

Biannual Economic and
Capacity Survey

January – June 2019

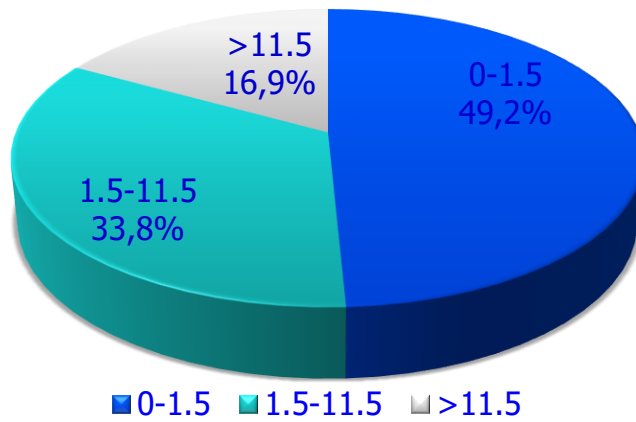
Firm distribution based on Annual Turnover (based on responses received)

January – June 2019

Full survey

Category by gross annual income	% of firms
0 – R1,5m	49,2%
R1,5m – R11,5m	33,8%
> R11,5m	16,9%
Total	100.0%

Firm distribution based on turnover

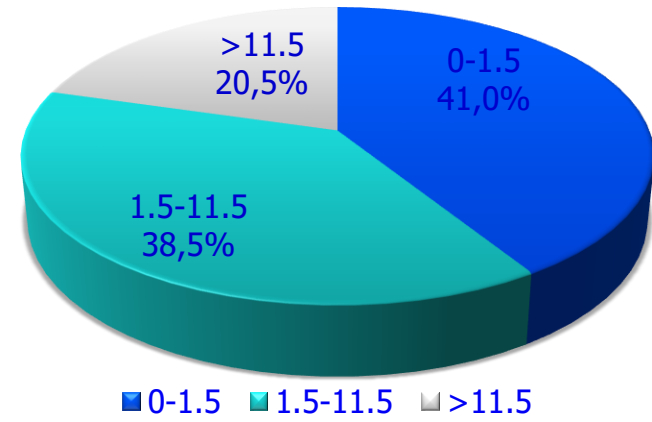


July – December 2018

Full survey

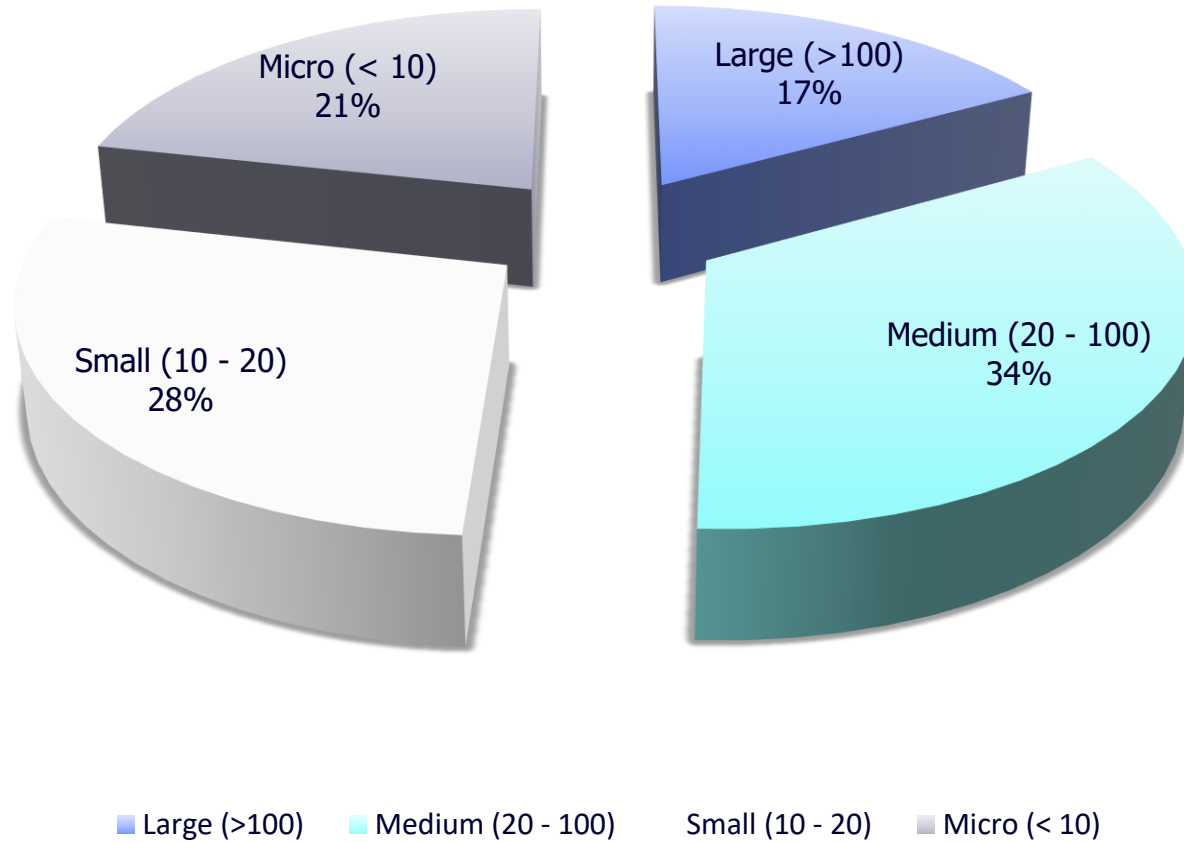
Category by gross annual income	% of firms
0 – R1,5m	41,0%
R1,5m – R11,5m	38,5%
> R11,5m	20,5%
Total	100.0%

Firm distribution based on turnover



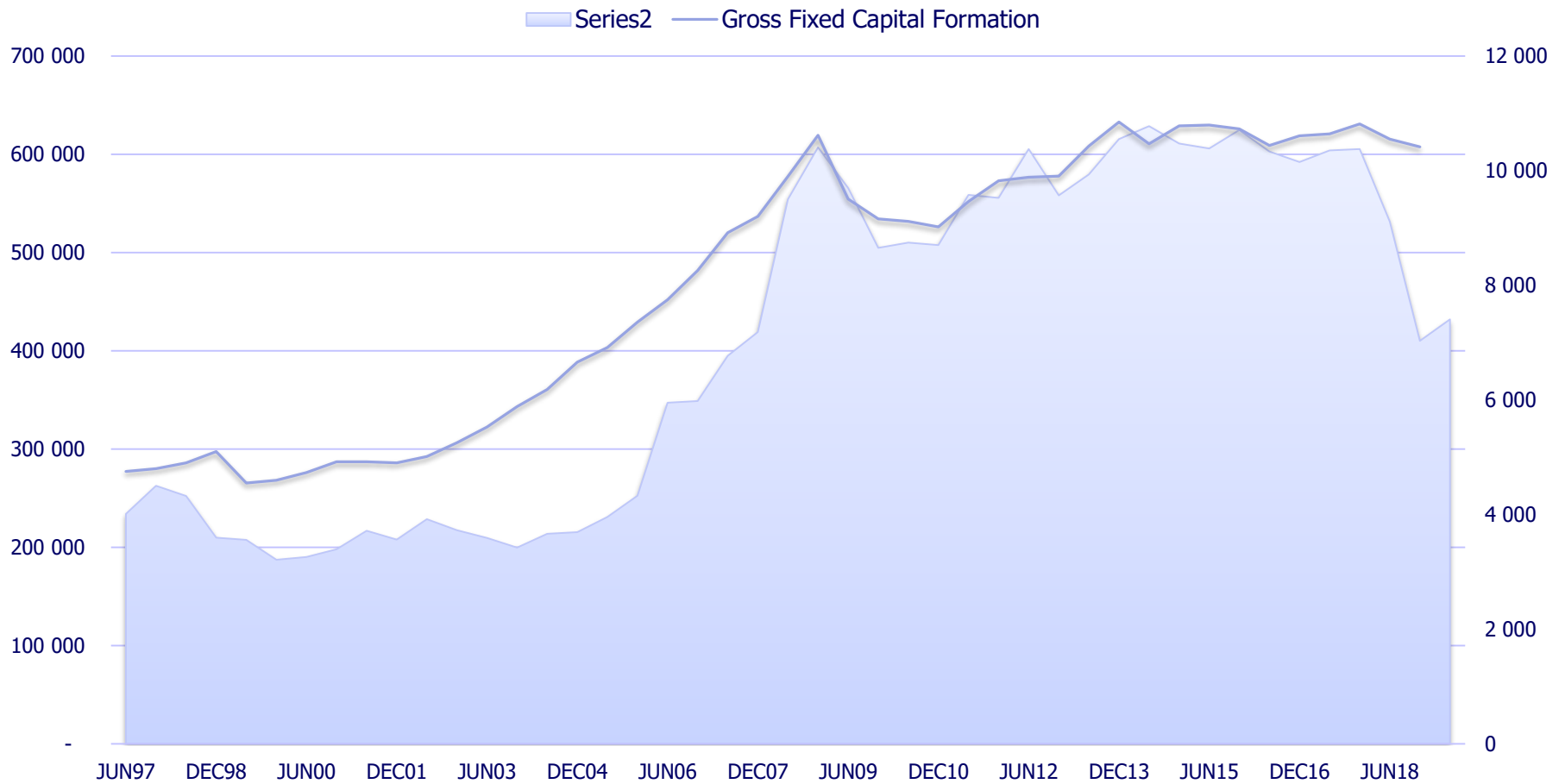
Profile of respondents – by firm size

Based on full and part time employment

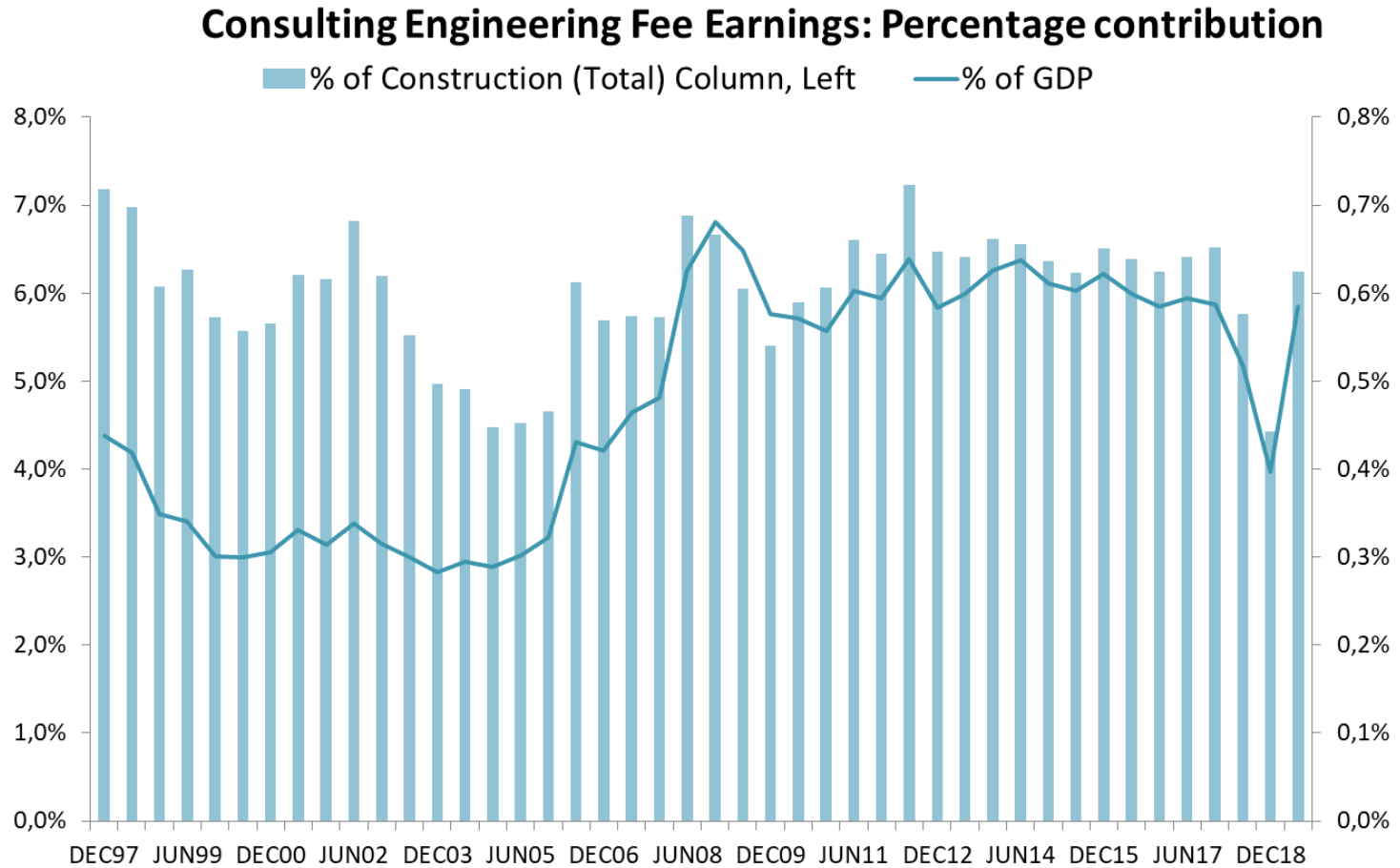


Fee earnings vs Gross Fixed Capital Formation (Res, Non-Res, Construction works) | Rbn, Constant 2010 prices

Consulting earnings vs GFCF: Civil construction works (2000 prices)

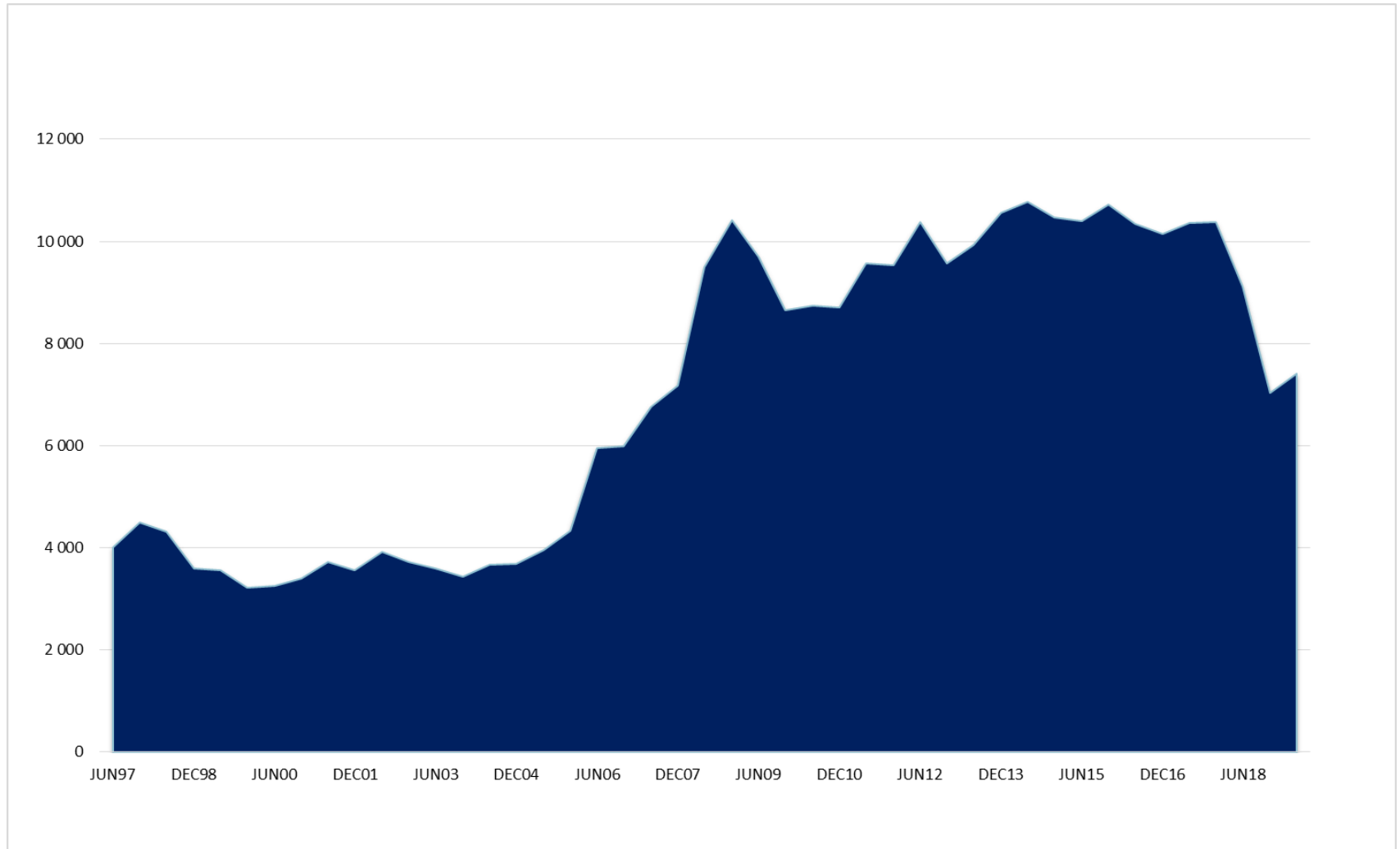


Consulting Engineering Earnings Percentage of GDP / GFCF construction



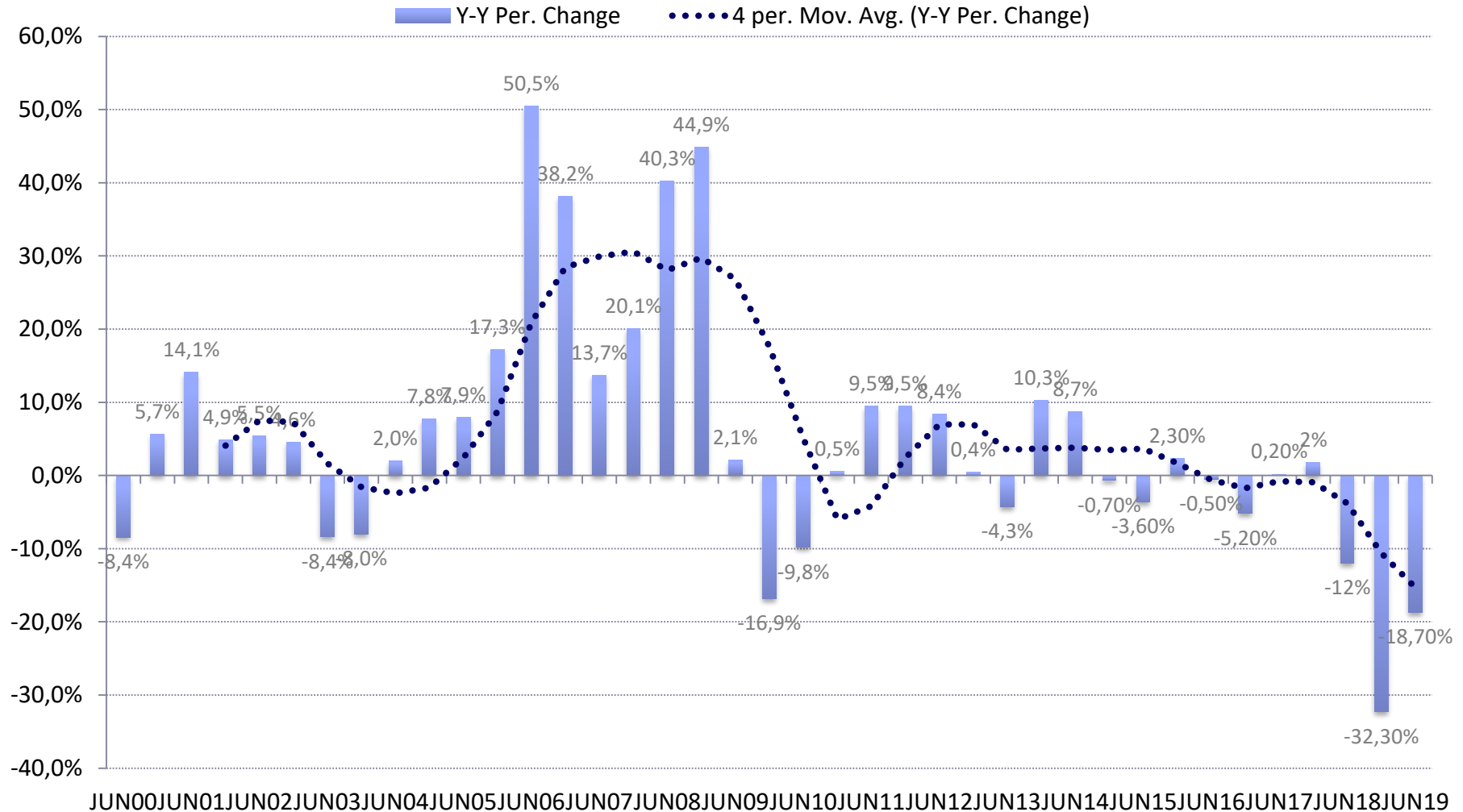
Fee income, R billions Real 2000 prices

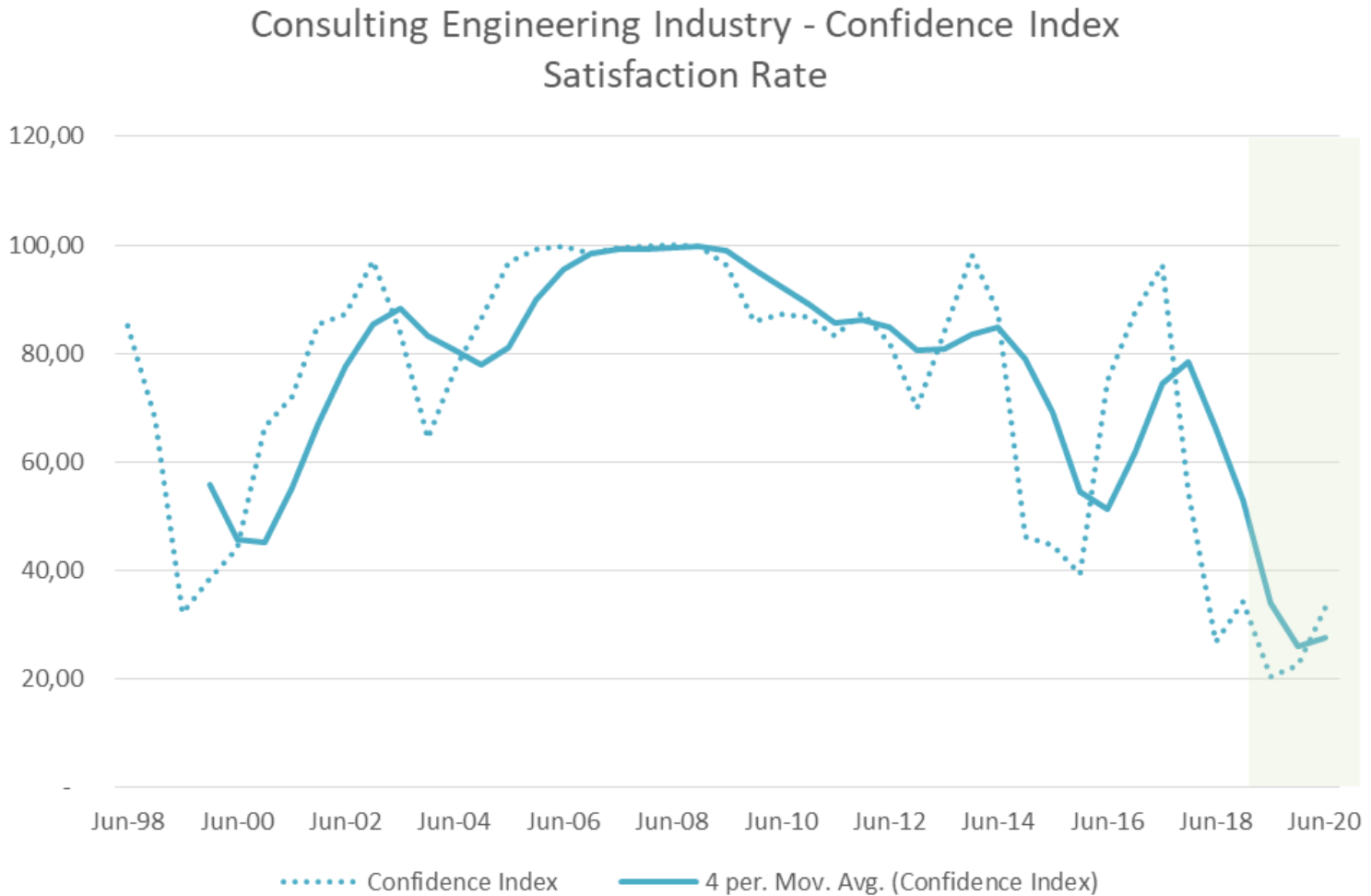
Annualised | Deflator = CPI



Real Fee income, Real prices

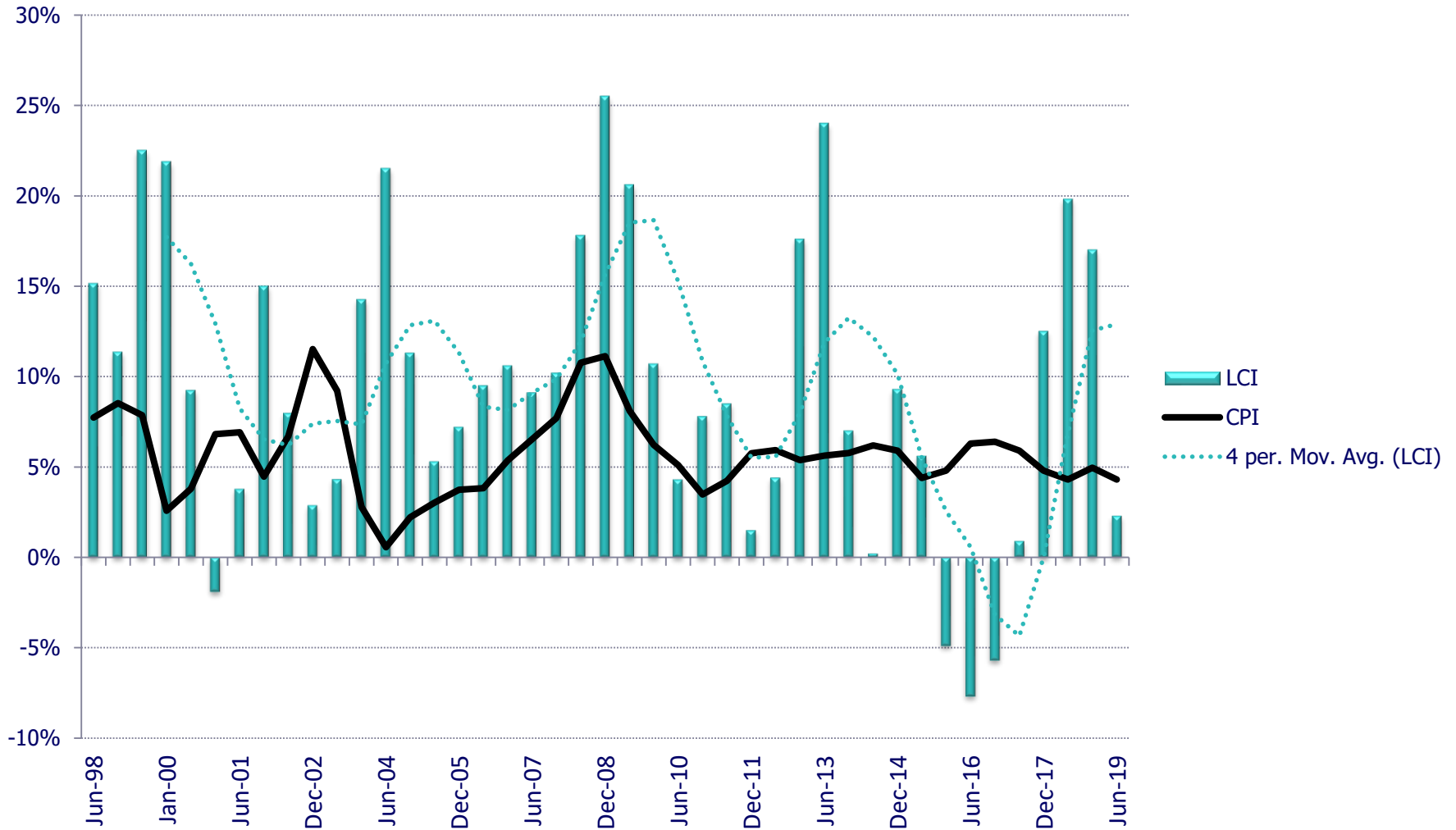
Annual Change | Deflator = CPI





CESA Labour Cost Indicator vs CPI

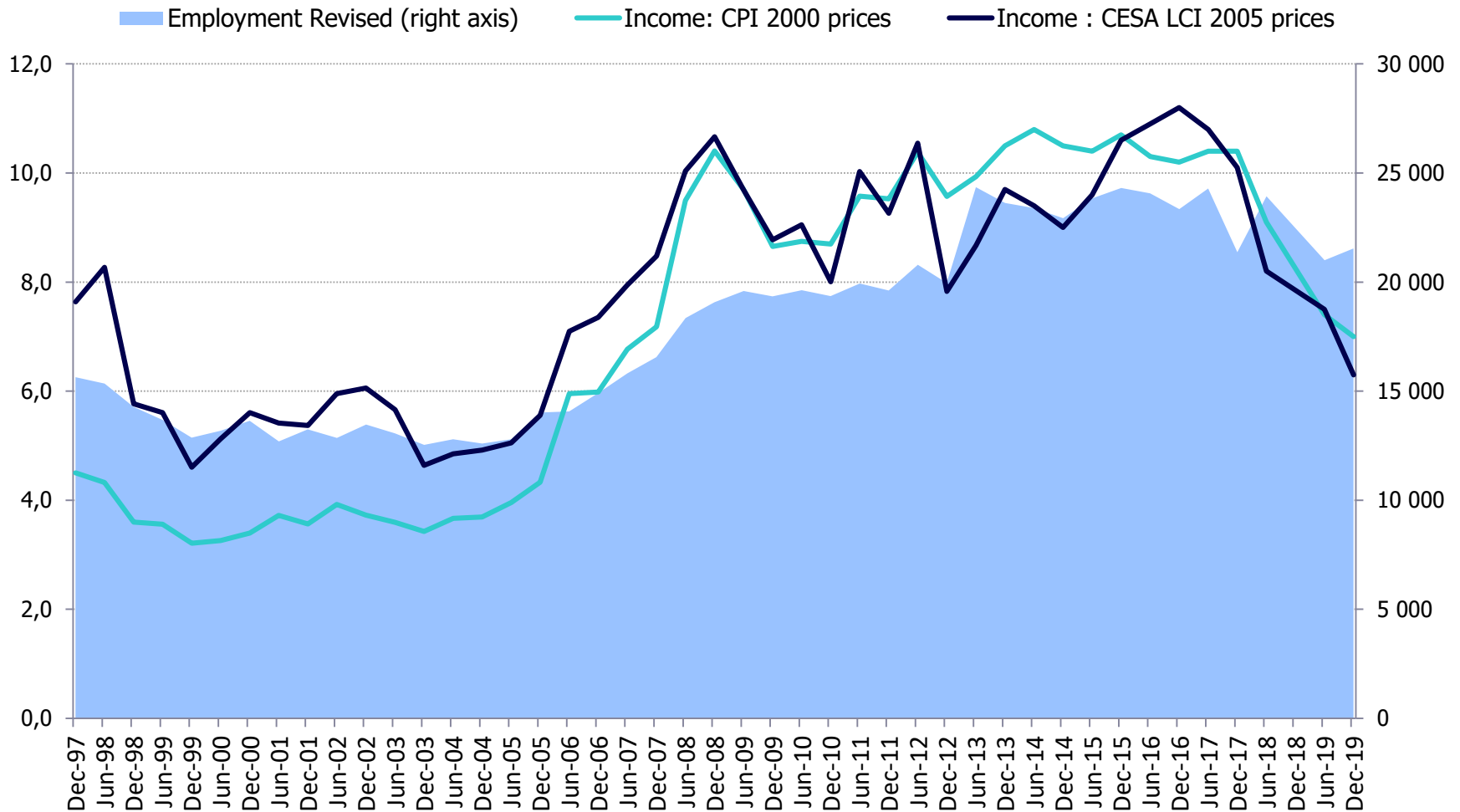
Year on Year percentage change



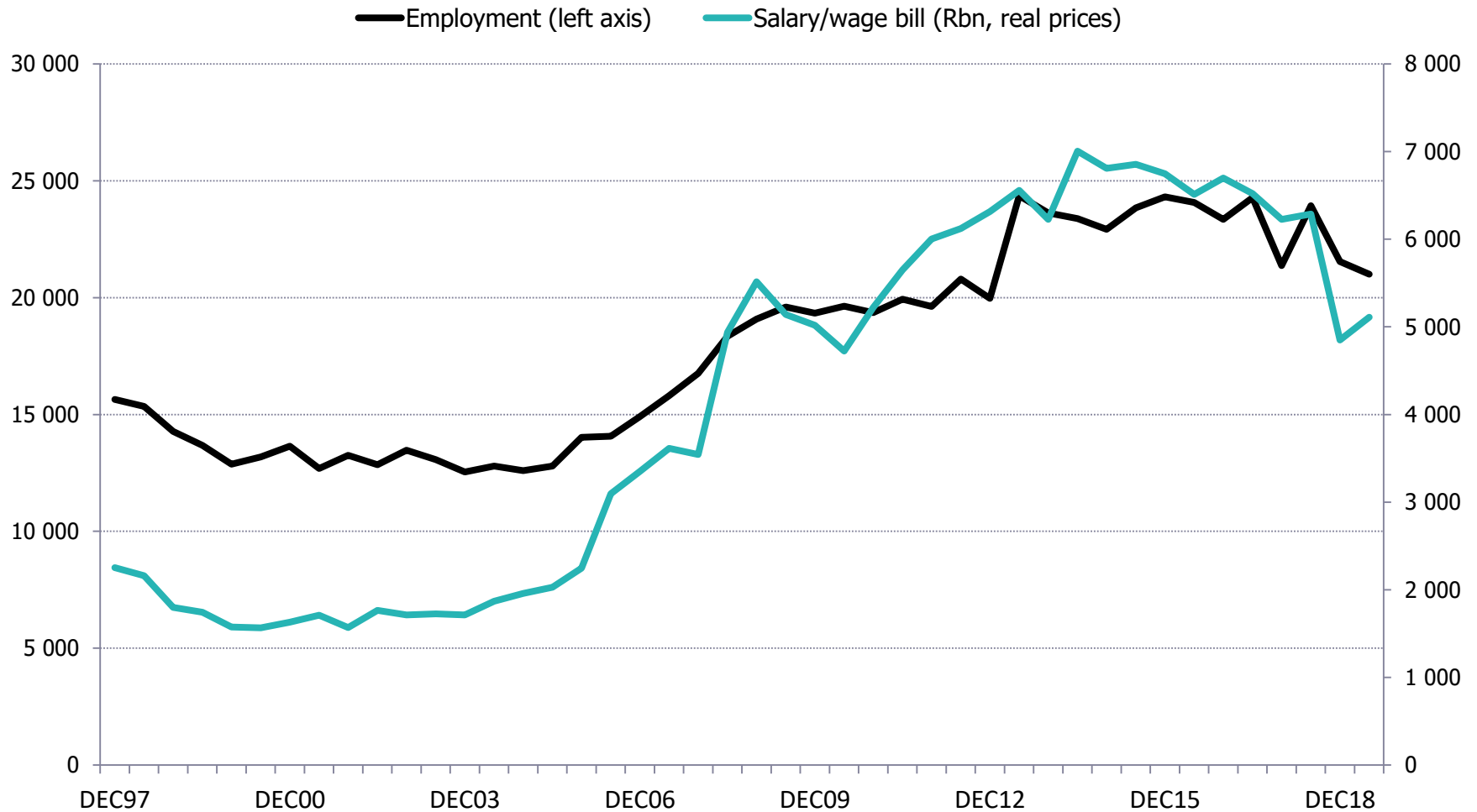
Employment vs REAL fee income (Rbn)

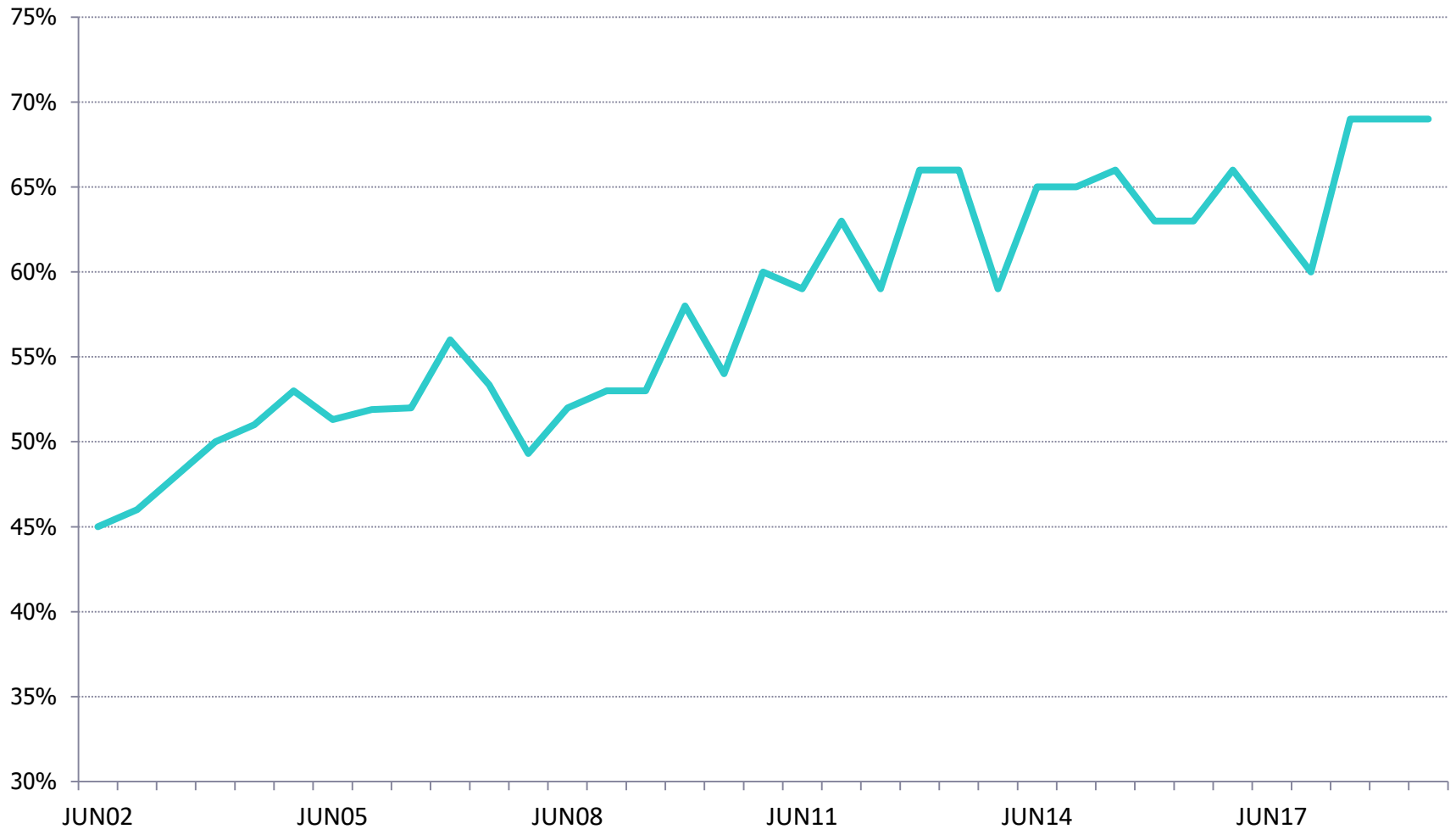
(Deflated using the CPI & LCI)

- CPI: Consumer price index
- LCI : Labour Cost Indicator



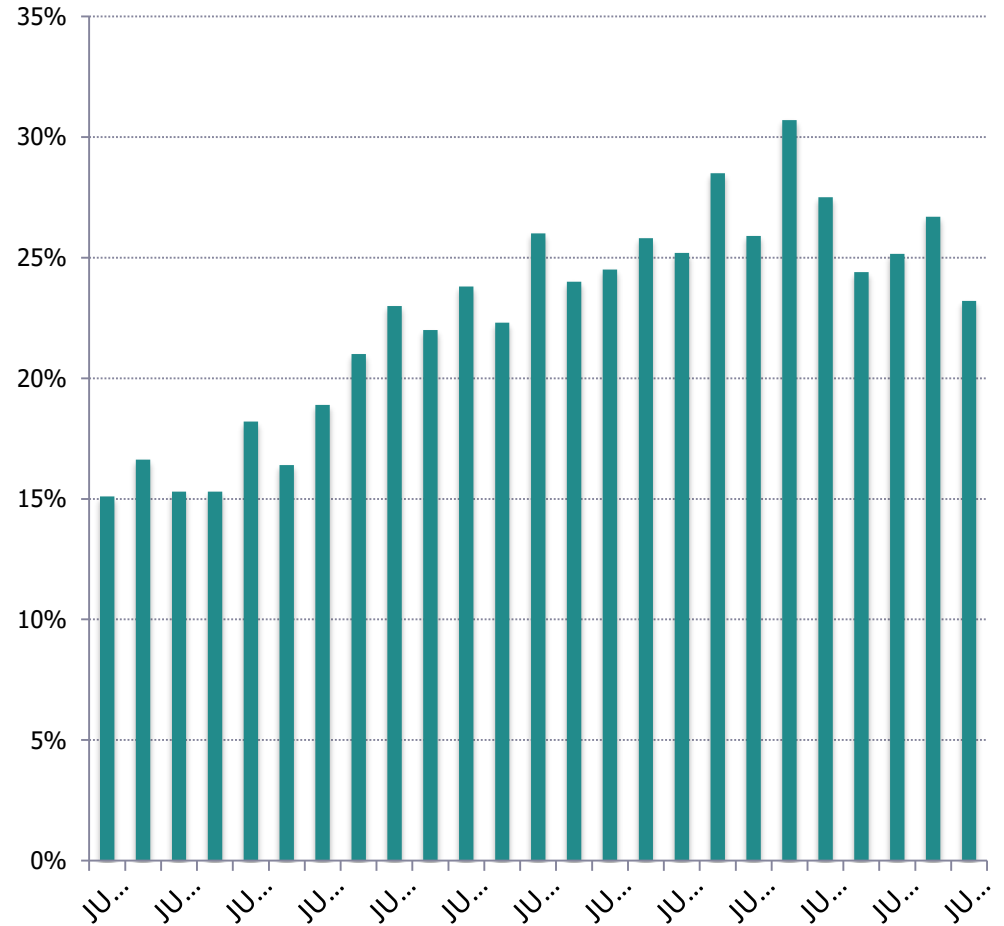
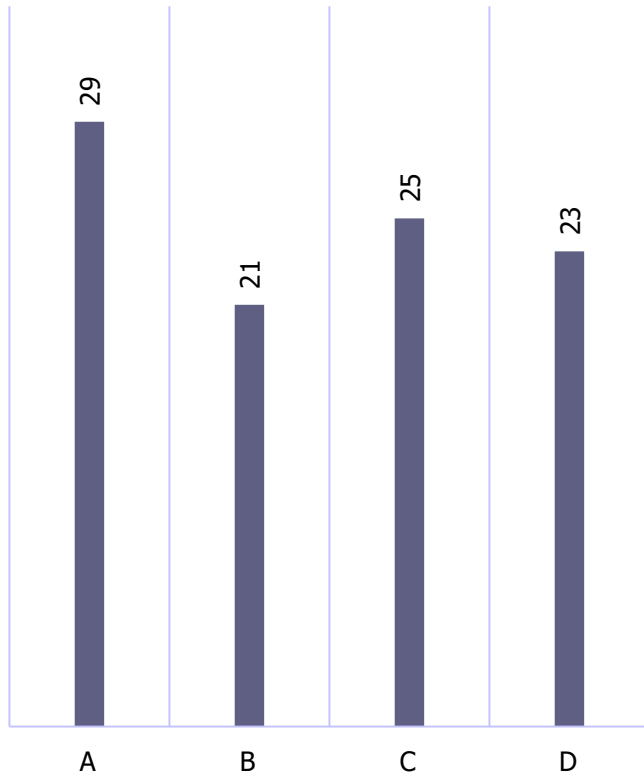
Salary and wage vs Employment



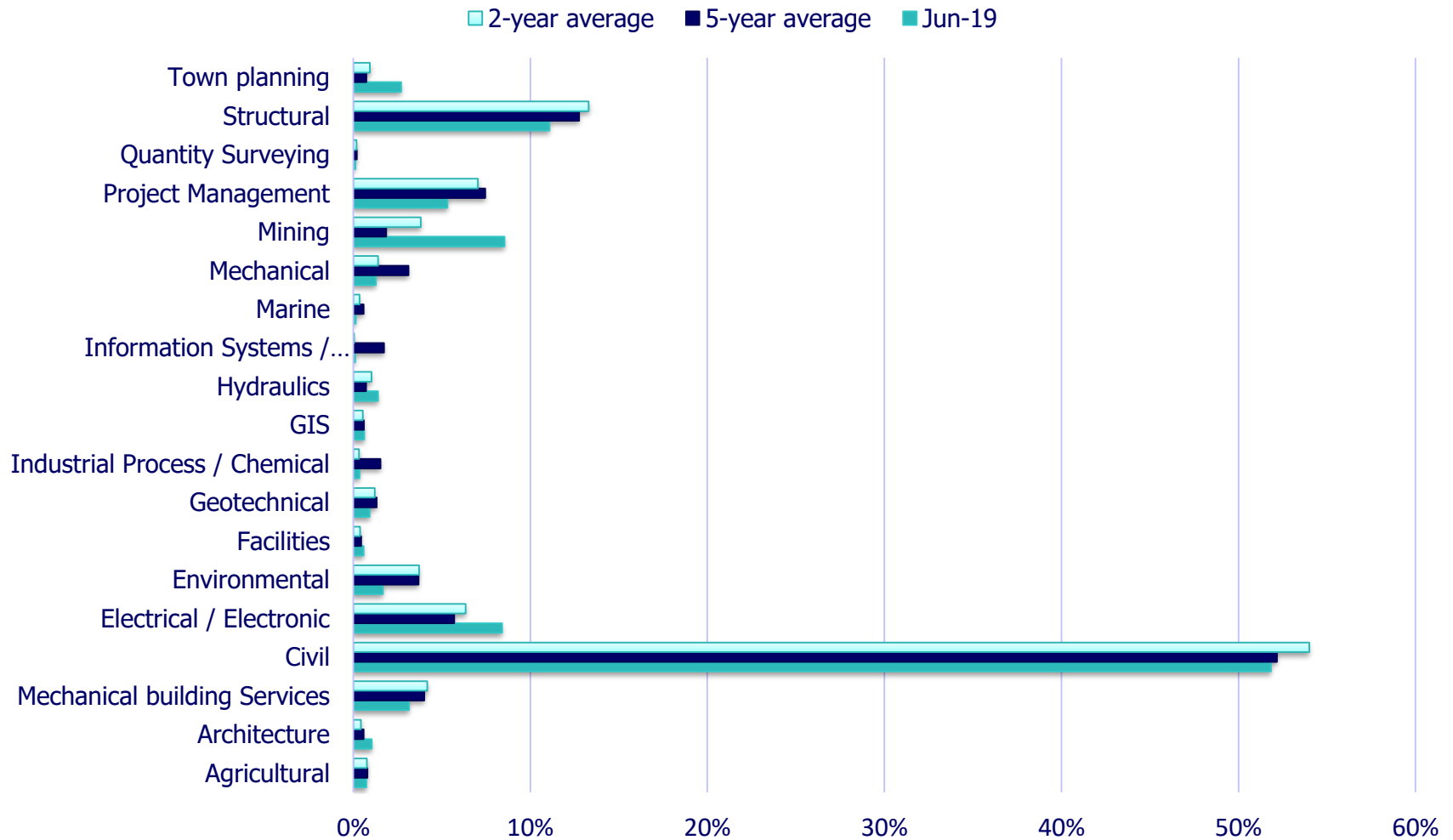


Average Discounting rate

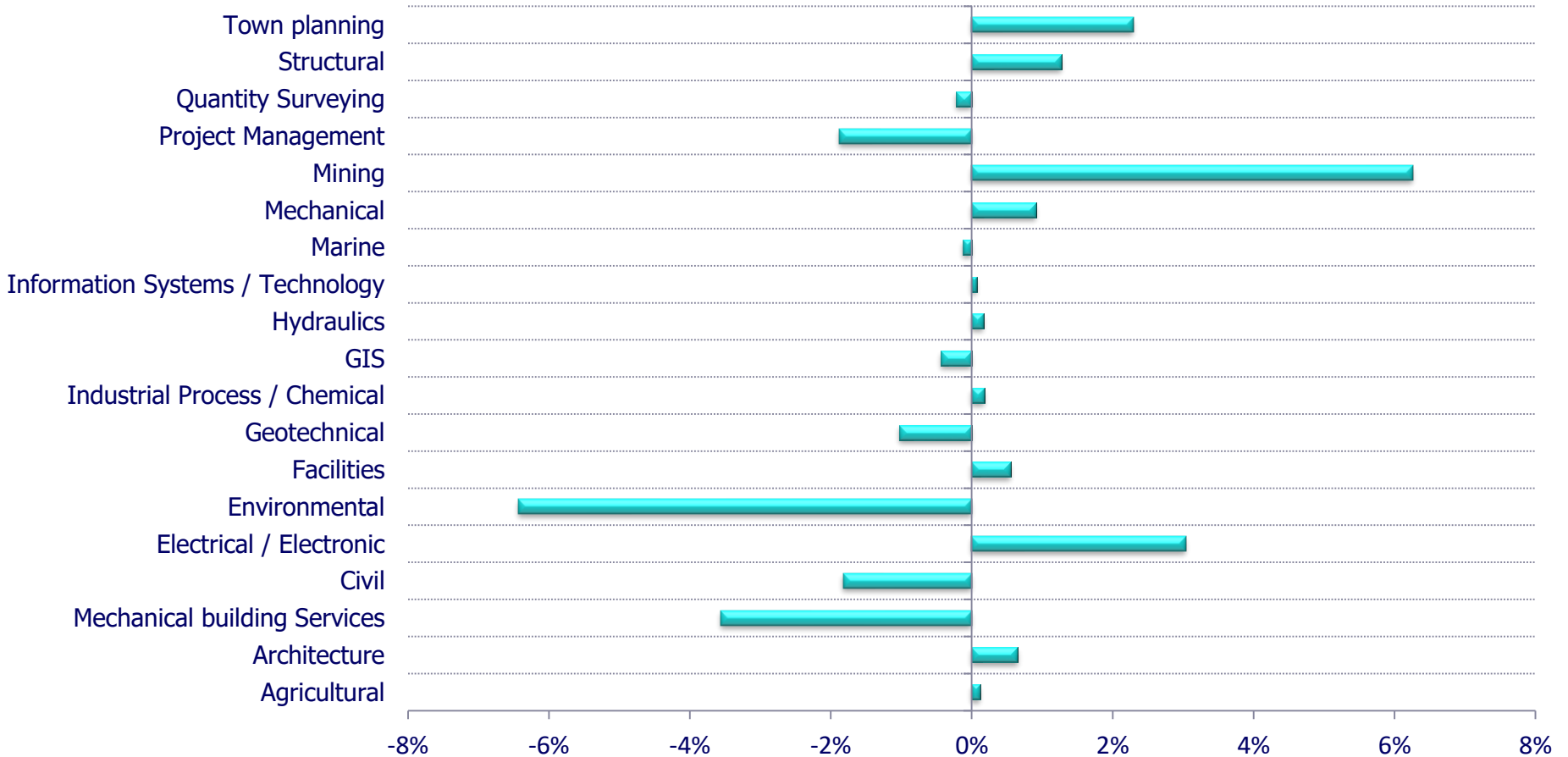
BY FIRM CATEGORY



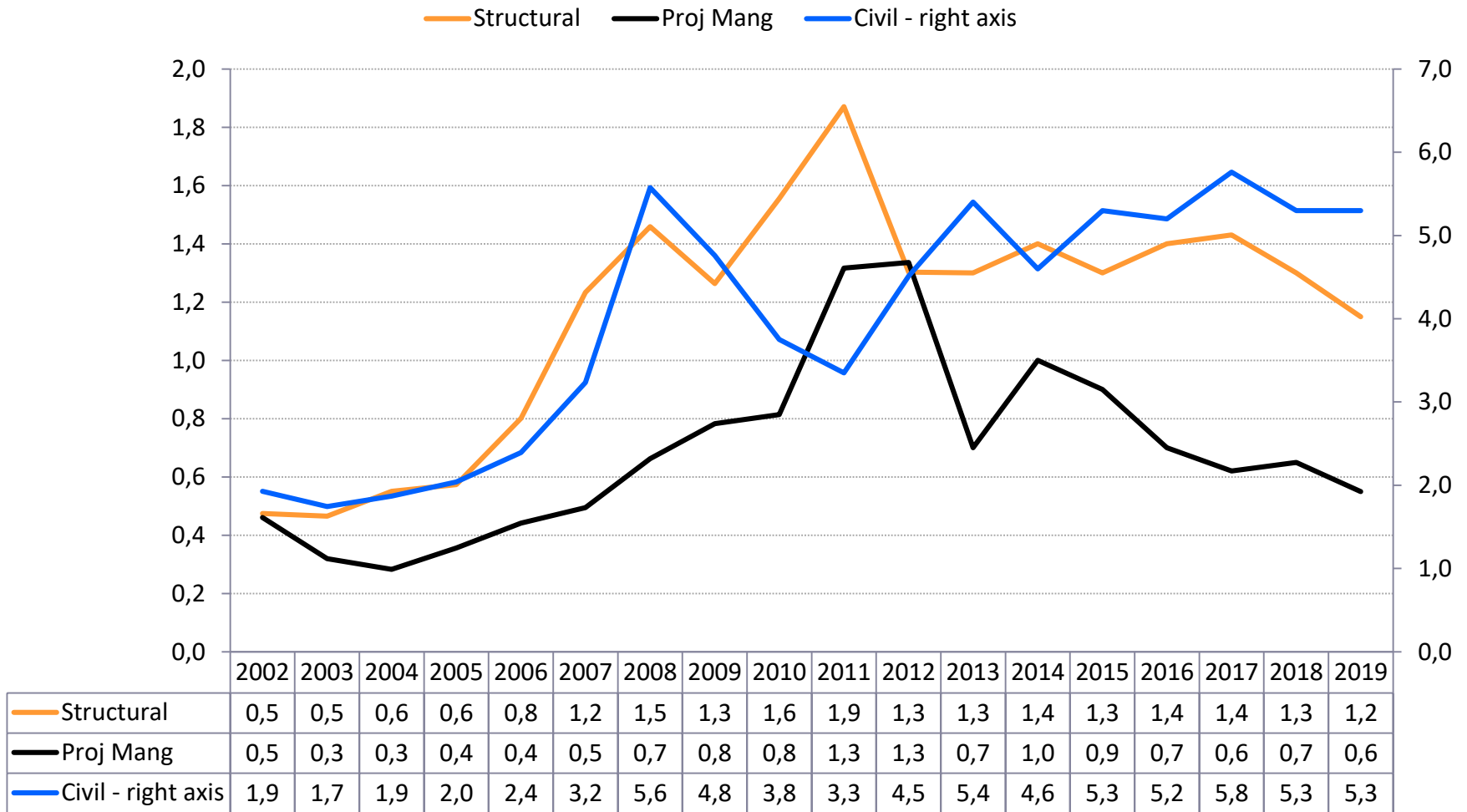
Fee income earned by Sub-disciplines: % Share



Fee income earned by Sub-disciplines: % Share Change in market share in the last 6 months

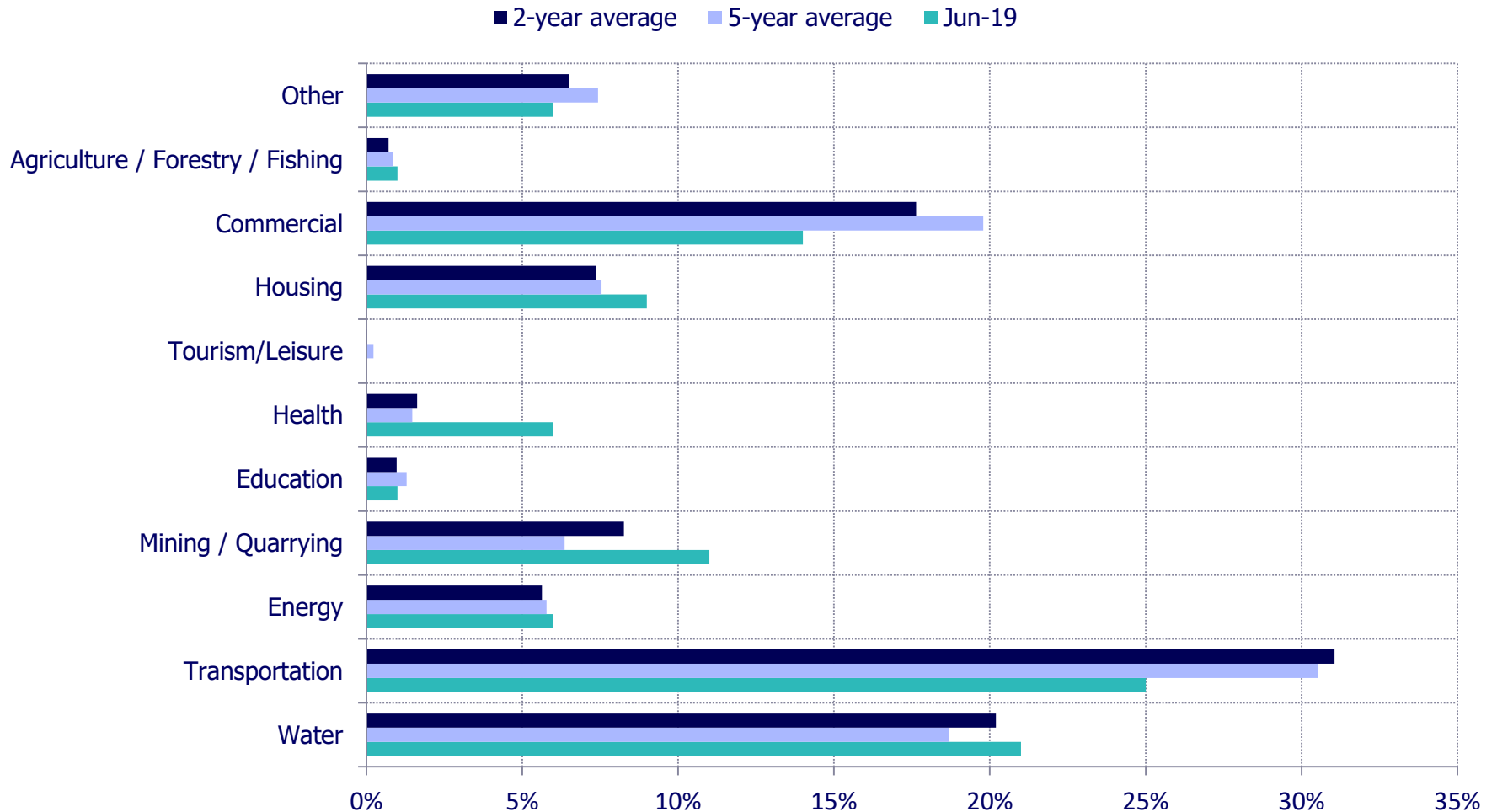


Fee income earned by TOP THREE disciplines: R bn Real 2000 prices Moving average (2 survey period): 2002-June 2019

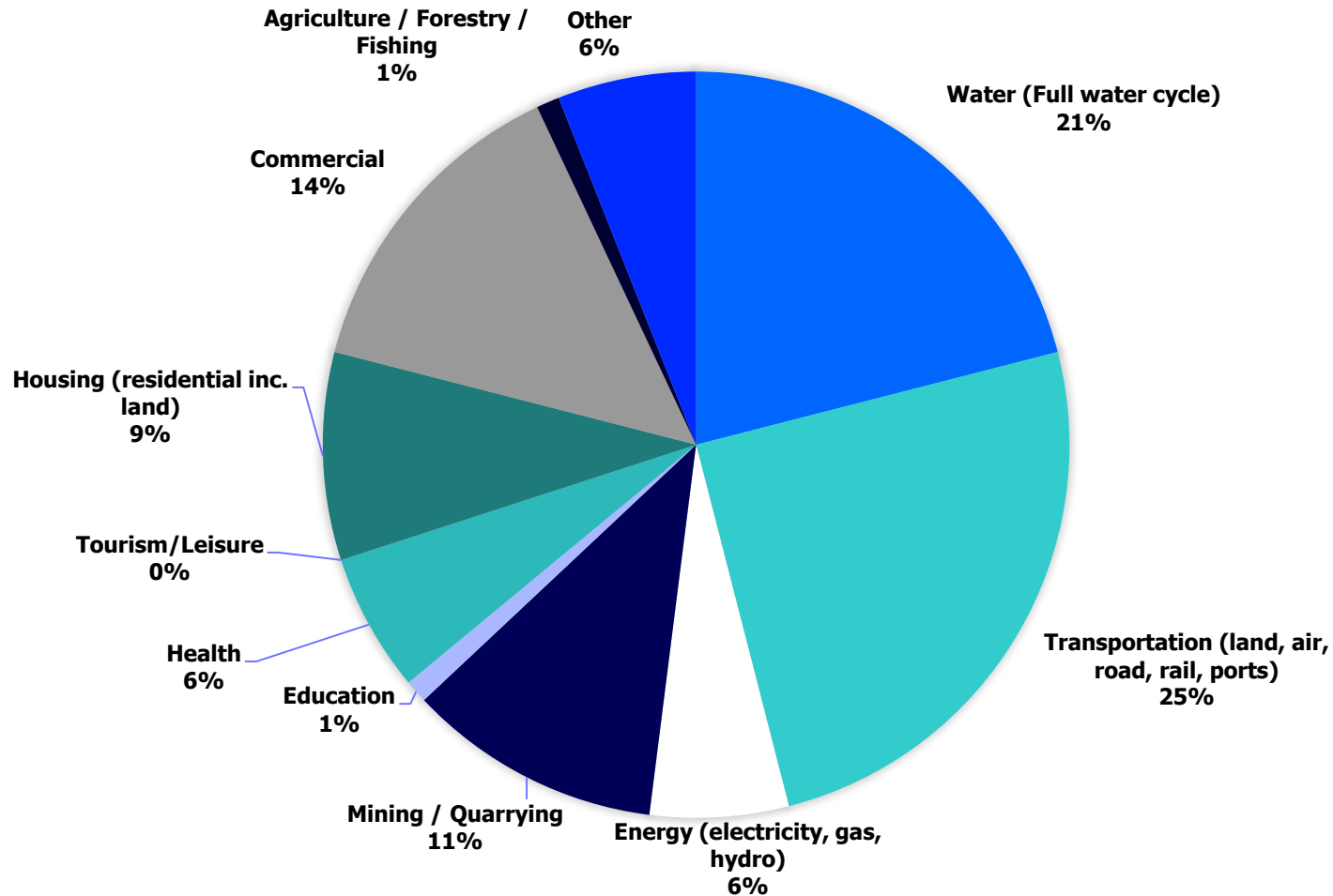


Fee income earned by economic sector

Percentage market share

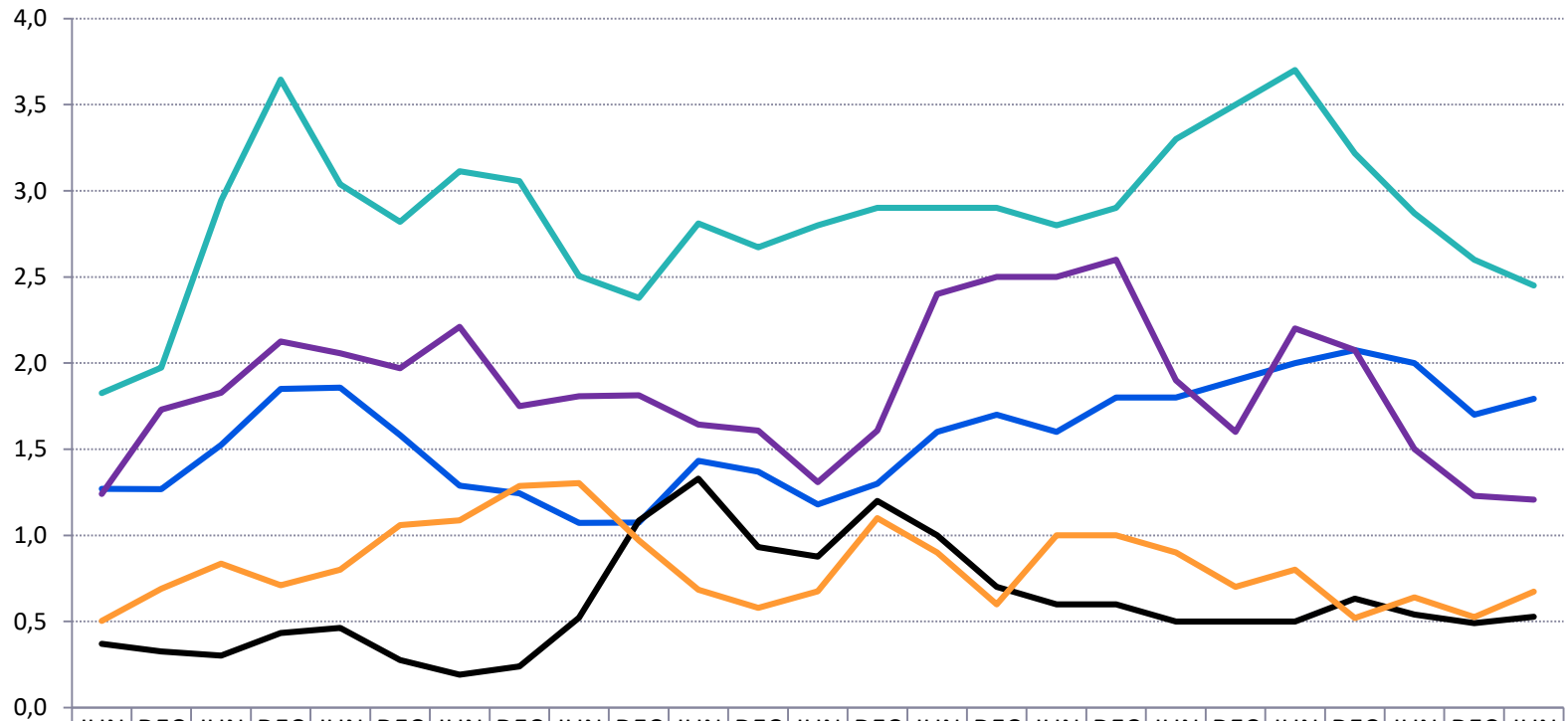


Profile of earnings by sector

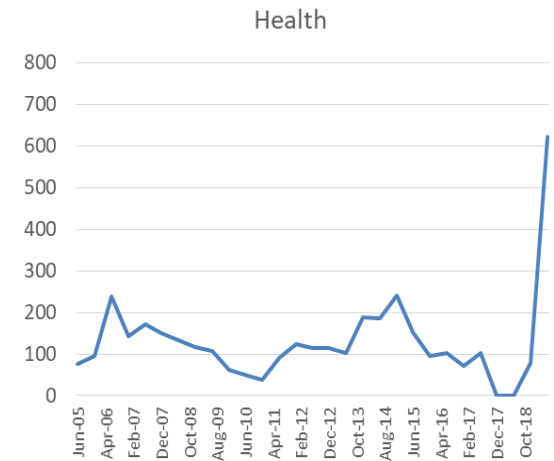
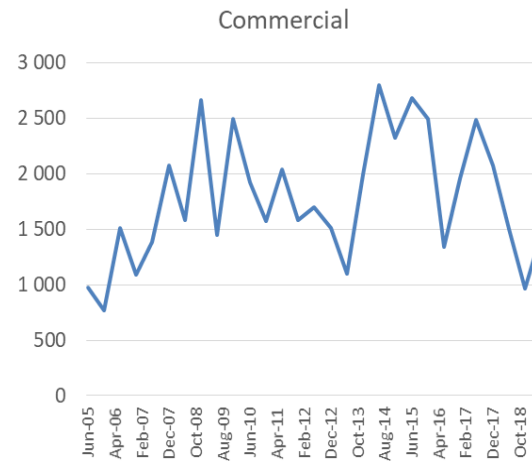
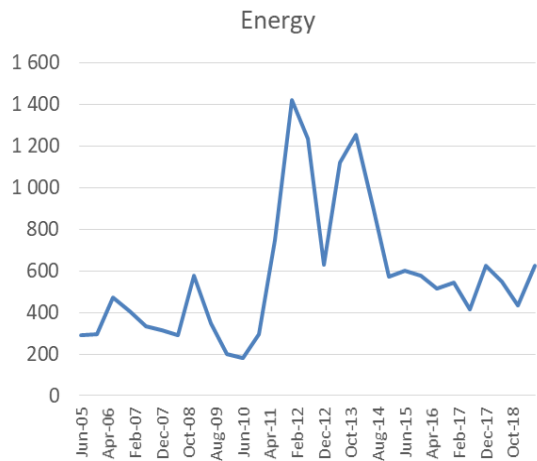
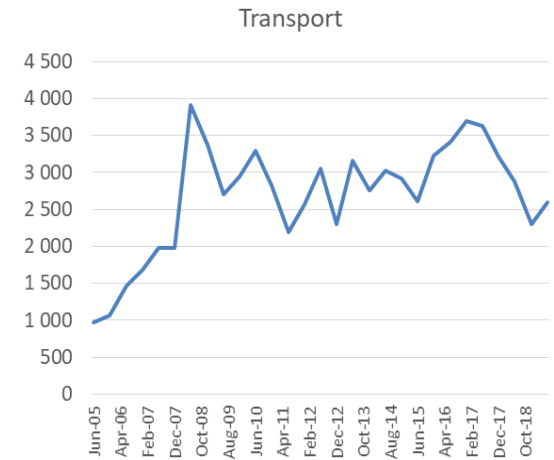
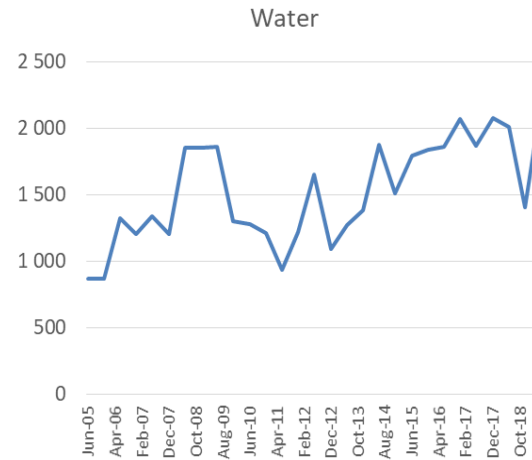
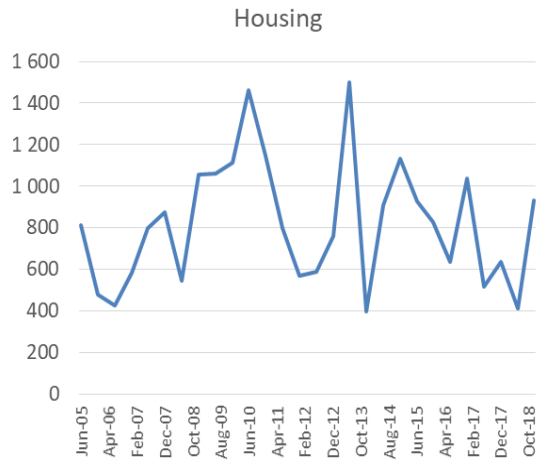


Fee earnings by selected sector

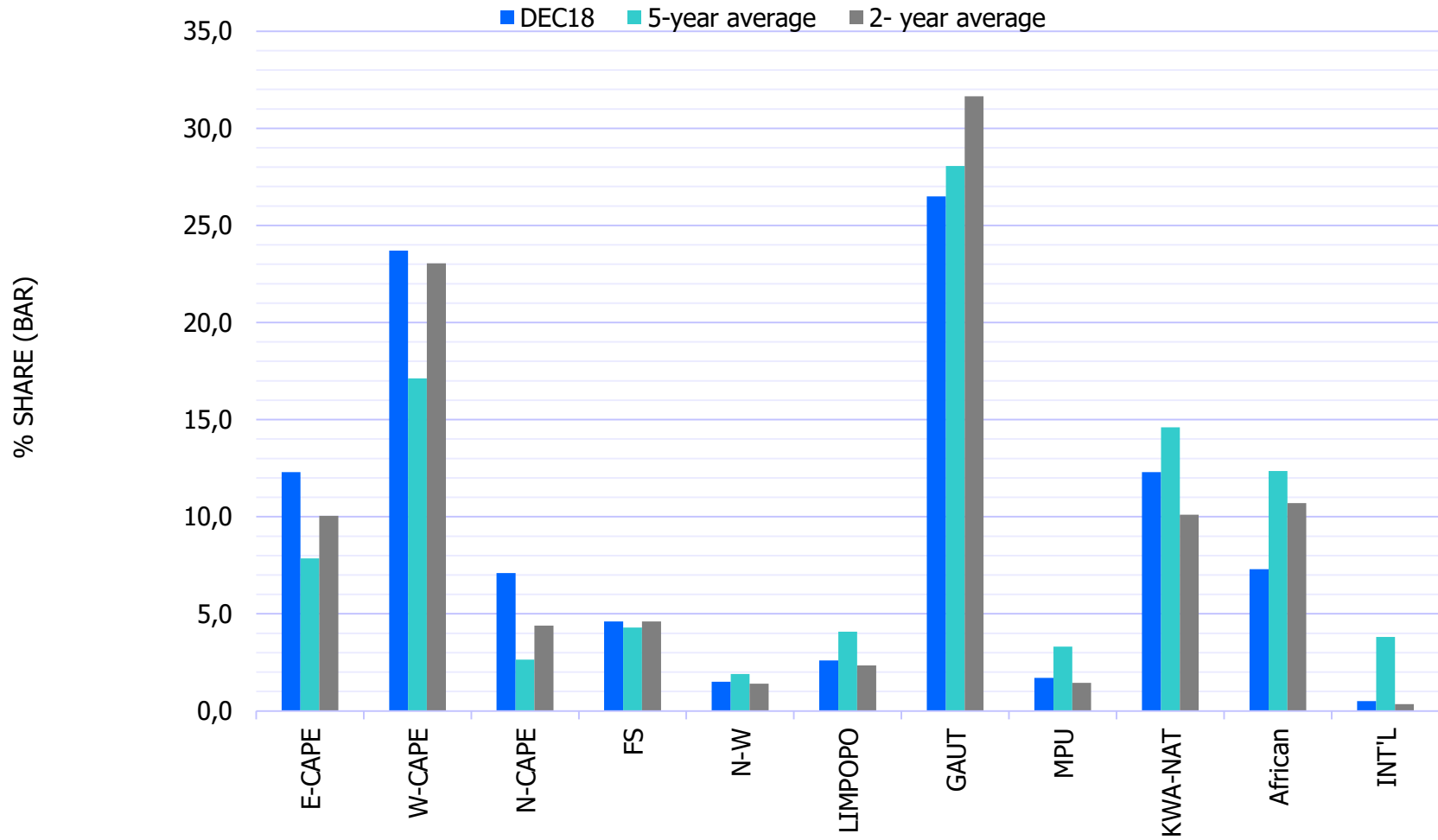
R billions, Real 2000 prices | Smoothed | 2 survey average



	JUN 07	DEC 07	JUN 08	DEC 08	JUN 09	DEC 09	JUN 10	DEC 10	JUN 11	DEC 11	JUN 12	DEC 12	JUN 13	DEC 13	JUN 14	DEC 14	JUN 15	DEC 15	JUN 16	DEC 16	JUN 17	DEC 17	JUN 18	DEC 18	JUN 19
Water	1,3	1,3	1,5	1,9	1,9	1,6	1,3	1,2	1,1	1,1	1,4	1,4	1,2	1,3	1,6	1,7	1,6	1,8	1,8	1,9	2,0	2,1	2,0	1,7	1,8
Transportation	1,8	2,0	2,9	3,6	3,0	2,8	3,1	3,1	2,5	2,4	2,8	2,7	2,8	2,9	2,9	2,9	2,8	2,9	3,3	3,5	3,7	3,2	2,9	2,6	2,5
Energy	0,4	0,3	0,3	0,4	0,5	0,3	0,2	0,2	0,5	1,1	1,3	0,9	0,9	1,2	1,0	0,7	0,6	0,6	0,5	0,5	0,5	0,6	0,5	0,5	0,5
Housing	0,5	0,7	0,8	0,7	0,8	1,1	1,1	1,3	1,3	1,0	0,7	0,6	0,7	1,1	0,9	0,6	1,0	1,0	0,9	0,7	0,8	0,5	0,6	0,5	0,7
Commercial	1,2	1,7	1,8	2,1	2,1	2,0	2,2	1,8	1,8	1,8	1,6	1,6	1,3	1,6	2,4	2,5	2,5	2,6	1,9	1,6	2,2	2,1	1,5	1,2	1,2

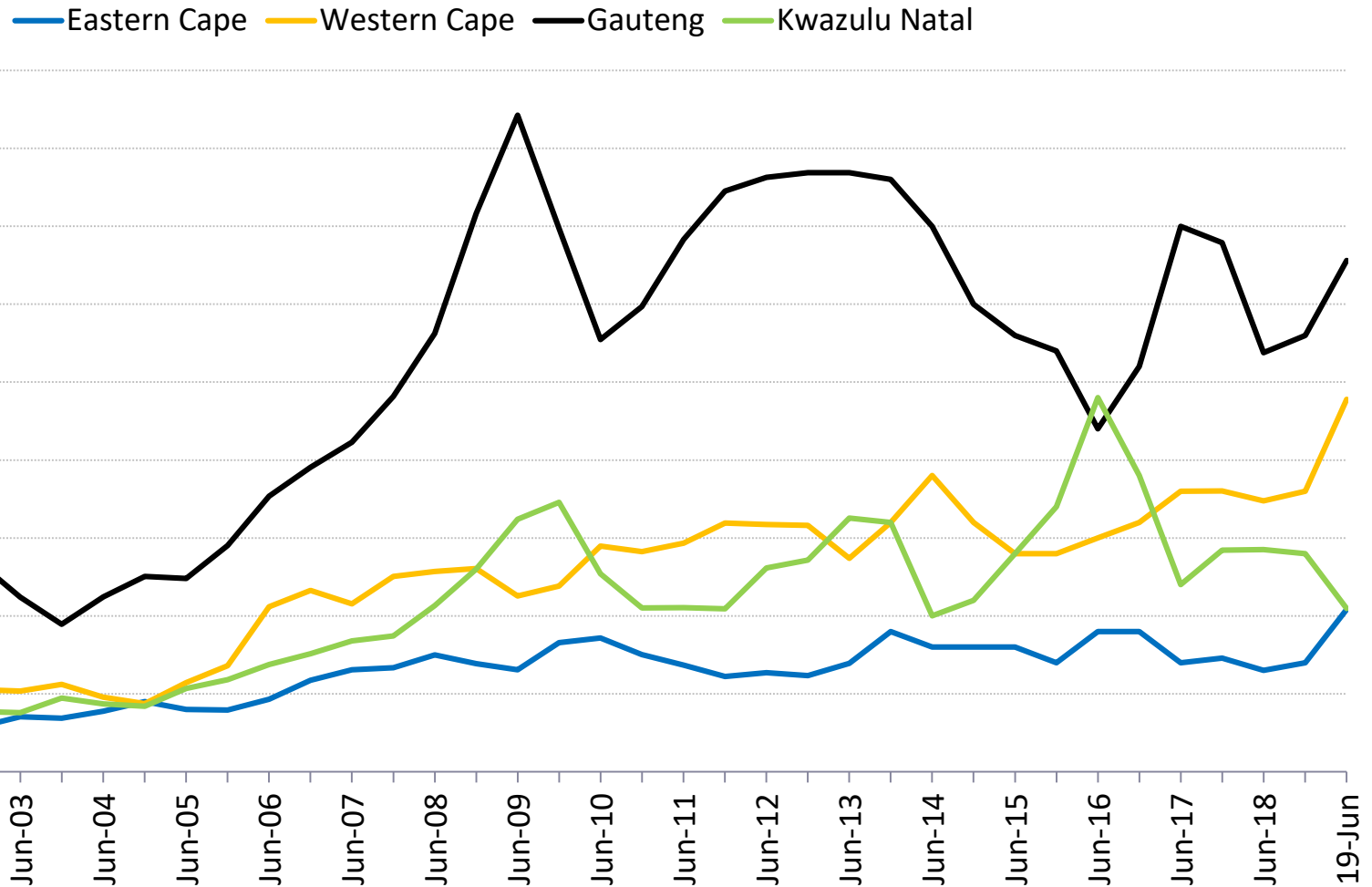


Provincial Market Share



Fee income earned by province (Rbn, real prices)

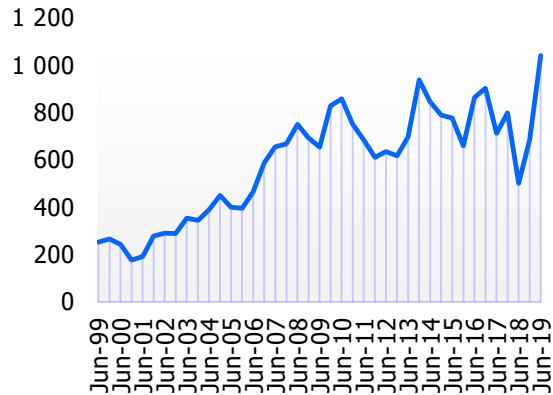
High Capacity economies | TREND Annualised smoothed, average over 2 past surveys



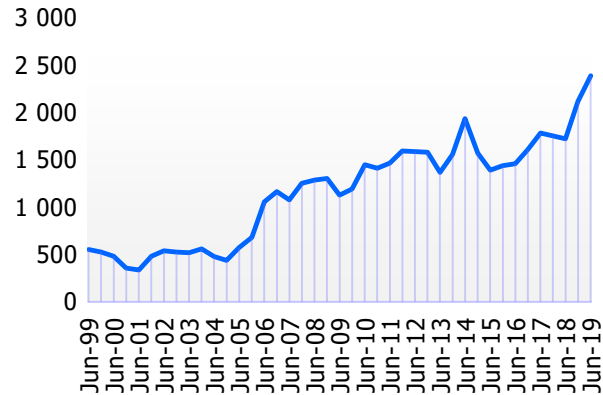
Fee income earned by province

June 1999 – December 2016 | Rm real prices

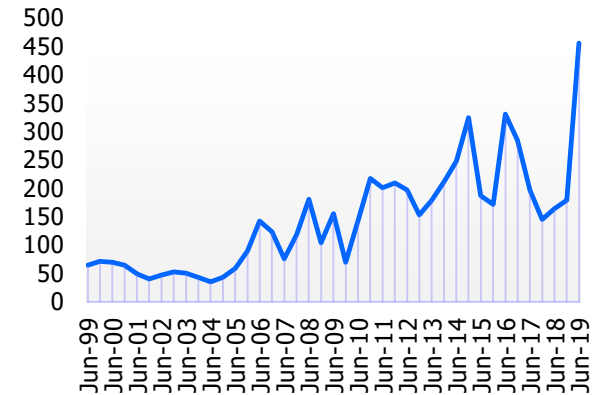
Eastern Cape



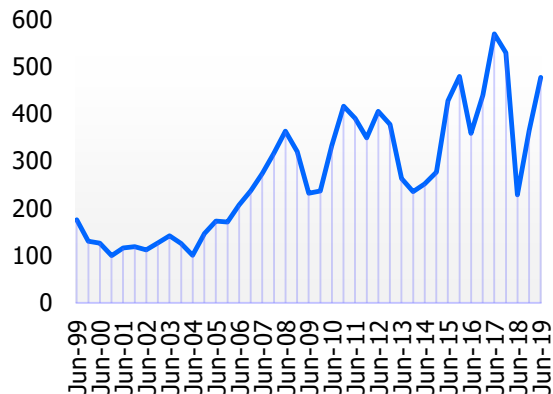
Western Cape



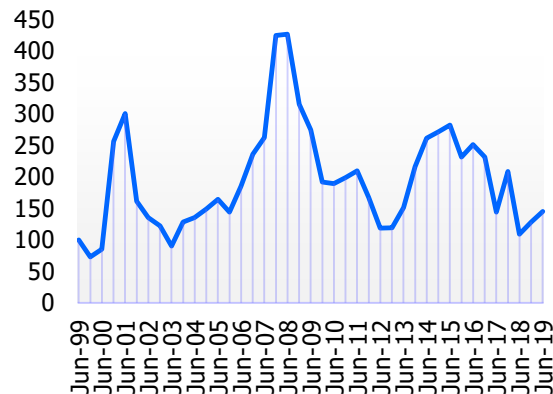
Northern Cape



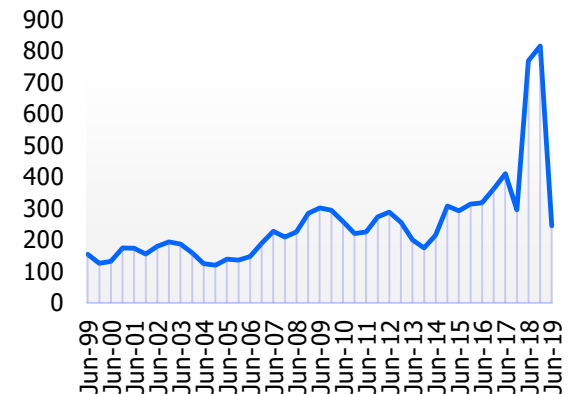
Free State



North West



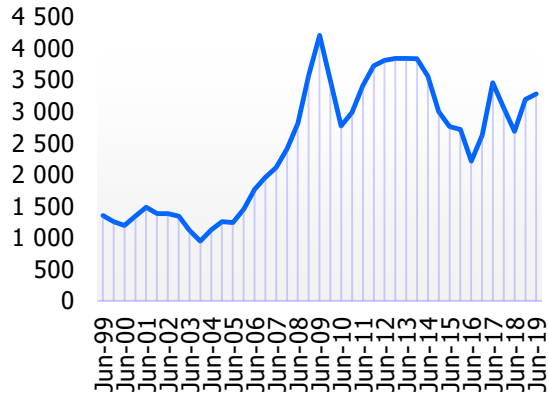
Limpopo



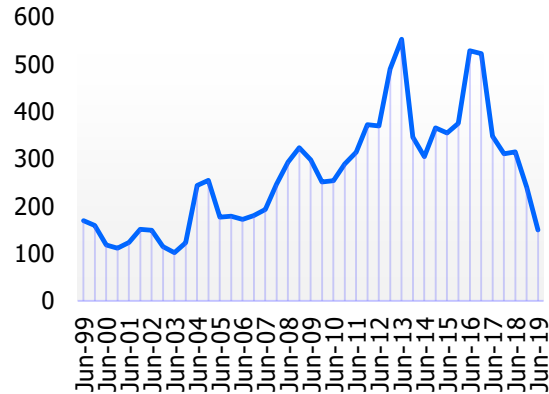
Fee income earned by province

June 1999 – December 2016 | Rm real prices

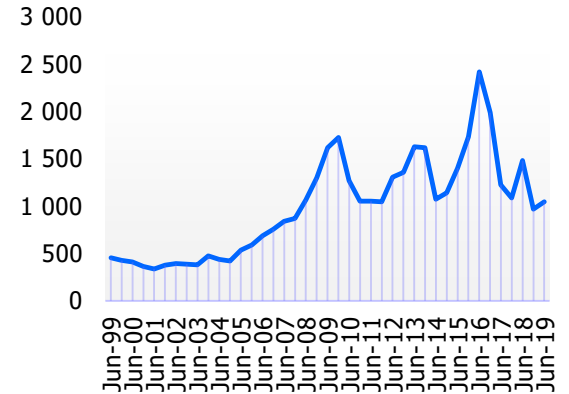
Gauteng



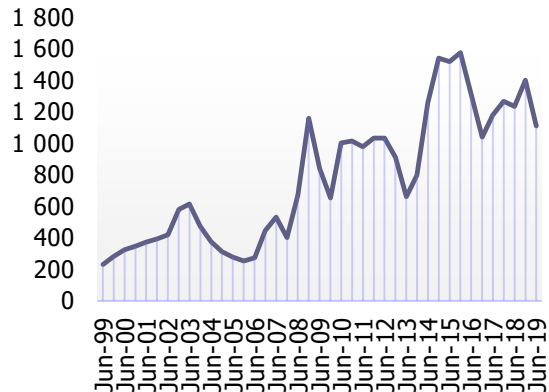
Mpumalanga



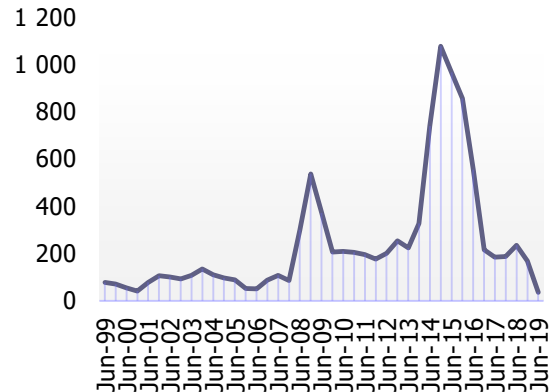
Kwazulu Natal



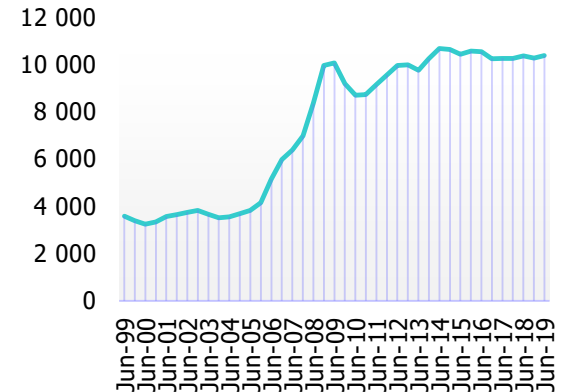
Africa



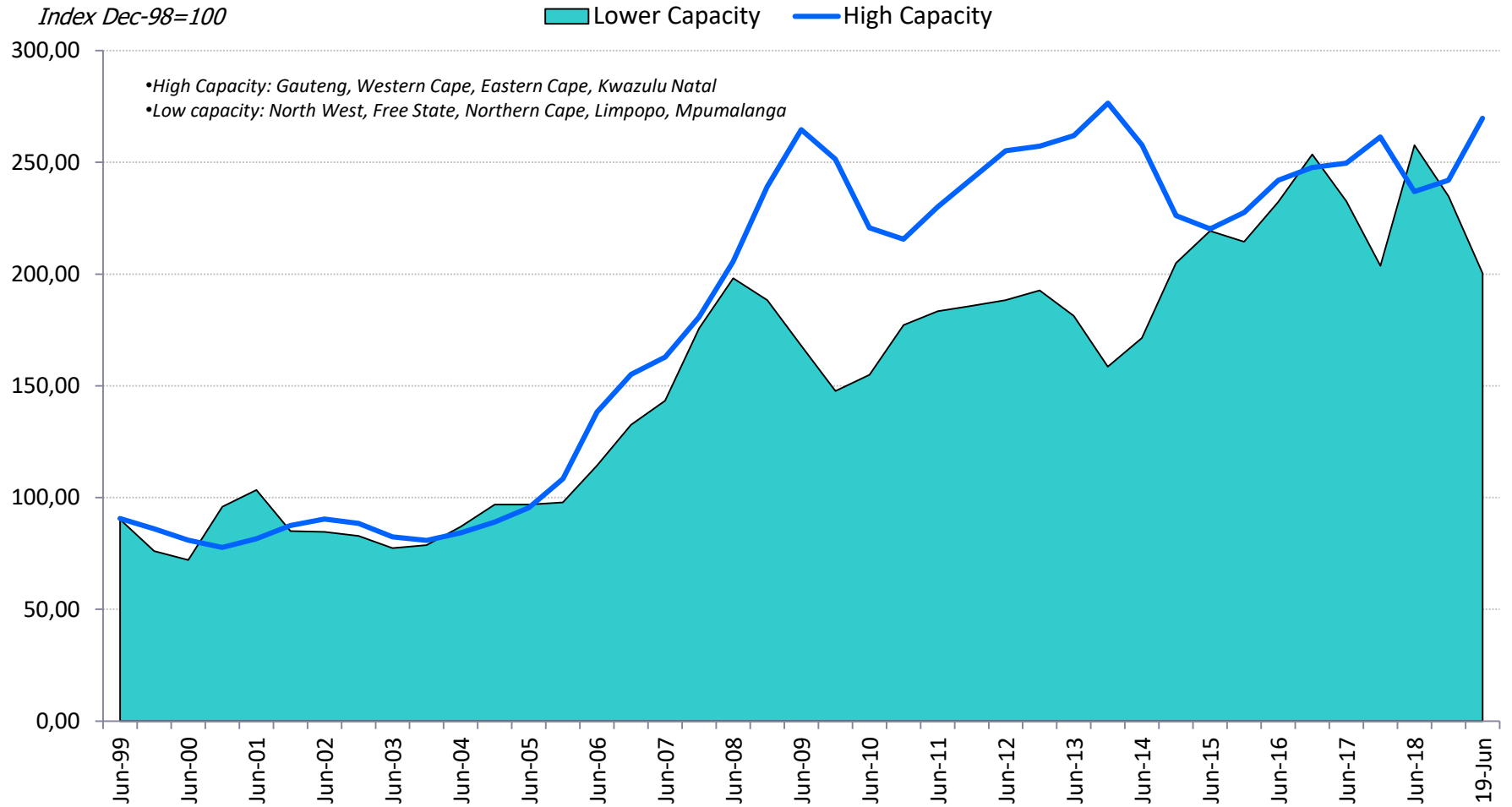
International

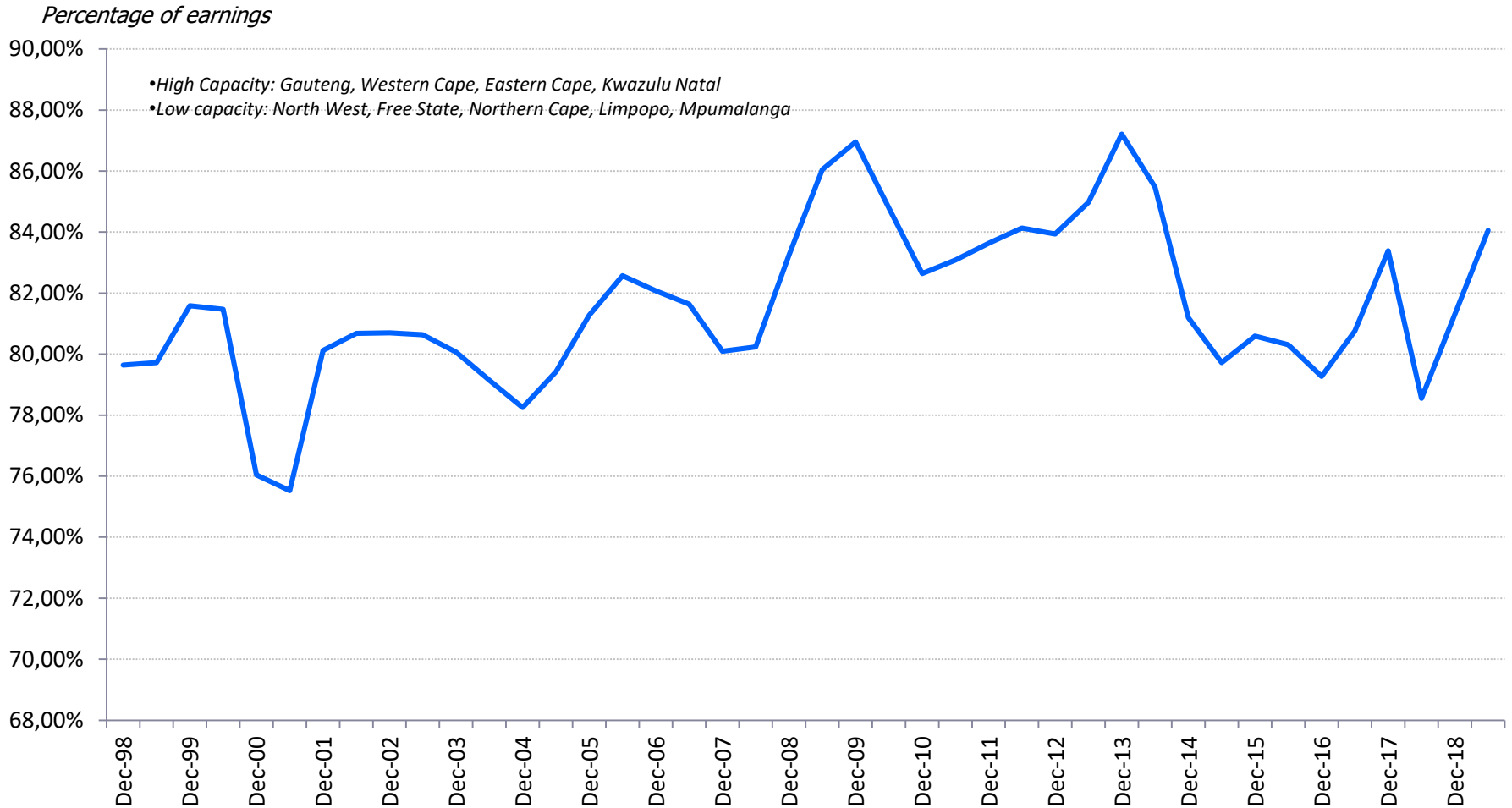


Total Fee Earnings



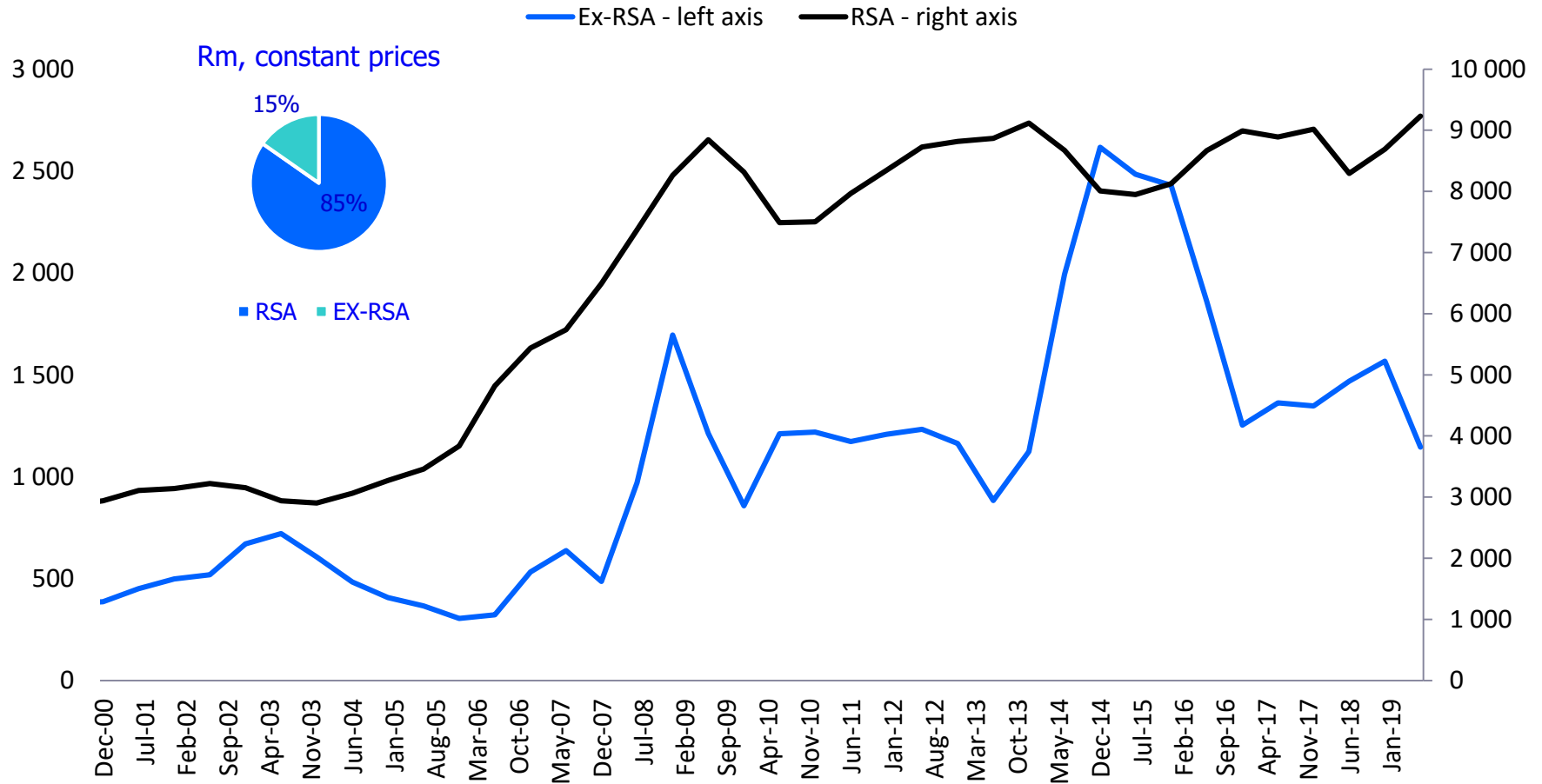
Fee income earned (Real 2000 prices) High Capacity vs lower capacity provincial economies | Smoothed





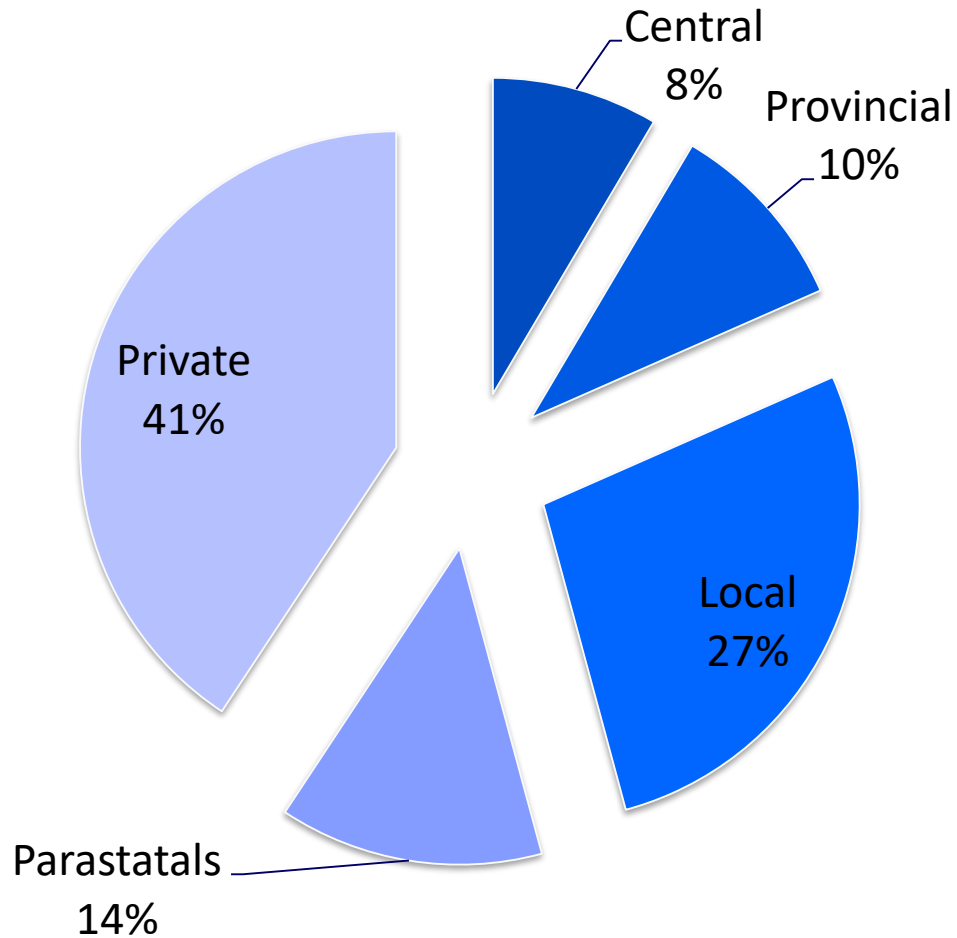
Fee income earned : RSA vs EX-RSA

R mill, Real 2000 prices | Annualised, smoothed



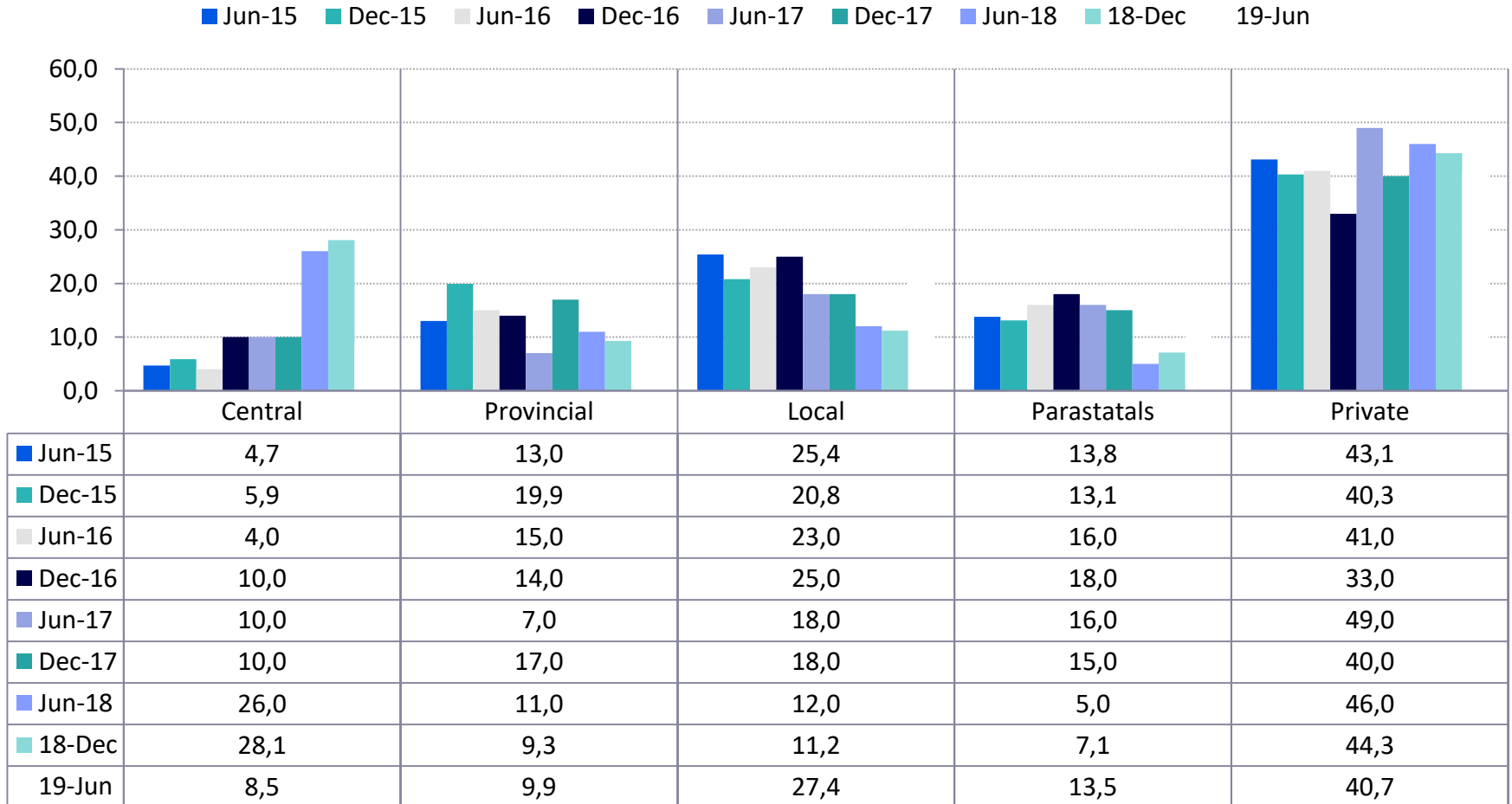
Fee income earned by type of client

Percentage share as at June 2019



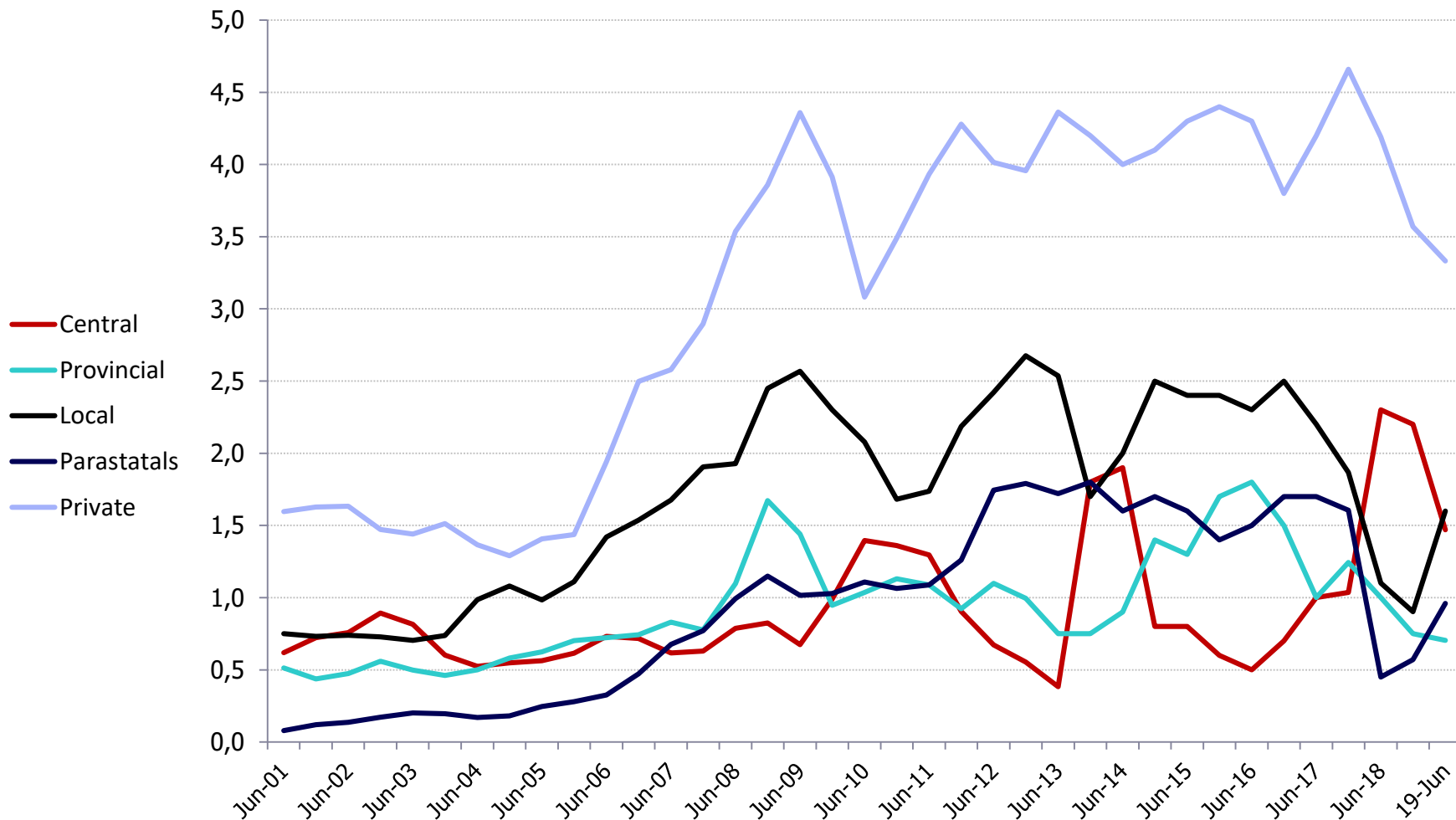
Fee income earned by type of client

Percentage share



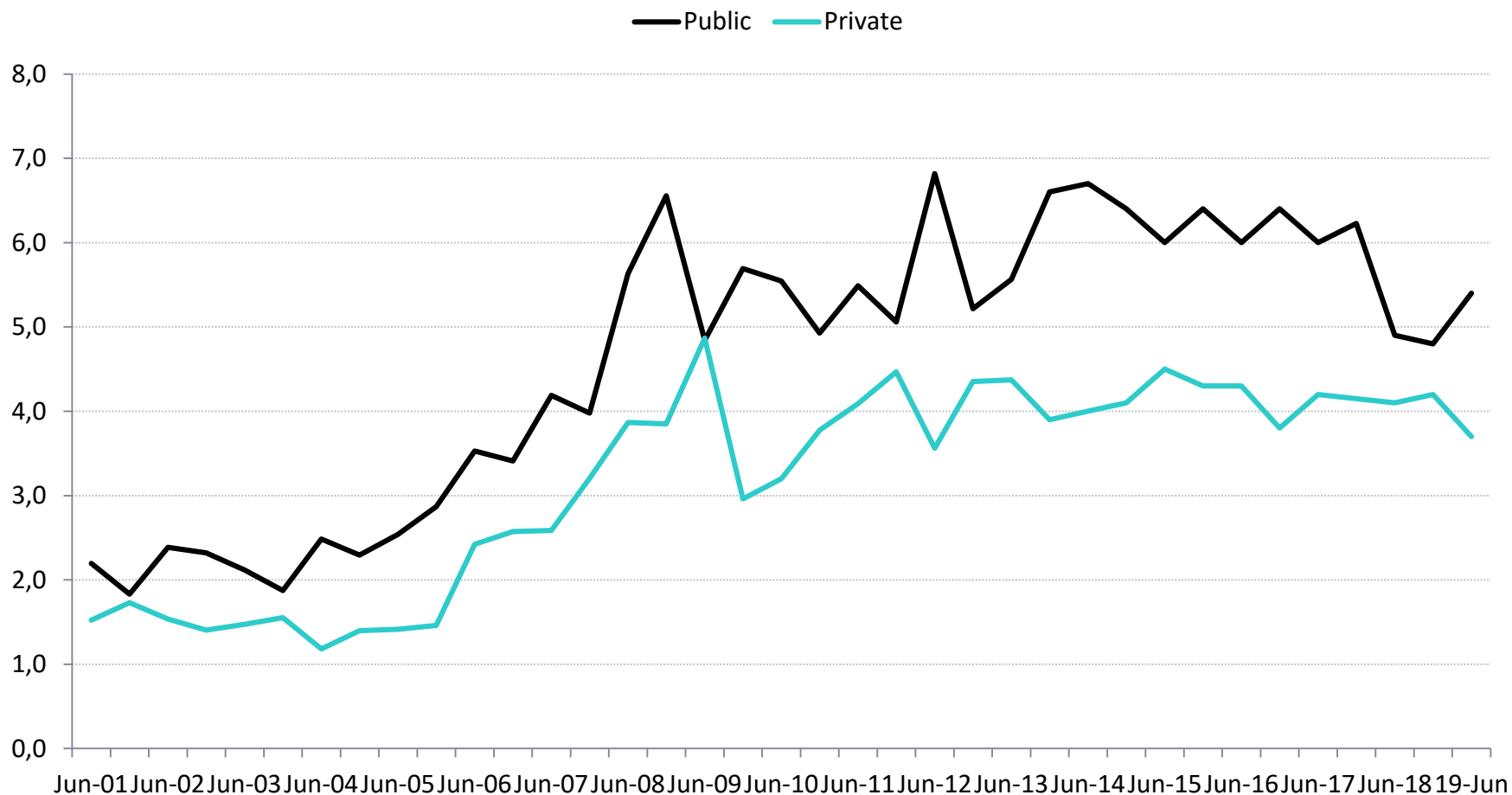
Fee income earned by type of client

R billion Real 2000 prices | Annualised, smoothed - avg over 2 survey periods



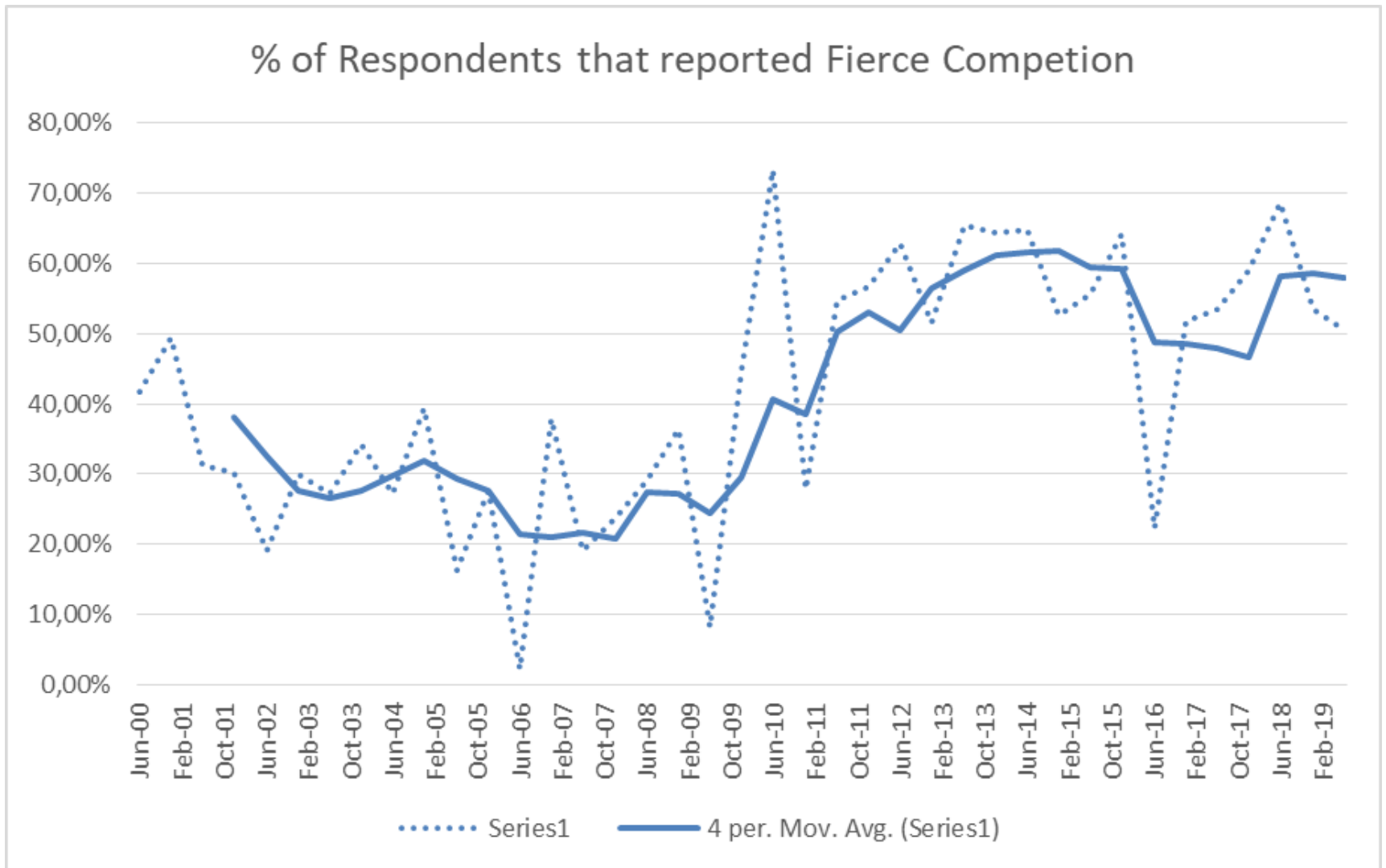
Fee income earned by type of client

R billions Real 2000 prices | Annualised, smoothed - average over 2 survey periods

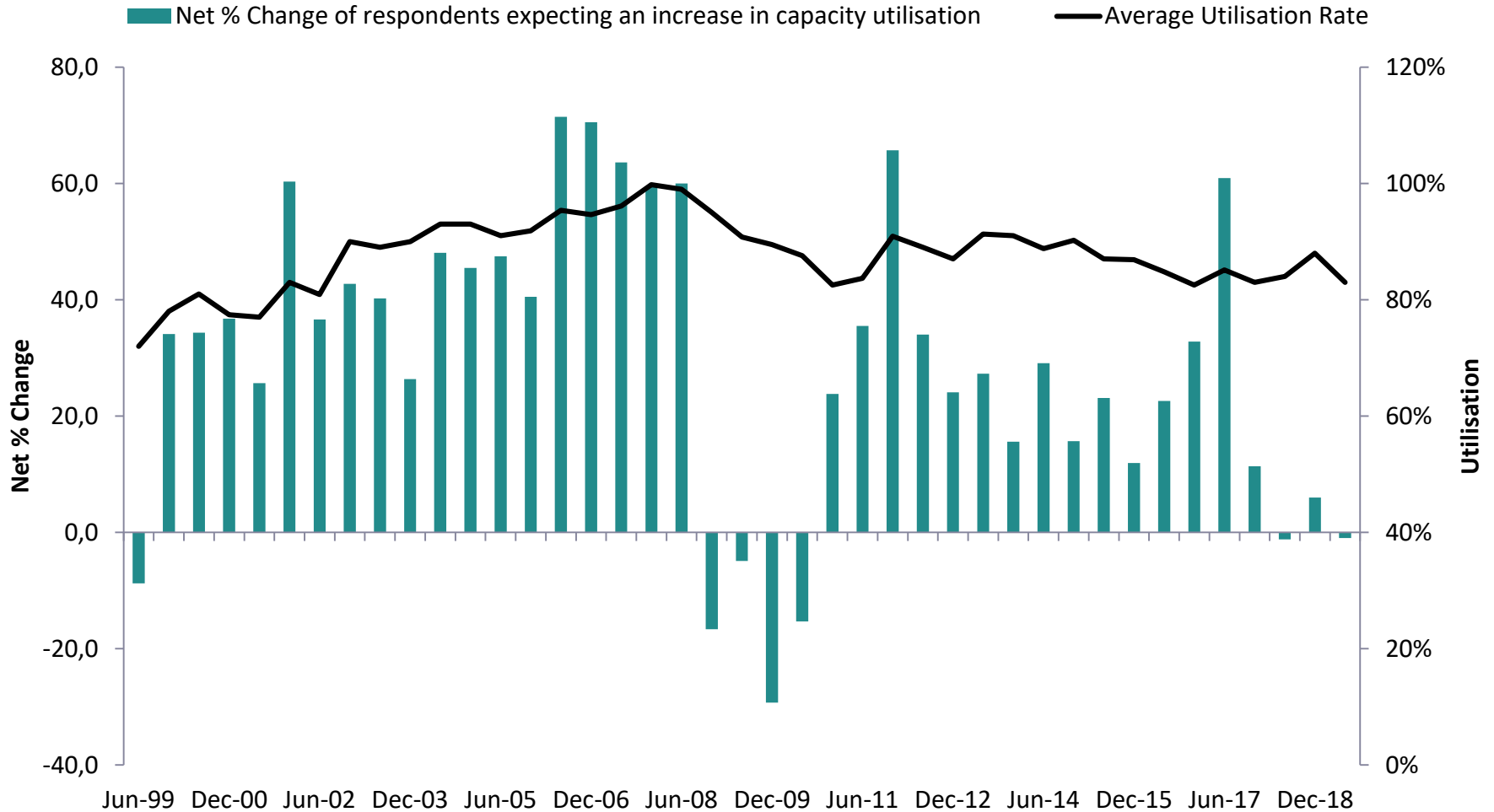


Competition in tendering

Percentage of respondents that reported “Fierce” competition

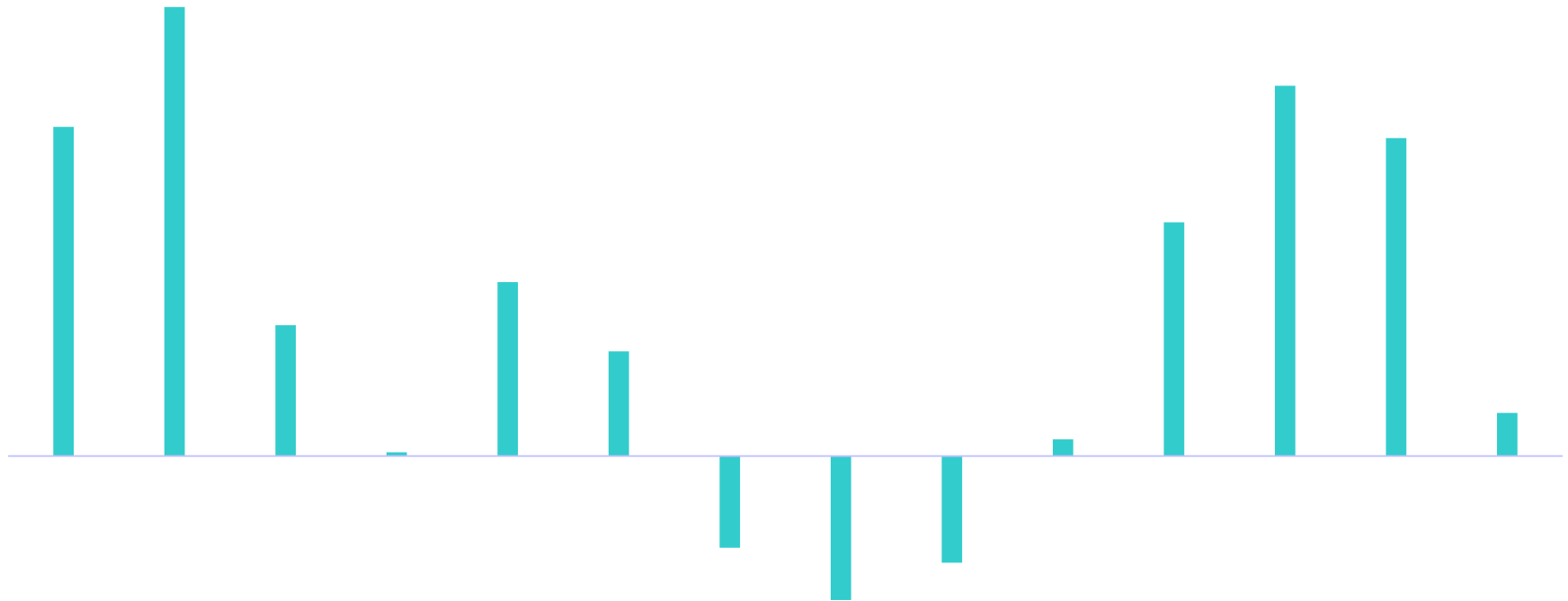


Industry Capacity Utilisation Of existing technical staff



Labour unit cost indicator

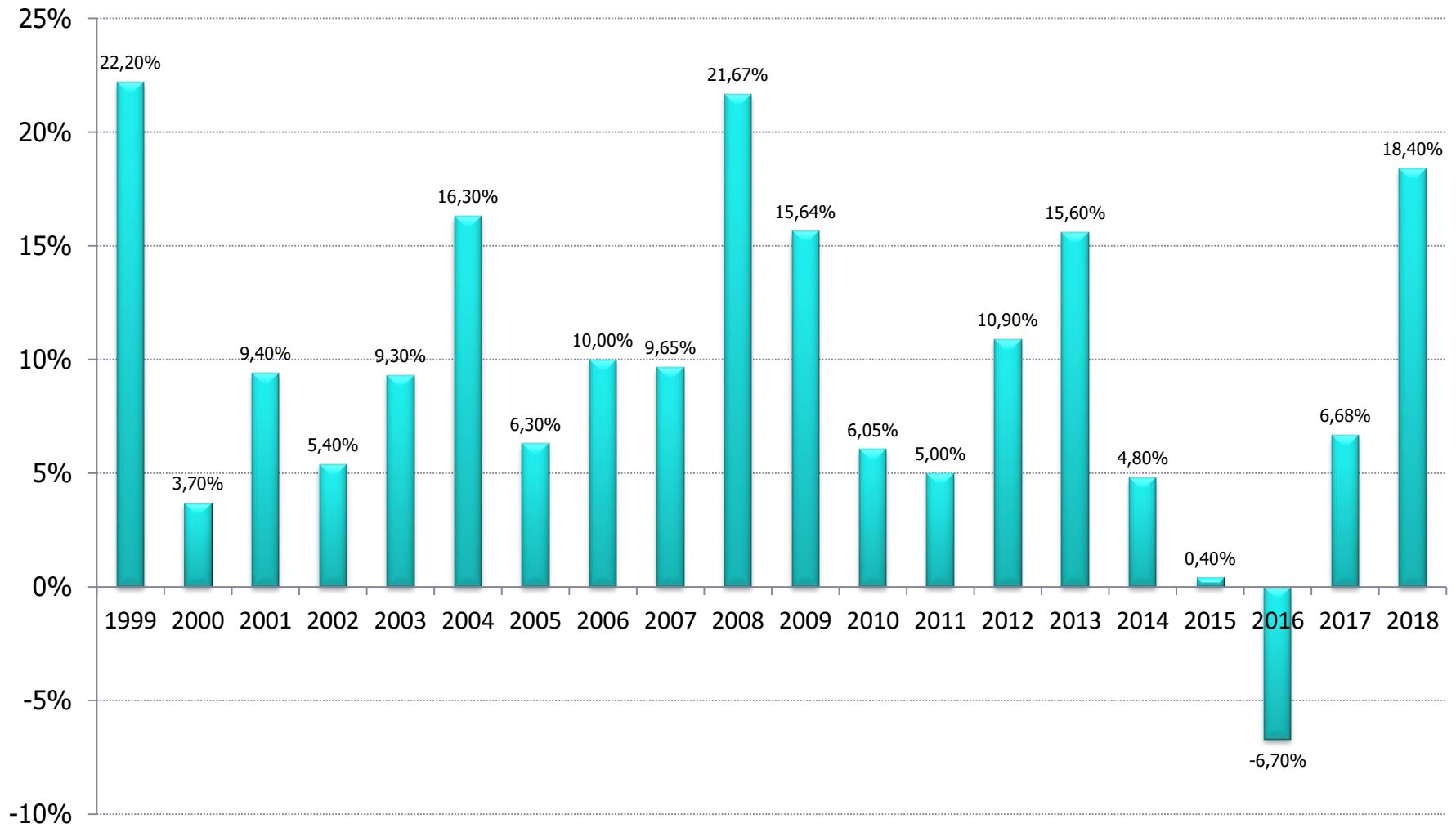
Year-on-Year % Change (Smoothed)



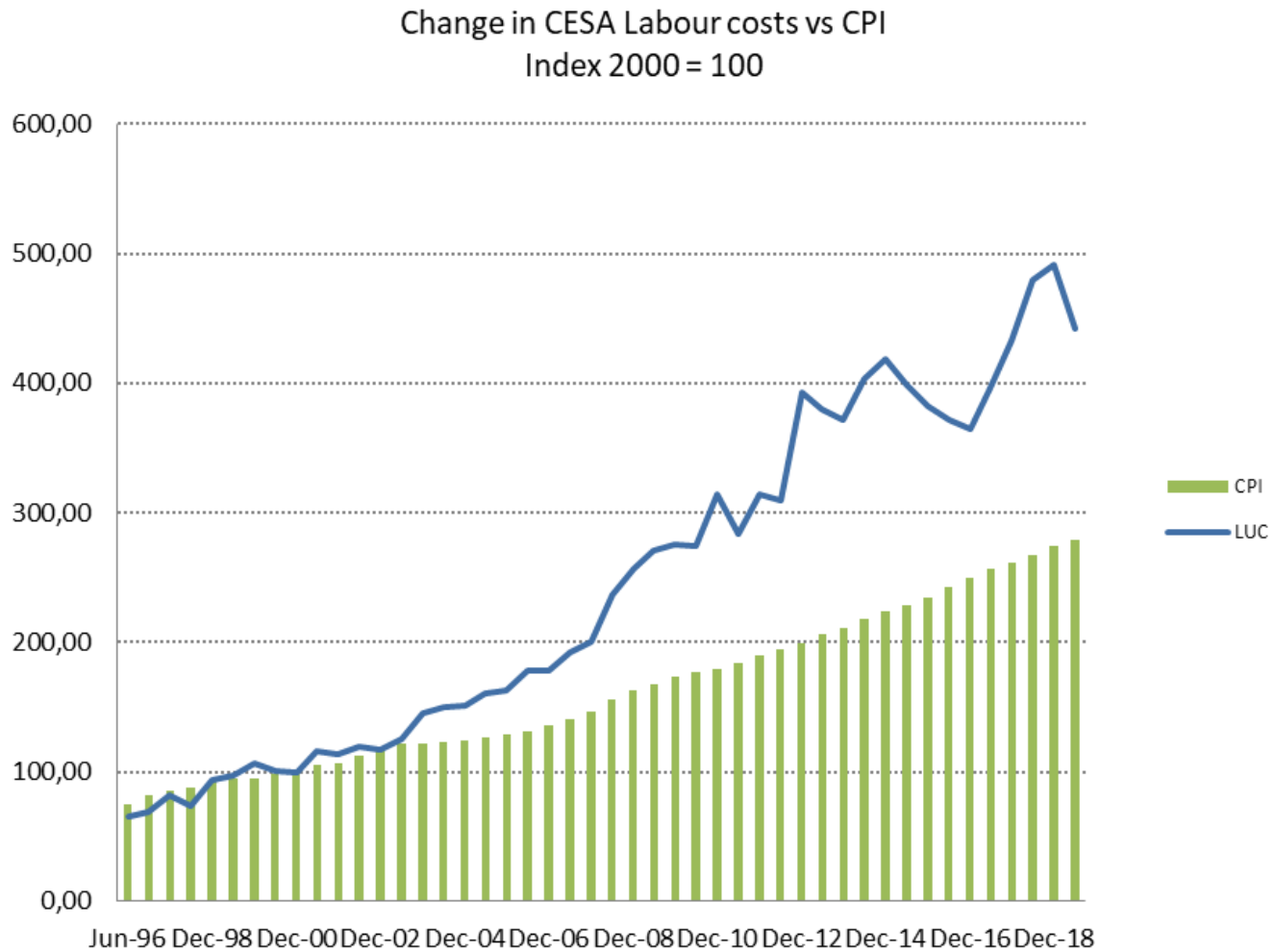
	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14	Jun-15	Dec-15	Jun-16	Dec-16	Jun-17	Dec-17	Jun-18	Dec-18	19-Jun
%	17,60%	24%	7%	0%	9,30%	5,60%	-4,90%	-7,70%	-5,70%	0,90%	12,50%	20%	17%	2,30%

Labour unit cost indicator

Annual Average Year-on-Year Percentage Change



CESA labour costs outpace CPI





CESA

Consulting Engineers South Africa

Thank you

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