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1. General Economic Overview

Amidst a slower than expected global recovery, South African remains firmly in the throws of an economic recession. After falling by 6,4% (seasonally adjusted annualised) in the 1st quarter of 2009, economic growth contracted by 3% in the second quarter. This is the third consecutive quarter of negative growth experienced in the country, affecting most supply side sectors of the economy. Mining and quarrying and the construction sector prevented a sharper downturn in the GDP growth in the 2nd quarter. Economic growth, according to a selection of economic experts, is expected to fall by 1,8% in 2009, followed by an increase of around 2,4% in 2010. While economists are in agreement on most of the economic indicators, there is a large discrepancy in forecasts related to gross fixed capital formation as government and state owned enterprises expenditure on critical infrastructure remains a necessity, but widespread financial constraints may mean several projects will have to be postponed in the near term.

The Monetary Policy Committee lowered the repo rate in August 2009 by a further 50 basis points to 7% which means prime lending rates were lowered to 10,5% - back to the June 2006 level, before the latest cycle of interest rate increases began. Poor economic performance coupled with an increase in job losses and lower overall inflation, supported the Reserve Bank's decision to cut lending rates.

Price inflation eased both in terms of consumer and production prices. The consumer price index (CPI) moderated to 6,9% y/y in June 2009, while producer price inflation (PPI) declined by 4%. Since September 2008, oil prices have moderated to between \$50 and \$60/barrel, and although prices have increased since then, it is still below \$80/barrel. This combined with a relatively stable currency (at between R7 and R8/US Dollar) alleviated imported price inflation.

Table 1: Macro economic growth projections (Economist Poll)

	2009	2010	2011	2012	2013	2014
GDP	-1.85	2.38	3.53	4.10	4.50	4.90
Household consumption	-1.60	1.35	3.00	3.70	4.35	4.60
Government consumption	4.77	4.67	4.85	4.95	4.85	5.15
Gross Fixed capital formation	-2.93	1.40	6.13	7.00	7.55	6.20
US/ZAR	8.56	8.53	8.44	8.88	9.35	9.87
CPI Inflation	7.13	5.65	5.37	5.40	5.05	4.50
Prime Lending rate	10.75	11.50	11.83	12.00	12.25	11.00

Poll: RMB, Investec, FNB, Standard Bank.

Gross fixed capital formation

Total investment in gross fixed capital formation (GFCF) increased by 10,2% in 2008, but is expected to fall by around 3% in 2009, as investment in new housing construction, machinery, equipment and transport is expected to fall this year. Weaker growth in non-residential construction is also expected, which means the only sector expected to continue to show positive growth is construction works.

The contribution of GFCF to GDP increased from 17% in the 1st quarter of 2005 to 23,3% in the 1st quarter of 2009 (Annualised rates). Over the last four years there has been a substantial increase in fixed capital, necessary to support longer term and sustainable economic growth. Strong investment in fixed capital will provide structural support to the economy. The construction sector contributed 42% to GFCF, and increased its contribution to 9,8% of GDP. Over the last four years the construction industry was supported by stronger government investment as well as an increase in spending by Eskom, ACSA and Transnet, while private sector investment was boosted primarily by residential and retail construction. Given the current economic climate, private sector investment is likely to contract for the next 2 years, but given the commitment by government to improve capacity, we believe that spending on infrastructure such as roads, water and electricity (albeit over the longer term) will continue to support future investment in construction.

The important role of infrastructure spending is highlighted in the priorities outlined in global rescue packages. The global financial crisis has affected borrowing and lending abilities of many institutions, unavoidably putting a question mark on the financial viability of planned high impact projects. Countries like the United States, Germany, Chile and France are prioritizing between 20% and 40% of their respective economic rescue packages infrastructure spending, while countries such as Australia, China and the EU are spending more than 80%. This clearly shows that infrastructure will remain a key priority for countries to stimulate economic growth. This means the demand for engineering services will continue to increase, globally.

Investment contribution to GDP

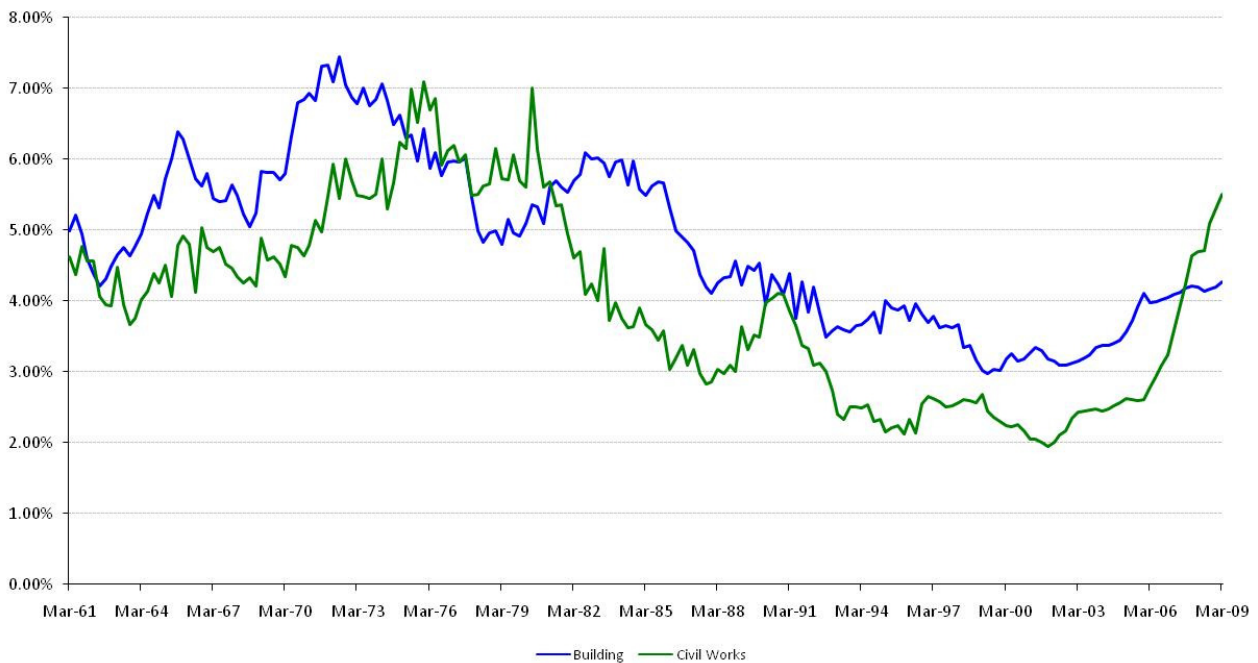


Figure 1: Investment contribution to GDP

For the first time since the late seventies, investment in the civil industry has a higher contribution to GDP compared to the building industry. Sustained investment in buildings is impossible without supportive investment in civil works, and given the rapid increase in civil investment in recent years, greater investment in buildings is likely to follow once the current financial crunch has filtered through the economy.

2. CESA Survey: Background

CESA implemented a more efficient on-line data management system to streamline the questionnaire and data capturing system. Due to many firms still not familiar with the new electronic system, the response rate has been weaker for the past two consecutive surveys, but did improve by 23% from 69 (December 2008 survey) to 85 in the June 2009 survey. With support from member firms however, the response rate should improve in the next surveys.

The analysis of the questionnaires completed by active firms in the consulting engineering profession provides a proxy of current and expected working conditions for the profession, which can be measured on a regular basis.

Questionnaires were distributed to all member firms of the Consulting Engineers South Africa (CESA). To eliminate possible distortions in the statistics and prevent anomalies, only responses received from firms that have submitted questionnaires for the last two consecutive surveys are used. **The CESA welcomes commentary received** from firms and invites all members to actively participate in sending commentary on either the survey or conditions in the work place thereby increasing the relevance of these reports.

The sample size for the June 2009 survey was a slightly higher 43 out of 85 surveys received. The sample was based on a total fee income of R1,2 billion and approximately 3700 employees for the period January to June 2009.

The survey is re-evaluated on a continuous basis, to ensure that the questions asked are pertinent and relevant to current conditions in the industry.

3. Prevailing conditions in the Consulting Engineering Industry

3.1 Financial Indicators

Conditions in the consulting engineering industry were more challenging during the first 6 months of 2009. Most of the responding firms reported a decrease in fee earning. Compared to a 15% increase in nominal fee earnings in the last 6 months of 2008, fee income fell by 4% during the first 6 months of 2009. This does not mean all the firms are experiencing a downturn. Some firms still managed to report solid growth in earning. Most firms expected tighter conditions in 2009, and projected a 13% drop in the December 2008 survey. Looking towards the end of the year, firms expect earnings to fall further by between 8% and 10% during the last six months, suggesting more difficult times ahead.

The average (un-weighted) net profit (before tax) moderated in the last six months, from 19,4% in the first six months of 2008 to 18,4% in the first six months of 2009. Profit margins are expected to moderate further in the last six months of 2009, to an average of between 15% and 16%. Majority of firms (based on a weighted response) were however satisfied with the current profit margin. Profit margins are expected to be weaker in the next 6 to 12 months, but are expected to remain above the 15% level.

Order books (the value of outstanding (not yet invoiced) for confirmed appointments, (excluding sub-consultants or JV partners) fell 29% compared to the last 6 months of 2008. In June and December 2008 the value of outstanding fee income were 66% and 40% higher respectively. The drop in the order book supports the decrease in confidence levels with regards to working conditions in the next 12 to 18 months.

The industry's ROI (unweighted average) increased from 44,8% to 47,8%, but fell from 59,2% to 54% for larger firms during the same period. Majority of firms reported a ROI of between 20% and 100%. *Return on investment is defined as the company's annual profit after interest and tax, as a percentage of Net Working Capital (current assets – current liabilities) during the last completed financial year. Working capital is considered part of operating capital as it affects the day to day operating liquidity. An increase in working capital indicates the business has either increased current assets (ie accounts receivable or inventory) or has decreased its current liabilities (accounts payable).*

Fee earnings outstanding from local government has increased to 13,2% of total earnings, the highest level since the December 2004 survey when fees outstanding escalated to over 14%. An improvement in payments received from state owned enterprises, provincial government and foreign clients, reduced the percentage outstanding from a revised 12% in the December 2008 survey to 9,5% in the June 2009 survey. An estimated R1,5 billion in fee earnings (current prices) or R927 million (2000 prices) were outstanding for more than 90 days as at June 2009.

3.2 Human Resources

Employment estimates were revised in the December 2007 survey to correlate with information supplied by CESA firms in their annual declaration submissions. Employment has increased by a softer 2,7%, compared to a 4% decrease in nominal fee earnings since the last 6 months of December 2008. An estimated 19 596 people are currently employed in the consulting engineering industry, of which 11,8%, or 2313 have a professional engineering qualification (Pr.Eng). Black people represented 43,5% of the total number of people employed (at all levels), (including African, Coloured and Asian). The contribution of black people in professional appointments (Engineers, Architects, QS and Other) was 13,5%.

The percentage of firms looking to employ engineers fell from 67.4% in the June 2008 survey to 26.4% in the June 2009 survey, the lowest level since December 2000. Economic uncertainty coupled with rapidly increasing labour costs, means a more cautious approach to employment. Demand for staff has moderated significantly in the last survey, affecting all the major categories including technical staff, technicians, and support staff. Almost all firms (95%) continued to report difficulties associated with recruiting suitable candidates for engineering positions. Fewer however reported difficulties with recruiting technicians (including PDI's). Interestingly there has been an increase in recruitment difficulties related to technologists and technicians, up from 63.4% and 57% to 84% and 71% respectively.

Global economic uncertainty coupled with a rapidly increasing salary and wage bill is encouraging a more cautious approach by firms with regards to increasing employment. It however continues to remain a challenge to find suitable candidates to fill engineering positions. Filling posts for technicians and technologists has shown some improvement, but also remains challenging. The global financial crisis, although still supported by infrastructure investment globally, may result in retrenchments of engineers in some countries (i.e East), which has already seen an influx of ex-patriots returning to South Africa. This does not mean an end of the engineering skills shortage.

On average, between 16% and 20% of firms total fee income earned were outsourced to external enterprises or individuals, including sub-consultants, joint venture and contract workers. This amounted to between R2 and R3 billion (annualised) in rand terms (2000 prices), or between R1,5 and R2 billion in constant 2000 prices. Larger firms (employing more than 100 people) by comparison to the industry average, outsourced a higher percentage of turnover (27%), compared to 22% in the December 2007 survey.

Training expenses, which includes the costs directly associated with training as well as the cost of salaries but excludes the 1% CETA skills development levy, moderated to 17,4%, from 32% in the June 2008 survey. Direct training costs stabilized at 0,8% of the salary and wage bill, which means the industry spent on average R70 million on direct training. Bursaries increased slightly from 0,5% of the salary and wage bill in December 2008 to 0,6% in the current survey. As engineering and technical skills remain a scarce resource the need for training intensifies. Firms are very sensitive to the availability of training, in terms of location and the type of training provided. There is also a growing need for a greater distribution (provincially) of training courses offered. However, the contribution or focus of training has deteriorated since previous surveys and only 11% of firms spent more than 2% of their salary and wage bill on direct training, compared to 23% of firms that spent more than 2,5% of their salary and wage bill on direct training.

A lower weighted 0,15% of the industry salary and wage bill was spent on bursaries for black students, compared to an average of 0,24% in December 2008 and 0,5% in June 2008. The Construction Charter, requires a minimum spend of 0,3% of the payroll on bursary expenditure towards black students. A number of larger firms are complying with the minimum targets, but industry compliance is jeopardized by smaller firms. Approximately 27% of firms spend more than 0,3% of their payroll on bursaries for black students.

3.4 Capacity Utilisation

Capacity utilization fell for the second consecutive survey, but is still running at more than 90%. Fewer firms expect utilization to increase, while the vast majority expect conditions to remain unchanged (static). Larger firms, employing more than 100 people, seem to be busier compared to smaller firms, based on utilization rates. The utilization rate of larger firms averaged a higher 92% (ranging between 75% and 100%), while smaller firms averaged a lower 87% (ranging from 25% to 120%). Those firms that earn a higher percentage from local authorities and the private sector seem to be busier compared to similar profile firms earning a higher contribution by comparison from central and provincial government.

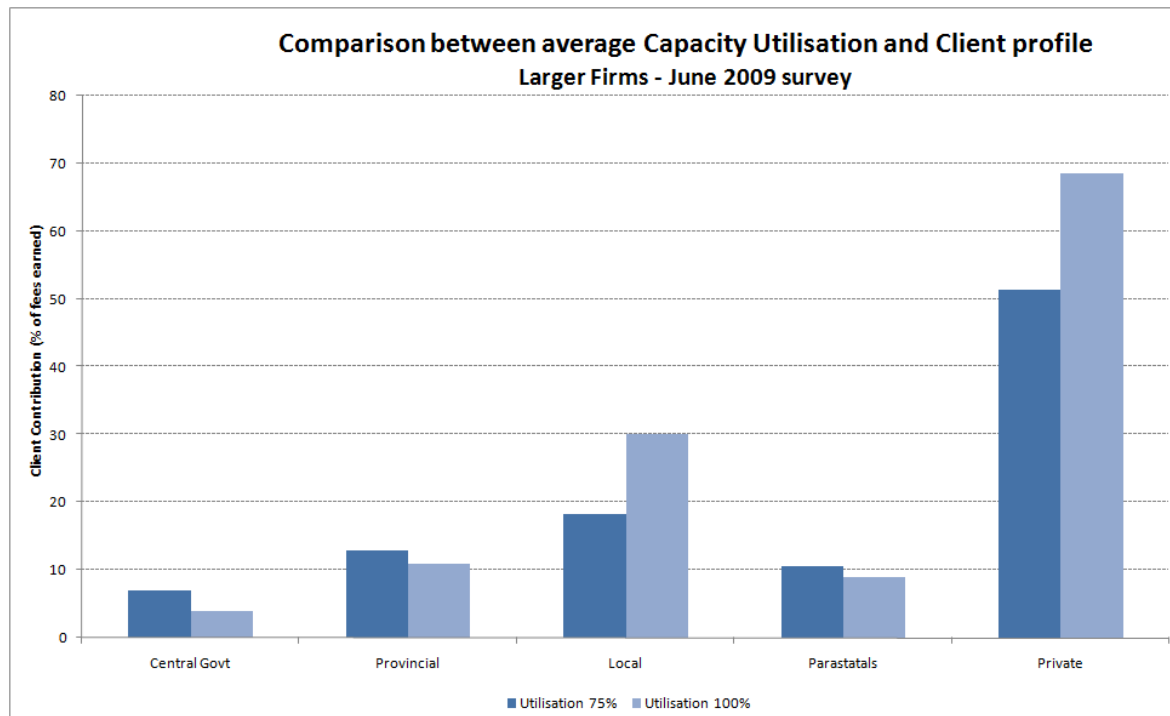


Figure 2: Capacity Utilisation and Clients

3.5 Competition in tendering

Competition in tendering generally eases during a time when the availability of work has increased and becomes more severe during times of work shortages. An easing of competition will generally lead to an increase in prices, while price inflation is capped during periods of work shortages due to the fact that an increasing number of firms tender on the same project. The tendering process is costly and time consuming, and higher levels of competition significantly increases the risk for the engineering firm.

The percentage of respondents saying that competition was very keen to fierce dropped from 79% in December 2007 to 78% in December 2008 to 36% in the June 2009 survey. The smaller firms, operating in specialist fields are more likely to report on lower levels of competition. Competition was extremely fierce in Gauteng, especially for those firms working in local government and the private sector. Fierce competition was also reported by firms working in the Western Cape mainly within the private sector (disciplines of civil and structural services).

3.6. Pricing

Firms have complained about discounting, as this creates a price war in an industry that already has to grapple with prescribed fees and unproductive procurement procedures. CESA amended the June 2007 survey, to include a question that monitors the extent of discounting offered by firms to clients, benchmarked against the ECSA Guideline Fee Scales.

The average discounting rate for the industry rose to (weighted) 19,3%, the highest level since it was recorded (June 2007). High discounting rates were offered by firms mainly operating in Gauteng, where a higher percentage of fees were earned from local authorities particularly in the transportation and housing sector. Competition levels were also found to more severe here. Larger firms discounted by an average of 25% (up from 15% in December 2008).

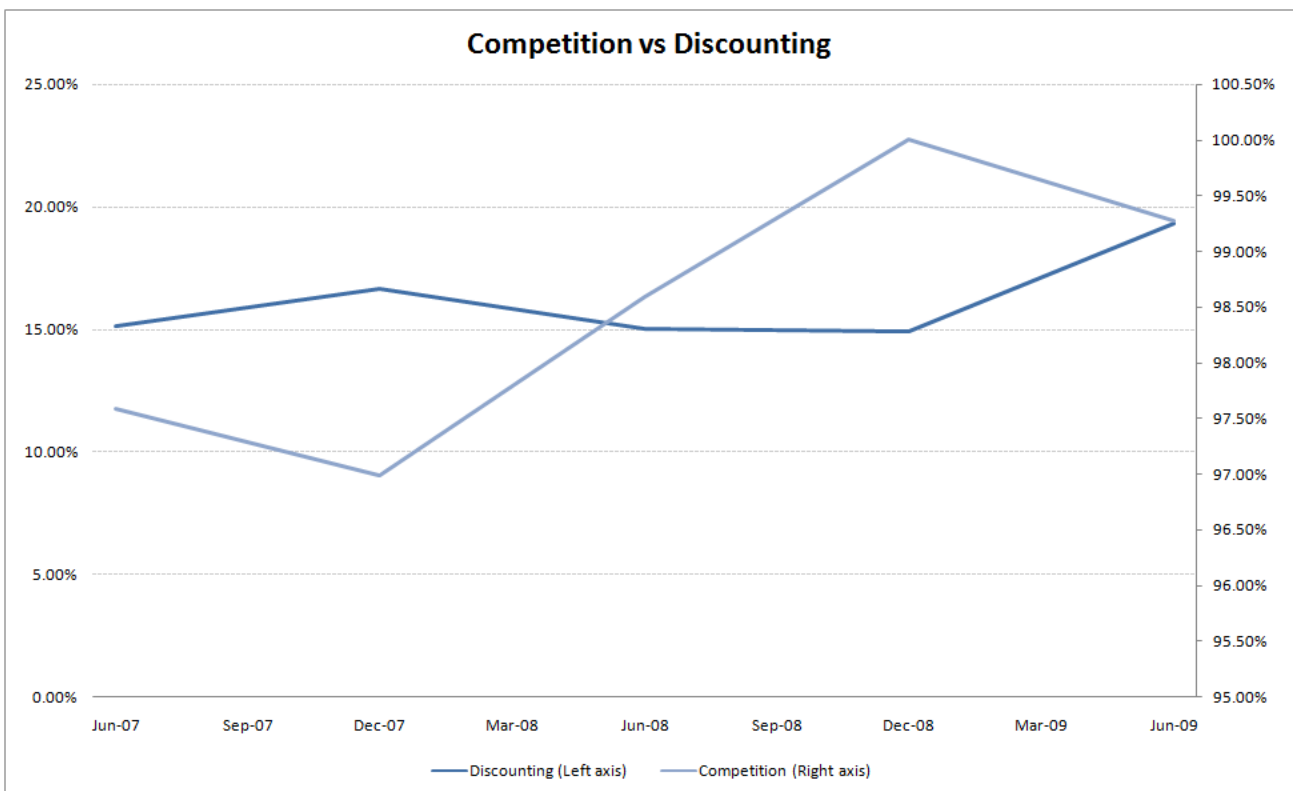


Figure 3: Competition vs discounting

No specific escalation index is available for the consulting engineering industry. After exploring many different avenues it was proposed to calculate a CESA Cost index that is based on a “labour unit cost” and extracted directly from the CESA MIS Survey. This should accommodate at least 50% of the firms’ costs and should therefore, in theory, be a reliable indicator of escalation. The CPI is currently used to deflate all financial information, until such time CESA officially applies the CESA Labour cost index as an industry price deflator.

CESA's labour cost indicator, based on the sample of total number of employees versus the salaries and wages paid during the period under review, increased by 25,4% y/y in June 2009. The increase in engineering costs has since June 2003, surpassed the increase in the CPI, which means the real change in fee income is probably overstated, given the fact that the CPI is used as a nominal fee income deflator.

The average unit labour cost in the consulting engineering industry increased by 145,0% between June 2002 and June 2009, from an average of R75 per hour (based on 160 hours per month) to R185 (June 2009). Average unit costs, (over 2 surveys) increased by an annual rate of 21,7% in 2008, compared to 9,6% in 2007, and 10% in 2006. Unit costs rose 11% in June 2009 compared to December 2008, or by 25,4% compared to the June 2008 survey.

Changes in the general cost of living (as measured by the Statistics South Africa's Consumer Price Index) are clearly not indicative of labour cost changes in the consulting engineering industry. However, the CPI may have a strong influence in the determination of ECSA Fees, which has shown an average increase of 6,2% in 2005, 4% in 2006 and 4,5% in 2007 and 9,2% in 2008.

3.7 Industry Outlook

The confidence index, as an indicator of members' assessments regarding current and future prospects with regard to market developments, is a "weighted" index. The response of each company is weighted according to its total employment, including full and part time staff, and the index represents the net percentage of members satisfied with business conditions.¹ To ensure that possible distortions emanating from ad hoc replies do not occur, only those members that have submitted returns during the last two consecutive surveys are used. The confidence index is used as a leading indicator to determine a short to medium term outlook for the consulting engineering industry.

¹ The net percentage reflects only those members that expect conditions to be satisfactory, quite busy or very busy.

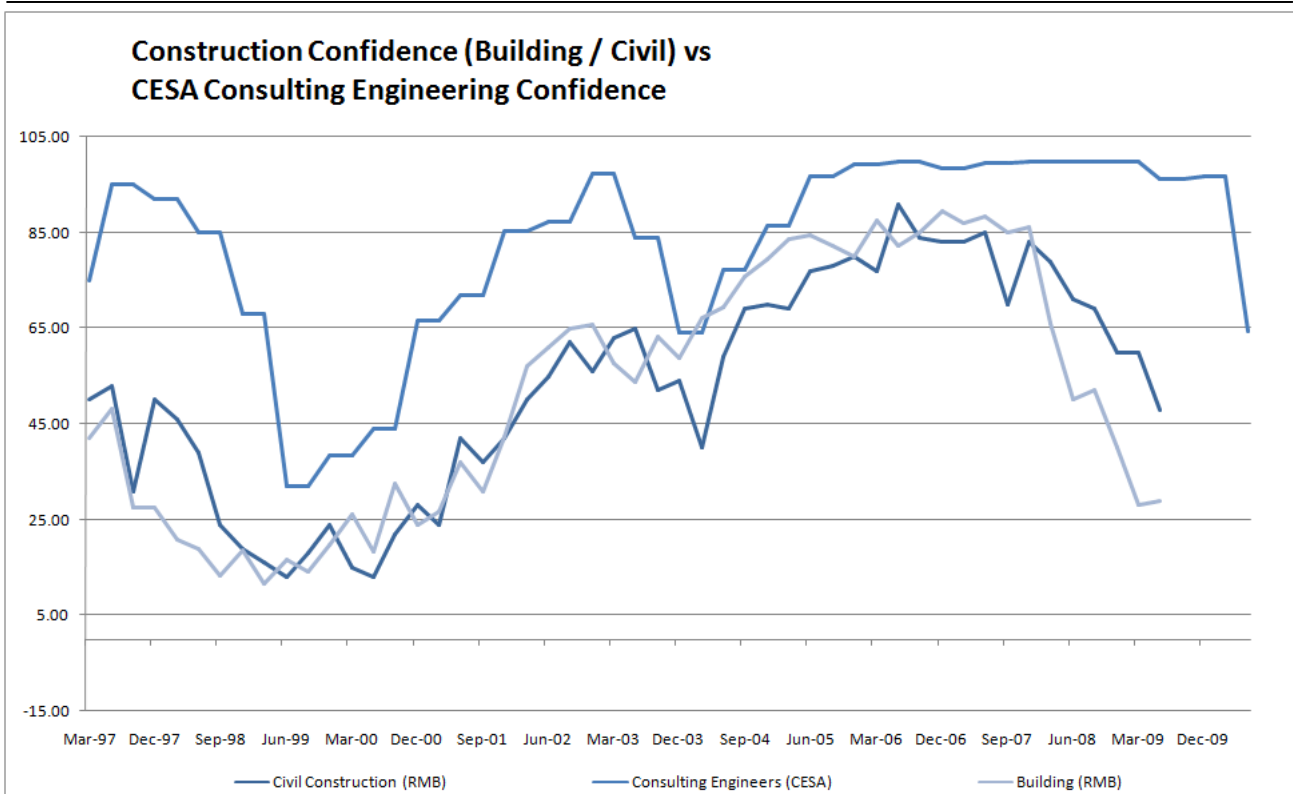


Figure 4: Confidence indices

For the first time since 2002 there has been a real notable shift in engineering confidence. Since 2005, confidence levels amongst consulting engineers have consistently remained above 98% showing exceptional levels of satisfaction with current working conditions. Confidence levels for 2009 and 2010 deteriorated from an index value of 99.8 in December 2008 to 96.2 in June 2009, 96.7 for the outlook up to December 2009 and down to 64.3 for the first six months in 2010. Although tighter working conditions were expected for the first half of 2009, actual conditions weren't as bad as expected. Firms are not overly pessimistic looking ahead to the last 6 months of 2009, but there does seem to be a greater level of uncertainty.

Confidence in the engineering sector generally lags business sentiment. Business sentiment (RMB/BER) has started to weaken in the first 6 months of 2008 to an average of 26.5 in June 2009, (the weakest level since June 1999 when the Asian crisis led to an index value of 13.5 in confidence levels). During the same time confidence levels amongst consulting engineers were also at record lows of 32%, given the poor state of not only the economic environment but lack of spending on infrastructure by both the private and public (government and state owned enterprises) sectors. Conditions in the civil industry has been slow to react to changing business sentiment, mainly due to the investment drive by the government's, Eskom, ACSA and Transnet, which to some extent is cushioning the industry against the current economic downturn.

A comparison of confidence levels within the contracting fraternity against the engineering industry, shows that although the engineering profession was until recently relatively optimistic, conditions amongst contractors have already become less optimistic. The exact reason for this is uncertain, and the fact that the engineering confidence index has been weighted while the FNB confidence index (compiled by the BER) is not, could be a possible reason as smaller firms are certainly less optimistic given the challenges that these firms have to deal with. Smaller contracting firms are also not affected by the engineering industry, as they are mostly involved in smaller scale projects. Another possible explanation is that many projects are in planning stages, but implementation of these projects are challenged by various obstacles including provincial and local government inefficiencies, political uncertainty leading up to the March 2009 elections and potential budgetary constraints. In other words, engineers may have been busy, but many of the projects are currently being shelved.

One must also consider that the industry is now operating from a new "elevated" platform. Rapid growth over the past five years has required an increase in capital, including human, financial and manufacturing. This needs to be sustained. A mild slowdown in investment could therefore have a sharper than expected impact on confidence. There is now just so much more at stake.

Table 2: CESA Confidence index: % respondents satisfied with working conditions

Survey Period	CESA Confidence Index	% Change on previous survey	% Change on survey same time last year
Jun-05	96.8	12.2%	25.4%
Dec-05	99.3	2.5%	14.9%
Jun-06	99.7	0.5%	3.0%
Dec-06	98.4	-1.30	-0.8
Jun-07	99.4	1.0%	-0.3%
Dec-07	99.8	0.4%	1.4%
Jun-08	99.9	0.1%	0.5%
Dec-08	99.8	-0.1%	0.0%
Jun-09	96.2	-3.6%	-3.7%
Dec-09	96.7	0.5%	-3.1%
Jun-10	64.3	-33.5%	-33.2%

3.8 Professional Indemnity Insurance

The annual premium as a percentage of gross fee income over a 12 month period, averaged 2,3% for the industry (unweighted) compared to a lower 1,4% in the previous survey. The premium for professional indemnity insurance was still the lowest amongst larger firms, but rose to 1,3% (up from 0,7% in June 2008).

Claims represented on average 27% of total premiums paid over the last five years.

In terms of the various firm's perceptions of risk, close to 60% of respondents said that their firm had a low risk exposure, almost 40% said medium. Larger firms are exposed to medium risk, while smaller firms reported overwhelmingly that their firms operated under a low risk environment.

The industry's average limit of indemnity as a percentage of gross fee income over the 12 month period ranged from 15% to as much as 200%, with a weighted industry average of 16%. Larger firms averaged 12,0%, medium size firms a higher 35%, while small and micro firms have the highest indemnity insurance cover of 100% and 75% of annual gross fee income, even though they perceive their firms to be operating in a low risk environment, they can not afford the risk of not being adequately covered. Although their monthly premiums are a higher percentage of gross income, monthly contributions average between R4000 and R10 000 per month for small firms compared to an average of R123 000 per month for larger firms. The premiums may vary according to a firm's exposure and can be affected on a project by project basis.

During the last five years, the majority of claims were however reported by large firms (70% of claims as per the December 2008 survey), although a few large firms reported that between 60% and 70% of their claims were not refunded. Out of a total of 44 claims submitted by large firms in the last 5 years, 40% or 17 claims were not funded by the insurers for reasons most likely related to exclusionary clauses. This seems to be prevalent mostly amongst larger firms as medium, small and micro firms did not report on any claims not refunded.

3.9 Quality Management System

A quality management system (QMS) is a control that is implemented at various stages of production process or service delivery stages. A QMS system is important for all firms, big and small. All the large firms reported to have a QMS in place, compared to 93% of medium size firms, and 75% of micro firms, averaging 84% for the industry as whole.

Having a QMS in place is now compulsory for all CESA members, who recognize the importance of good efficient quality control. CESA recommends the ISO:9001:2000 frame work, recognizing this framework as being comprehensive and internationally recognized.

Members can, provided the correct procedures are followed, claim a portion of the skills development levy for quality management training.

For more information on statutory requirements for members, please refer to the advisory note released by CESA.

Members are obliged to use accredited agents should they wish to obtain an ISO 9001:2000 certificate. Details of certification bodies used by Members consenting to make this information available, is published on the CESA website. Compared to 75% of the smaller firms that said they do have a QMS, none of them were ISO accredited. In the larger firms, where 100% reported to have a QMS in place, approximately 90% were ISO accredited, an improvement compared to the 81% in the June 2008 survey.

The industry has improved it's ISO compliance from 24,6% in the December 2007 survey to 34,8%.

The following table provides a quick synopsis of some of the key indicators in the consulting engineering profession by firm size.

Table 3: Summary of key indicators by firm size

Employment category	Data	Average
Larger than 100	Average % of turnover outsourced	28
	Average capacity utilization %	93
	Average net profit percentage	18
	Discounting	25
	% of payment outstanding for longer than 90 days	8.9
	Average of salary bill to gross fee income	58
Between 20 and 100	Average % of turnover outsourced	10
	Average capacity utilization %	94
	Average net profit percentage	19
	Discounting	16
	% of payment outstanding for longer than 90 days	11.5
	Average of salary bill to gross fee income	45
Between 10 and 20	Average % of turnover outsourced	8
	Average capacity utilization %	96
	Average net profit percentage	19
	Discounting	13
	% of payment outstanding for longer than 90 days	12.2
	Average of salary bill to gross fee income	41
< 10	Average % of turnover outsourced	26
	Average capacity utilization %	78
	Average net profit percentage	20
	Discounting	22
	% of payment outstanding for longer than 90 days	1.8
	Average of salary bill to gross fee income	36
Average % of turnover outsourced		16.3
Average capacity utilization %		90.8
Total average net profit percentage		18.9
Discounting		19.3
% of payment outstanding for longer than 90 days		9.5
Total average of salary bill to gross fee income		53

3.4 Financial indicators

Table 4: General financial indicators

Survey period	Employment ²	Salaries / Wages 2000 prices (Annualised)	Fee Income, R mill (Annualised)			Cost Deflator	
			Current prices	Constant 2000 prices	Y/Y real % change	CPI Index 2000 = 100	CPI y/y % Change
Dec-01	13,247	1,567	3,788	3,562	4.92%	106.4	4.47%
Jun-02	12,850	1,765	4,394	3,922	5.46%	112.0	6.70%
Dec-02	13,467	1,714	4,418	3,725	4.59%	118.6	11.52%
Jun-03	13,063	1,725	4,396	3,593	-8.39%	122.4	9.21%
Dec-03	12,540	1,713	4,176	3,426	-8.0%	121.9	2.8%
Jun-04	12,791	1,870	4,511	3,666	2.0%	123.0	0.6%
Dec-04	12,599	1,957	4,601	3,692	7.8%	124.6	2.2%
Jun-05	12,798	2,030	5,015	3,957	7.9%	126.8	3.0%
Dec-05	14,026	2,247	5,597	4,330	17.3%	129.3	3.7%
Jun-06	14,068	3,096	7,835	5,954	50.5%	131.6	3.8%
Dec-06	14,912	3,350	8,149	5,983	38.2%	136.2	5.4%
Jun-07	15,807	3,613	9,493	6,771	13.7%	140.2	6.5%
Dec-07	16,755	3,542	10,537	7,183	20.1%	146.7	7.7%
Jun-08	18,347	4,940	14,752	9,499	40.3%	155.3	10.8%
Dec-08	19,081	5,516	16,965	10,407	44.9%	163.0	11.1%
Jun-09	19,596	5,141	16,287	9,700	2.1%	167.9	8.1%

Please note that anomalies may still exist in comparing year on year employment trends, due to changes made in the December 2001 questionnaire with regard to full and part time staff.

Table 5: Consulting Engineering Profession: Financial indicators: Annual Percentage Change (Real)

Survey period	Employment	Salaries and Wage Bill	Fee income	Cost escalation based on CPI index (Stats Sa)
Dec-01	-2.9%	-3.8%	4.9%	4.47%
Jun-02	1.3%	3.2%	5.5%	6.70%
Dec-02	1.7%	9.3%	4.6%	11.52%
Jun-03	1.6%	-2.3%	-8.4%	9.21%
Dec-03	-6.9%	0.0%	-8.0%	2.8%
Jun-04	-2.1%	8.4%	2.0%	0.6%
Dec-04	0.5%	14.2%	7.8%	2.2%
Jun-05 *	0.0%	8.6%	7.9%	3.0%
Dec-05	11.3	14.8%	17.3%	3.7%
Jun-06	9.9%	52.5%	50.5%	3.8%
Dec-06	6.3%	49.1%	38.2%	5.4%
Jun-07	12.3%	16.7%	13.7%	6.5%
Dec-07	12.3%	5.7%	20.1%	7.7%
Jun-08	16.1%	36.7%	40.3%	10.8%
Dec-08	13.8%	54.1%	44.9%	11.1%
Jun-09	6.8%	53.0%	2.1%	8.1%

* Revised

² Revised June 2007

Table 6: % of firms wanting to increase staff, by type of personnel

Type of personnel	% of firms wanting to increase staff June 2006	% of firms wanting to increase staff December 2006	% of firms wanting to increase staff June 2007	% of firms wanting to increase staff December 2007	% of firms wanting to increase staff June 2008	% of firms wanting to increase staff December 2008	% of firms wanting to increase staff June 2009
Engineers	92.1	93.5	91.2	94.5	67.4	33.2	26.4
Technologists	87.8	91.3	88.6	90.6	67.1	11.3	12.8
Technicians	80.8	80.8	89.2	89.4	43.0	9.3	12.5
Other technical staff	56.2	55.2	59.9	52.1	40.06	2.5	3.8
Support Staff	24.0	25.2	26.5	28.7	18.5	2.3	1.9

7. Salient Features

7.1 Sub-disciplines of fee income earned

Table 7: Sub-disciplines: June 2008 – June 2009, Percentage share

Sub-discipline	Jun-08	Dec-08	Jun-09	Change in market share Jun-09/Jun-08	Change in market share Jun-09 / Dec-08
Agricultural	0.1%	0.00%	2.04%	2.0%	1.9%
Architecture	0.0%	0.03%	0.33%	0.3%	0.3%
Mechanical building Services	1.9%	2.53%	2.02%	-0.5%	0.1%
Civil	59.4%	52.92%	51.07%	-1.9%	-8.4%
Electrical / Electronic	5.2%	6.66%	4.82%	-1.8%	-0.3%
Environmental	1.8%	1.00%	4.69%	3.7%	2.9%
Facilities Management (New)	0.6%	1.50%	1.83%	0.3%	1.2%
Geotechnical	0.9%	1.15%	1.17%	0.0%	0.3%
Industrial Process / Chemical	0.9%	1.98%	0.51%	-1.5%	-0.3%
GIS	0.8%	0.64%	0.38%	-0.3%	-0.4%
Hydraulics (New)	0.8%	0.31%	0.54%	0.2%	-0.2%
Information Systems / Technology	1.4%	1.55%	0.43%	-1.1%	-1.0%
Marine	5.9%	1.02%	0.04%	-1.0%	-5.8%
Mechanical	1.6%	1.47%	1.22%	-0.2%	-0.4%
Mining	0.5%	1.55%	8.75%	7.2%	8.2%
Project Management	4.6%	8.54%	9.95%	1.4%	5.3%
Quantity Surveying	0.1%	0.24%	0.06%	-0.2%	0.0%
Structural	12.6%	16.56%	9.75%	-6.8%	-2.8%
Town planning	0.9%	0.36%	0.41%	0.1%	-0.5%
Total	100.0%	100.0%	100.0%	0.0%	0.0%

Table 8: Sub-disciplines: June 2007 – June 2009, Annualized R mill, 2000 prices

Sub-discipline	Jun-08	Dec-08 Revised	Jun-09	Change Jun-09/Dec-08	Change Jun-09 / Jun-08
Agricultural	R 9	R 0	R 198	-	2114.4%
Architecture	R 0	R 3	R 32	936.6%	-
Mechanical building Services	R 185	R 263	R 196	-25.6%	5.7%
Civil	R 5 645	R 5 507	R 4 954	-10.0%	-12.2%
Electrical / Electronic	R 491	R 693	R 468	-32.5%	-4.8%
Environmental	R 170	R 104	R 455	338.1%	167.5%
Facilities Management (New)	R 60	R 156	R 177	13.5%	194.5%
Geotechnical	R 87	R 119	R 114	-4.7%	30.4%
Industrial Process / Chemical	R 81	R 206	R 50	-75.9%	-38.6%
GIS	R 78	R 67	R 37	-44.7%	-52.9%
Hydraulics (New)	R 72	R 32	R 52	61.9%	-27.3%
Information Systems / Technology	R 134	R 162	R 42	-74.2%	-68.9%
Marine	R 558	R 106	R 3	-96.7%	-99.4%
Mechanical	R 155	R 153	R 119	-22.5%	-23.4%
Mining	R 50	R 161	R 849	425.8%	1603.8%
Project Management	R 438	R 889	R 966	8.7%	120.6%
Quantity Surveying	R 8	R 25	R 6	-76.9%	-29.9%
Structural	R 1 196	R 1 724	R 946	-45.1%	-20.9%
Town planning	R 82	R 37	R 40	6.9%	-51.6%
Total	R 9 499	R10,407	R9,700	-6.8%	2.1%

The South African consulting engineering industry is represented by many different sub-disciplines. The most common disciplines within larger firms include civil, structural services and project management. Within the smaller and micro firms, electrical services and mechanical building services also play an important role in earnings.

7.2 Provincial distribution of fee income earned

South African Consulting Engineering Industry

Fee earnings by province: January - June 2009
R9,700million (Annualised, constant prices)

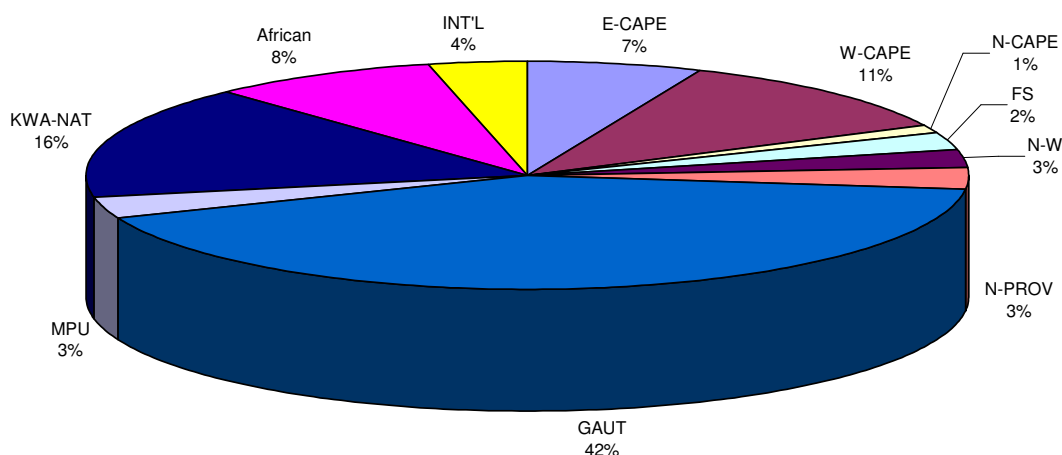


Figure 5

Table 9: Provincial Turnover, R mill, 2000 prices (Annualized)

Province	Survey period							
	Dec-05	Jun-06	Dec-06	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09
EC	394	536	640	670	664	836	552	757
WC	745	1,371	956	1,198	1 307	1,263	1 342	912
NC	117	142	123	76	119	180	104	155
FS	191	223	251	296	336	389	250	213
NW	160	210	262	262	586	266	364	184
LIM	126	167	211	242	175	275	291	310
GAU	1,550	1,987	1,921	2,306	2 510	3,116	4 048	4 375
MPU	160	184	176	210	283	304	343	252
KZN	610	766	747	931	811	1,320	1 280	1 959
AFRICAN	238	306	585	477	324	1,016	1 301	378
INT'L	39	61	112	103	68	532	541	204
Total	4,330	5,954	5,983	6,771	7 183	9,499	10 417	9 700

Over the last 12 months, fee earnings fell in the most of the provinces, except for Limpopo, Gauteng and Kwazulu Natal. High capacity provinces gained more prominence contributing a higher 86% of total fee earnings, compared to 80% in the June 2008 survey, where fee earnings rose on average 28% y/y. High capacity provinces include Gauteng, Western Cape, Eastern Cape and Kwazulu Natal.

Almost 50% (45,1%) of annualized fee earnings were generated in Gauteng, followed by a much higher 20,2% in Kwazulu Natal, a lower 9,4% in the Western Cape and 7,8% in the Eastern Cape. In the latest survey, a lower 3,9% (compared to only 12,5% in the December 2008 survey) of fee earnings were generated in Africa and a lower 2,1% in the international market.

**CESA Fee Earnings Distribution: Market Share
January - June 2009 (Annualised)**

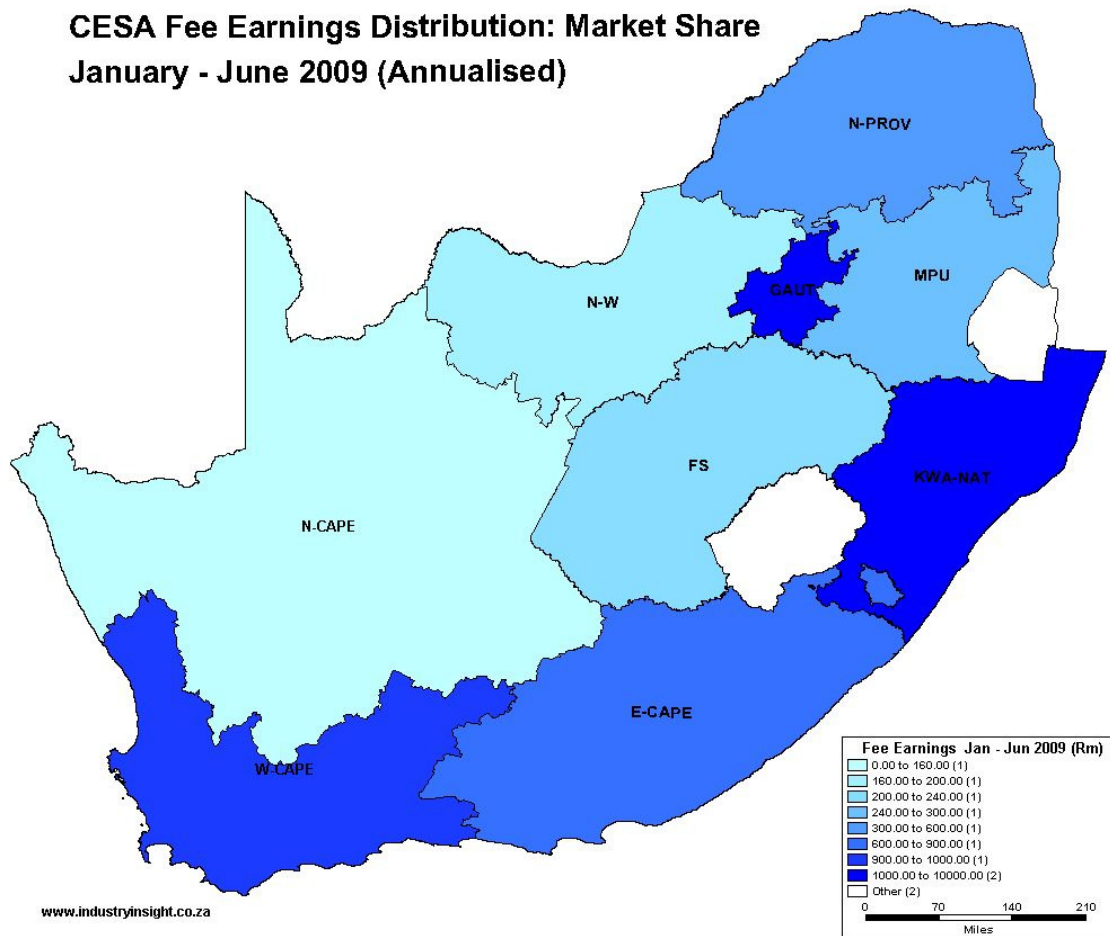


Figure 6: Provincial Fee Earnings Distribution (Jan – June 2009)

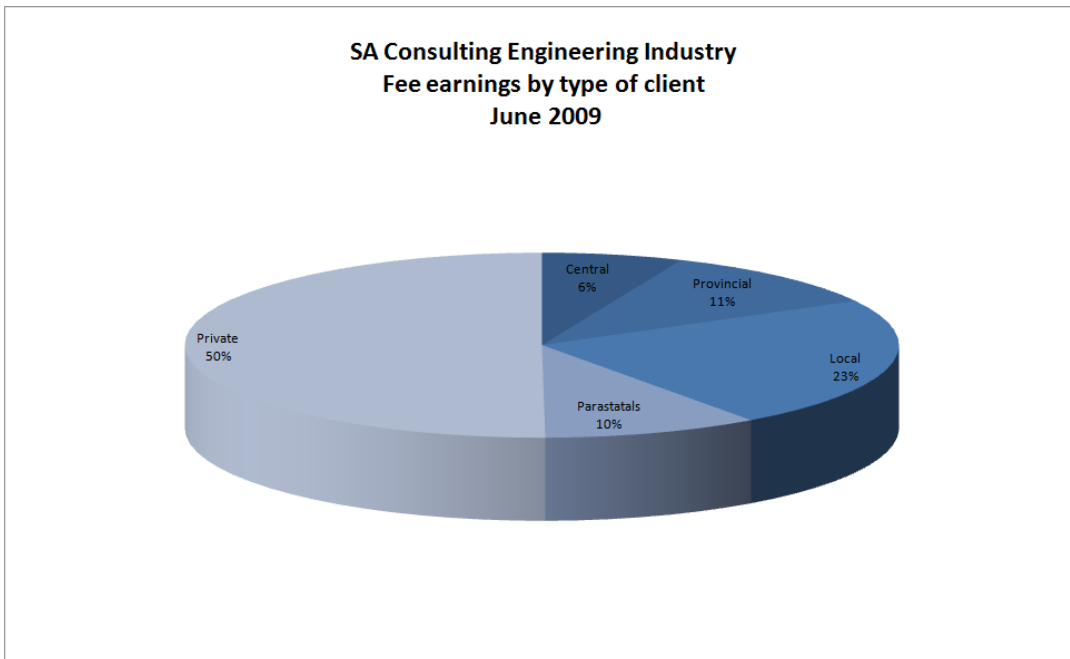


Figure 7: Client profile

The contribution of local authorities and the private sector increased notably to 23% and 50% respectively. Capital projects from state owned enterprises and smaller to medium size infrastructure projects funded primarily through the municipal infrastructure grant supported earnings from state owned enterprises and local government. Fee earnings from the private sector were supported mostly from an increase in commercial developments, transportation, some from mining, energy and tourism related projects.



Figure 8: Private Sector fee earnings

The role of central government continued to soften and moderated to just 6,4% in June 2009, from more than 20% in 2002. State owned enterprises represent between 9% and 12% of total fee earnings, a major increase compared to between 3% and 5% in 2004/05.

Table 10: Fee income earned by type of client, R mill, 2000 prices (Annualized)

Client	Survey period						
	Jun-06	Dec-06	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09
Central	807	628	605	654	921	728	621
Provincial	683	802	860	692	1,501	1 842	1 038
Local	1,674	1,400	1,950	1,863	1,995	2 904	2 231
State Owned	366	580	772	771	1,216	1 082	951
Private	2,423	2,573	2,587	3,204	3,866	3 851	4 870
Total	5,953	5,983	6,771	7,183	9,499	10 407	9 710

Table 11: Percentage market share by client

Client	Survey period						
	Jun-06	Dec-06	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09
Central	13.6%	10.5%	8.9%	9.1%	9.7%	7.0%	6.4%
Provincial	11.5%	13.4%	12.7%	9.6%	15.8%	17.7%	10.7%
Local	28.1%	23.4%	28.8%	25.9%	21.0%	27.9%	23.0%
State Owned	6.1%	9.7%	11.4%	10.7%	12.8%	10.4%	9.8%
Private	40.7%	43.0%	38.2%	44.6%	40.7%	37.0%	50.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

7.4 Economic Sectors

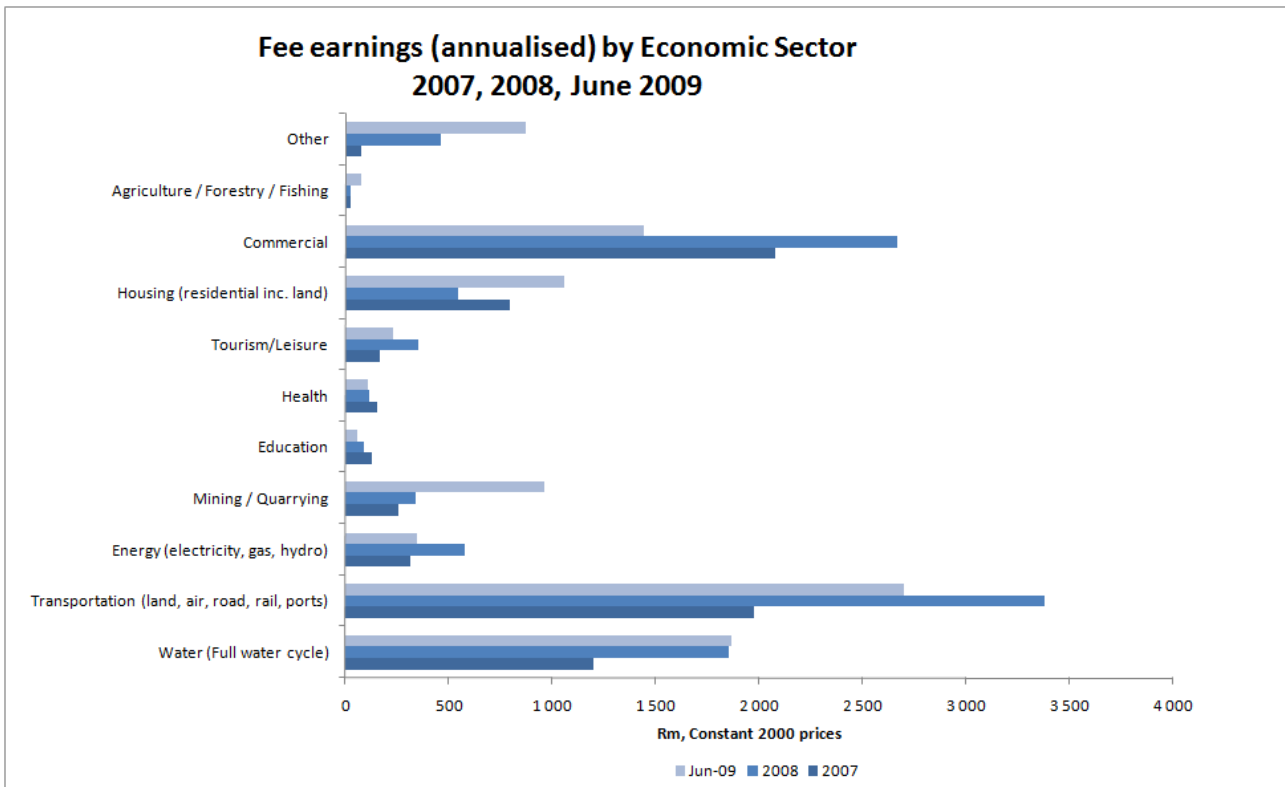


Figure 9: Economic Sectors

The economic sectors include all infrastructure associated within that sector including expenditure related to soft issues such as feasibility studies or environmental assessments. From this, three key sectors evolved namely water services, transportation and commercial.

In the first six months of 2009, compared with the second half of 2008, there was more focus on energy, mining/quarrying, housing (predominantly local government) as well as water services while the contribution of commercial and tourism related projects weakened.

Table 12: Percentage of fee income earned by economic sector

Economic sector	Dec-06	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09	Change in 6 months
Water (Full water cycle)	20.11%	19.7%	16.7%	19.5%	17.8%	19.2%	1.4%
Transportation (land, air, road, rail, ports)	28.05%	29.1%	27.5%	41.2%	32.5%	27.8%	-4.7%
Energy (electricity, gas, hydro)	6.78%	5.0%	4.4%	3.0%	5.5%	3.6%	-1.9%
Mining / Quarrying	6.70%	4.4%	3.6%	2.1%	3.3%	9.9%	6.6%
Education	1.29%	1.3%	1.8%	1.0%	0.9%	0.6%	-0.3%
Health	2.40%	2.6%	2.1%	1.4%	1.1%	1.1%	0.0%
Tourism/Leisure	3.47%	1.4%	2.3%	1.0%	3.4%	2.4%	-1.0%
Housing (residential inc. land)	7.09%	8.6%	11.1%	9.2%	5.2%	10.9%	5.7%
Commercial ³	18.30%	20.5%	28.9%	16.6%	25.6%	14.9%	-10.7%
Agriculture / Forestry / Fishing	1.08%	1.9%	0.4%	0.8%	0.2%	0.8%	0.6%
Other	4.73%	5.7%	1.1%	4.2%	4.4%	9.0%	4.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%

Table 13: Fee income earned by economic sector, Constant 2000 prices, Annualized

Economic sector	Dec-06	Jun-07	Dec-07	Jun-08	Dec-08	Jun-09	Real % Change Jun-09/Jun-08
Water (Full water cycle)	1,203	1,336	1,200	1,848	1 852	1 862	0.8%
Transportation (land, air, road, rail, ports)	1,678	1,973	1,975	3,913	3 379	2 697	-31.1%
Energy (electricity, gas, hydro)	406	336	316	289	577	349	20.8%
Mining / Quarrying	401	297	259	204	339	960	370.4%
Education	77	86	129	92	89	58	-36.9%
Health	144	173	151	134	117	107	-20.4%
Tourism/Leisure	208	95	165	93	352	233	149.7%
Housing (residential inc. land)	424	582	797	875	545	1 057	20.8%
Commercial	1,095	1,385	2,076	1,580	2 668	1 445	-8.5%
Agriculture / Forestry / Fishing	65	125	29	74	23	78	5.2%
Other	283	383	79	397	461	873	120.0%
Total	5,983	6,771	7,183	9,499	10 407	9 700	2.1%

³ Commercial includes: Manufacturing, industrial buildings, communication, financial, facilities management

Table 14: Proposed CESA Labour unit cost index

Survey period	Labour Unit cost (LUC) per hour	Index (2000 = 100) Smoothed	Year on Year percentage change in Index	Annual Average Annual Increase
Jun-96	R 41.85			
Jun-97	R 43.75	67.41		
Dec-97	R 51.64	75.13		
Jun-98	R 46.93	77.63	15.2%	
Dec-98	R 59.30	83.65	11.4%	13.3%
Jun-99	R 61.46	95.10	22.5%	
Dec-99	R 68.01	101.96	21.9%	22.2%
Jun-00	R 63.90	103.88	9.2%	
Dec-00	R 63.08	100.00	-1.9%	3.7%
Jun-01	R 73.80	107.80	3.8%	
Dec-01	R 72.23	115.00	15.0%	9.4%
Jun-02	R75.56	116.39	8.0%	
Dec-02	R74.67	118.31	2.9%	5.4%
Jun-03	R79.51	121.42	4.3%	
Dec-03	R92.14	135.18	14.3%	9.3%
Jun-04 * Revised	R95.22	147.56	21.5%	
Dec-04	R95.75	150.40	11.3%	16.4%
Jun-05	R101.62	155.44	5.3%	
Dec-05	R 103.07	161.20	7.2%	6.3%
Jun-06	R 112.97	170.14	9.5%	
Dec-06	R113.40	178.28	10.6%	10.0%
Jun-07	R122.3	185.61	9.1%	
Dec-07	R127,21	196.49	10.2%	9.7%
Jun-08	R150.43	218.65	17.8%	
Dec-08	R162.80	246.68	25.5%	21.7%
Jun-09	R185.49	274.29	25.4%	

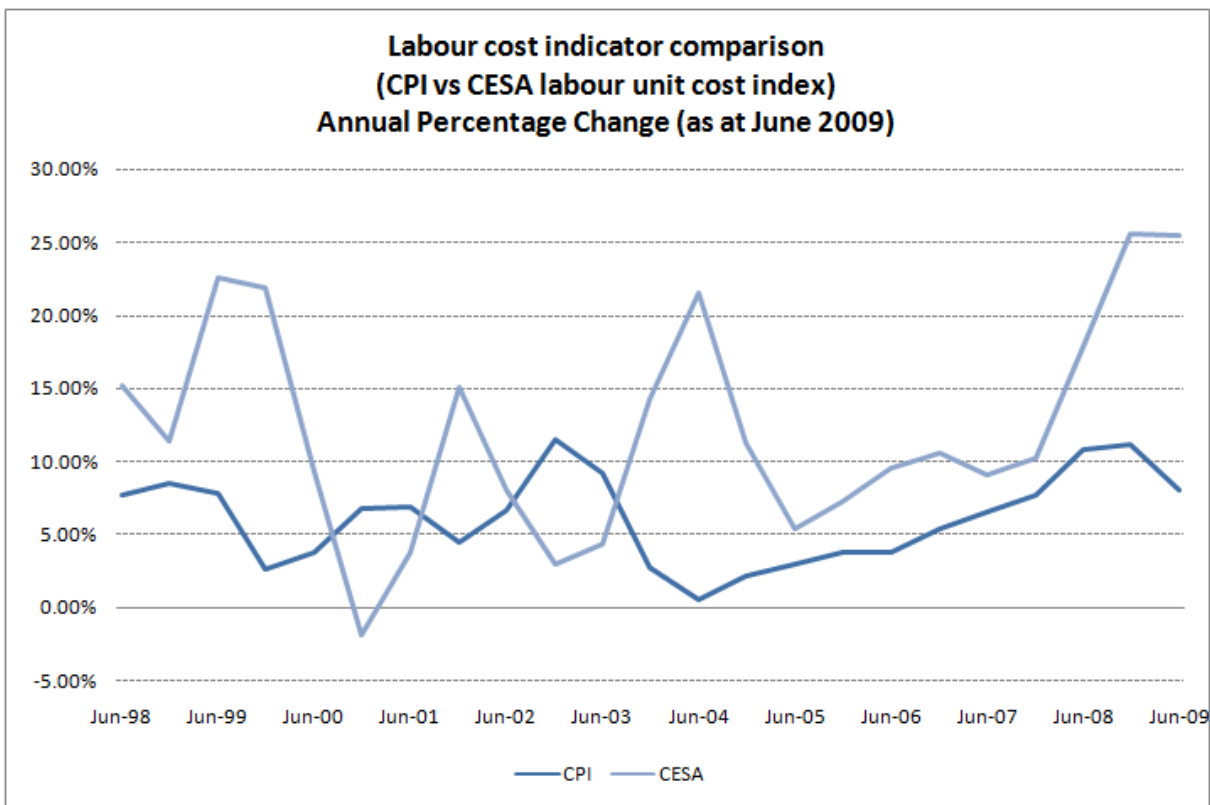


Figure 10: CESA Labour Cost Indicator

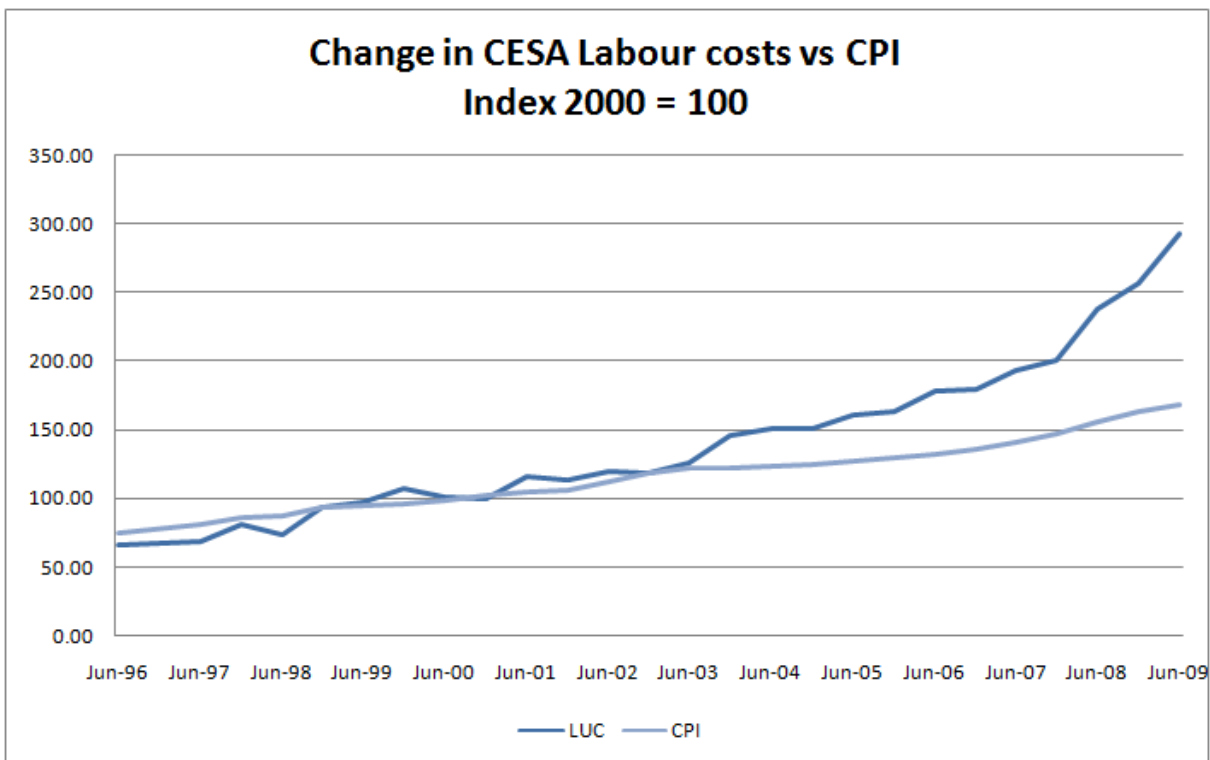


Figure 11: Change in CESA labour costs vs CPI

9. Delayed payments

Table 15: Fee income outstanding for 90 days or more (including foreign fee income earnings)

Income distribution	Fee income outstanding for more than 90 days as % of total annualized fee income (total fee income = gross fee income + fee income outstanding)					Fee income outstanding longer than 90 days R mill, current prices
	Jan-Jun 2007	July - Dec 2007	Jan - Jun 2008	Jul - Dec 2008	Jan - Jun 2009	
	%	%	%	%	%	
Central government	4.8%	10.4%	5.3%	3.9%	7.3%	R53
Provincial government	5.7%	5.4%	5.8%	4.3%	3.8%	R132
Local government	6.9%	8.3%	10.5%	6.9%	13.2%	R419
State owned enterprises	3.2%	5.9%	5.8%	7.7%	1.4%	R15
Private Sector	9.9%	8.6%	9.6%	11.0%	11.9%	R801
Foreign (all EX-RSA)	29.2%	42.0%	17.5%	27.0%	13.0%	R136
Total	10.3%	11.3%	11.1%	12.0%	9.5%	R1 557

*** Note:**

In the July – December 2001 survey the questionnaire was changed to exclude non-payment for periods less than 60 days, which leads to distortions when comparing previous survey’s results.

In the July – December 2002 survey the questionnaire was changed to include non-payments by foreign clients (irrespective of client classification). The total percentage of fee income outstanding therefore includes non-payments by foreign clients, previously excluded.

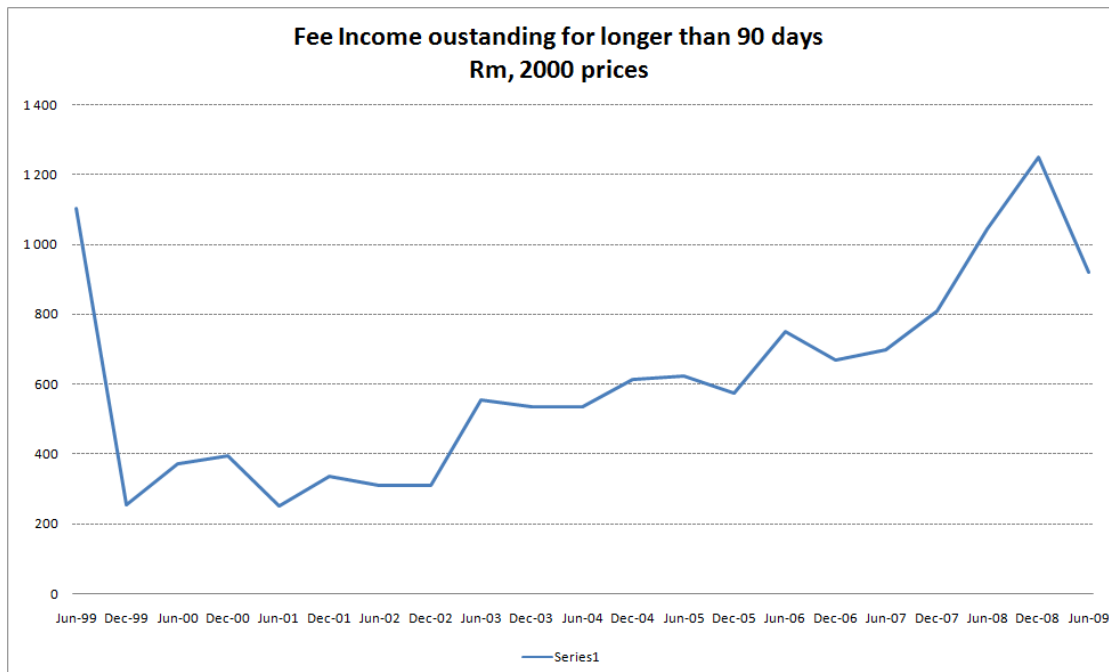


Figure 12: Fee income outstanding for longer than 90 days

10. Education and Training

Table 16: Contribution to education and training (excluding 1% CETA Levy)

Survey	Bursaries % of salary bill	Bursaries R mill current prices	Training % of Salary bill ⁴	Training R mill current prices
Jun-98	1,0%	R20	2,2%	R 42.1
Dec-98	1,0%	R17	2,7%	R 45.1
Jun-99	1,9%	R12	0,7%	R 38.9
Dec-99	0,7%	R11	1,5%	R 23.1
Jun-00	1,1%	R17	2,9%	R 44.5
Dec-00	0,6%	R10	2,1%	R 36.0
Jun-01	0,8%	R14	2,0%	R 36.6
Dec-01	0,5%	R9	1,5%	R 25.7
Jun-02	0,5%	R10	1,3%	R 25.7
Dec-02	0,9%	R19	0,7% ⁵	R 14.6
Jun-03	0,6%	R13	1,5%	R 31.7
Dec-03	0,5%	R11	1,3%	R 28.0
Jun-04	0,6%	R13	1,3%	R30.0
Dec-04	0,5%	R12	1,8%	R44.6
Jun-05	0,6%	R15	1,3%	R33.7
Dec-05	0,7%	R19	1,5%	R44.2
Jun-06	0,9%	R35	1,2%	R48.5
Dec-06	0,6%	R29	1,1%	R49.7
Jun-07	0,9%	R44	1,0%	R52.2
Dec-07	0,6%	R32	1,3%	R67.0
Jun-08	1,1%	R82	1,4%	R107.4
Dec-08	0,5%	R40	0,8%	R70.1
Jun-09	0,6%	R52	0,8%	R68.2

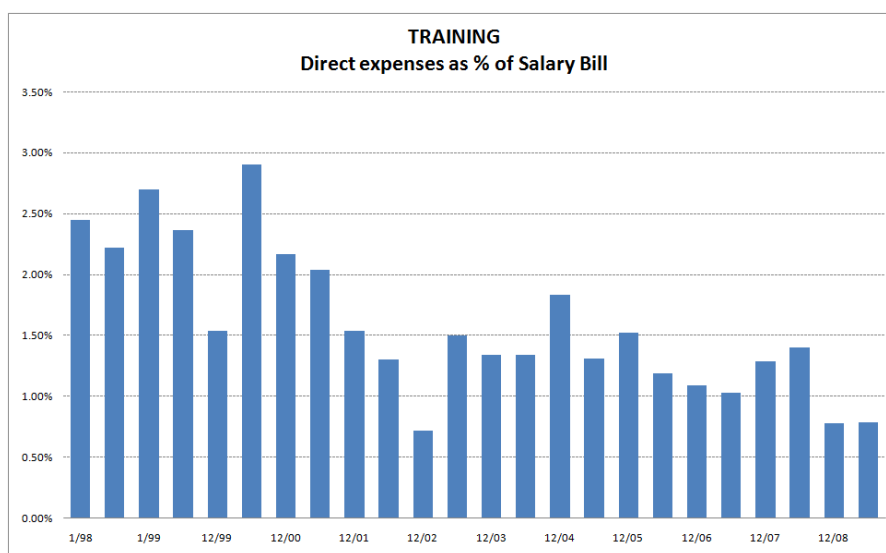


Figure 13: Training

⁴ Training now includes all training, in-house and external. Comparisons with previous surveys not compatible. – excludes costs related to salaries

⁵ Revised: Removed outlier questionnaire erroneously included in previous sample.

12. Employment profile analysis

Consulting Engineering Industry Employment Profile: JANUARY - JUNE 2009

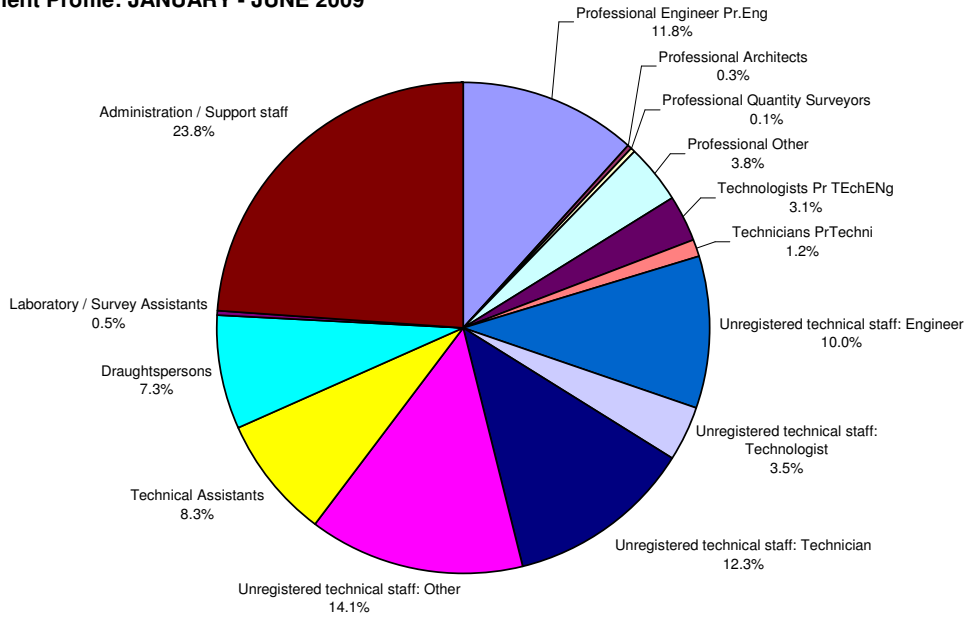


Figure 14: Employment profile June 2009

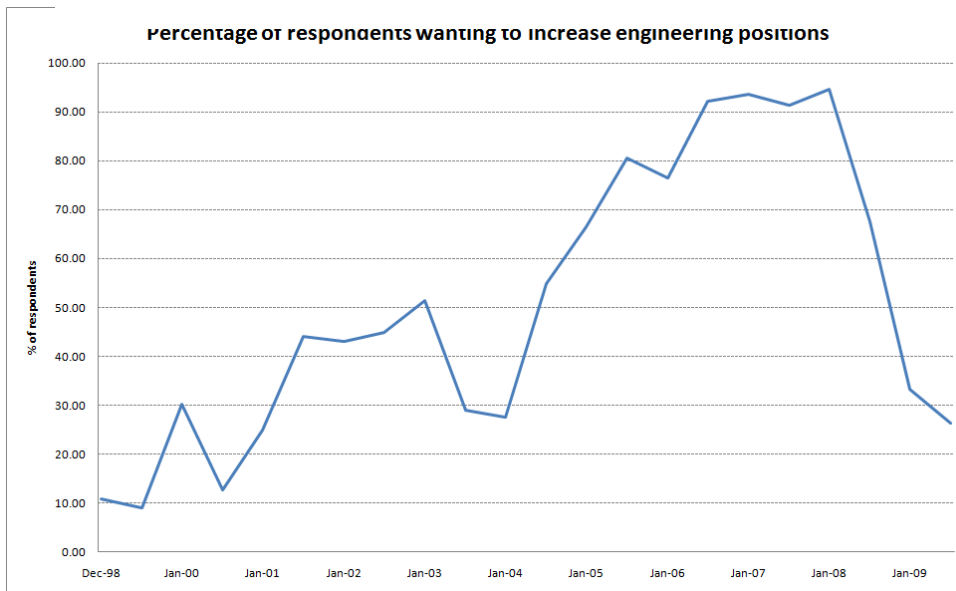


Figure 15: Percentage of respondents wanting to increase Engineers

Table 17: Employment profile of the consulting engineering industry: Percentage contribution: January – June 2009

Job Category	Black	Coloured	Asian	White	Total
Professional Engineer Pr.Eng	5.0%	1.8%	2.5%	90.6%	100.00%
Professional Architects	0.0%	0.0%	0.0%	100.0%	100.00%
Professional Quantity Surveyors	33.3%	0.0%	0.0%	66.7%	100.00%
Professional Other	16.2%	4.2%	6.3%	73.2%	100.00%
Technologists Pr TEchENg	5.3%	2.6%	7.9%	84.2%	100.00%
Technicians PrTechni	16.3%	11.6%	11.6%	60.5%	100.00%
Unregistered technical staff: Engineer	29.6%	2.4%	8.1%	59.8%	100.00%
Unregistered technical staff: Technologist	31.5%	10.0%	12.3%	46.2%	100.00%
Unregistered technical staff: Technician	49.2%	8.8%	5.5%	36.5%	100.00%
Unregistered technical staff: Other	31.4%	1.7%	5.7%	61.1%	100.00%
Technical Assistants	45.0%	5.9%	6.2%	43.0%	100.00%
Draughts Persons	12.3%	11.5%	8.9%	67.3%	100.00%
Laboratory / Survey Assistants	70.6%	29.4%	0.0%	0.0%	100.00%
Administration / Support staff	39.7%	11.0%	6.5%	42.9%	100.00%
Total	30.6%	6.6%	6.3%	56.5%	100.00%

Table 18: Employment profile of the consulting engineering industry: Percentage contribution: January – June 2009 2008: Change in distribution June 2008 survey

Job Category	Black	Coloured	Asian	White
Professional Engineer Pr.Eng	0.6%	-0.3%	-1.0%	0.7%
Professional Architects	0.0%	0.0%	0.0%	0.0%
Professional Quantity Surveyors	-41.7%	0.0%	0.0%	41.7%
Professional Other	0.8%	0.4%	1.9%	-3.0%
Technologists Pr TEchENg	-0.8%	-5.2%	2.7%	3.3%
Technicians PrTechni	-19.7%	2.0%	0.2%	17.4%
Unregistered technical staff: Engineer	10.3%	-1.2%	-9.1%	0.0%
Unregistered technical staff: Technologist	-21.5%	1.8%	8.9%	10.8%
Unregistered technical staff: Technician	5.4%	0.8%	2.7%	-8.9%
Unregistered technical staff: Other	6.4%	1.7%	5.7%	-13.9%
Technical Assistants	2.4%	-5.3%	-1.1%	4.0%
Draughts Persons	-0.1%	2.8%	3.5%	-6.2%
Laboratory / Survey Assistants	-12.7%	27.0%	-1.2%	-13.1%
Administration / Support staff	4.8%	-0.8%	2.5%	-6.5%
Total	0.8%	-1.2%	0.0%	0.4%

13. Ownership / Equity

Table 19: Black ownership / equity by company and professional type, as % of TOTAL Equity (including⁶ Asian, Colored)

Company Type	Owner category	Professional Category	Dec-06	Jun-07	Dec07	Jun-08	Dec-08	Jun-09
(PTY) LTD	Executive Directors	Pr.Eng	16.4%	14.9%	11.5%	12.3%	7.4%	10.5%
		PrTechEng	33.3%	24.4%	38.5%	25.0%	16.7%	20.0%
		Other	65.8%	47.2%	28.9%	37.8%	43.7%	32.1%
		TOTAL	25.3%	21.9%	16.8%	18.6%	13.5%	14.2%
	Non-Executive Directors	Pr.Eng	7.4%	34.5%	27.3%	40.0%	71.4%	77.8%
		PrTechEng	20.0%	50.0%	33.3%	0.0%	0.0%	0.0%
		Other	48.4%	75.6%	69.2%	80.0%	85.0%	70.0%
	TOTAL	23.9%	58.5%	55.0%	72%	81.5%	70.0%	
CC	Members	Pr.Eng	12.1%	12.2%	20.8%	41.7%	28.6%	20.0%
		PrTechEng	37.5%	36.8%	50.0%	33.3%	66.7%	40.0%
		Other	70.0%	65.2%	33.3%	42.9%	50.0%	50.0%
		TOTAL	28.8%	32.5%	24.1%	41.2%	36.8%	20.0%
Partnership	Partners	Pr.Eng	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%
		PrTechEng	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Other	66.7%	33.3%	0.0%	0.0%	0.0%	0.0%
		TOTAL	40.0%	7.7%	0.0%	0.0%	0.0%	0.0%
Total			25.5%	28.4%	21.7%	27.3%	22.4%	20.0%

Black (including Asian and Colored) equity, including executive directors, non-executive directors, members and partners, represented a lower 20% (down from 22,4%% in the December 2008 survey) of total equity in the industry. Black executive directors represented a higher 14,2% of total equity, while black non-directors represented 70%. Black members taking equity in closed corporations were still higher by historical terms, but softened from 41% in the June 2008 survey to 20%.

⁶ Changed from previous survey to include Asians and Colored

Table 20: CESA Confidence index: % respondents satisfied with working conditions

Survey Period	CESA Confidence Index	% Change on previous survey	% Change on survey same time last year
Jun-98	85.0	-7.61%	-10.5%
Dec-98	68.0	-20.00%	-26.1%
Jun-99	32.0	-52.94%	-62.4%
Dec-99	38.5	20.31%	-43.4%
Jun-00	44.0	14.29%	37.5%
Dec-00	66.5	51.05%	72.6%
Jun-01	71.9	8.23%	63.5%
Dec-01	85.4	18.67%	28.4%
Jun-02	87.3	2.24%	21.3%
Dec-02	97.2	11.34%	13.8%
Jun-03	83.8	-13.76%	-3.9%
Dec-03	64.2	-23.38%	-33.9%
Jun-04	77.2	20.25%	-7.9%
Dec-04	86.3	11.77%	34.4%
Jun-05	96.8	12.2%	25.4%
Dec-05	99.3	2.5%	14.9%
Jun-06	99.7	0.5%	3.0%
Dec-06	98.4	-1.30	-0.8
Jun-07	99.4	1.0%	-0.3%
Dec-07	99.8	0.4%	1.4%
Jun-08	99.9	0.1%	0.5%
Dec-08	99.8	-0.1%	0.0%
Jun-09	96.2	-3.61%	-3.7%
Dec-09	96.7	0.52%	-3.1%
Jun-10	64.3	-33.51%	-33.2%

15. Employment Tables

Table 21: Employment Breakdown, by race, gender and job category: January – June 2009

Job category	Black			Coloured			Asian			White			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Professional Engineer Pr.Eng	116	0	116	42	0	42	53	5	58	2 022	74	2 096	2 234	79	2 313
Professional Architects	0	0	0	0	0	0	0	0	0	48	5	53	48	5	53
Professional Quantity Surveyors	5	0	5	0	0	0	0	0	0	5	5	11	11	5	16
Professional Other	69	53	122	21	11	32	16	32	48	381	169	551	487	265	752
Technologists Pr TEchENg	32	0	32	16	0	16	48	0	48	498	11	508	593	11	603
Technicians PrTechni	32	5	37	26	0	26	26	0	26	127	11	138	212	16	228
Unregistered technical staff: Engineer	519	64	582	42	5	48	122	37	159	1 048	127	1 175	1 731	233	1 964
Unregistered technical staff: Technologist	169	48	217	53	16	69	64	21	85	296	21	318	582	106	688
Unregistered technical staff: Technician	889	296	1 186	180	32	212	111	21	132	842	37	879	2 022	386	2 408
Unregistered technical staff: Other	519	349	868	37	11	48	74	85	159	1 302	386	1 689	1 932	831	2 763
Technical Assistants	588	143	730	79	16	95	85	16	101	561	138	699	1 313	312	1 625
Draughts Persons	122	53	175	90	74	164	69	58	127	513	445	958	794	630	1 424
Laboratory / Survey Assistants	64	0	64	26	0	26	0	0	0	0	0	0	90	0	90
Administration / Support staff	503	1 350	1 853	101	413	513	58	243	302	265	1 736	2 001	926	3 742	4 669
Total	3 626	2 361	5 987	715	577	1 292	725	519	1 244	7 908	3 165	11 074	12 974	6 622	19 596
% of total	18.5%	12.0%	30.6%	3.6%	2.9%	6.6%	3.7%	2.6%	6.3%	40.4%	16.2%	56.5%	66.2%	33.8%	100.0%

Table 22: Employment Breakdown, by race, gender and job category: January – June 2009: Percentage share

Job category	Black			Coloured			Asian			White			Total		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
Professional Engineer Pr.Eng	0.6%	0.0%	0.6%	0.2%	0.0%	0.2%	0.3%	0.0%	0.3%	10.3%	0.4%	10.7%	11.4%	0.4%	11.8%
Professional Architects	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.3%	0.2%	0.0%	0.3%
Professional Quantity Surveyors	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.1%
Professional Other	0.4%	0.3%	0.6%	0.1%	0.1%	0.2%	0.1%	0.2%	0.2%	1.9%	0.9%	2.8%	2.5%	1.4%	3.8%
Technologists Pr TEchENg	0.2%	0.0%	0.2%	0.1%	0.0%	0.1%	0.2%	0.0%	0.2%	2.5%	0.1%	2.6%	3.0%	0.1%	3.1%
Technicians PrTechni	0.2%	0.0%	0.2%	0.1%	0.0%	0.1%	0.1%	0.0%	0.1%	0.6%	0.1%	0.7%	1.1%	0.1%	1.2%
Unregistered technical staff: Engineer	2.6%	0.3%	3.0%	0.2%	0.0%	0.2%	0.6%	0.2%	0.8%	5.3%	0.6%	6.0%	8.8%	1.2%	10.0%
Unregistered technical staff: Technologist	0.9%	0.2%	1.1%	0.3%	0.1%	0.4%	0.3%	0.1%	0.4%	1.5%	0.1%	1.6%	3.0%	0.5%	3.5%
Unregistered technical staff: Technician	4.5%	1.5%	6.1%	0.9%	0.2%	1.1%	0.6%	0.1%	0.7%	4.3%	0.2%	4.5%	10.3%	2.0%	12.3%
Unregistered technical staff: Other	2.6%	1.8%	4.4%	0.2%	0.1%	0.2%	0.4%	0.4%	0.8%	6.6%	2.0%	8.6%	9.9%	4.2%	14.1%
Technical Assistants	3.0%	0.7%	3.7%	0.4%	0.1%	0.5%	0.4%	0.1%	0.5%	2.9%	0.7%	3.6%	6.7%	1.6%	8.3%
Draughts Persons	0.6%	0.3%	0.9%	0.5%	0.4%	0.8%	0.4%	0.3%	0.6%	2.6%	2.3%	4.9%	4.1%	3.2%	7.3%
Laboratory / Survey Assistants	0.3%	0.0%	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.5%
Administration / Support staff	2.6%	6.9%	9.5%	0.5%	2.1%	2.6%	0.3%	1.2%	1.5%	1.4%	8.9%	10.2%	4.7%	19.1%	23.8%
Total	18.5%	12.0%	30.6%	3.6%	2.9%	6.6%	3.7%	2.6%	6.3%	40.4%	16.2%	56.5%	66.2%	33.8%	100.0%

Table 23: Ownership profile: Employment, company type, race & gender: January – June 2009

Comp any Type	Owner category	Professional			Black			Coloured			Asian			White			Total		
		Category	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total		
(PTY) LTD	Executive Director	PrEng	42	0	42	26	0	26	16	5	21	757	11	768	842	16	858		
		PrTechEng	11	0	11	0	0	0	5	0	5	64	0	64	79	0	79		
		Other	37	0	37	0	0	0	11	0	11	90	11	101	138	11	148		
	Non-Executive Director	PrEng	16	5	21	5	5	11	0	5	5	11	0	11	32	16	48		
		PrTechEng	0	0	0	0	0	0	0	0	0	5	0	5	5	0	5		
		Other	16	21	37	0	0	0	0	0	0	16	0	16	32	21	53		
CC	Member	PrEng	5	0	5	11	0	11	5	0	5	85	0	85	106	0	106		
		PrTechEng	5	0	5	5	0	5	0	0	0	16	0	16	26	0	26		
		Other	5	5	11	5	0	5	0	0	0	5	11	16	16	16	32		
Partnership	Partner	PrEng	0	0	0	0	0	0	0	0	0	16	0	16	16	0	16		
		PrTechEng	0	0	0	0	0	0	0	0	0	0	5	5	0	5	5		
		Other	0	0	0	0	0	0	0	0	0	0	0	5	0	0	5		
GRAND TOTAL			138	32	169	53	5	58	37	11	48	1064	37	1106	1292	85	1382		
% distribution			10.0%	2.3%	12.3%	3.8%	0.4%	4.2%	2.7%	0.8%	3.4%	77.0%	2.7%	80.1%	93.5%	6.1%	100.0%		
% directorship only			8.3%	0.0%	8.3%	2.4%	0.0%	2.4%	2.9%	0.5%	3.4%	83.9%	2.0%	85.9%	97.6%	2.4%	100.0%		
Total employment			3 626	2 361	5 987	715	577	1 292	725	519	1 244	7 908	3 165	11 074	12 974	6 622	19 596		
% ownership / equity			3.8%	1.3%	2.8%	7.4%	0.9%	4.5%	5.1%	2.0%	3.8%	13.5%	1.2%	10.0%	10.0%	1.3%	7.1%		

End of report

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