

THE SMALL ENTERPRISE ENVIRONMENT IN ZIMBABWE: GROWING IN THE SHADOW OF LARGE ENTERPRISES

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1 INTRODUCTION

The article examines how small enterprises compete, cooperate, and specialise on the local level in Zimbabwe. The analytical approach is inspired by flexible specialisation and enterprise network studies in the sense that small enterprises are examined as integral parts of their industrial and socio-cultural environment. It is shown how current small Zimbabwean enterprises face a double weakness: they are competing with long-established, large competitors, while there are only weak industrial and social networks among small enterprises. Because of this weakness the article advocates linkage — building to large firms and not small firm clusters as the main strategy for small enterprise development. The large firms possess greater technological knowledge, more advanced organisational capacities, and marketing channels, from which the much weaker small enterprises can learn and thus improve their operation. This requires, in turn, policy intervention towards the large firms.

2 LESSONS FROM THE FLEXIBLE SPECIALISATION PARADIGM

This article uses the flexible specialisation literature¹ as inspiration for the methodological design of a small enterprise study rather than as a concrete search for cases resembling European experiences of clustering, flexible technologies, etc. Small enterprises are regarded as a range of heterogeneous units, which are part and parcel of a (large) industrial and socio-cultural environment, and not as isolated units to be counted and measured. This perspective transcends former approaches to small enterprise studies in developing countries in at least two aspects.

Firstly, the flexible specialisation literature provides more powerful arguments for small enterprise efficiency than the neo-classical arguments of optimum factor utilisation. While 'informal sector' studies argue that small enterprises basically are efficient because they use ample labour instead of scarce capital, the flexible specialisation argument for small enterprise efficiency rather focuses on their external relations. Small enterprises are not more or less efficient *per se*, but small-scale production can be as efficient as large-

scale production if external economies of scale and scope are exploited. Moreover, small enterprises are not to be regarded as a 'sector'. Many small enterprises do what large firms cannot do or do not want to be bothered with, thus making a direct comparison between large and small enterprise efficiency invalid (Pedersen 1989).

Secondly, the flexible specialisation literature documents both present and historical large differences in industrial organisation and the particular role of small enterprises (Sabel and Zeitlin 1985). Small enterprises are not only a recent success story, spurred by advanced market segmentation and new computer technologies; factors, which can hardly be transferred to poorer countries. Historically, small enterprises have not occupied the same inferior position in all countries. Rather, their strength has been affected by the degree of large firm domination, state policies, and differences in the socio-cultural environment. Thus, generalising suggestions for promotion of small enterprises must be replaced by analyses of the specific industrial, political and socio-cultural system in which small enterprises operate. This is undoubtedly also true in developing countries.

The following empirical analysis applies such an 'environment perspective' on small enterprises in Zimbabwe.

3 ZIMBABWE: THE HEARTLAND OF LARGE ENTERPRISE DOMINATION

Contrary to the small firm resurgence in Europe in the 1970-80s, the Zimbabwean manufacturing sector has moved towards increased plant centralisation (Table 1). The employment in small- and medium-scale enterprises with less than 100 employees declined from 19 per cent of the manufacturing workforce in 1977 to 15 per cent a decade later, at the same time the total number of employees in manufacturing increased slightly from 141.223 to 168.005. The somewhat similar distribution in terms of output indicates that production efficiency per employee does not rise significantly with increasing enterprise scale.²

More striking than one decade's concentration

¹ The flexible specialisation literature is broadly understood as the body of industrial studies, which focuses on small enterprises' internal and external organisation and assigns importance to the strategic choice of individual enterprises (see Hirst and Zeitlin 1991).

² The decrease in output in relation to employment in the smallest enterprise group, however, indicates a relative decline in output per labour unit for the small firms, which may be an effect of the significant white exodus in the early 1980s.

Table 1: Trends in the size and contribution of manufacturing units by number of employees in Zimbabwe (in per cent)

Indicator	Number of employees in enterprises ¹					Total
	1-50	51-100	101-500	501-750	Over 750	
Employment (%), 1977	10	9	32	22	26	100
Employment (%), 1986/87	8	7	31	9	46	100
Net output (%), 1977	9	8	31	15	36	100
Net output (%), 1986/87	5	6	31	9	49	100

Source: Rasmussen 1992: 110

¹ Enterprise units denote the smallest unit of independent production and service functions. Firms might own several enterprise units.

tendency is the low percentage (below 20 per cent) of small enterprises in Zimbabwe.³ Compared with the main industrialised countries for which comparative data exist, only the UK touches a similar low, although growing, share of small enterprises (Sengenberger and Loveman 1988). In countries like France, Italy, Denmark and Japan small manufacturing enterprises with less than 100 employees employ between one third and two thirds of the manufacturing workforce. This structural similarity between Zimbabwe and the UK is hardly a coincidence, given the fact that the bulk of the Zimbabwean industrial investment, along with the white immigration and industrial culture, originates from Britain and not, say, Italy.

The entire industrial sector is dominated by local whites and to a certain extent by foreign capital, while blacks historically have been excluded from urban-based business activities. The almost total eradication of black crafts in the beginning of the century, the white skill monopoly, and the profound market penetration by the large firms have streamlined the demand structure and hereafter more or less 'vacuum cleaned' the domestic market (Rasmussen 1992). This vacuum cleaning was augmented by international sanctions during the 1960-70s, which spurred domestic large firms to produce a wide array of products beside pure mass production. Thus, after Independence in 1980, black small enterprises have faced a huge skill and capital backlog *vis a vis* large enterprises, and a market where both mass produced items and many niche products are provided by large firms.

This industrial structure, enforced by the former racist

government, has not been challenged by the present majority government. Industrial policies have been characterised by continuity rather than change (Riddell 1988, Ostergaard 1991). To mention a few examples, foreign currency during the 1980s has still been allocated by government to specific (large) firms, and the educational training system has been geared completely towards the needs of large enterprises (Rasmussen 1992). Small enterprise support policy has been carried out by the Small Enterprise Development Corporation, separated from 'real' industrial policy which is carried out by the Ministry of Industry. Not surprisingly, such isolated initiatives have had limited impact (Sverrisson 1990).

This is, in brief, the macro-environment which small black-owned enterprises face in today's competition. Despite this, small enterprises have emerged in quite a large number since 1980. The following section turns the perspective to the local level to examine how enterprises operate in their immediate local environment.

4 ENTERPRISE LINKAGES AND THE LOCAL ENVIRONMENT

A survey of 70 local enterprises in three small towns, varying in size from 5,000 to 40,000 inhabitants, was carried out in 1989. Inspired by the flexible specialisation and Scandinavian 'network studies' literature (see Illeris and Jakobsen 1990) the survey methodology focused on enterprise diversity in competition, and enterprise linkages to their industrial and social environment.⁴ Industrial linkages and

³ The relatively limited number of informal/unregistered enterprises (Moyo *et al* 1984, World Bank 1985) would not alter this low percentage of small production enterprises significantly.

⁴ A comprehensive presentation of methodology and survey results is found in Rasmussen (1992). Detailed analyses of two of the towns are presented in Rasmussen (1990) and Rasmussen (forthcoming).

competition over price, quality, service, and product scope take place within (sub) sectors and not between unrelated small enterprises in various sectors. Therefore, a case study of one specific sector served as a more appropriate methodology than a sample survey of a wide range of small enterprises across sectoral boundaries.

The largest local production sector, the building-related sector, broadly defined, was chosen for this purpose. Both construction, manufacturing, and service enterprises (contractors, plumbers, building material producers and merchants, etc.) were included with the purpose of disclosing upstream and downstream linkages. Interviews were conducted with as many different enterprises as possible, both small and large local firms, and company branches, whether privately, jointly, or state owned. The other 'ends' of the enterprise linkages (banks, suppliers, machinery repair enterprises) were also interviewed. This survey was accompanied by a survey of market segmentation and consumer preferences, embracing 85 customers (houseowners, shops, public authorities, etc.).

Designed in this way, the study does not pretend to be statistically representative. The strength of this case-study approach is rather to disclose what cross-sectoral samples lose: the industrial dynamics of competition, market segmentation, and enterprise strategies in relation to their environment, where some enterprises succeed, many stagnate and some fail.

4.1 Enterprise specialisation and market segmentation

The enterprises generally showed a considerable specialisation with respect to market segments, but less with respect to products. Well consolidated owner-managed enterprises compete less over price and more over quality (producers, contractors) or service and reliability (merchants). Smaller owner-operated enterprises rely mainly on price competition over standardised products, although the current Zimbabwean building boom has fostered an emerging product specialisation among some producers.

In construction, large (often city-based) contractors cater for practically all institutional and parastatal building activity, which all require public tenders. Local, and mostly small, contractors are unable to purchase materials required in such contracts. Instead they construct local shops and high-cost housing. Further down the industrial hierarchy, unregistered builders and building cooperatives undertake the bulk of low-cost housing construction.

In building materials, mass produced items from the city, which are distributed through local building

merchants and branch outlets, capture by far the largest share of the rather homogeneous building material market. This unsegmented market leaves only small pockets to be filled by local manufacturers, who basically copy the mass produced items and sell them at slightly lower prices (and frequently at a slightly lower quality). However, the increasing local demands have initiated an embryonic product specialisation among local producers. Some have recently begun to produce custom-made window frames, special burglar bars, specialised building blocks, etc., which the large enterprises do not produce, or at least do not distribute to distant markets. Despite the dominant direct price competition, many small producers still manage to prosper, mainly by minimising both labour and especially distribution costs by selling directly from the workshop. In this way they compensate for absent scale economies in their production process by achieving a high distribution efficiency.

4.2 Inter-firm linkages and enterprise cooperation

As in most countries, inter-firm linkages are common in all construction-related enterprises due to the required flexibility in this sector. Most registered contractors (62 per cent) employ sub-contractors and an additional 23 per cent serve occasionally as sub-contractors to larger enterprises. By contrast, few unregistered builders employ sub-contractors, whereas most work occasionally as labourers for small and big contractors. Not surprisingly, more than half of the building construction specialists (plumbers, carpenters, electricians) carry out sub-contracts for building contractors. However, all these enterprise linkages do not show any evidence of enterprise cooperation in terms of product innovation, although most linkages were carried by inter-personal knowledge.

Among manufacturing enterprises inter-firm linkages are much less frequent. Almost all cater directly for the end market: the private consumers. Few enterprises, owned by local whites or Asians, serve as stable input-suppliers to other enterprises (some medium-scale manufacturing firms supplying wholesalers and large construction companies). These relations were often based on mutual personal knowledge and take form as enterprise cooperation (e.g. agreement on a certain inter-firm division of labour). However, the rapidly growing market for building products and the subsequent need to avoid shortages and rapid cost increases, has encouraged large white merchants and contractors to identify small black manufacturers as input-suppliers. As a result, a few small manufacturers, who have improved the product quality to an acceptable level, have started to serve as input-suppliers for the first time. In one case, some skilled welders from a ceased firm established their own

welding enterprise and managed to get a supply contract with a local white-owned wholesaler, who could distribute their window frames all over the province. Still, such cases of black-white enterprise interaction are exceptions to the rule, and in all instances they are not founded on personal relations.

More surprisingly, inter-firm trade and enterprise cooperation are almost absent among black-owned manufacturers, even when they possess different machinery, which could be rationally utilised for enhancing the division of labour. For example, only one black welder in Masvingo had a rare and costly sheet iron bending machine, but he and other welders declined to specialise and leave parts of the production process to each other.

Thus, whereas the flexibility requirements in construction are met by widespread sub-contracting, the ascending product specialisation among manufacturing enterprises has not been accompanied by a similar increase in the division of labour between enterprises. They still undertake all stages in the production process themselves. This lack of inter-firm linkages is partly explained by economic/technical factors, such as a low level of technical division of labour within small enterprises. But a division of labour between enterprises possessing different machines and cooperation in material acquisition could be mutually beneficial. In fact, a few black entrepreneurs have tried to organise common bulk purchases, but met resistance and distrust from other similar enterprises. Conversely, the white/Asian enterprises cooperate in several ways. This points to the importance of long term social networks and development of trust relations.

4.3 Professional and social networks

As opposed to a widely held belief, the entrepreneurs are, with a few exceptions, neither dispossessed destitutes nor excluded from large industry employment. Their educational level is above average and most have voluntarily chosen to become independent after many years of work in the private or public sector. This is also the case for many of the smallest entrepreneurs with one or two employees.

The entrepreneurs' previous employment and geographical movements influence their social and professional networks. Here two types of entrepreneurs can be discerned. As is common in many countries, contractors and manufacturing entrepreneurs have generally followed the 'trade route', i.e. some years of formal vocational training followed by years of skilled work in large enterprises before starting on their own back in their home region. In this way, local manufacturing enterprise formation is a spill-over effect of the large scale sector rather than a result of

locally rooted skills, as often emphasised in European studies. Such entrepreneurs may benefit from key contacts in the city (e.g. a supplier). Being relatively newly established in the local town, they tend to rely more on the family network than on local industrial contacts.

The trade route renders the entrepreneurs with a decent level of technical skills, but without crucial managerial skills. Such managerial skills are virtually impossible to obtain in large firms, where the rigid technical division of labour precludes insights in managerial and marketing decisions taken by white collar employees. Consequently, small contractors lose money where profits are normally gained in construction: in proper site management, in stage planning, and in negotiable building alterations in the course of construction.

As opposed to this trade route and migrant worker tradition, the local black merchants have worked most of their life in the given location, starting as small traders and in some cases ending up as wealthy merchants in building materials and a range of other goods and services. In this way, they have acquired a life-time's knowledge of the locality, ample social networks, and not least, a good reputation. These 'qualifications' are crucial, especially for merchants selling almost the same products at roughly the same price as their competitors, the national companies' branch outlets. Thus, opposed to the trade route entrepreneurs, the merchants rely to a large extent on non-family local networks.

Apart from the long-established whites/Asian and large black merchants, the small towns are to a large extent nobody's town. They are dominated by inhabitants, who reside here more or less voluntarily and only for a temporary period of time, (this is the case for the two surveyed district centres, while a bigger old 'white town' is more urbanised in all senses). In addition to the high population turnover, a large share of the 'locals' working in town actually reside in the rural hinterlands. Such dispersed habitation further weakens the local urban social network.

4.4 Distrust and low exit costs

The weak local embeddedness of skills and social networks in such towns with a rapid population turnover breeds a climate of mutual distrust among economic actors. This lack of trust contributes to the limited extent of inter-firm trade and the virtual absence of enterprise cooperation. Creating trust takes time and requires a certain stability and duration of residence. Secondly, maintaining trust requires that the economic or social repercussions of breaking trust relations are severe. If not, it does not 'cost' much to break the trust: the 'exit costs'⁵ are low.

⁵ This concept is inspired by Hirschman (1970).

The existing trust relations among white/Asian entrepreneurs is primarily a consequence of the fact that their social exit costs are high. If an entrepreneur belongs to a minority ethnic group (or another closed social group based on religious faith, moral conduct, etc.), the consequence of distrustful behaviour is not only a loss of business partners, but expulsion from the social group as such. Evidently the longer permanence of urban residence among these minorities further contributes to preserve existing trust relations. Beside the fear of repercussion, inter-firm trade and enterprise cooperation among minority actors evidently strengthens such a minority *vis a vis* the rest of society.

The notion of 'exit costs' can undoubtedly explain much of the striking dominance of business affairs by ethnic or religious minorities, even in African countries where governments have been hostile towards these minorities (see Iliffe 1983:45f).

For black entrepreneurs not firmly rooted in the local environment, or without their own urban dwelling, the exit costs are relatively low. If an entrepreneur betrays or cheats a fellow entrepreneur or a customer, there is little scope of social or economic repercussions. Thus, entrepreneurs hesitate to establish more intimate relations with others (e.g. pooling money for bulk supplies), since such an increased economic vulnerability is not matched by an increase in sanction possibilities.

4.5 Lacking family succession

A third factor, lack of family succession, contributes to destabilise long term social and economic networks. Contrary to what would be expected, less than half of the entrepreneurs engage family members of any kind in the business, and less than a quarter engage the closest kin, wife and children. The respondents often added that family involvement would erode business efficiency. In the local areas, several black-owned 'business empires' existed in the 1950-60s, but all have withered away with the founder. This tendency seems to persist. The survey only identified two enterprises where a son has succeeded the father, and only 15 per cent of the entrepreneurs, who have adult sons, recommend their own profession for their children's education.

The persisting weak tradition for family succession is only partly explained by the short historical tradition for black entrepreneurship in Zimbabwe, because business restrictions only applied for larger cities. It rather points back to certain structures in family life

⁶ The formation of the Indigenous Business Development Centre in 1990 (after research termination) has attracted around 4000 black businessmen. It seems it is the first serious step to raise the voice of

and young people's aspirations. Many sons strive to become independent of their often patriarchal father and deliberately seek to get away from the father's sphere of control. The father, often unintentionally, allows for such a break by offering the children a prestigious higher education in the city. A study found that 51 per cent of the grown-up children of district centre businessmen lived in Harare or other big towns, and only 30 per cent remained back home (Göttlicher 1986:362). Having acquired a higher education and a taste for city lifestyles, it is less likely that sons are eager to return to a district centre, especially if they have to subjugate to a patriarchal father.

Thus, in a peculiar way, the successful entrepreneurs can manage to transfer some of the accumulated wealth to their children, in the form of higher education, gifts, etc., but they cannot manage to transfer the physical/organisational foundation for their wealth: the enterprise and its network. By the time of the father's death, the accumulated capital disappears from the local scene to end up with the children in the city, while the business skills and the entire network, on which the business rested, are completely lost. This limited family succession (or transformation to a corporate form) seriously obstructs black enterprises from catching-up with their large-scale competitors, who continuously accumulate market and production knowledge.

4.6 Local government and hierarchical networks

A rapidly emerging social stratification contributes to impede a sense of community feeling in these 'young' towns. The local community is stratified, thus embracing many business communities, which are more or less well-organised. These communities are crossing sectoral boundaries and are based upon personal knowledge and influence. Despite a decade of official socialist rhetoric, there is a tight and well-working relationship between local large businessmen, black or white, and local politicians/bureaucrats (who often strive to become businessmen themselves). The big businessmen are frequently consulted in local matters and are often involved in party politics, business associations or occupy other trusted positions (e.g. head of local burial society). The small workshop owners or mobile producers are not as well organised because of their atomised behaviour and they often enter a kind of patron-client relationship with a larger businessman. Consequently they have no common voice in local (not to mention national) politics.⁶ One clear effect of this is that local town planning rarely caters for the needs of small entrepreneurs, for example

black entrepreneurs in national politics. The IBDC is thus the largest interest group outside agriculture.

by allowing them stands in the vicinity of the urban market/bus terminus or allowing cost-saving combined residence and workshop buildings.

5 CONCLUDING REMARKS AND POLICY REFLECTIONS

The case study affirmed the flexible specialisation literature, that overall efficiency is not a function of enterprise scale. The survey identified a range of small manufacturing, construction, and trading enterprises, which manage to compete not only in niche markets, but also in mass-production markets, primarily by selling at the workshop gate. Thus, high distribution efficiency in small enterprises can offset large enterprises' internal scale economies in production (high production efficiency), because these large plants often have considerable storage and transportation costs. This is also likely to be valid for a long range of other sectors serving a wide geographical market.

Zimbabwe's industrialisation has been shaped in a particular way, perhaps similar to only a few other countries in Southern Africa. The white-owned large-scale industrial structure, the white skill monopoly, and the homogeneous market, largely brought about by means of state-enforced cohesion, have hampered entrance of small black entrepreneurs, even after business restrictions were lifted in 1980. This has forced small enterprises to operate at the geographical and sectoral fringes of the market.

In spite of these structural barriers, new entrepreneurs have mushroomed during the past ten years. These enterprises are not just a common bunch of informal/petty commodity producers: they differ in size, strategy, market specialisation, and business success; many fail and only few succeed. They are more appropriately seen as occupying different positions in the lower levels of the industrial hierarchy. Here, my conclusions from the building-related sector are likely to be valid for other 'easy-entry' sectors (other trading, transport), while conditions are probably even harsher in manufacturing sectors requiring larger investments and skills. In general, the local small enterprise environment was characterised by widespread mistrust, community instability, local hierarchies, and limited family succession; all contrary to what has been found in dynamic small enterprise districts in developed countries.

Thus, small Zimbabwean enterprises face a double weakness: competing with a consolidated large-scale industrial structure and being at pains to organise themselves in wellworking networks and communities at the local level.

These conclusions raise some policy issues. Small

enterprises are crucial in the industrialisation process, and not just as employment generators, as has been the principal view in Zimbabwe during the 1980s. Beside creating employment, small enterprises contribute to skill formation and, not least, to domestic competition, which otherwise is threatened by the increasing monopolisation.

With respect to promotion of small enterprises, their present double weakness makes it futile to advocate massive support for small enterprise clustering as a principal strategy for small enterprise promotion. Small enterprises are already largely a result of the overspill from the large-scale sector, for example the trade route entrepreneurs. From the analysis of manufacturing, construction, and trading enterprises in the building sector, it seems more prospective to strengthen this overspill. This can be done in two ways. One dimension is encouragement of high positioned company employees to start independent businesses. Engineers and professionals constitute perhaps the most potent group of potential entrepreneurs, having both technical skills, managerial knowledge and a professional network.

The other dimension is to strengthen large-small enterprise linkages. Zimbabwe has a large indigenous industrial capacity, but in the hands of the white minority, who operate in closed economic and social circles. These companies control the domestic industrial knowledge. Therefore, it seems more prospective to attempt to 'open up' the large firms for smaller sub-contractors, suppliers and service providers (Rasmussen 1989), than to erect a comprehensive system of state-administered direct support measures. All evidence proves that such direct measures are prohibitively expensive and have only limited impact (Gasper 1989; Späth, this Bulletin). Letting large firms relate to and 'teach' the small enterprises will cost money. But compared to the present expensive small enterprise support institutions, such 'school money' can prove more efficient in terms of enhancing small enterprise capabilities.

Small enterprise clusters might have an additional role to play, but the problem of the weak local environment for small enterprise operation must be addressed first. Here the government, or rather local governments, have a task to perform. Authorities can hardly create family succession, trust, and business stability, but they can improve the conditions for this. Important factors are the introduction of title deeds enabling entrepreneurs to mortgage their property, encouragement of local business associations, and attention to entrepreneurs' needs in urban planning. A general political decentralisation can enable and encourage local authorities to support local enterprises, but without a concomitant professionalisation of local

authorities, there is a risk of cementing the already emerging clientalism between local elites and powerful local entrepreneurs.

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