

Consulting Engineers South Africa (CESA)

Quality Survey: December 2015

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Background and Methodology

As part of the Association's bi-annual state of the industry survey, member firms were asked to comment on the services offered by the association.

Questions included in the survey pertain to:

- Level of service from the Association as a whole
- Level of service from the Directorate and personnel
- Relevance and quality of services offered pertinent to the firms' sector(s)
- Suggestions for improvement

Information was aggregated from the surveys and weighted according to the total number of full and part time staff employed by the firm. Results are based on a total of 96 returns, by firms collectively employing 7000 people, during the survey period July - December 2015. Majority of the firms employ less than 20 people (60 percent), followed by 31.6 percent employing between 10 and 20 and 8.4 percent employing more than 100 people.

Profile of respondents

Table 1: Profile of respondents

Employment	% of total number of firms in December 2012 sample	% of total number of firms in June 2013 sample	% of total number of firms in December 2013 sample	% of total number of firms in June 2014 sample	% of total number of firms in December 2014 sample	% of total number of firms in June 2015 sample	% of total number of firms in December 2015 sample
>100	19.7%	14.9%	10.5%	14.0%	20.4%	9.6%	8.4%
Between 20 and 100	36.8%	41.8%	40.4%	36.8%	32.7%	33.6%	31.6%
Less than 20	43.4%	43.3%	49.1%	49.1%	46.9%	56.8%	60.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Overall service of the Association and it's Directorate

Question 1

Do you consider the overall service you receive from CESA as a body to be:

- Unsatisfactory
- Satisfactory
- Good
- Exceptional

Table 2: Question 1 and 2

	Unsatisfactory	Satisfactory	Good	Exceptional
December 2006 Survey				
CESA	1.0%	21.3%	73.12	4.4%
Directorate	0.8%	21.1%	72.8%	5.2%
June 2007 Survey				
CESA	0.7%	22.8%	71.3%	5.1%
Directorate	0.7%	29.0%	65.2%	5.1%
December 2007 Survey				
CESA	0.3%	26.0%	73.4%	0.3%
Directorate	0.7%	33.9%	64.1%	1.3%
June 2008 Survey				
CESA	0.09%	31.6%	65.9%	2.4%
Directorate	0.8%	30.1%	55.5%	13.6%
December 2008 Survey				
CESA	0.00%	16.28%	83.53%	0.19%
Directorate	0.72%	14.68%	76.25%	8.35%
June 2009 Survey				
CESA	0.0%	45.2%	54.6%	0.2%
Directorate	0.0%	49.8%	50.0%	0.2%
December 2009 Survey				
CESA	0.4%	14.0%	85.6%	0.0%
Directorate	0.0%	7.4%	92.6%	0.0%
June 2010 survey				
CESA	2.7%	35.1%	59.5%	2.7%
Directorate	2.7%	35.1%	59.5%	2.7%
December 2010 survey				
CESA	0.0%	42.1%	57.9%	0.0%
Directorate	0.0%	39.5%	57.9%	2.6%
June 2011 surveys				
CESA	7.6%	33.0%	59.3%	0.0%
Directorate	7.3%	22.9%	69.7%	0.0%
December 2011 Surveys				
CESA	0.7%	16.7%	72.8%	9.8%
Directorate	0.4%	47.0%	52.1%	0.6%
June 2012 Surveys				
CESA	1.1%	24.9%	66.2%	7.9%

Directorate	0.9%	22.2%	76.6%	0.2%
December 2012 Surveys				
CESA	2.3%	27.3%	68.9%	1.5%
Directorate	0.7%	17.2%	79.1%	2.9%
June 2013 Surveys				
CESA	1.9%	46.4%	50.8%	1.0%
Directorate	0.9%	47.7%	50.4%	1.0%
December 2013 Surveys				
CESA	0.1%	28.7%	70.1%	1.0%
Directorate	0.0%	29.7%	69.3%	1.0%
June 2014 Surveys				
CESA	1.7%	13.4%	84.7%	0.3%
Directorate	1.5%	22.6%	75.9%	0.0%
December 2014 Surveys				
CESA	1.2%	37.7%	60.8%	0.3%
Directorate	2.6%	41.1%	56.1%	0.2%
June 2015 Surveys				
CESA	8.9%	31.2%	59.0%	0.9%
Directorate	1.8%	36.5%	61.3%	0.4%
December 2015 Surveys				
CESA	7.2%	32.9%	58.7%	1.2%
Directorate	5.9%	32.0%	61.7%	0.4%

Question 2

Do you consider the service you receive from the Directorate and personnel to be:

- Unsatisfactory
- Satisfactory
- Good
- Exceptional

There was a 85,7 percent positive nett response rate from firms satisfied with CESA as an overall body, compared to 82,1 percent in the previous survey. Satisfaction rate was higher with regards to general and directorate services at 88,2 percent, but this was significant drop from 96,4 percent reported in the June 2015 survey. Overall the

Nett response rate
Satisfaction rate CESA as a body

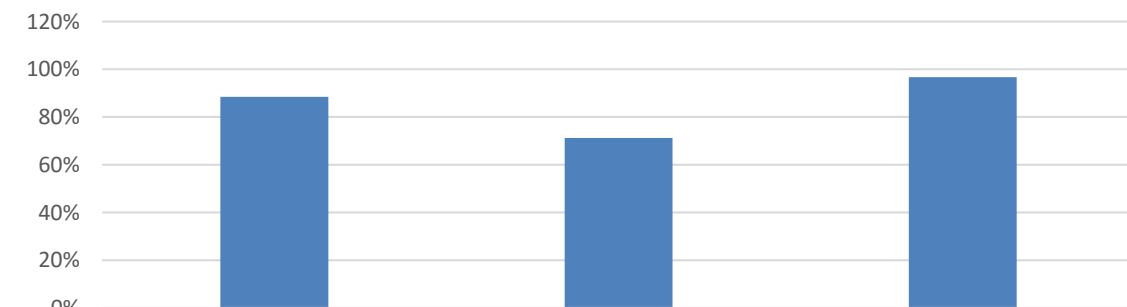


Figure 1

ratings improved slightly with regards to CESA as a body, although still below previous surveys, while ratings deteriorated more strongly in terms of the directorate.

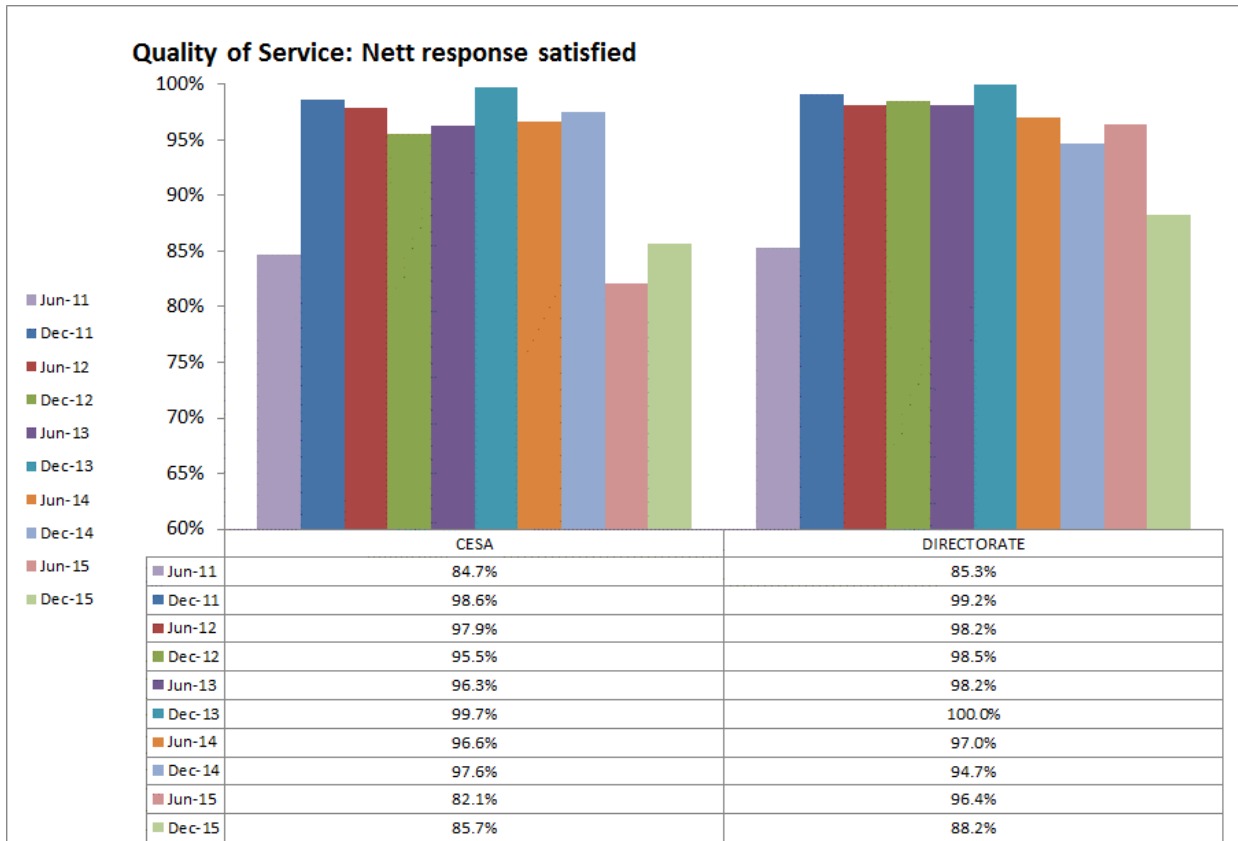


Figure 2: Nett response rate CESA and Directorate service

Relevance to industry needs

Question 3a

Does the Association focus on addressing the needs and issues pertinent to your **sector** of the industry:

- Yes
- No

Table 3: Question 3a

	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11	Dec-11	Jun-12	Dec-12	Jun-13	Dec-13	Jun-14	Dec-14
Weighted	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%	95.1%	95.1%	91.8%	96.1%	97.8%	95.0%	98.0%

	Jun15	Dec15
Weighted	89.0%	84.0%

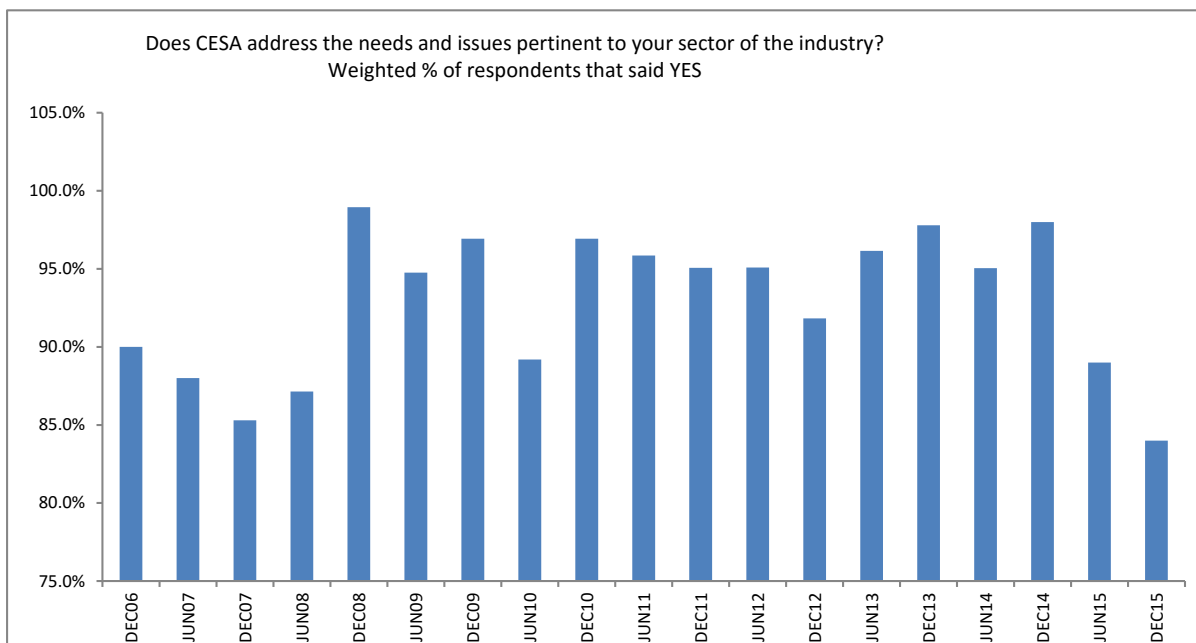


Figure 3

Members may be largely confident that CESA is addressing their industry needs, but the average satisfaction rate slowed for the second consecutive survey, to an satisfaction rate of 84,0 percent from 89,0 percent in the June 2015 survey. This can be ascribed to a weakening in responses received from larger firms, where 82,4 percent were satisfied that CESA was addressing pertinent needs. Medium firms were more optimistic, at 90,9 percent,

while smaller firms were the most negative with only 75 percent of the opinion that their concerns were being met. Satisfaction rates deteriorated across all firm size categories in the current survey.

Question 3b

....and in a manner which is

- *Unsatisfactory*
- *Satisfactory*
- *Good*
- *Exceptional*

Table 4: Question 3b

Weighted responses	Unsatisfactory	Satisfactory	Good	Exceptional
December 2006	12.1%	22.5%	63.1%	2.3%
June 2007	10.2%	22.2%	66.8%	0.9%
December 2007	3.1%	57.6%	38.2%	1.1%
June 2008	2.7%	23.9%	72.2%	1.1%
December 2008	1.8%	28.4%	69.6%	0.2%
June 2009	4.9%	40.3%	54.8%	0.1%
December 2009	2.9%	74.5%	22.2%	0.4%
June 2010	2.9%	40.0%	57.1%	0.0%
December 2010	0.8%	81.1%	18.1%	0.0%
June 2011	8.6%	59.4%	22.4%	9.7%
December 2011	2.8%	46.0%	50.9%	0.3%
June 2012	1.6%	21.8%	76.1%	0.5%
December 2012	2.5%	26.7%	70.5%	0.3%
June 2013	2.0%	88.1%	9.3%	0.7%
December 2013	0.4%	78.3%	20.3%	1.0%
June 2014	4.0%	65.1%	30.9%	0.0%
December 2014	0.0%	37.2%	62.8%	0.0%
June 2015	9.4%	32.4%	56.1%	2.1%
December 2015	11.0%	30.5%	55.9%	2.6%

The nett satisfaction rate fell for the second consecutive survey to 77,9 percent from 81,3 percent and 100,0 percent in the previous two surveys, mainly due to an increase of firms that reported their dissatisfaction, which increased to 11,0 percent in the current survey (from 9,4 percent in the June 2015 survey). The bulk of respondents however reported a satisfactory to Good level. The nett satisfaction rate amongst larger firms fell to 74.2 percent (from 83.0 percent), medium firms averaged 95 percent (a strong improvement from 79,1 percent

in the June 2015 survey) while smaller firms were the most negative with a nett satisfaction rate of only 71,7 percent (also a small improvement from the 70 percent in the previous survey).

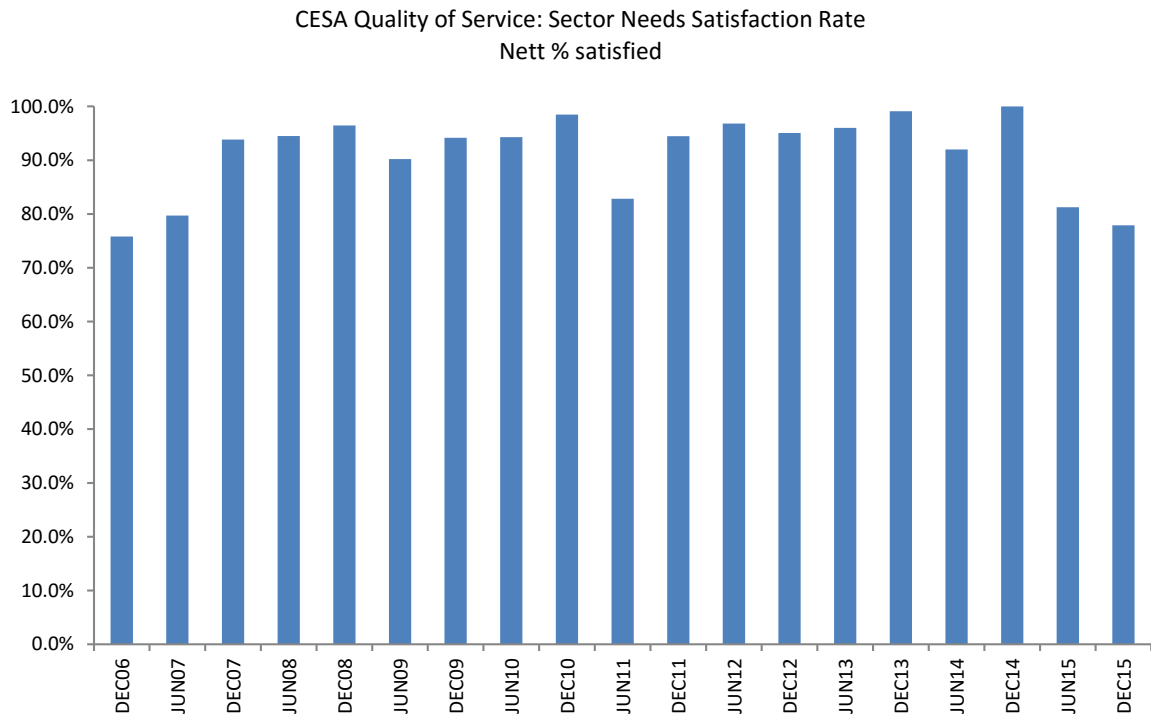


Figure 4

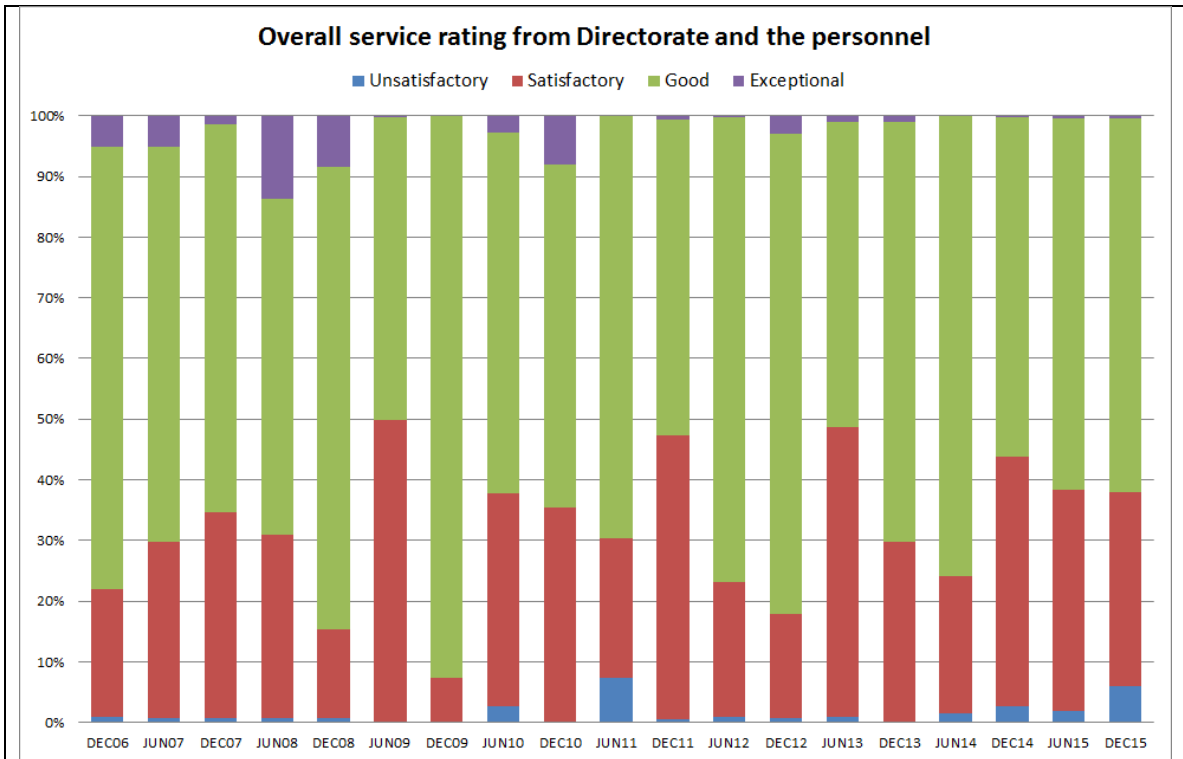


Figure 5

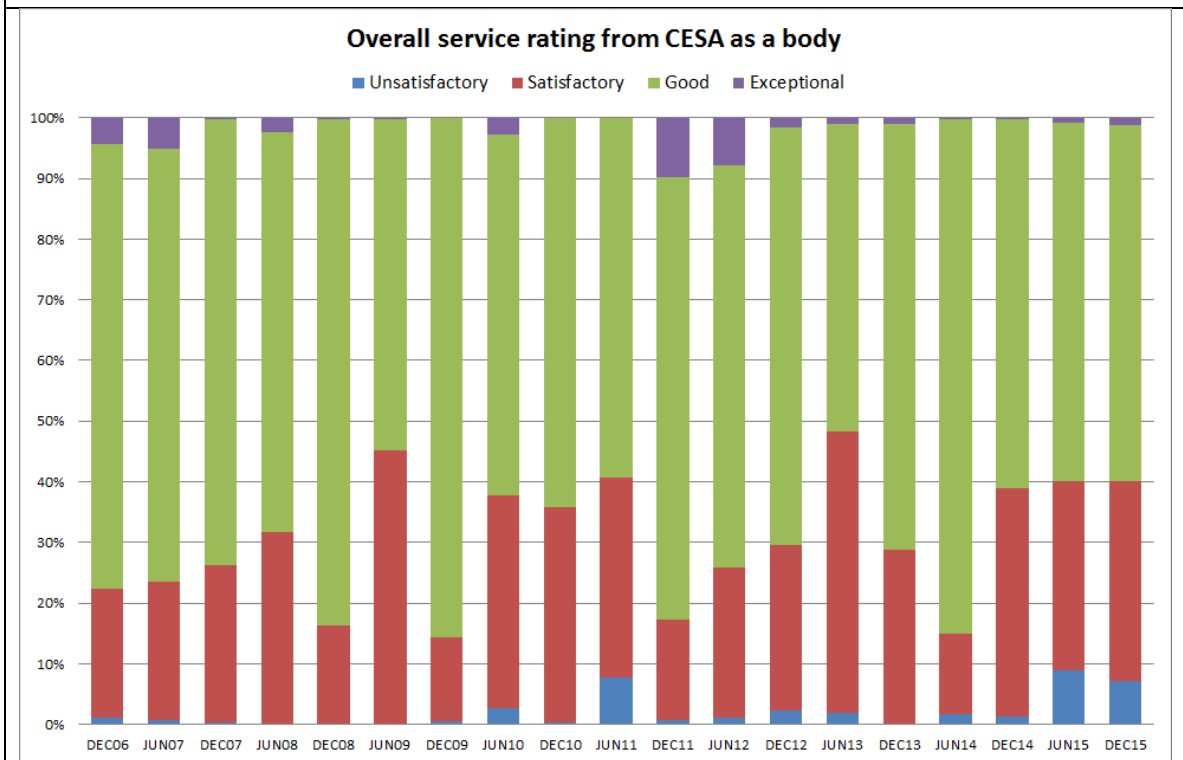


Figure 6

Benefits

Question F4

Are you aware of the benefits of being a CESA member?

- Yes
- No

Most of the responding firms were aware of the benefits of being a CESA member, with a small improvement to 99,4 percent in the current survey from 96 percent in the June 2015 survey. There was an improvement particularly amongst the medium and smaller firms, where only between 2 and 3 percent were not aware of benefits.

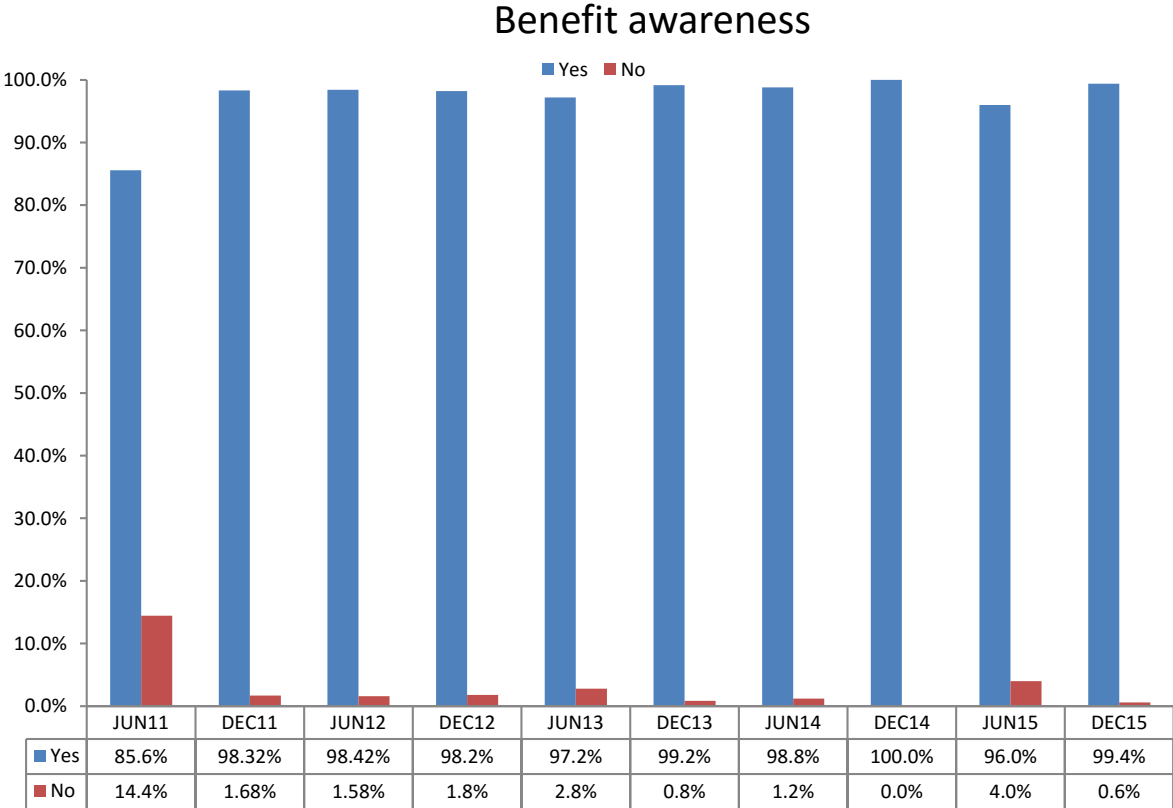


Figure 7

Suggestions

Question 4

Any comments or suggestions for improvement? General comments received from respondents are included here. Unfortunately some comments were truncated by the system.

Larger firms > 100 people

- CESA to help secure better training principles, procurement policies to be changed where quality counts more points.
- Need to be more vocal in ensuring consulting engineers are not treated as a commodity

Medium size : 20 – 100 people

- CESA should become more involved in the tendering systems of the various Government and Municipal bodies and assist to get a more uniform tendering system.
- Additional oversight of ECSA into the registration of new Pr Eng and Pr Tech Eng candidates. The period of candidature should be increased to a minimum of 4 and 5 years respectively.

Small size: < 20 people

- Consulting services is not appreciated by Government/clients & fee/professionalism on decline
- Tendering for professional services is not favourable for our long term sustainability. The gazetted fees and/or a roster system as previously used is preferred.
- More focus on project management as a professional discipline
- Assist all sectors of government in compiling comprehensive tender documentation for consultants in order to compare apples with apples.
- CESA must focus on the tendering system in our industry which should be scrapped, and address bribery in our industry in a strong way.
- How about considering changing the reporting periods related to the tax year ie March-Feb. Most businesses work in this way.

Response rate by firm size

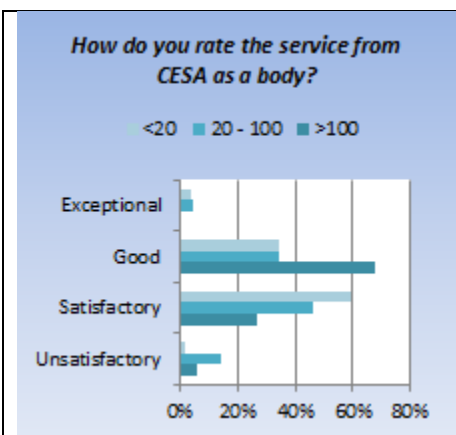


Figure 8

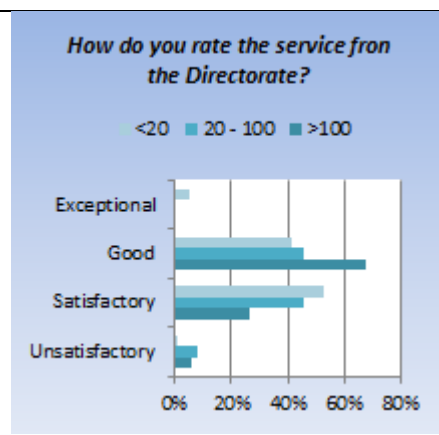


Figure 9

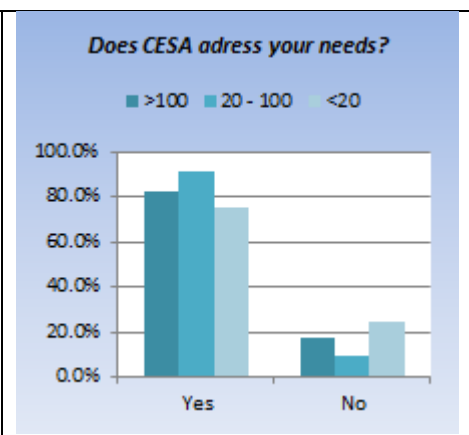


Figure 10

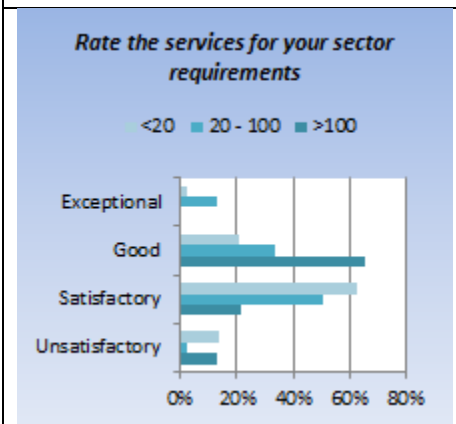


Figure 11

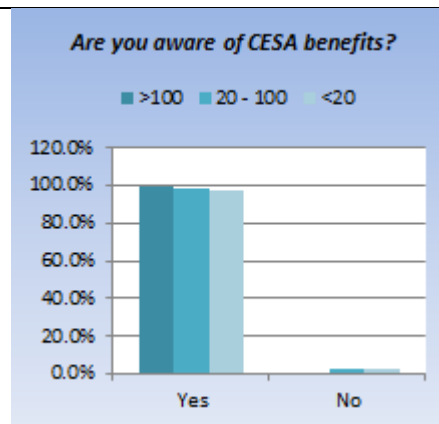


Figure 12

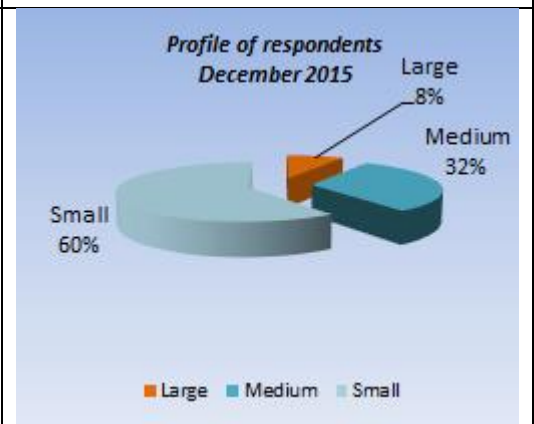


Figure 13

Conclusion

Satisfaction rates deteriorated for the second consecutive survey, indicative of concerns amongst members that pertinent issues may not be addressed. Although majority of members remain satisfied with services provided by both CESA as a body and the directorate, it is concerning that an increasing number of members have become unsatisfied with services provided. This is seen in the increase in firms saying that pertinent issues are not being address, and although at 16 percent, it is the highest level since the inception of the quality survey in 2006. Medium to smaller firms continued to play a more prominent role following on trends reported in previous surveys, and this could impact on results as medium and smaller firms seem to be more vocal on issues that are, according to them, not being addressed. The level of frustration are clearly higher amongst these firms.

Comments were limited in this survey, but related mostly to procurement and tendering procedures, where members are perhaps seeking more proactive support from CESA It is also felt that CESA should play a more active role in ensuring a transparent procurement process for its members, while addressing fragmentation issues to prevent the unnecessary duplication of representative organisations.