

**INDUSTRY INSIGHT CC**

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Construction Business Intelligence

**Consulting Engineers South Africa (CESA)**

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Quality Survey: June 2011

QUALITY OF SERVICE SURVEY: JUNE 2011

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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 *sample* of surveys and weighted according to the total number of full and part time staff employed by the firm. It is important to monitor the responses from a consistent base of firms to accurately identify existing and possible changes to perceptions regarding the services offered by the Association.

Results are based on a reflective sample totalling 8884 employees over the 6 months between January and June 2011. Majority of the firms employ between 20 and 100 people and earn between R1,5 million and R11,5 million per annum.

### Profile of respondents

**Table 1: Profile of respondents**

Employment	% of total number of firms in June 2010 sample	% of total number of firms in December 2010 sample	% of total number of firms in June 2011 sample
>100	35.3%	38.2%	28.3%
Between 20 and 100	41.2%	47.1%	39.1%
Less than 20	23.5%	14.7%	32.6%
Total	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

At face value all participating firms included in the survey were satisfied with CESA services including the directorate, which is the best rating since the inception of this survey (December 2006) – in other words hardly anybody rated services as unsatisfactory. Looking closer, majority of firms found services to be of a good standard, with an increasing number of firms finding services to be at satisfactory level only .

**Table 2: Question 1 and 2**

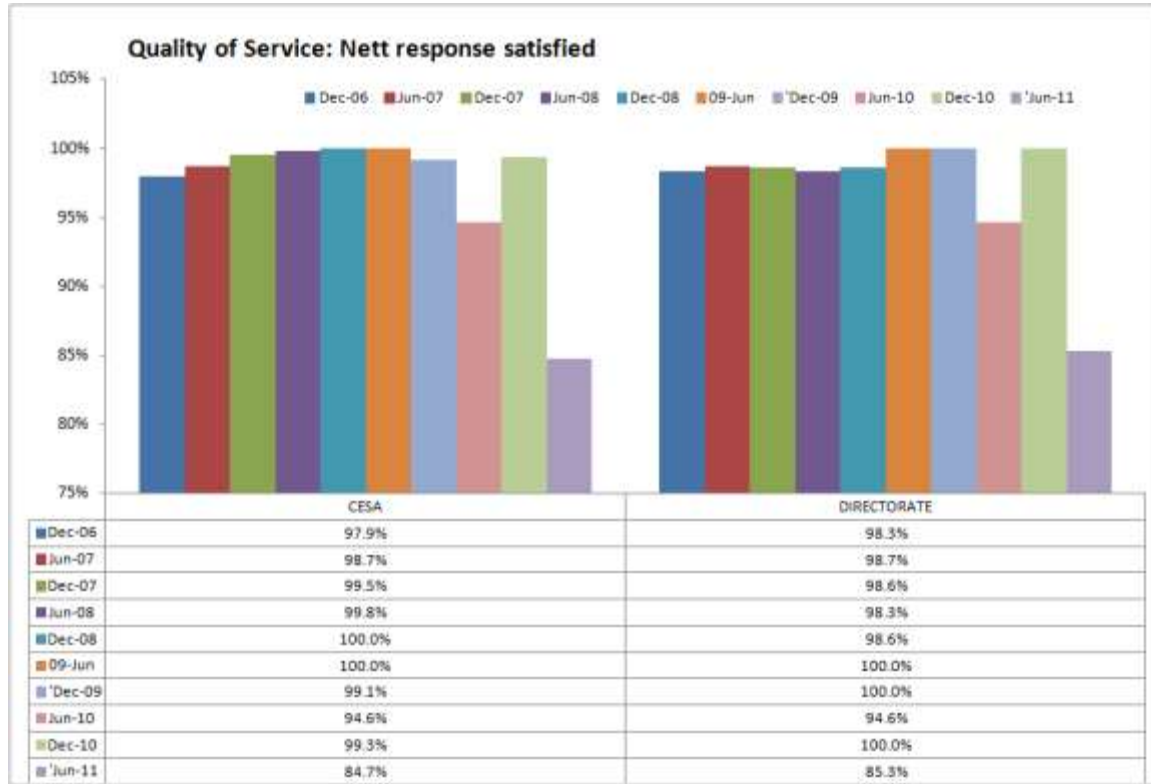
	Unsatisfactory	Satisfactory	Good	Exceptional
<b>December 2006 Survey</b>				
CESA	1.0%	21.3%	73.12	4.4%
Directorate	0.8%	21.1%	72.8%	5.2%
<b>June 2007 Survey</b>				
CESA	0.7%	22.8%	71.3%	5.1%
Directorate	0.7%	29.0%	65.2%	5.1%
<b>December 2007 Survey</b>				
CESA	0.3%	26.0%	73.4%	0.3%
Directorate	0.7%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

*Question 2*

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

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

There was a 85.3% positive nett response rate from firms satisfied with general and directorate services, compared with a slightly lower rate of 84.7% with regards to CESA as a body.



## Relevance to industry needs

### Question 3a

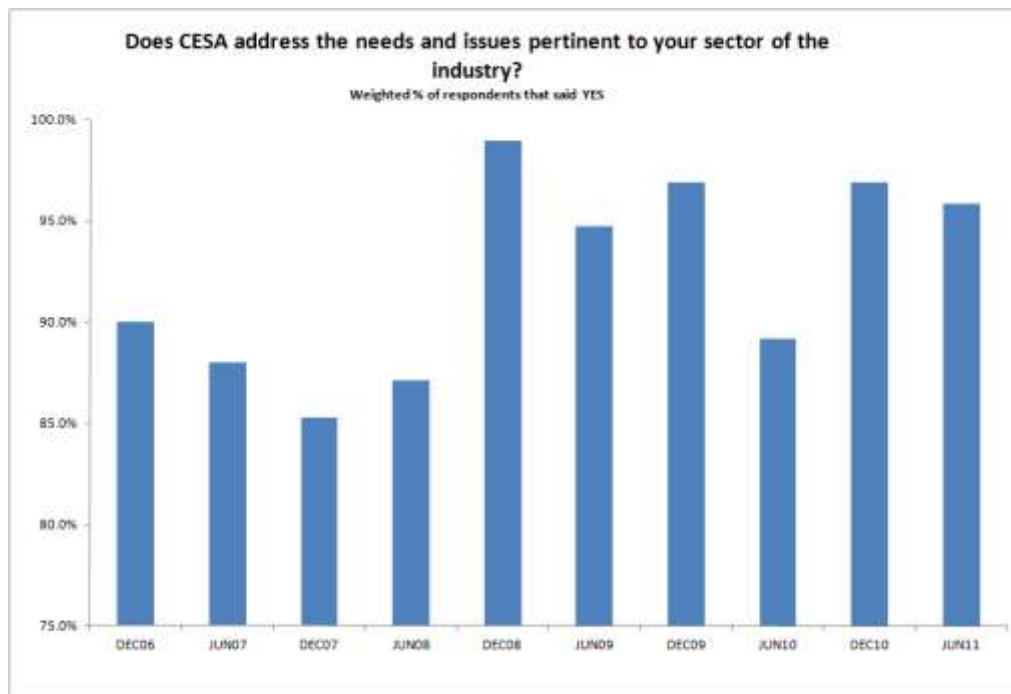
Does the Association focus on addressing the needs and issues pertinent to your **sector** of the industry:

- Yes
- No

**Table 3: Question 3a**

	Jun07	Dec07	Jun08	Dec08	Jun09	Dec-09	Jun-10	Dec-10	Jun-11
Weighted	88.0%	85.3%	87.1%	98.9%	94.8%	96.9%	89.2%	96.9%	95.9%

Members are confident that CESA is addressing their industry needs, which averaged 95.9% compared to 96.9% (revised from 89.5%) in the previous survey. It is interesting that members are satisfied that CESA is addressing the needs to their sector, but the overall satisfaction rate has deteriorated.



**Figure 1**

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%

Bulk of firms were satisfied in the way CESA was dealing with issues pertinent to their industry (59,4%), although this satisfaction rate has dropped from 81,8% reported in the previous survey. An increasing number of firms were dissatisfied reporting the highest level at 8,6% since June 2007 when it reached 10,2%.

There seems to be a growing disparity between those satisfied and those dissatisfied. The response rate of firms that reported services as exceptional, increased to 9,7% in the current survey.



Figure 2



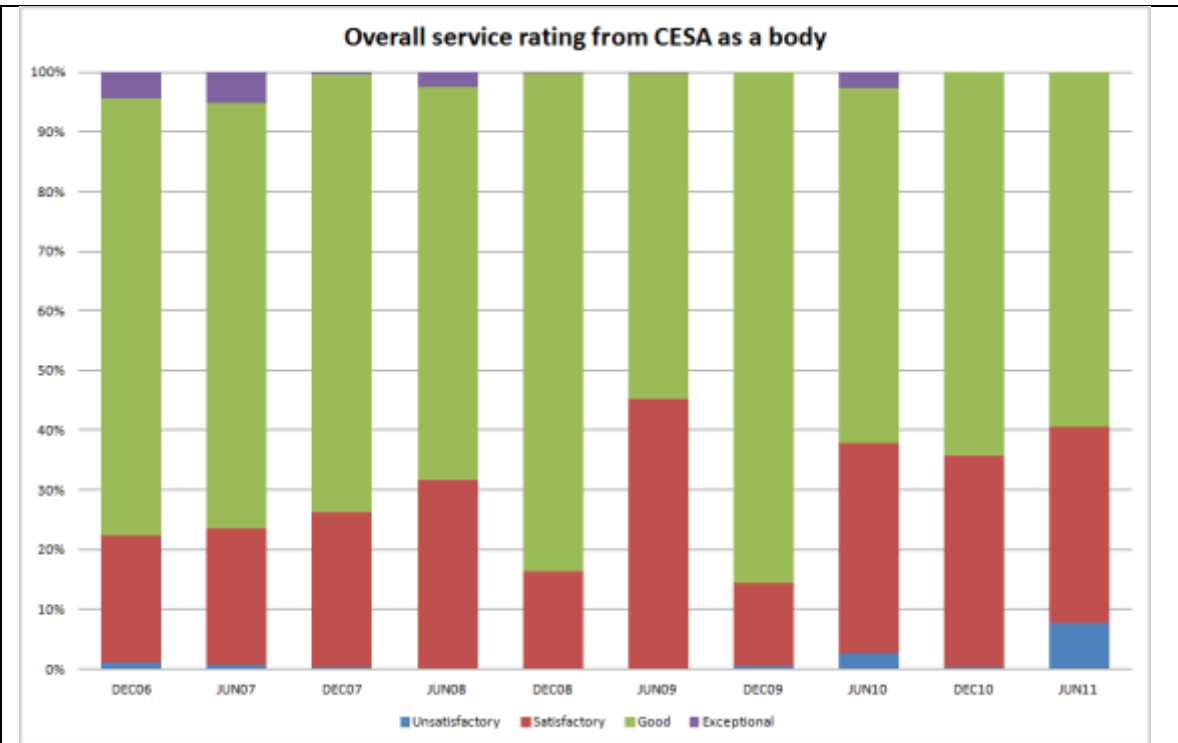


Figure 3

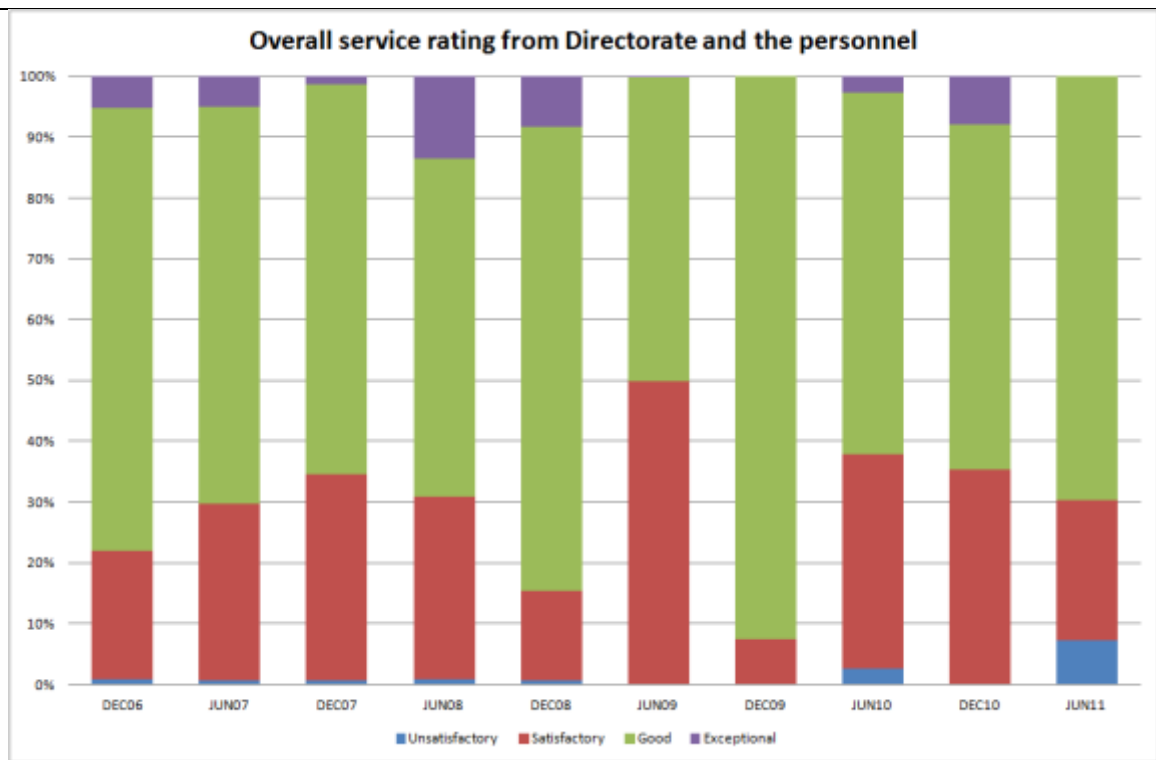


Figure 4

## Benefits

### Question F4

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

- Yes
- No

Majority of responding firms (85,6%) were aware of the benefits of being a CESA member. The rate amongst medium size firms (employing between 20 and 100 people) was slightly lower at 77,2%.

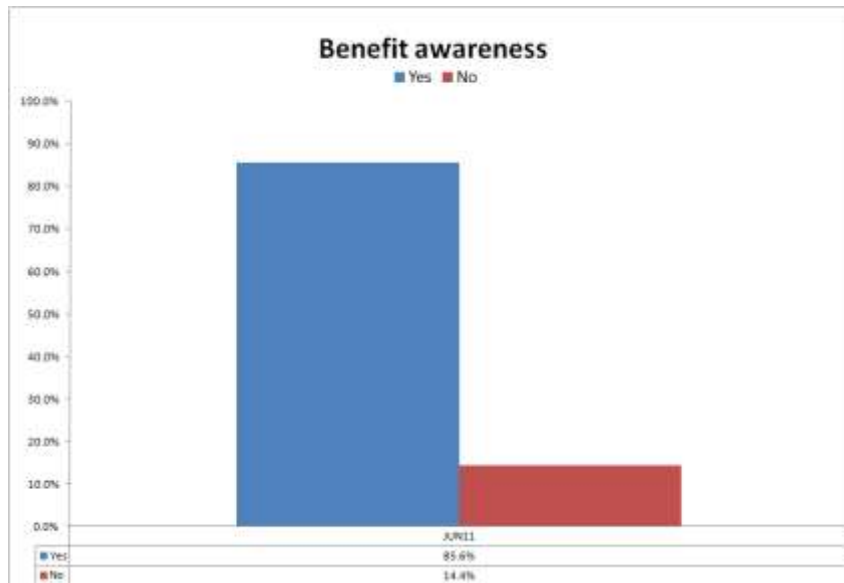


Figure 5

## 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.*

- *Wally Main very helpful regarding following up on a problem tender award by large Metro - this is the first time CESA has been really helpful to us.*
- *We need substation design training*
- *Look at ways of assisting emerging businesses and mentoring if possible.*
- *Extremely dissatisfied with the manner in which a non-refundable amount was managed by CESA*
- *Drive to have greater involvement by the smaller practices in CESA matters. Government focus to grow small organizations to ensure meaningful contribution to the economy should not be taken lightly.*
- *Communicate with member firms with regards to issues at hand*
- *CESA should keep focus on the lack of capacity in the public sector. CESA members have more than adequate experience and capacity to assist the public sector to improve service delivery. There is no point in government allocating funds, but then the service (e.g. schools, hospitals, housing, water purification, sewer treatment) is not delivered. This in turn has the impact that there is too little work for consultants and result in ridiculously low tender values in view of fierce competition for too little work being put out by the public sector.*
- *CESA needs to be more aggressive in improving tender system and engaging with government to improve infrastructure delivery.*
- *Assist small consultants who are overlooked in municipal and government projects because of politics.*

Response rate by firm size

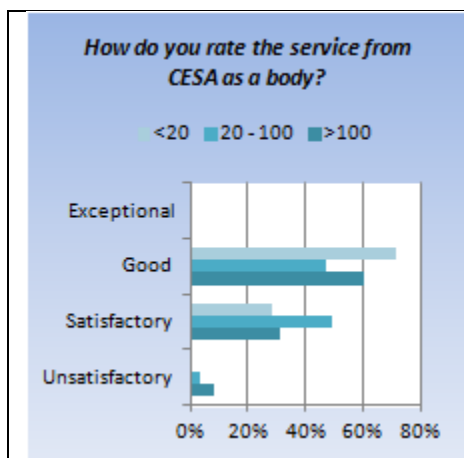


Figure 6

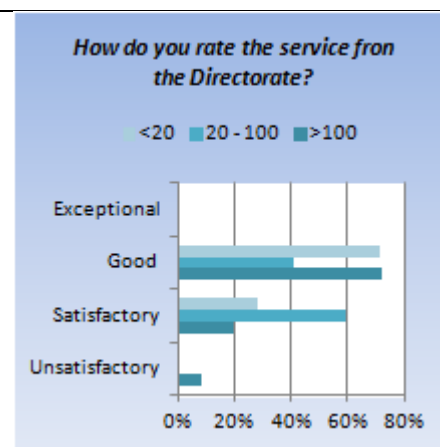


Figure 7

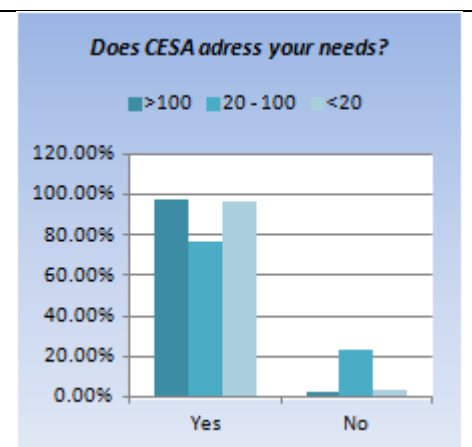


Figure 8

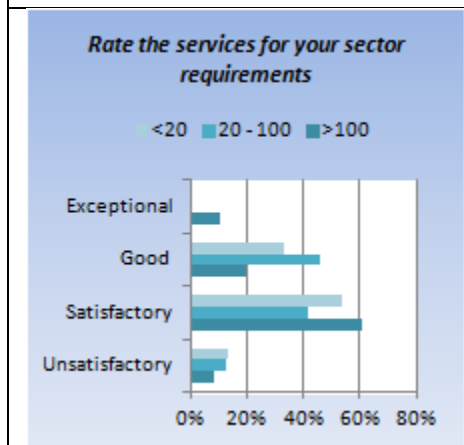


Figure 9

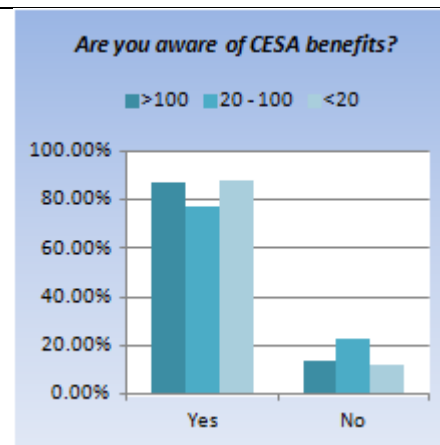


Figure 10

## **Conclusion**

The growing dissatisfaction rate amongst some member firms is more than likely related to the growing frustration amongst firms with the public sector's inability to prepare compliant tender documents, which could impede on the process of fair adjudication. Working conditions have become more strenuous in the consulting engineering industry, fuelling the need from members for a more rapid response from CESA on pertinent matters, even if this means more regular communication or engagement with members.

Lack of involvement from smaller firms has always been a concern for participating firms, which was again raised in this survey.