained with such difficulty. While NUMSA campaigned and achieved a ban on labour brokers within the metalworking industry,²⁸ organizations like Outsourcing Must Fall (OMF) and the Casual Workers Advice Office (CWAO) have been consistently fighting against the phenomenon and for casual workers' rights. The former has been particularly active in defending and organizing layers of outsourced workers within public institutions (universities, public service, transport etc). The latter has been directly involved in a high number of cases related to the application of section 198 of the South African *Labour Relations Act* (LRA), which stipulates the right for casual and temporary workers to be made permanent under the mother company, after three months of continuous employment.

Unfortunately, such initiatives have also been followed by corporate reactions and restructuring. The most recent way to overcome the limitations imposed by section 198 of the LRA and the ban on labour brokers won by NUMSA seems that of employers shifting casual labour from labour brokers to “service providers”, which are not covered by section 198, to continue operating within the client company. In addition, the latest attack on labour, exercised

through the approval of the new Labour Bills,²⁹ further reinforces such processes, contributing to the precarization of already vulnerable workers from the least protected segments.

Casual Auto Workers' Voices: Stories of Discrimination and Exploitation

During the past eight to ten years I had the honour of talking to many casual workers employed in the auto industry, both in India and in South Africa. In the Indian NCR, these were contract workers employed by both OEMs and ancillary companies; in South Africa, they were either workers from auto component suppliers or outsourced workers providing “services” within OEMs. Some examples will help illustrate their overall conditions and awareness of the injustice linked to their status. Given the scope of the paper, these are not detailed accounts, but still they can be considered as paradigmatic of a broader system.

In the Indian NCR, the 2011-12 Maruti case (Monaco, 2015; 2017) disclosed widespread abuses of the contract labour system, with casual workers often outnumbering permanent employees, frequent anti-union behaviours and fierce repression. Recalling the story of their dispute, a former worker leader³⁰ remembers how:

Workers that were already permanent in the Maruti Gurgaon plant were employed on a contract basis once they were transferred to the new Manesar plant opened in 2006. In the new plant, production rhythms were faster and facilities inadequate (no canteen, no medical facilities). We had no transport allowance, and leave was linked to production performance, with bosses often claiming we hadn't earned any holidays. There were three contractors at the plant, often changing after 6 months. Workers only referred to supervisors but did not really know who their boss was. When we went on strike (2011) our main request was to ease working conditions, they were too tough. Straight after the strike, 546 workers were terminated, mostly casuals. Afterwards, it was difficult to find other jobs, as Maruti was on the “blacklist”. After the July 2012 accident, many workers were jailed, and the struggle became a huge legal battle.

Workplace discrimination, difficult working conditions, poor pay received by the casual workers and the repression of any form of protest did not only occur at Maruti. It was common – and still is – to most component suppliers that cater the OEMs in the Gurgaon–Manesar area, as well as in the neighbouring industrial sites. Worker leaders from Mark Exhaust,³¹ a component supplier operating in Gurgaon and catering to both car and two-wheelers manufacturers in the area, also tell of a prolonged dispute revolving around the contract labour issue:

Our struggle started around the issue of regularization. After years working for the company on a contract basis, and promises to be made permanent, only 10 out of 550 workers were regularized. These were young, not the most experienced, but certainly close to management. The other 540 contract workers were left behind, earning five times less than permanent colleagues,³² with scarcity of accommodations and very poor facilities in the area, no job security and families to feed. We started meeting, secretly,³³ until we demanded a union. After the union was finally registered, coercion and victimizations by the company started. We called a strike, management shut the company and terminated all of us (550 workers). Eventually, all new workers were employed, and the union was de-registered, because our contractor had no legal status.

Differential treatment between contract and permanent workers, poor working conditions, lack of security and opposition to union activities are now the norm in the NCR auto cluster. Similar practices also affect industrial plants operating across the border, like in Rajasthan. The Daikin workers from Neemrana are currently fighting against the massive use of contract and fixed-term workers (up to 90 per cent in the area), for a minimum wage, against indecent working conditions and against police repression and criminalization of the workers movement. Their struggles have by now involved many other companies in the Neemrana industrial site and have seen permanent and precarious workers striking together, despite ongoing arrests and terminations.³⁴

In South Africa, production workers within OEMs are

largely protected by NUMSA. However, a process of casualization also affects the auto industry to the extent that labour brokers, often registered as service providers to bypass the restrictions imposed by section 198, manage to penetrate large factories despite the ban on brokers, and the use of outsourcing and labour brokering is still frequent amongst suppliers. Labour broker workers from different companies operating in the Rosslyn area (Pretoria) confirm the presence of contractors also within assembling plants. Workers from Averda, a company that does recycling inside Nissan, and Rhino Linings,³⁵ providing rubber covers for the OEM, report how:

We often perform the same task as permanent workers employed by the mother company, but we get lower pay.³⁶ Unlike Nissan workers, we get no medical aid. On the shop floor, there's frequent discrimination between black and white. We don't get bonuses, and if we get an increase it is not the same that Nissan workers will get.

In addition, Averda workers describe how:

We were shifted from one employer to another (Waste-man to Averda) all of a sudden, but we didn't receive a different contract. We have no benefits, our salary did not change for years. [Before the new Labour Bills] we receive an hourly rate lower than the minimum wage (15.95 ZAR p/h in Sept 2017). We get no medical aid, neither sick leave. We were shifted from a weekly to a monthly pay (4 against 4.3 weeks) with no increase. We are put on a cleaning contract, but we don't do cleaning. We do overtime but we get no extra pay.³⁷

Understanding Precarity Through Continuity and Change: Status, Organizing and Institutions

The discussion of the global context and the examination of two case studies are here used to derive both theoretical and political conclusions, not only on the nature and the degree of casualization in the sector but also on political-institutional responses to it. The focus is on three main aspects. First, the nature of such precarization processes: to what extent are these categories of workers new? How can we characterize this supposedly emerging layer of the industrial

working class? Second, what are the current forms of organization put in place by casual workers in the analyzed contexts, and what are the obstacles to their political representation and full participation in the bargaining process? Third, what are the trends in terms of institutional responses to casualization, and what can we learn from both cases?

Starting from the nature of these apparently new forms of work, it is crucial to avoid simplification of the debate and to go beyond buzzwords and trendy controversies. The first issue concerns the apparent novelty of the observed casualization processes and of the “new” forms of work absorbed by the system. While it is true that the employment of informal and casual labour in the Global South has been a long-standing issue and it often represents the norm rather than the exception, it must be acknowledged that precarization is intensifying and expanding. In the Indian case, employers are not only ignoring any restriction to the employment of casuals but are denying the possibility of regularization to layers that would have previously led, more easily, to permanent positions (e.g., apprentices, see Amit and Jyoti, 2018). In the South African case, the frequent attempt to overcome principles stated by the law and rights won by the union movement also represents a worrying phenomenon. In this regard, I see descriptions of widespread precarity as a new, unprecedented phenomenon (Standing, 2011; 2014) as theoretically and historically problematic, but opposing claims that point at how informality has always existed (Munck, 2013; Scully, 2016) as politically risky. The latter, in my view, might tend to downplay the urgency and the serious need to counter the phenomenon, which is proceeding fast indeed. As far as the capitalist attack on labour rights is concerned, it is proceeding way faster than the capacity of traditional unions to renew themselves or for labour movements to organize effectively against it.

With reference to the geographical nature of precarity, an analysis of its spread within a traditional manufacturing sector within two Southern emerging economies can also occupy an intermediate place between the two extremes of the above-mentioned debate. While Standing (2011; 2014) has been accused of Northern/Western centrism, broad analysis of precarity and casualization “in the Global South” (Scully, 2016) also have their limitations. In this sense, not only is a closer investigation of local contexts and labour regimes necessary, but it must also be driven by solid, grounded research,

going beyond statistical definitions and meeting the qualitative experience of casual employment.³⁸ Here, I am not outlining an accusation towards any individual piece of research, but rather inviting contemporary studies of casualization and precarization to be more grounded, as a whole.³⁹ On the other hand, while context and history matter and affect the local casualization regime, the analysis of global manufacturing sectors and a comparative study of the interaction between global and local within global supply chains may also serve to highlight continuities and similarities occurring across the globe. In this regard, as far as building global solidarity represents an imperative to act, denouncing recurring patterns and explaining to workers how their condition resembles that of others in a different geographical context may contribute to breaking isolation and give courage to otherwise invisible actors. The last point related to the nature of the precarious experience concerns the class identity of these new lawyers of workers. This is a complex issue, of no easy discussion or solution. In this regard, I would place emphasis on empirical findings that confirm how delicate this matter is and how cautious one should be in defining a common class identity. Looking at the two cases I had the honour to witness, I would point at the following. Workers often perceive the arbitrariness of being assigned a determined status. Perhaps in manufacturing more than in other productive sectors, casual workers are aware that they frequently perform the same tasks and possess the same skills as permanent workers, often side by side on the same assembly line. Similarly, contract workers can see that they execute the same job as colleagues working under a different employer.⁴⁰ While this raises an awareness of the injustice experienced and often leads to a better understanding of the precarious employment condition, it also shows how lines of fragmentation are often randomly applied, mainly in order to lower costs and hamper labour organizing. In turn, this may lead to challenging the idea of a “different class identity” of workers who see themselves as entitled to the same treatment as luckier colleagues placed on less precarious terms. Recently, a worker leader from Mark Exhaust in Gurgaon reported how even regularization was enacted on random criteria, or responded to preferential treatment, dividing workers according to unjustifiable differentiations.⁴¹ In this sense, both the perception of arbitrary divisions and the constant demand to be regularized can be read as an indicator of false difference, whereby casual workers feel they

should belong to the same group as their permanent counterparts. How does this create a different, or new class identity? This is arguable. Isn't this rather the perception of an arbitrarily different treatment within the same class group? This should be an ongoing discussion. In addition, the very existence of workers with the same levels of skills and technical expertise but placed on different statuses may lead to questioning the presence of a distinguished class group characterized by a specific technical composition within the relation of production. What places the precarious worker on a different level, except the different relationship with the employer (and with the state, in case of a public provision of social benefits and rights, see Scully, 2016)?

Shifting from a discussion of the nature of the casual employment relation to a reflection about organizing forms observed in the two contexts, several points can be made. Undoubtedly, the extent and the diffusion of casual employment practices in the Indian industry, together with working and living conditions significantly worse than in South Africa, have determined a much higher frequency and intensity of labour protests involving casual workers. Together with the higher number of protests, the Indian case seems to have been characterized by a higher level of independence of casual workers movements from traditional trade unions.⁴² On the one hand, what can be seen as a major weakness of the Indian labour movement, i.e., the much higher number and the consequent fragmentation of existing trade unions, also represents higher pluralism of organizing forms and more leeway for autonomous actions. On the other hand, the high incidence of independent actions and the more and more frequent formation of small, independent unions also signals a substantial problem of representation,] and the detachment between traditional trade unions and new workers movements (Monaco, 2015).

In the South African context, NUMSA's "monopoly" over organizing in the auto industry represents both a strength and a weakness: on one side, it is an indicator of strength and control on the workplace; on the other, it also suffocates the possibility of non-aligned movements or actions.⁴³ However, the centralization of union power around NUMSA is also counterweighed by a distinction between different bargaining fora.⁴⁴ Overall, this factor makes bargaining along the supply chain more difficult and creates a further line of fragmentation between differently protected workers.

In terms of political representation, there are also differences between the two cases.

In the Indian context, while NCR companies are constantly hampering the formation of new unions, the triangular relationship and the frequent lack of legal compliance of contractors further complicates the registration of new, plant-level unions.⁴⁵ In addition, many union charts still formally address only permanent, regular employees, making it difficult for casual workers to join the main company union. In South Africa, union registration and the access to principal unions on behalf of casual workers remain easier, and labour rights like the right to strike and to appeal arbitration bodies are still an individual entitlement.⁴⁶ Furthermore, even non-union organizations (like, for example, the CWAO) can conduct negotiations and represent workers. In sum, the centrality of the union form in South Africa, compared to India, seems to be more a matter of “physical strength” of existing organizations than an actual necessity, whereby the individual worker and non-union organizations enjoy rights that in other countries are reserved for unions only.

Finally, another distinctive feature about casual workers organizing pertains to the composition of workers taking action: in the Indian NCR, not only has a much higher participation of casual workers been observed, which contrasts with the significant vulnerability of workers in the area, but also a peculiar solidarity between permanent and casual workers, often striking together.⁴⁷ In the South African case, communication and joint actions between permanent and casual workers seem more rare and difficult to achieve. Several factors may explain such a situation: more rigid separation within the workplace, stronger attachment to the job and relative fear to lose it in a context of much wider unemployment, stronger interest to keep the benefits associated with union membership (and stewardship) etc. In India, there is no linear explanation for the unprecedented solidarity recorded in the recent NCR labour protests, but that has certainly been a distinguishing feature in most of the latest uprisings. To conclude, as casualization and precarity take different shapes in different contexts, the same can be said with reference to forms of organizing. These highly depend on the material circumstances and on the balance of forces between casual workers movements and traditional labour organization. However, albeit to different extents, the inclusion of casual workers within

traditional unions still seems to be very low in both cases, reflecting in the emergence of independent/contract workers unions in India and in the frequent lack of unionization in the South African case.⁴⁸

A last element that affects the dynamics of the casualization regime in the two cases is the institutional setting that surrounds it. This includes both the existing labour laws that should regulate the casualization process and the response of state institutions to casual labour issues. In the first instance, despite the current attack to existing laws, South Africa owns much stronger legal tools, embodied in section 198 of the LRA. This legislation, which states the obligation to make labour broker workers permanent after three months of service, definitely represents an important instrument for the organizations engaged in the anti-casualization struggle. In India, labour regulations limiting the use of casual labour do exist but are massively ignored or circumvented. In addition, the latest use of apprentices and trainees as a further pool of disposable labour appears to have been facilitated by the same government schemes for “skills development” that have practically legalized the wide use of such categories of workers.⁴⁹ Finally, the relationship between casual workers and state institutions has also been different in the two cases: the use of institutional violence, of state repression, has been evidently increasing in India, with a much wider criminalization of labour protests (see Maruti, and most recent Daikin case). In South Africa, strikes and protests are more regulated: whereas violence occurs, it is often of an informal nature, involving private security and more “selective” repression (individual targets, informal use of weapons but fewer arrests and long-term convictions compared to India).

Conclusion: Understanding the Local Embeddedness of Casualization Regimes

Through the analysis of two different casualization regimes, both part of the same global industry, this article sought to shed light on the relationship between global and local within global production. In this regard, global competitiveness and the integration within international markets cannot be built without reliance on local labour regimes. Even more, the competitiveness of global manufacturing today seems inseparable from the search for a flexible, disposable, replaceable (and controllable) workforce. In this sense, the presence of a casual labour regime appears as a desirable

competitive advantage for global manufacturing. At the same time, it is neither only global corporate strategies nor local institutional settings that can explain casualization, but the interaction between the two and the local embeddedness of global production.

Building on comparative field research, the paper also aimed at intervening in a broader debate on precarity and on the definition of a “global precarious class”. In particular, it engaged with critiques to Standing (2011; 2014) and to his conceptualization of the “precariat, as a new, emerging global class”. To start with, the paper responded to the need, highlighted by Breman (2013), to look at precarious regimes in their variety and specific determinations, with the aim to derive commonalities and continuities on which to build solidarity and political action. This is the main purpose of such a comparative study.

Overall, while acknowledging a global deterioration of working conditions and a widespread attack on labour, the paper questions the possibility of employing universal categories in the definition of a global precarious class, seen as a new phenomenon. It underlines the importance to carefully analyze continuities and changes, to avoid easy aggregations (Global North vs Global South, for example) and to look at the local construction of precarity as a lived experience. In this regard, the paper discusses how, even within global production, the development of a national industry, the specificities of the local labour market and the institutional setting affect the nature and the dynamics of a casualization regime. In turn, these also influence the way casual workers perceive their status, build an awareness of their condition, relate to existing labour institutions and organize. Ultimately, building global solidarity and more effective political actions to counter casualization will not be possible without a careful consideration of the local, material reality of precarity on the ground.

Endnotes

1. Lorenza Monaco, Senior Lecturer, African Institute for Economic Development and Planning, College of Business & Economics, University of Johannesburg)
2. In this regard, see the very interesting response to Standing formulated by Erik Olin Wright (2016).
3. This is done elsewhere: for example in Monaco (2015) on class formation in the Indian auto sector.
4. On this point, Standing attracted a number of quite powerful responses, too. See for example Allen (2014), Braga (2016), Breman (2013), Jørgensen (2015).

5. Field interviews: NTUI, October 2017; Workers Solidarity Centre, January 2019.
6. Confederation of Indian Industries.
7. Society of Indian Automobile Manufacturers.
8. Indian Auto Components Manufacturers Association.
9. National Association of Auto Manufacturers of South Africa
10. National Association of Auto Components and Allied Manufacturers.
11. Automotive Industry Development Centre.
12. Import tariffs are still higher than in many other countries.
13. The local content requirement set at 50% in the 1950s was increased to 80% by 1960-61 and to a further 85% by 1965-66 (Ranawat, Tiwari 2009).
14. Original equipment manufacturers, i.e. large assembling companies.
15. Medium & heavy commercial vehicle segment.
16. <http://timesofindia.indiatimes.com/business/india-business/1-5-cr-people-to-be-employed-in-automobile-sector-by-2022/articleshow/47977138.cms>. Retrieved 22/02/2019.
17. Black economic empowerment, term referred to the need to promote racial transformation within the economy.
18. Interview, NUMSA, 1/12/2016.
19. For 'organized sector labour', Harriss-White and Gooptu (2001:89) intend those 'workers on regular wages or salaries, in registered firms and with access to the state social security system and its framework of labour law'. On the other hand, one of the most widely accepted definitions of unorganized sector is the one provided by the NCEUS (2009:12), i.e. it consisting of 'all unincorporated private enterprises owned by individuals or households engaged in the sale and production of goods and services operated on a proprietary or partnership basis and with less than ten total workers'.
20. Either for express clauses specified in union charts, covering only permanent workers, or for lack of inclusive practices on behalf of traditional unions, hardly coping with the changing labour scenario.
21. Field interviews, 2012, 2017 and 2019.
22. Field interviews conducted with scholars based at the Indian Society of Labour Economics, with reps from CITU, INTUC, HMS, IndustriALL (different rounds, 2012 and 2017) and with activists from the Gurgaon-based Workers Solidarity Centre (2017 and 2019).
23. Recent IndustriALL- led anti-casualization initiative in Tamil Nadu, for example.
24. Interview, NTUI, October 2017.
25. CITU and NTUI field interviews, October 2017.
26. Amit and Jyoti (2018) describe how in the NCR auto industry production has been progressively shifted onto a whole set of workers, not even recognised as such, employed on casual terms: diploma trainees, student trainees, diploma apprentices etc.
27. The way the same government is seconding corporate requirements in this sense is evident in the recently approved Labour Bills, May 2018.
28. Interviews, I. Schroeder, CWAO, 2017, and L. Phanyeko, OMF, 2019.
29. Interview, N. Bodibe, NUMSA, 2017.
30. The 2018 Labour Bills include a significant attack on the right to strike, an agreed minimum wage well below what is deemed a decent living wage, the

proposed elimination of the sectoral determination in the sectors not covered by the main bargaining fora, new bargaining rules that mostly favour large unions. Meetings with the Scrap Labour Bills campaign, 2018.

31. Interview with R., Maruti workers leader, Workers Solidarity Centre, Gurgaon 25/01/2019.
32. Interview with Mr Singh and Singh, dismissed worker leaders from Mark Exhaust. Gurgaon District Court, 16/01/2019.
33. At the time of the dispute, contract workers were earning 10-12,000 INR, permanent workers up to 60,000.
34. No gatherings allowed in the factory.
35. From a meeting with Daikin workers, Delhi University, 22/01/2019. See also <https://hrln.org/fact-finding-report-violence-unleashed-upon-workers-by-daikin-in-connivance-with-the-state-police/>. Retrieved 16/02/2019.
36. Meetings with workers in Rosslyn, 29/09/2017.
37. These companies are officially registered as service providers, so they don't fall within the section 198 and workers belong to different bargaining fora.
38. Following the meetings workers used to have in Rosslyn, outside the factory plant, their leader was terminated.
39. A good example in South Africa is the work conducted by Englert and Runciman (2019, forthcoming).
40. In relation to this, I would like to highlight the Notes from Below experience (<https://notesfrombelow.org/>) in the UK as particularly interesting. I also participated in some of their initiatives and I was very impressed by the solid attempt to connect labour activism and research.
41. See for example, Mark Exhaust case – January 2019 interviews, Gurgaon.
42. The workers first took action when young, inexperienced workers closer to manager were regularized before their senior, more experienced colleagues: this made them question the criteria used for promotions and regularisation. Interview held in Gurgaon, 20/01/2019.
43. Interviews with NTUI (2017) and Workers Solidarity Centre (2017 and 2019). For an analysis of independent trade unions in India see also Hensman, 2011.
44. See Nissan case, 2014: <https://www.dispatchlive.co.za/news/opinion/2014-08-01-new-union-in-anc-fold-targets-prodigious-numsa/> (retrieved 16/02/2019), and interview with former Nissan shop steward, sept 2017.
45. One covering OEMs/manufacturing plants (NBF – National Bargaining Forum), one grouping component suppliers (MIBCO – Motor Industry Bargaining Council) and sectoral determination for companies/suppliers falling outside of the metalworkers sector). From interviews with A.Mashilo, former NUMSA chairperson, 2017.
46. Interview with Mark Exhaust workers and their CITU legal advisor, Gurgaon, Jan 2019.
47. Interviews at CWAO, 2016-2017.
48. From interviews with Workers Solidarity Centre, 2017 and 2019. See also Monaco, 2015 and 2017.
49. Interviews and meetings at CWAO, 2016 to 2018.
50. Interviews, NTUI, 2017.

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