

Biannual Economic and
Capacity Survey

July – December 2019

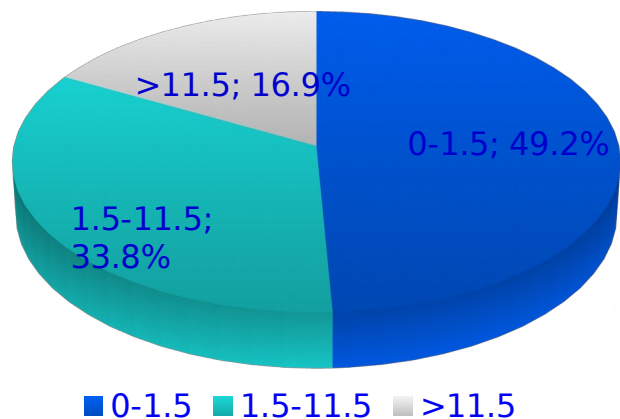
Firm distribution based on Annual Turnover (based on responses received)

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

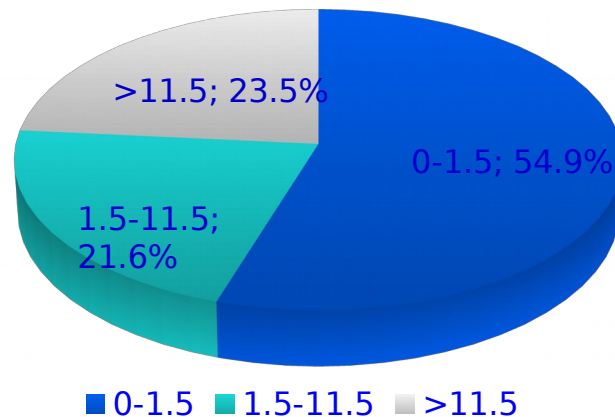


July – December 2019

Full survey

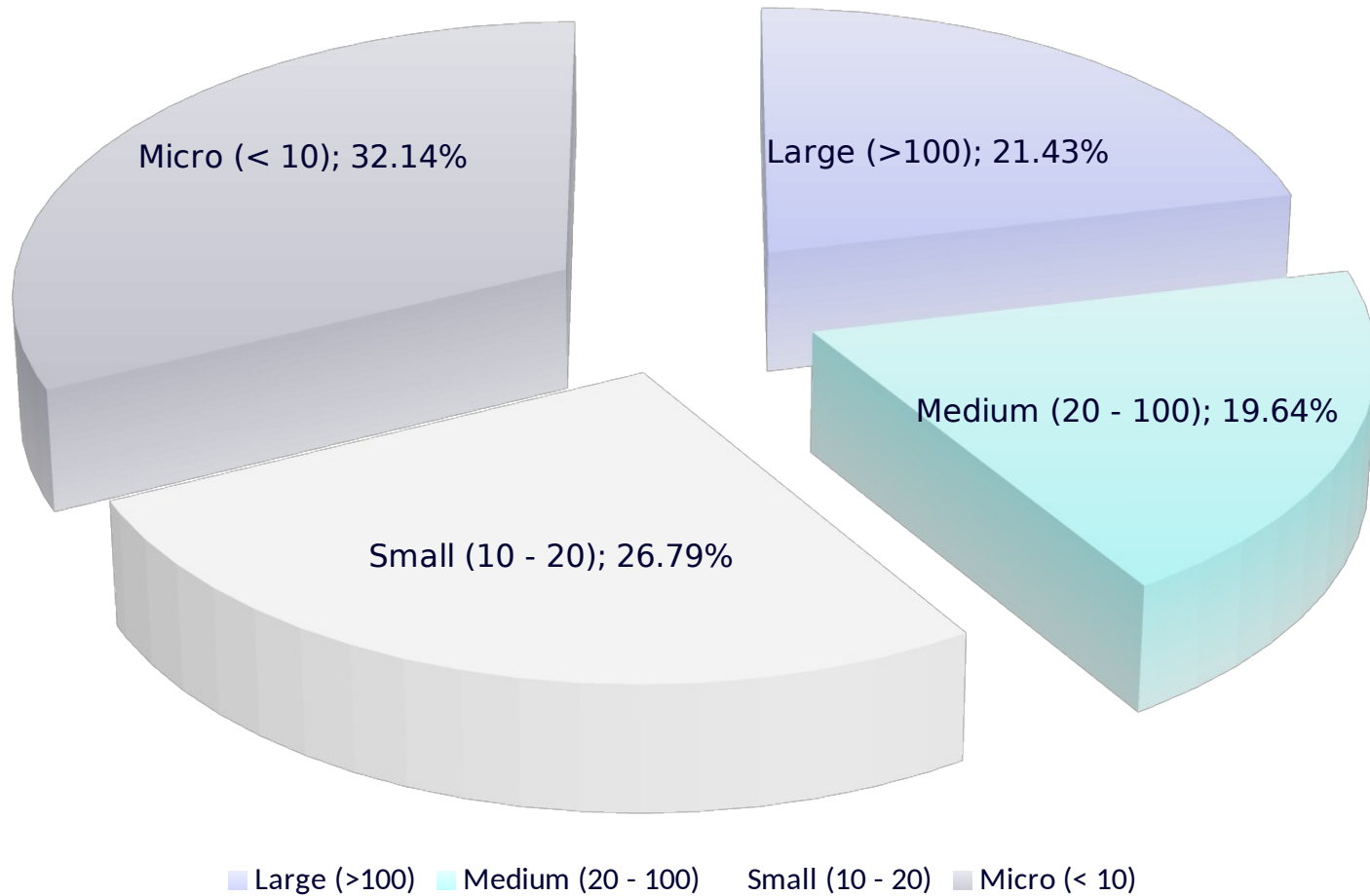
Category by gross annual income	% of firms
0 – R1,5m	41,0%
R1,5m – R11,5m	38,5%
> R11,5m	20,5%
Total	100.0%

Firm distribution based on turnover

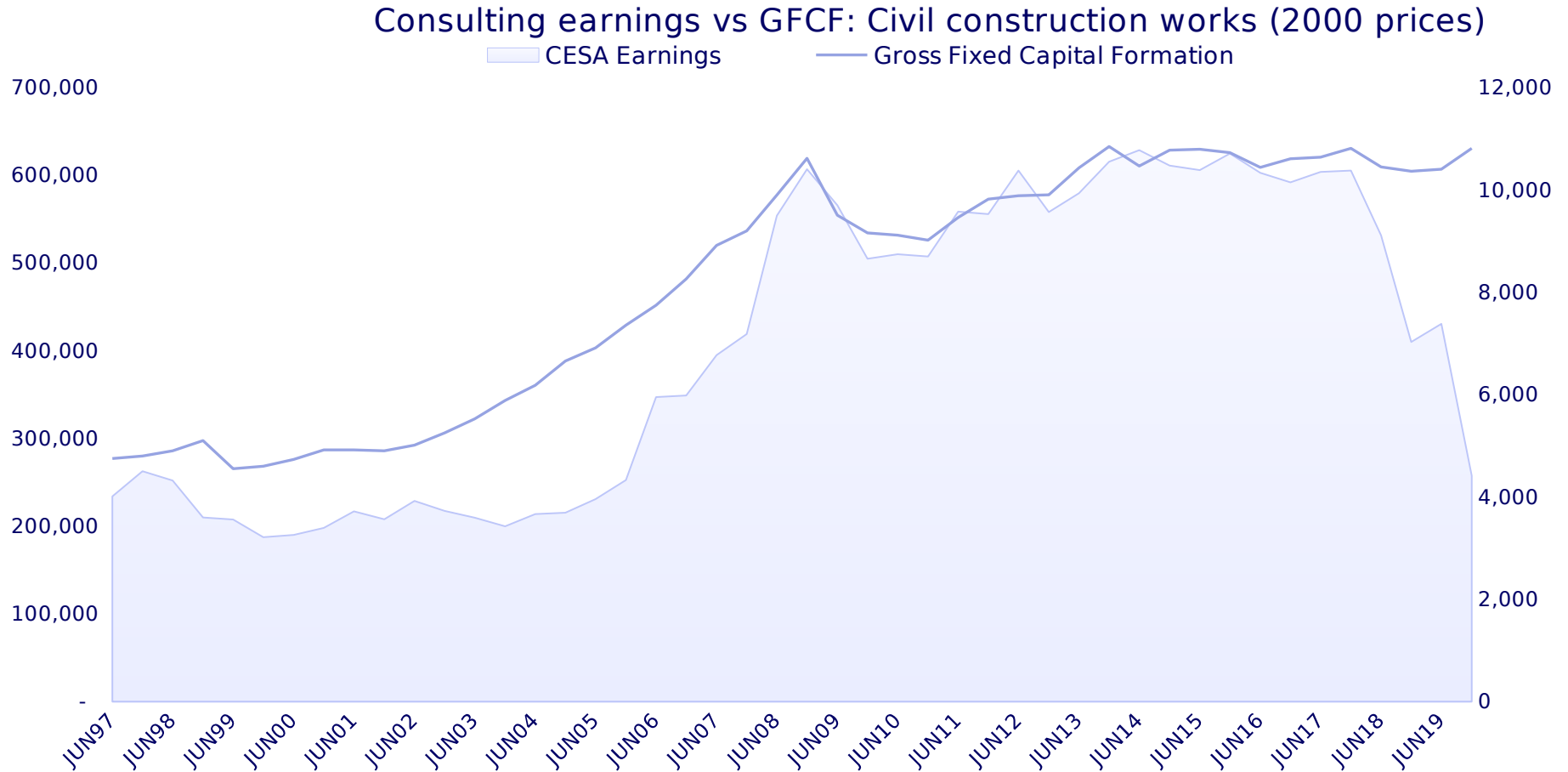


Profile of respondents - by firm size

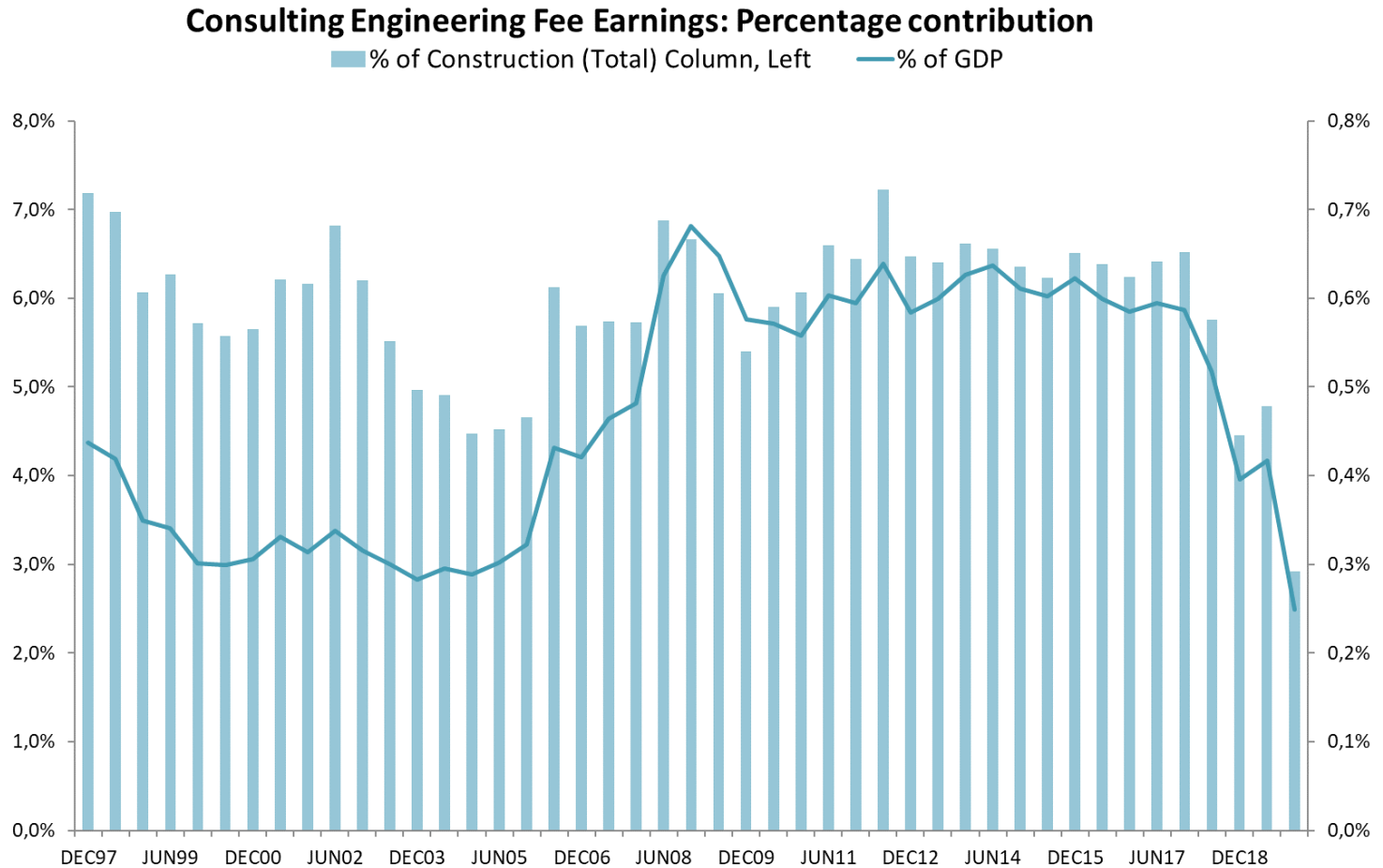
Based on full and part time employment



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

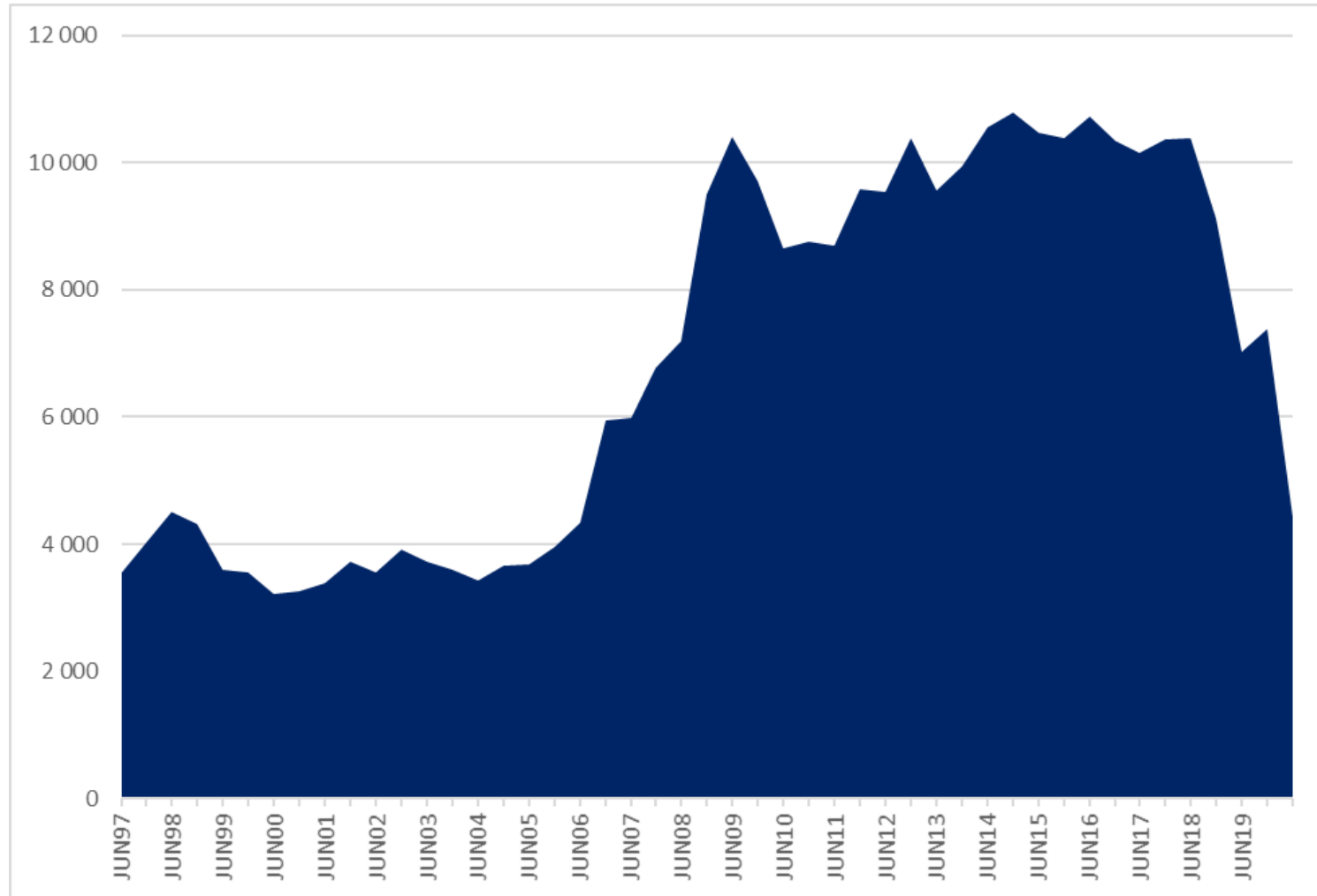


Consulting Engineering Earnings Percentage of GDP / GFCF construction



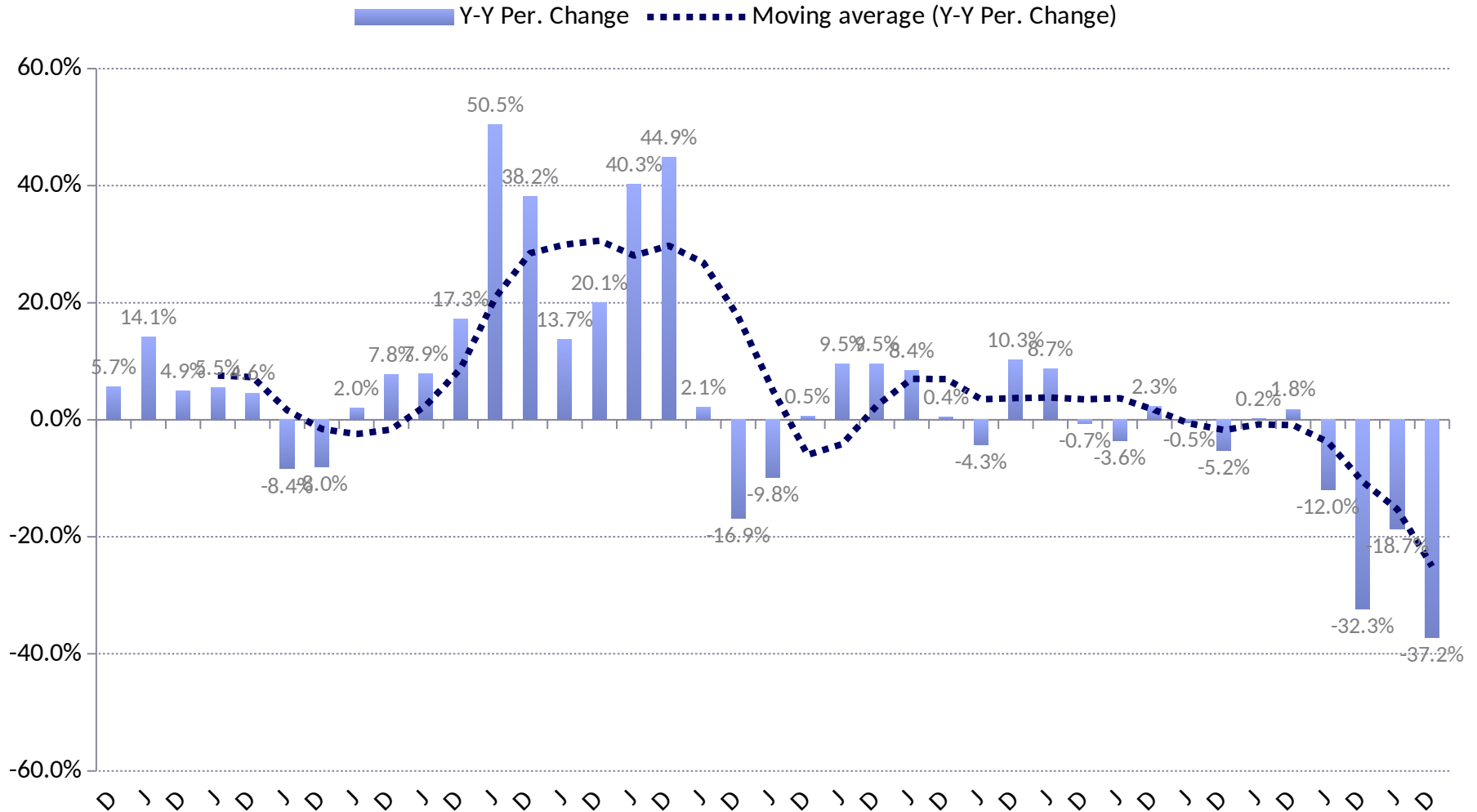
Fee income, R billions Real 2000 prices

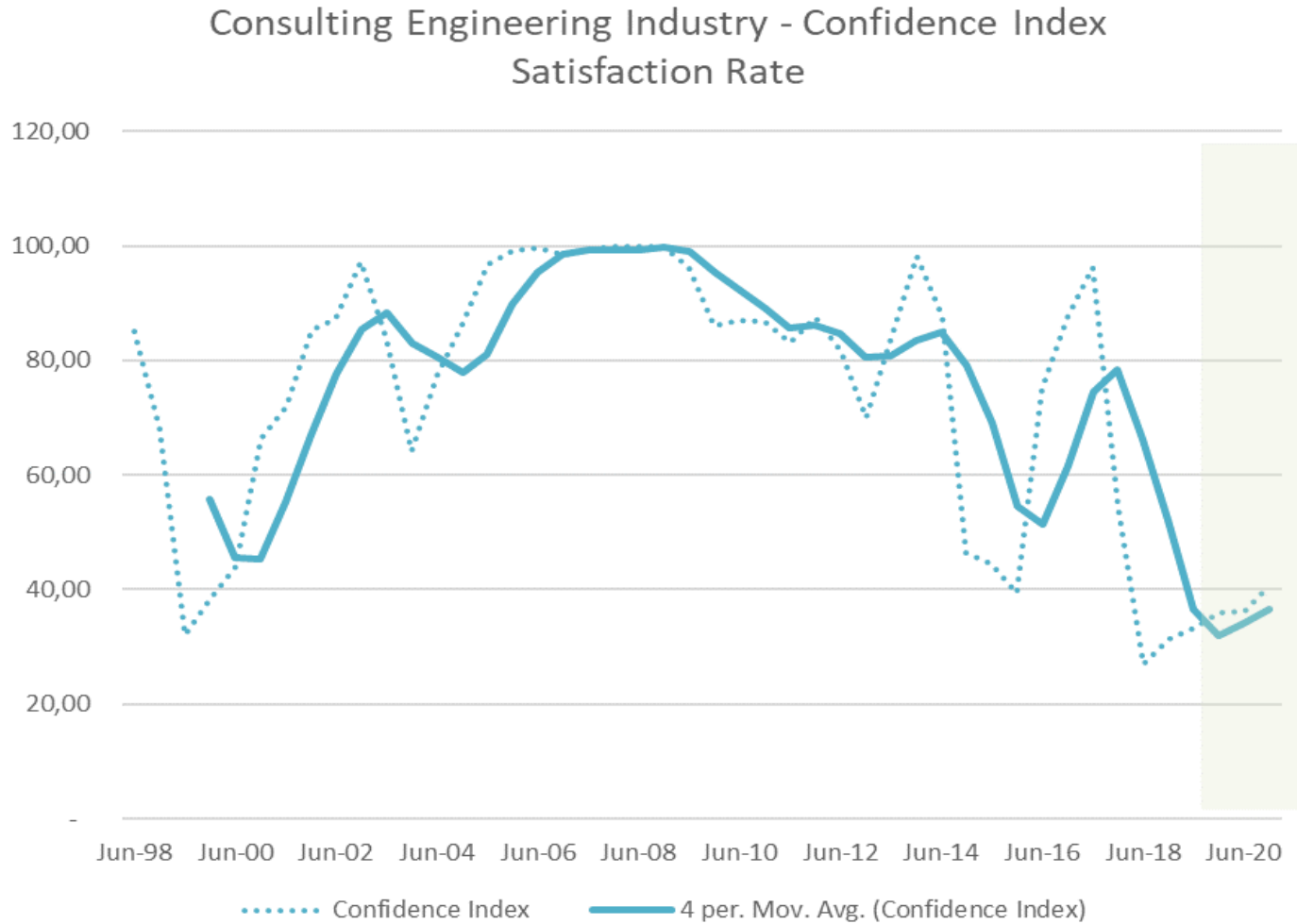
Annualised | Deflator = CPI



Real Fee income, Real prices

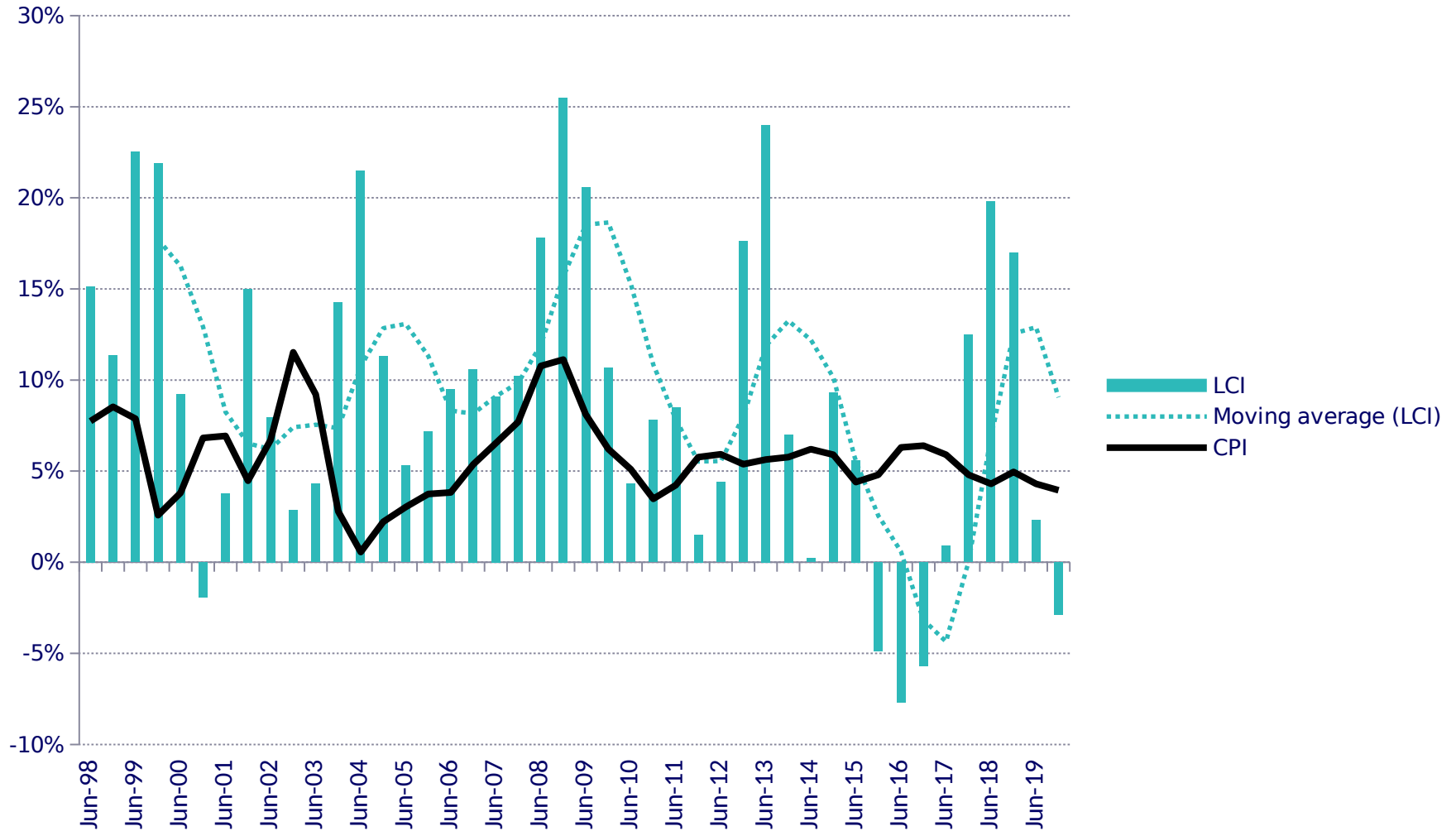
Annual Change | Deflator = CPI





CESA Labour Cost Indicator vs CPI

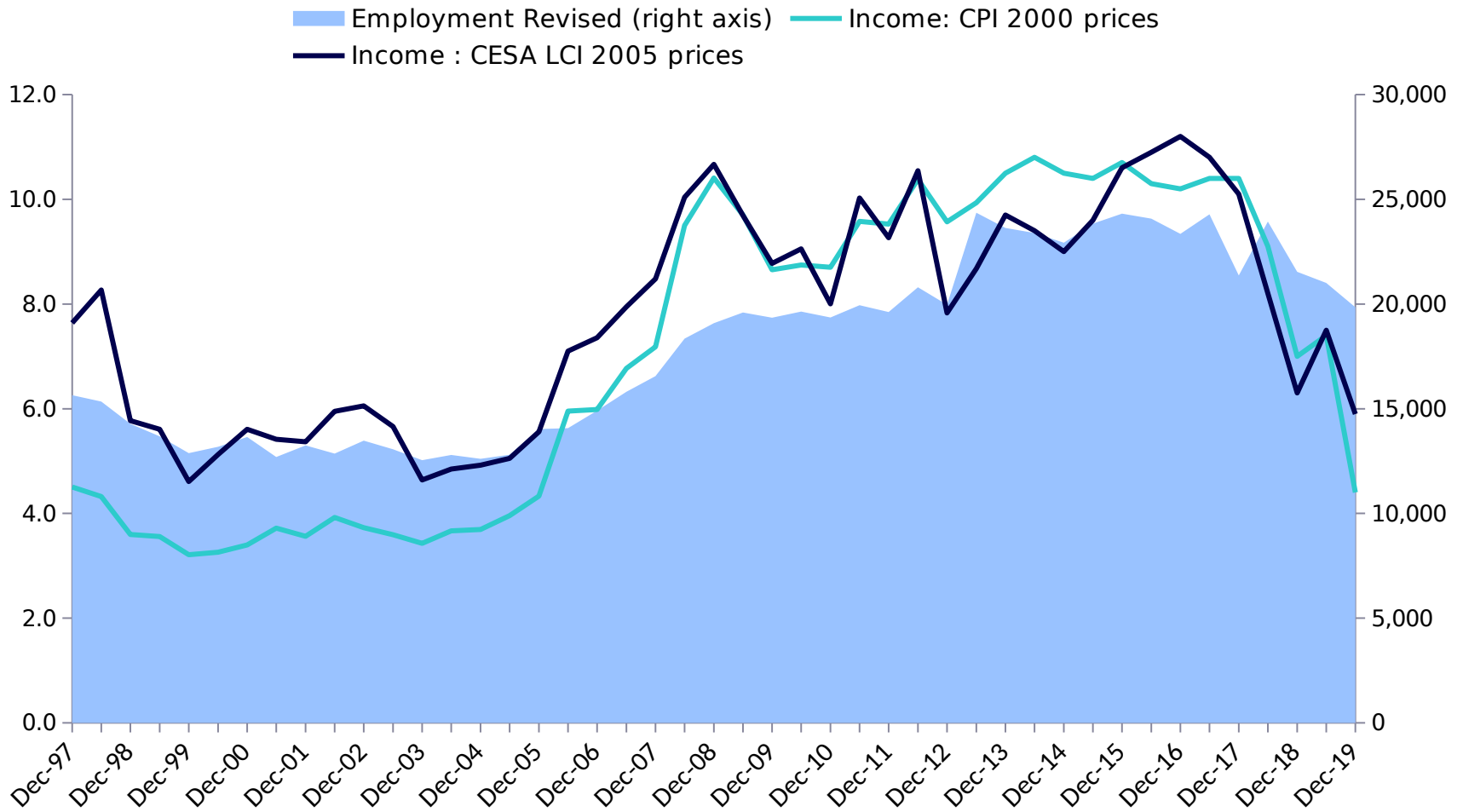
Year on Year percentage change



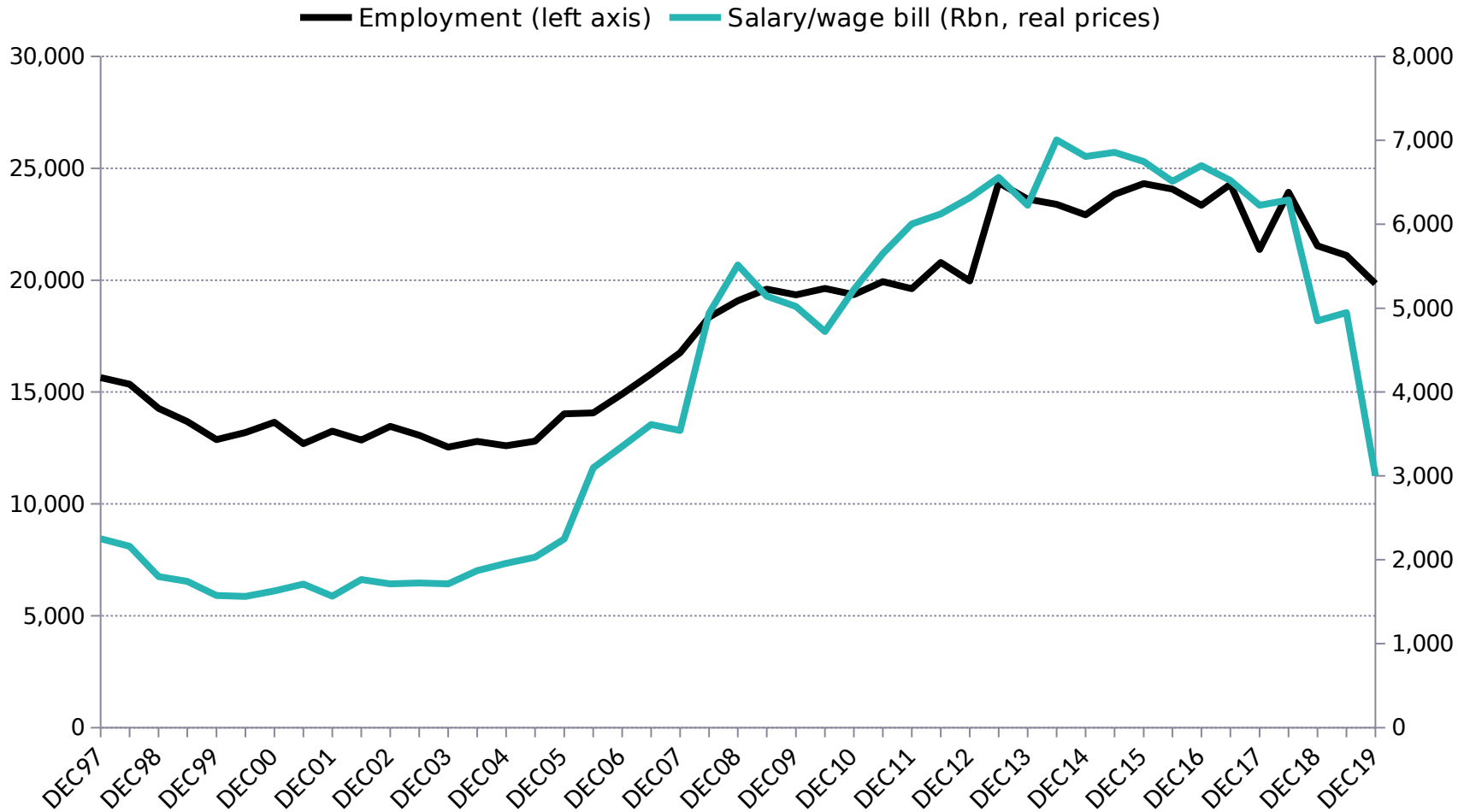
Employment vs REAL fee income (Rbn)

(Deflated using the CPI & LCI)

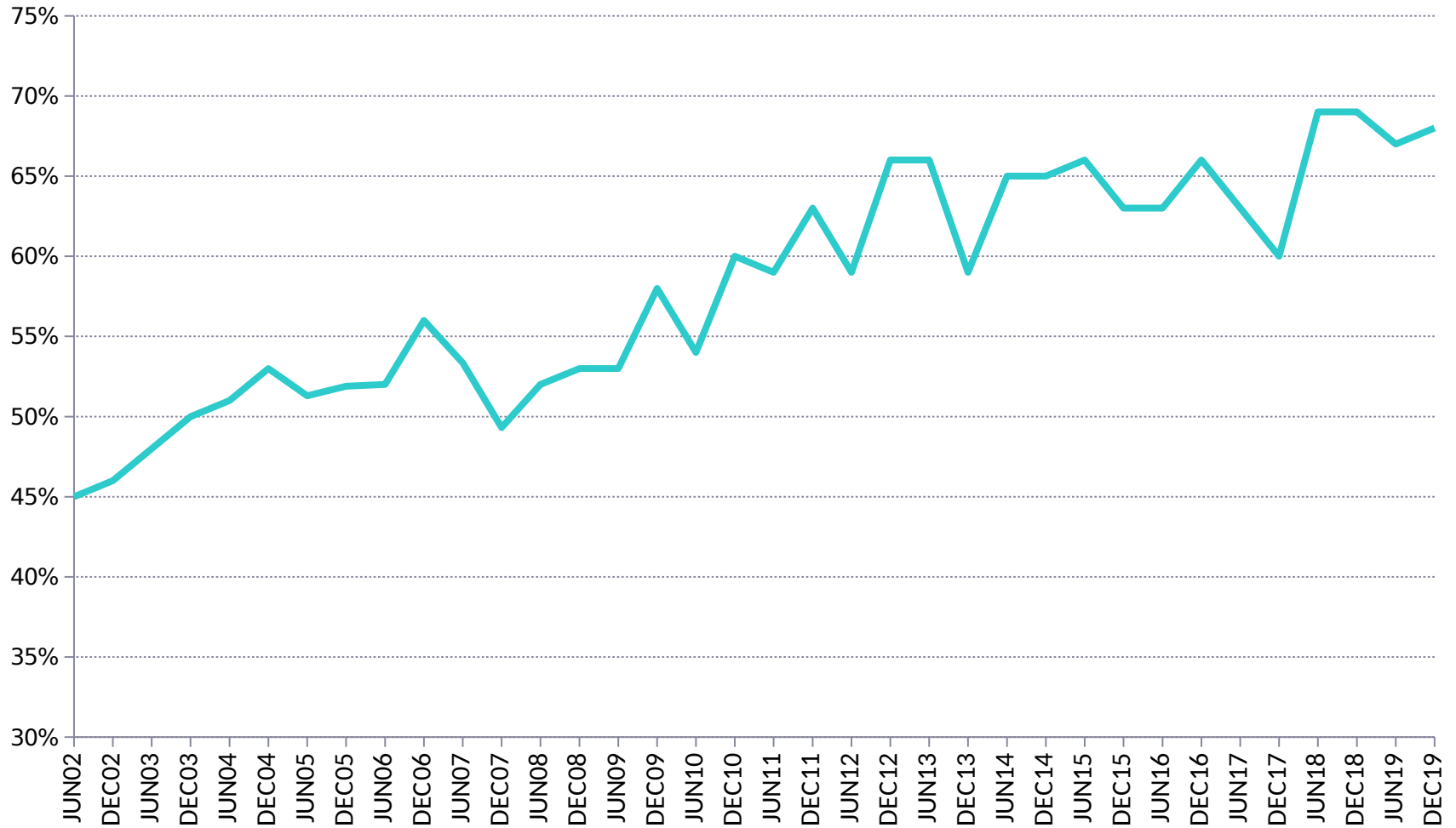
- CPI: Consumer price index
- LCI : Labour Cost Indicator



Salary and wage vs Employment

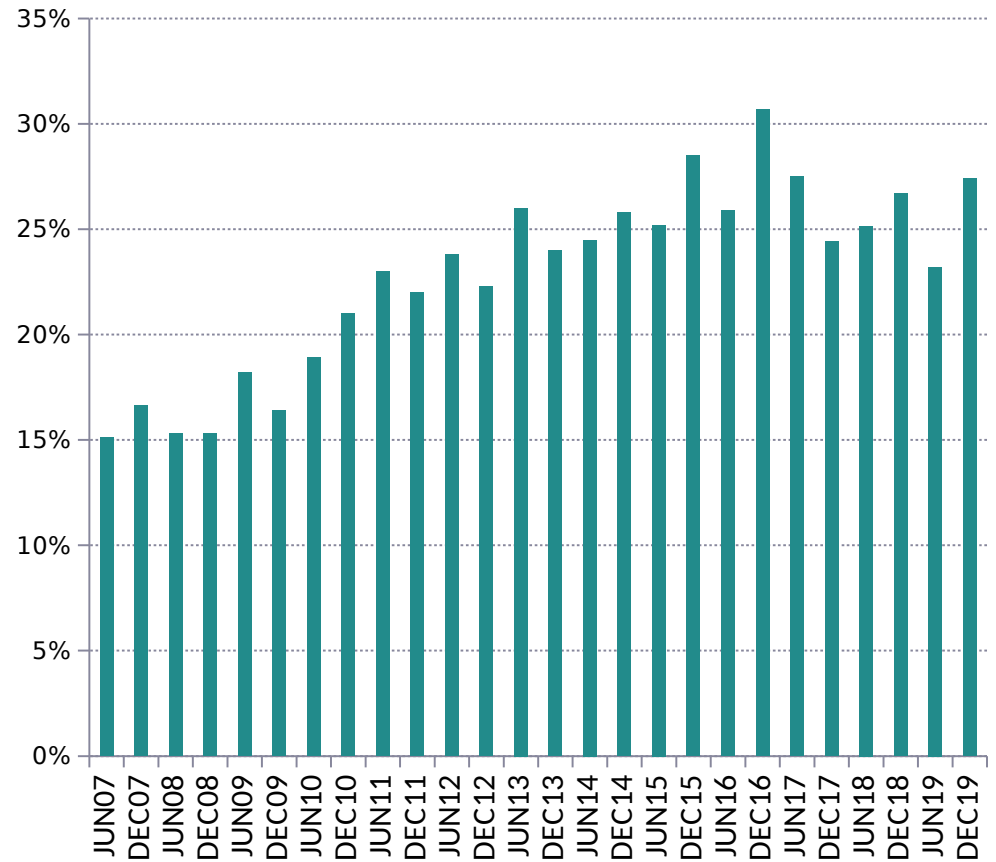
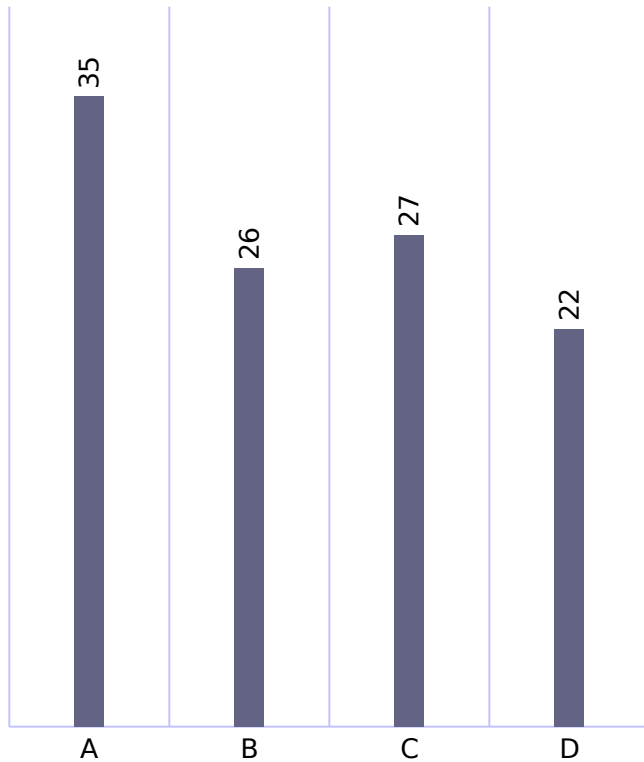


Salary and wage bill | Percentage of gross fee earnings

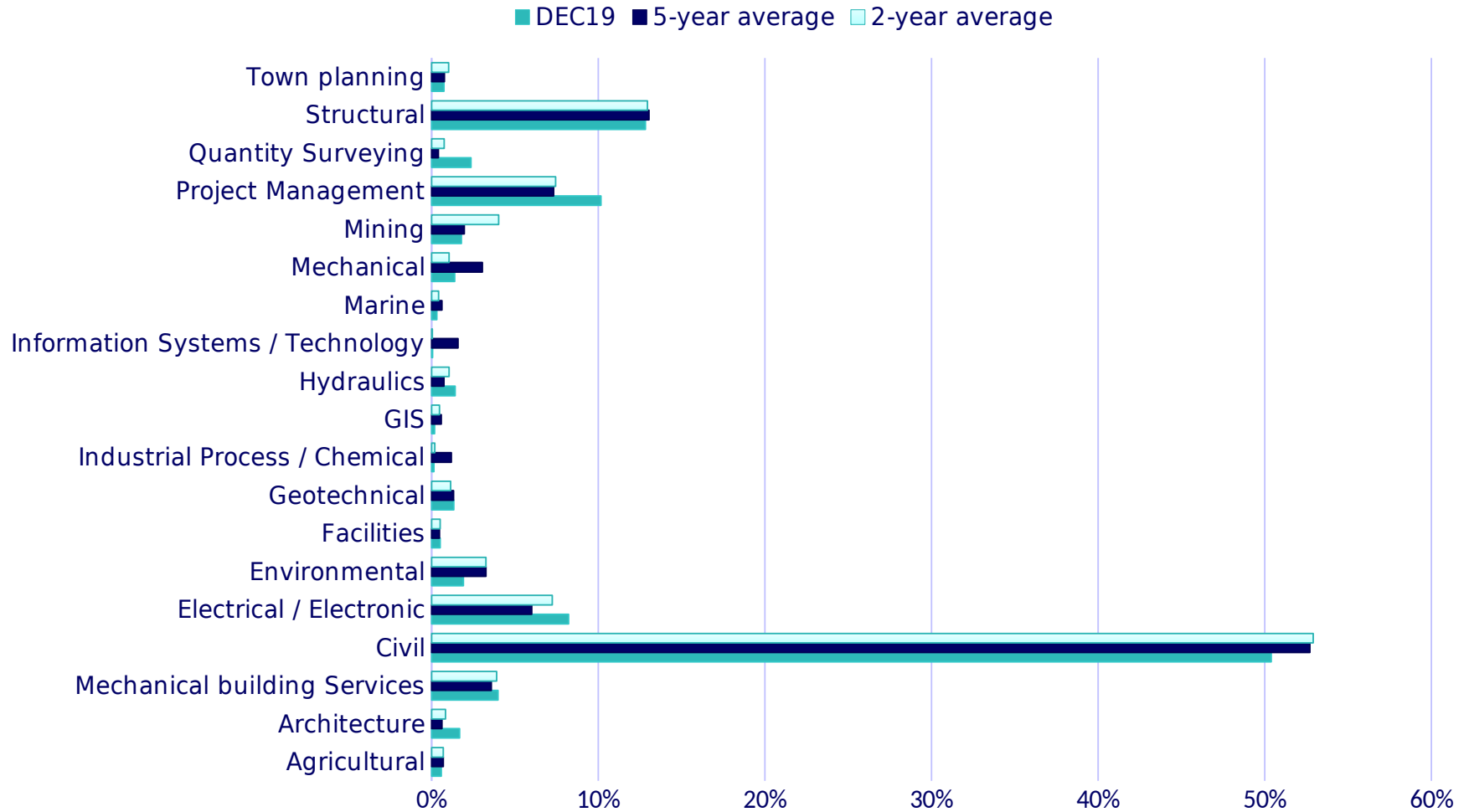


Average Discounting rate

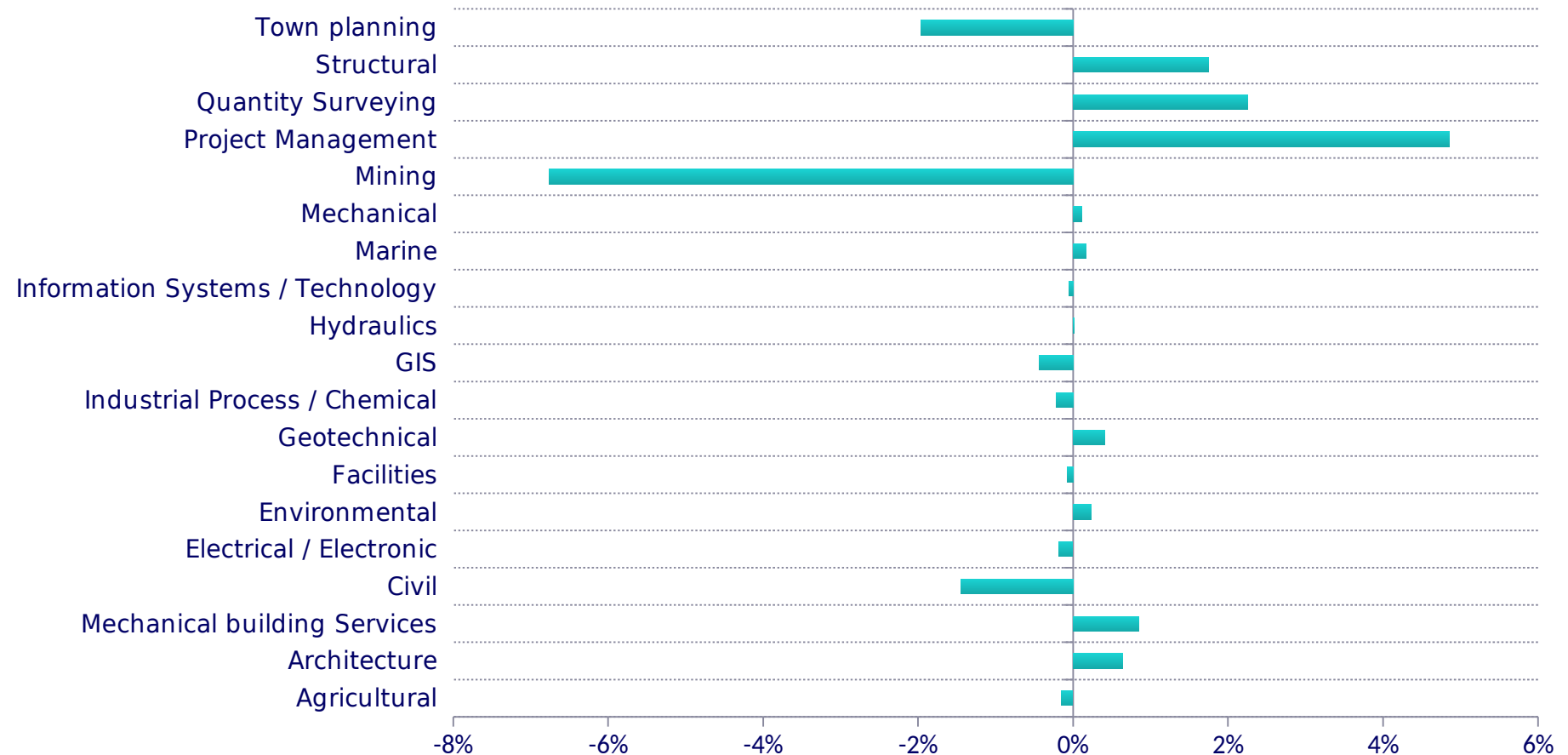
By firm category



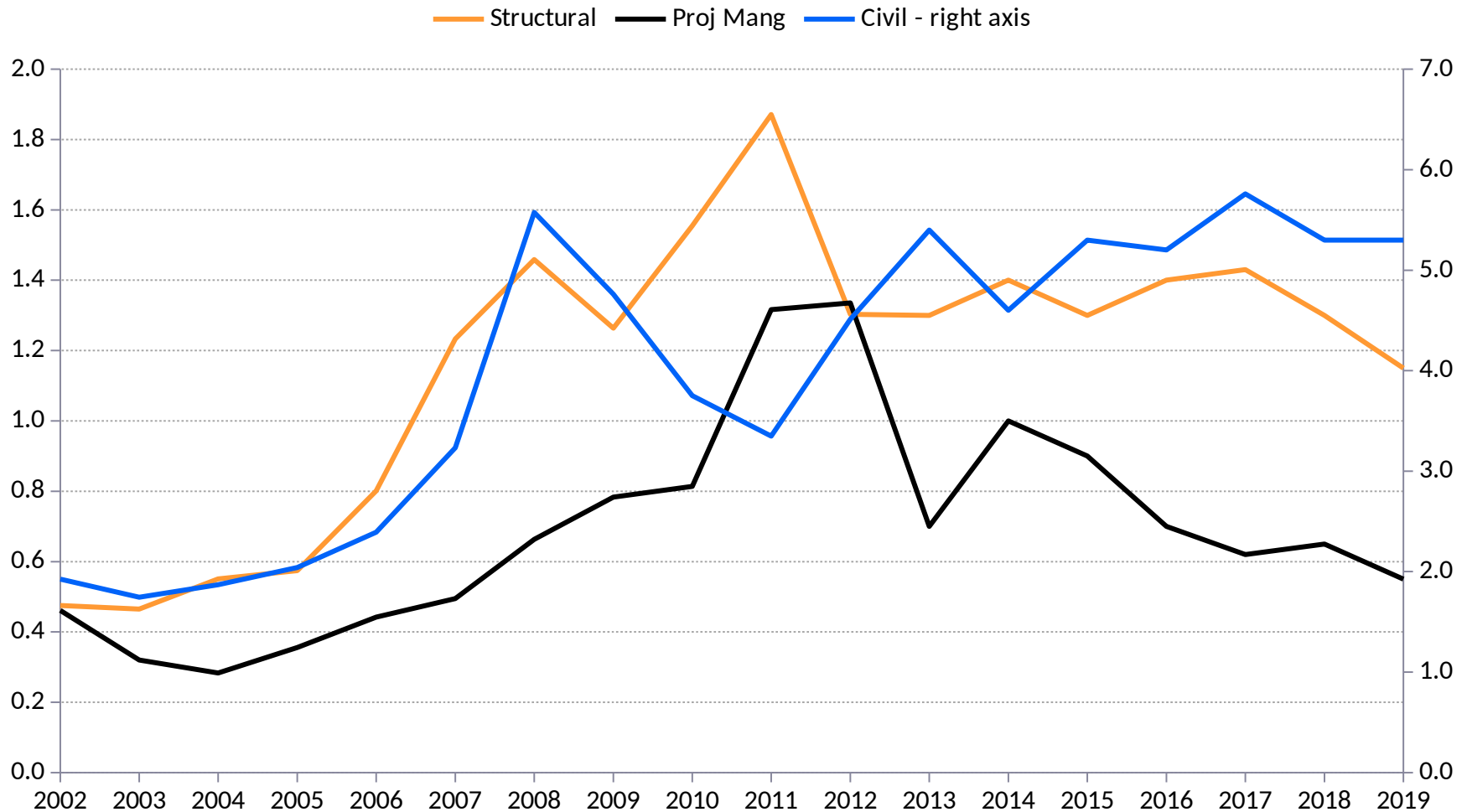
Fee income earned by Sub-disciplines: % Share



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

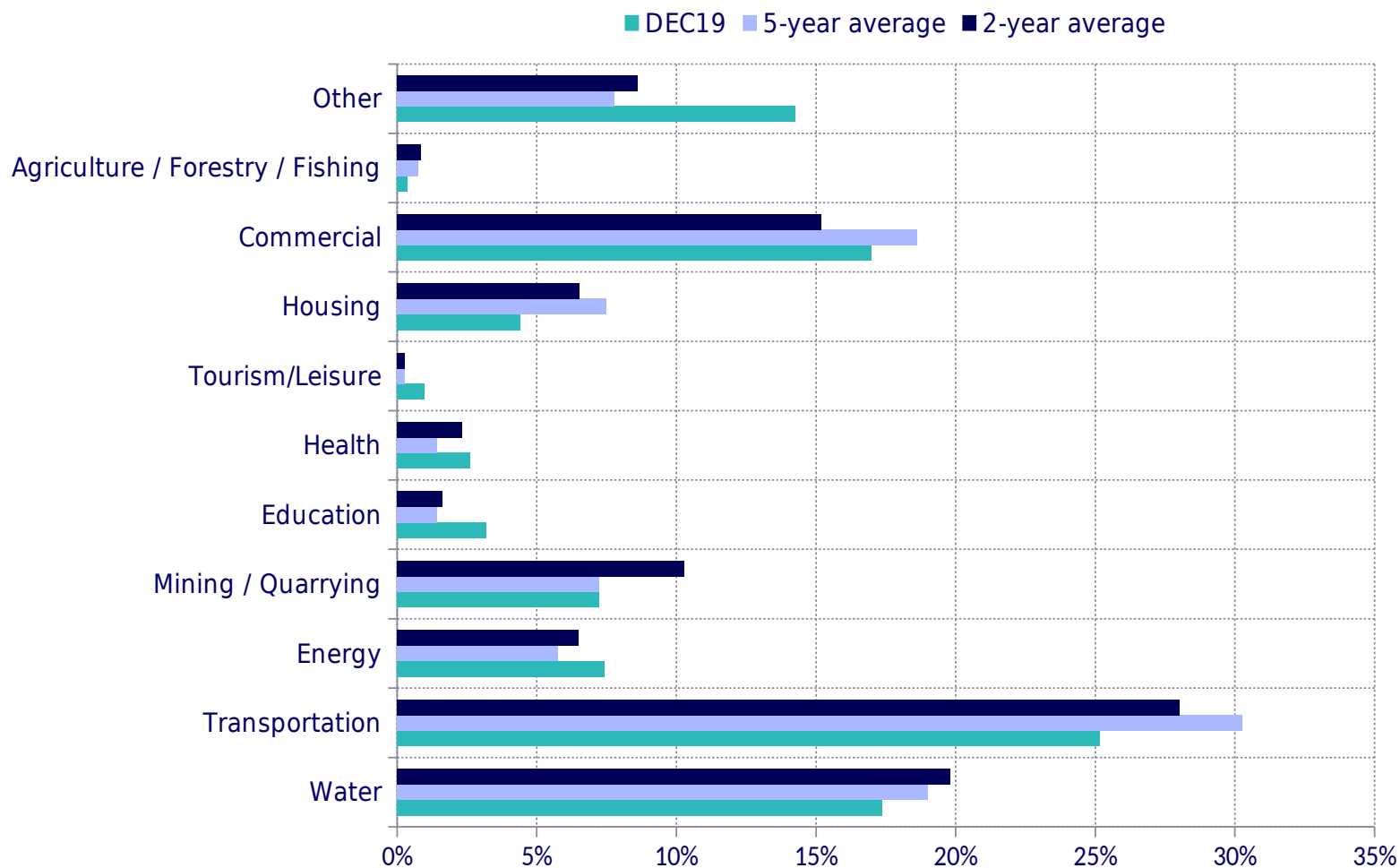


Fee income earned by TOP THREE disciplines: R bn Real 2000 prices Moving average (2 survey period): 2002-June 2019

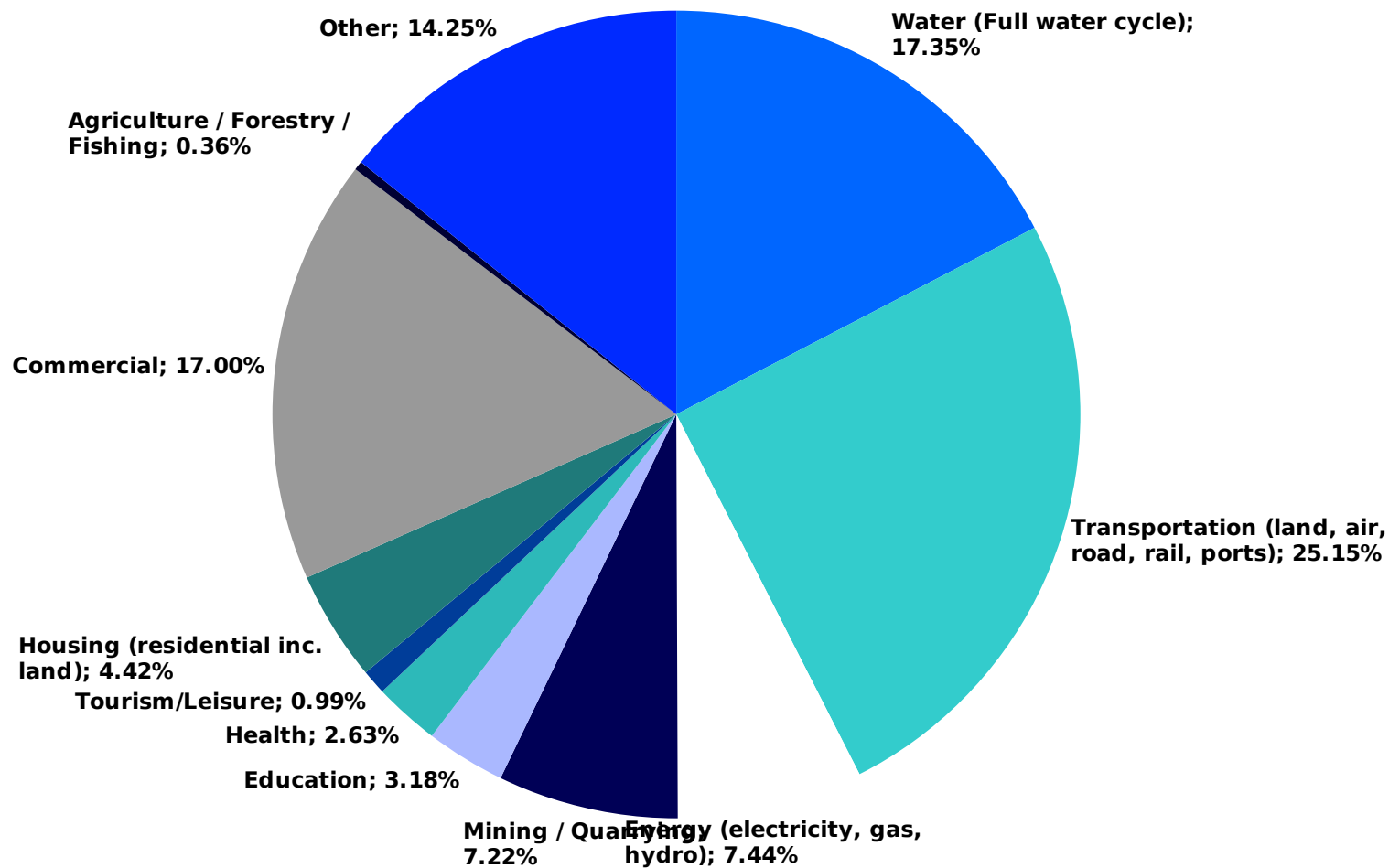


Fee income earned by economic sector

Percentage market share

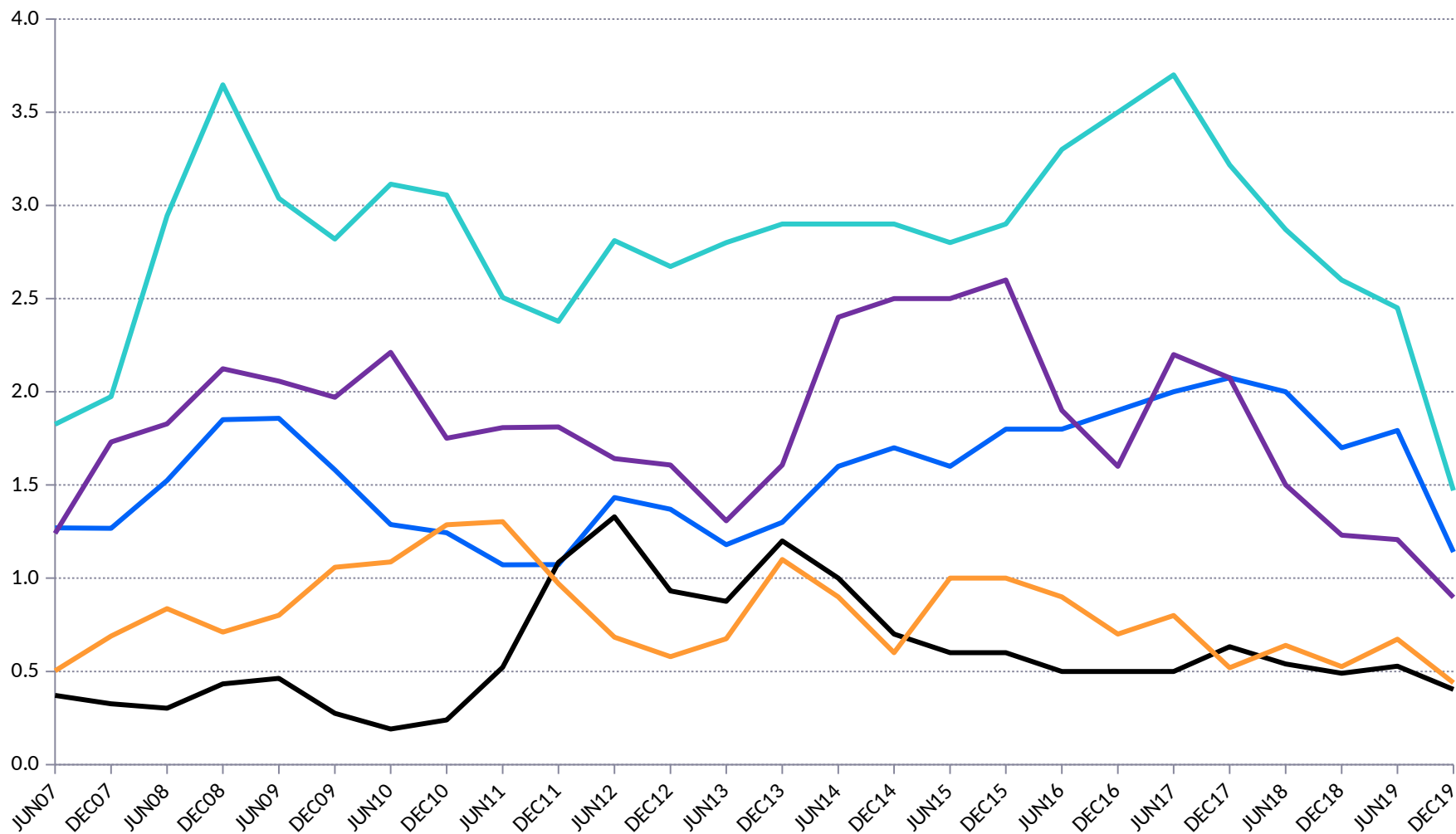


Profile of earnings by sector

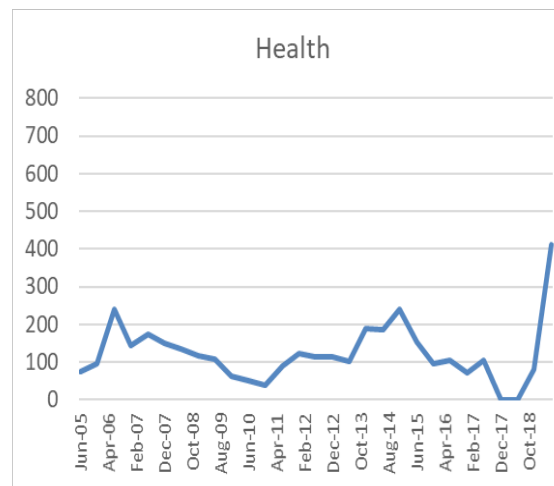
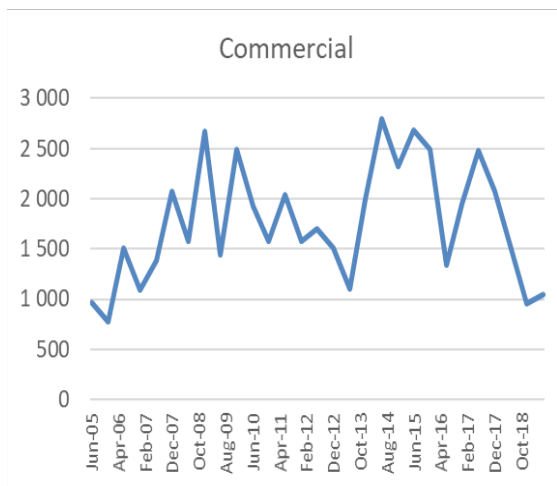
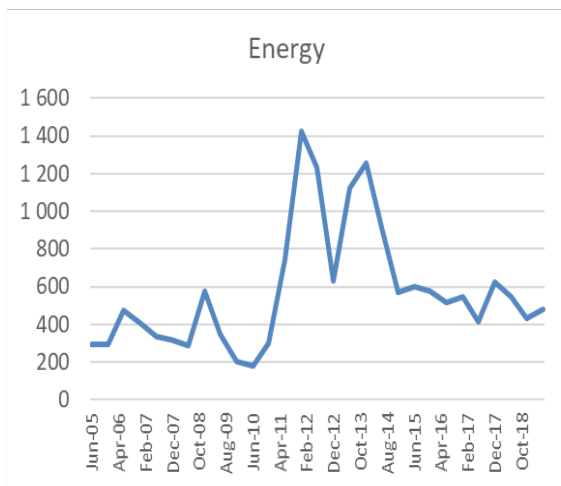
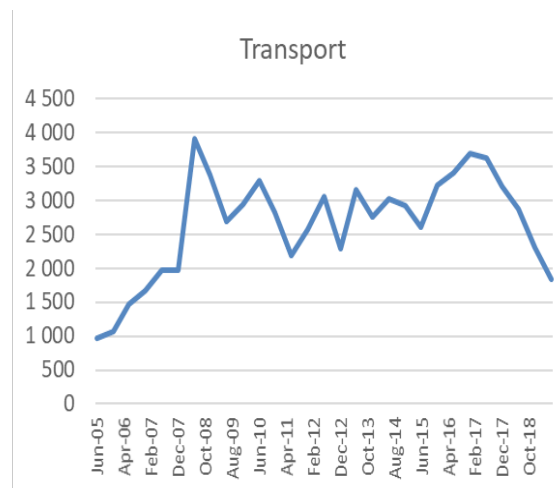
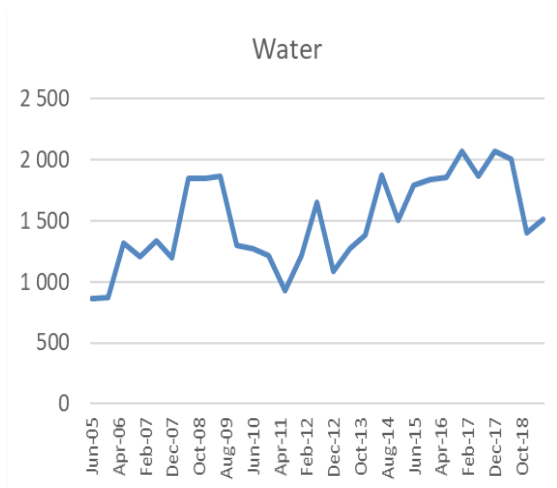
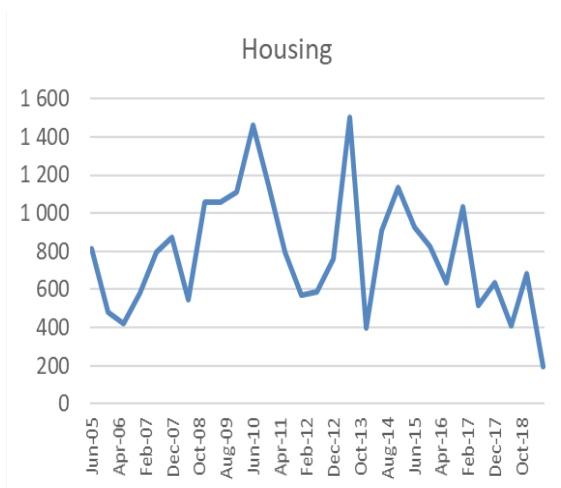


Fee earnings by selected sector

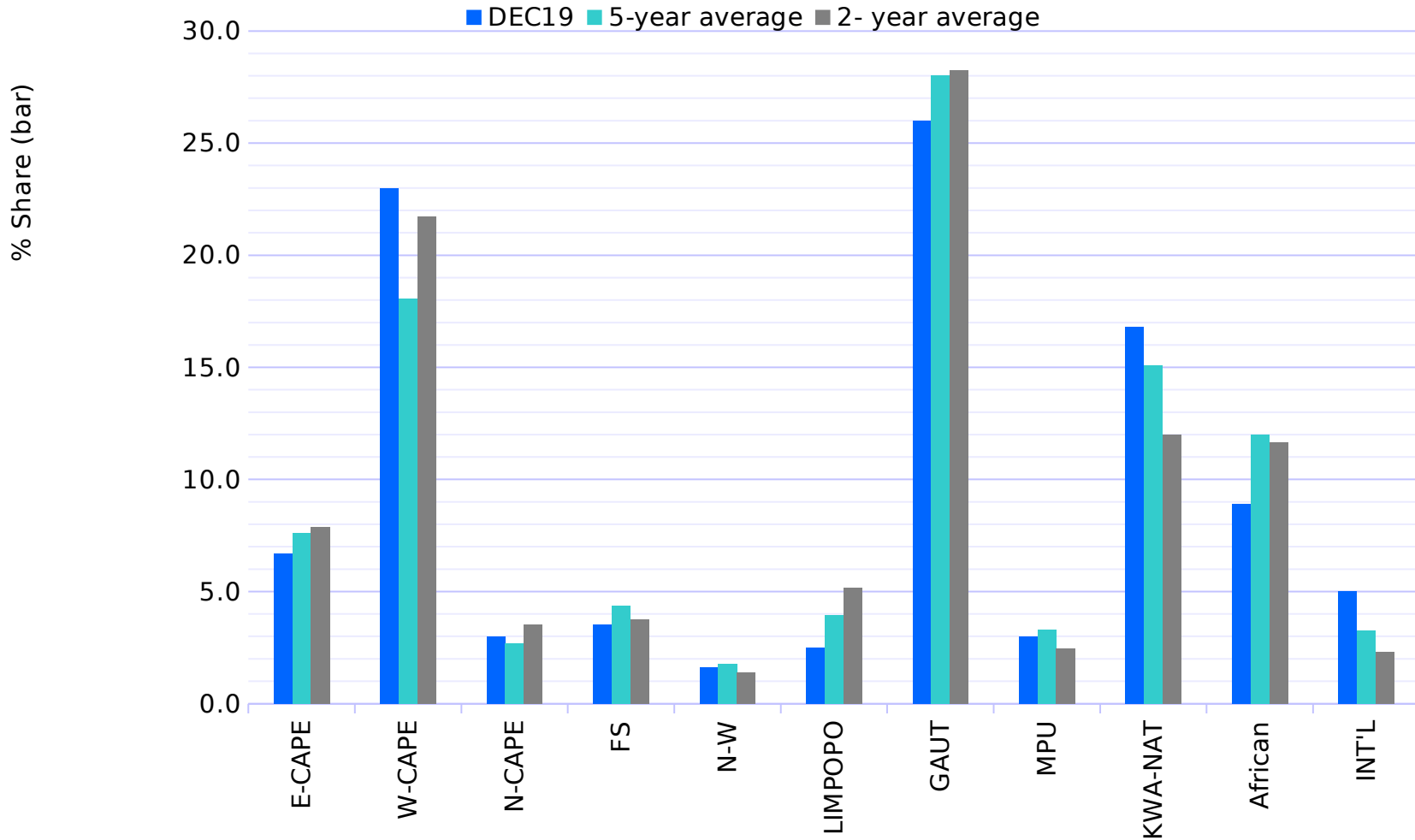
R billions, Real 2000 prices | Smoothed | 2 survey average



Fee income (Rm annualised, Real prices) earned by key economic sectors

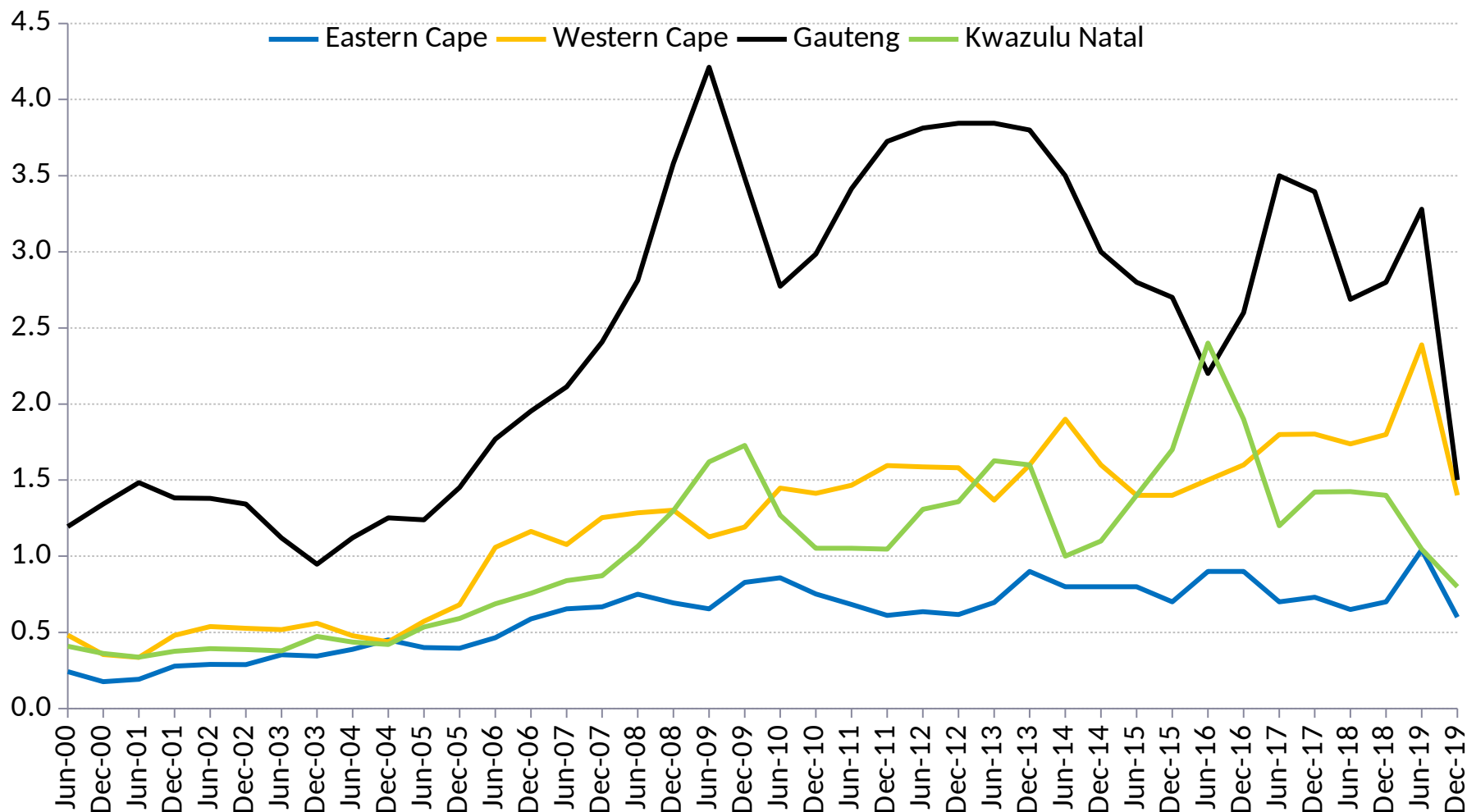


Provincial Market Share



Fee income earned by province (Rbn, real prices)

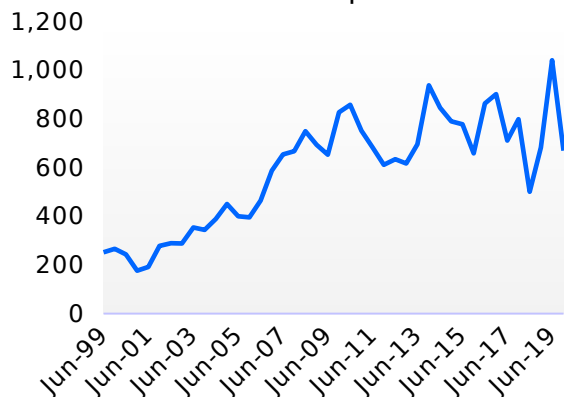
High Capacity economies | TREND Annualised smoothed, average over 2 past surveys



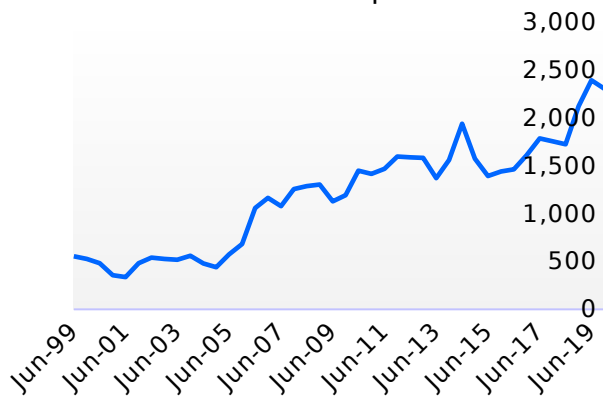
Fee income earned by province

June 1999 - December 2019 | Rm real prices

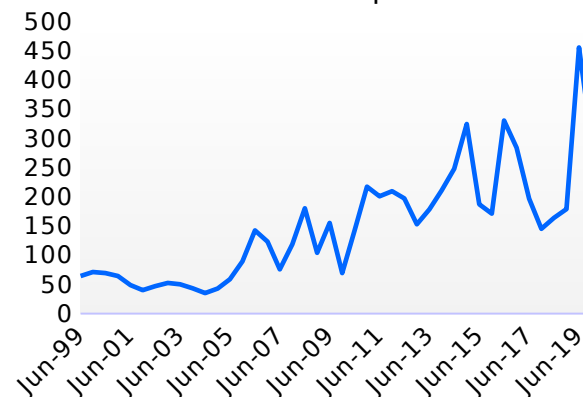
Eastern Cape



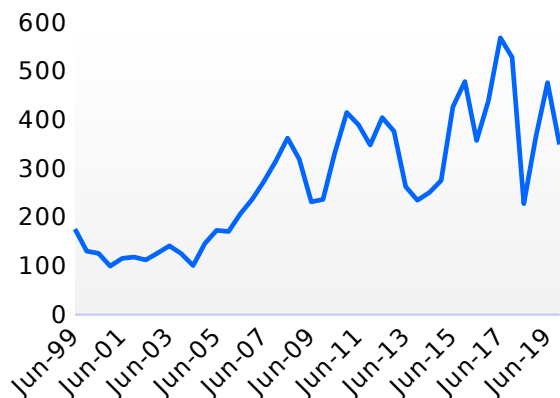
Western Cape



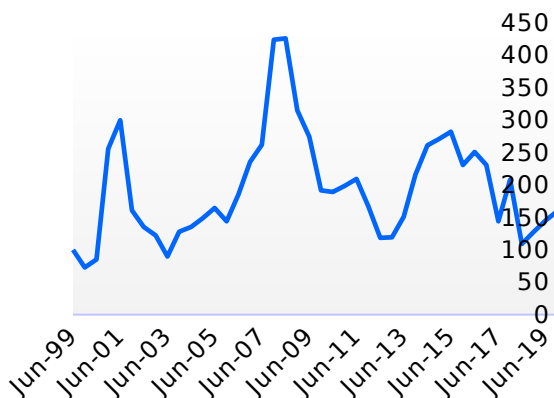
Northern Cape



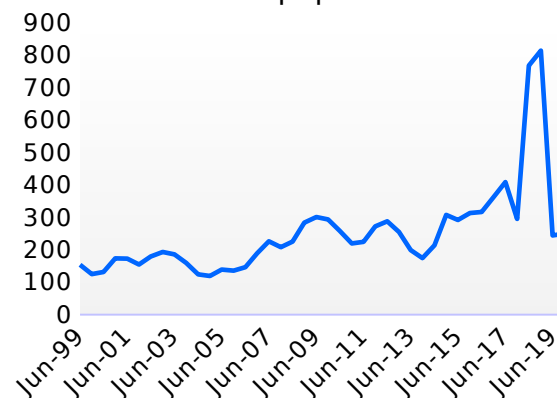
Free State



North West



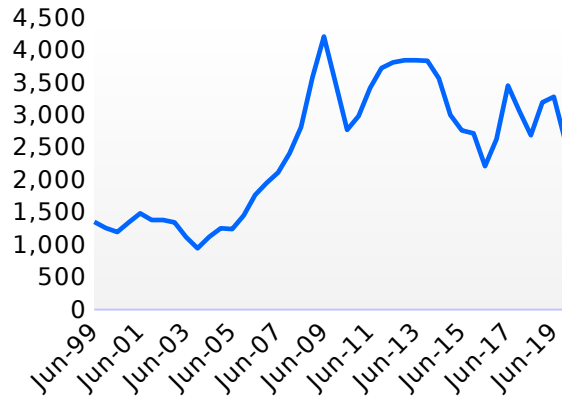
Limpopo



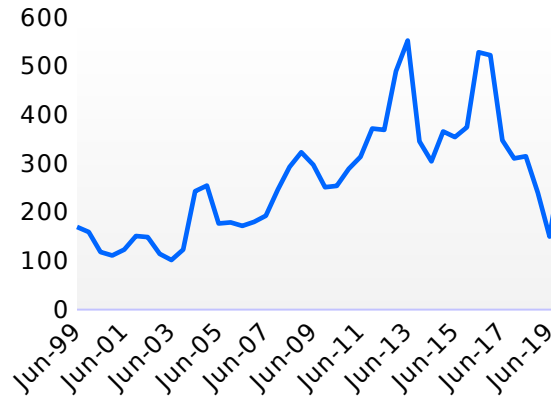
Fee income earned by province

June 1999 - December 2019 | Rm real prices

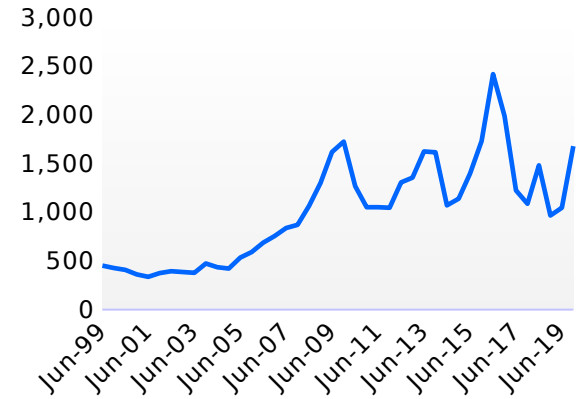
Gauteng



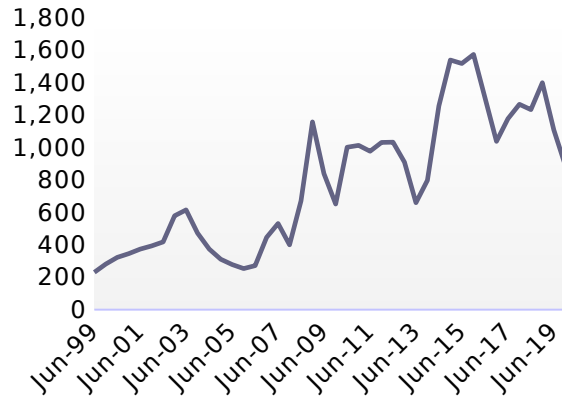
Mpumalanga



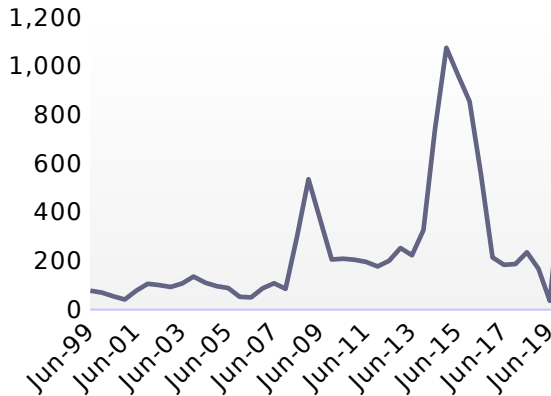
Kwazulu Natal



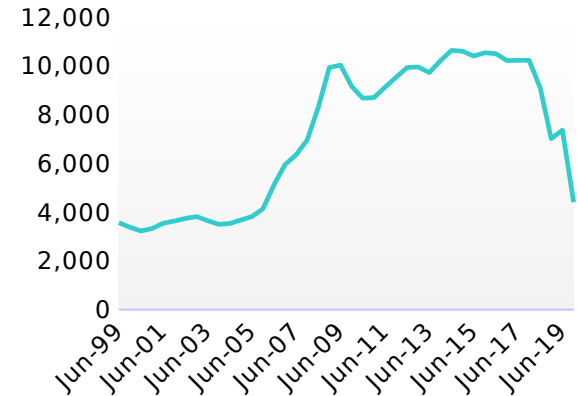
Africa



International

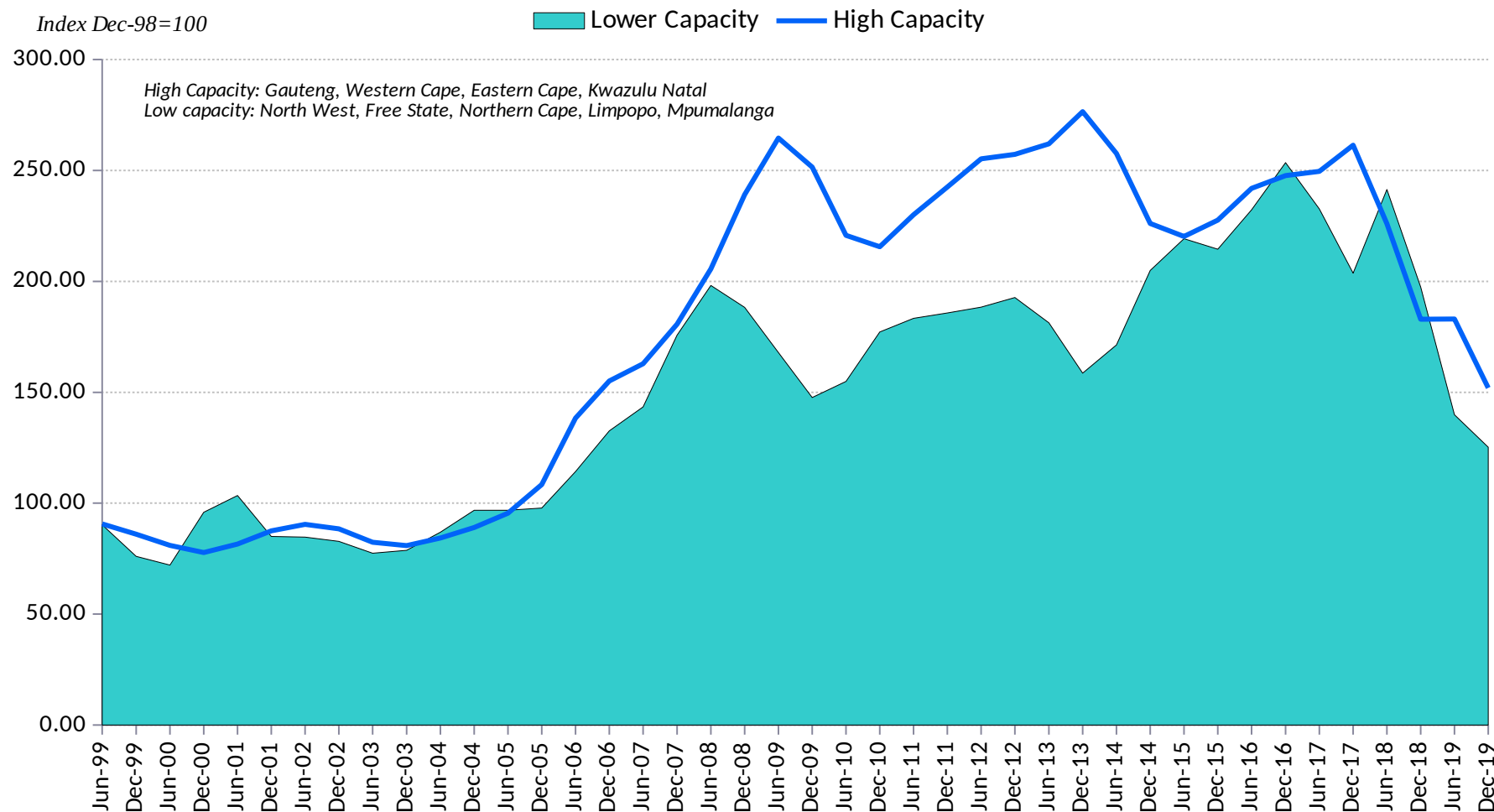


Total Fee Earnings

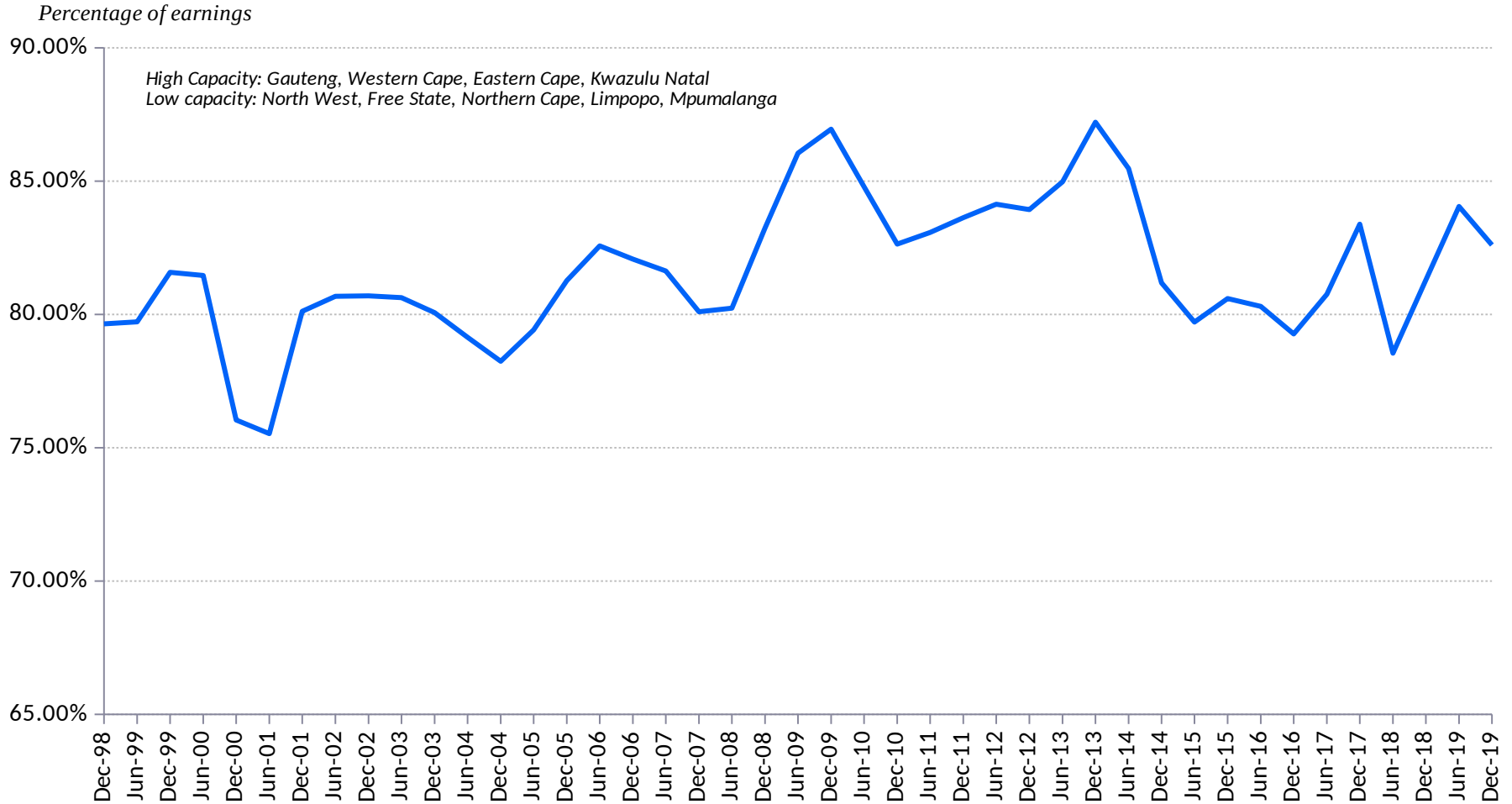


Fee income earned (Real 2000 prices)

High Capacity vs lower capacity provincial economies | Smoothed

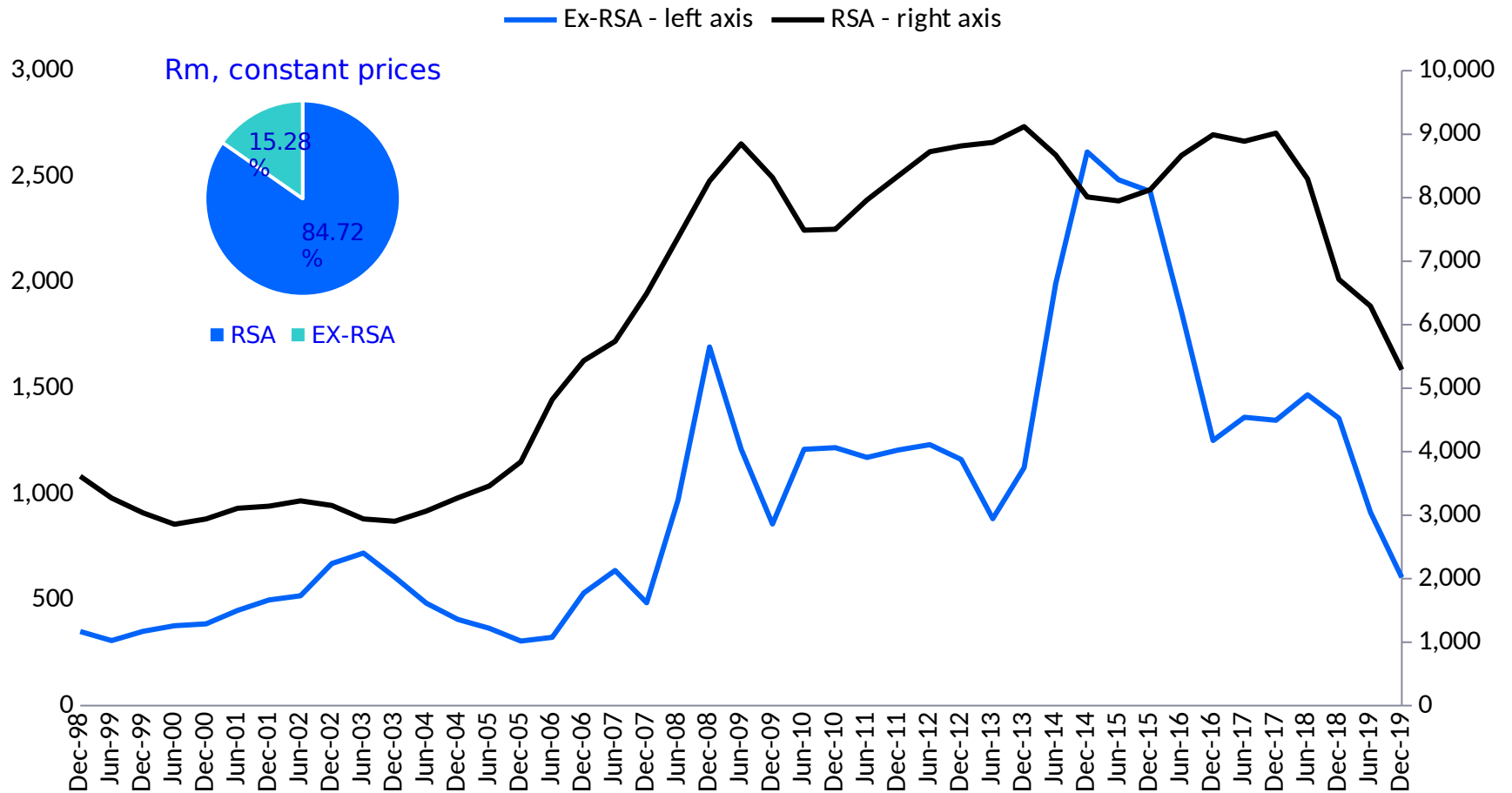


Fee income earned (Real 2000 prices) Contribution to Higher Capacity provinces (Gauteng, Western Cape, Eastern Cape and KZN)

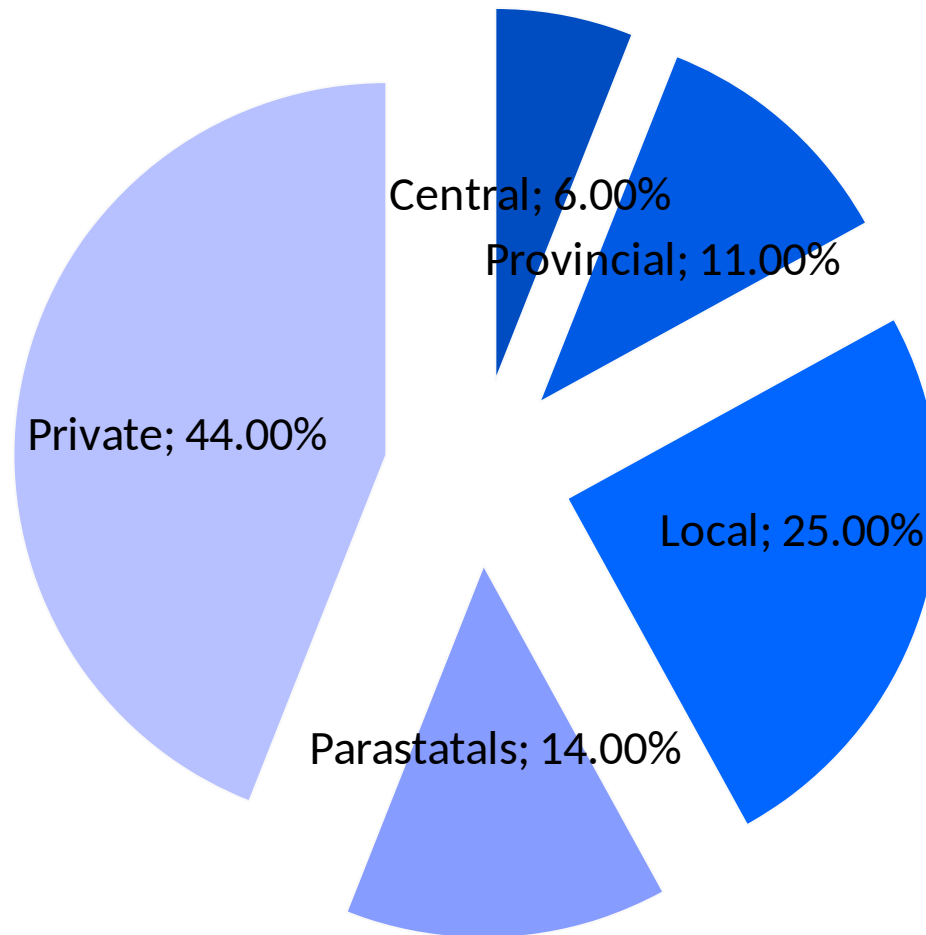


Fee income earned : RSA vs EX-RSA

R mill, Real 2000 prices | Annualised, smoothed

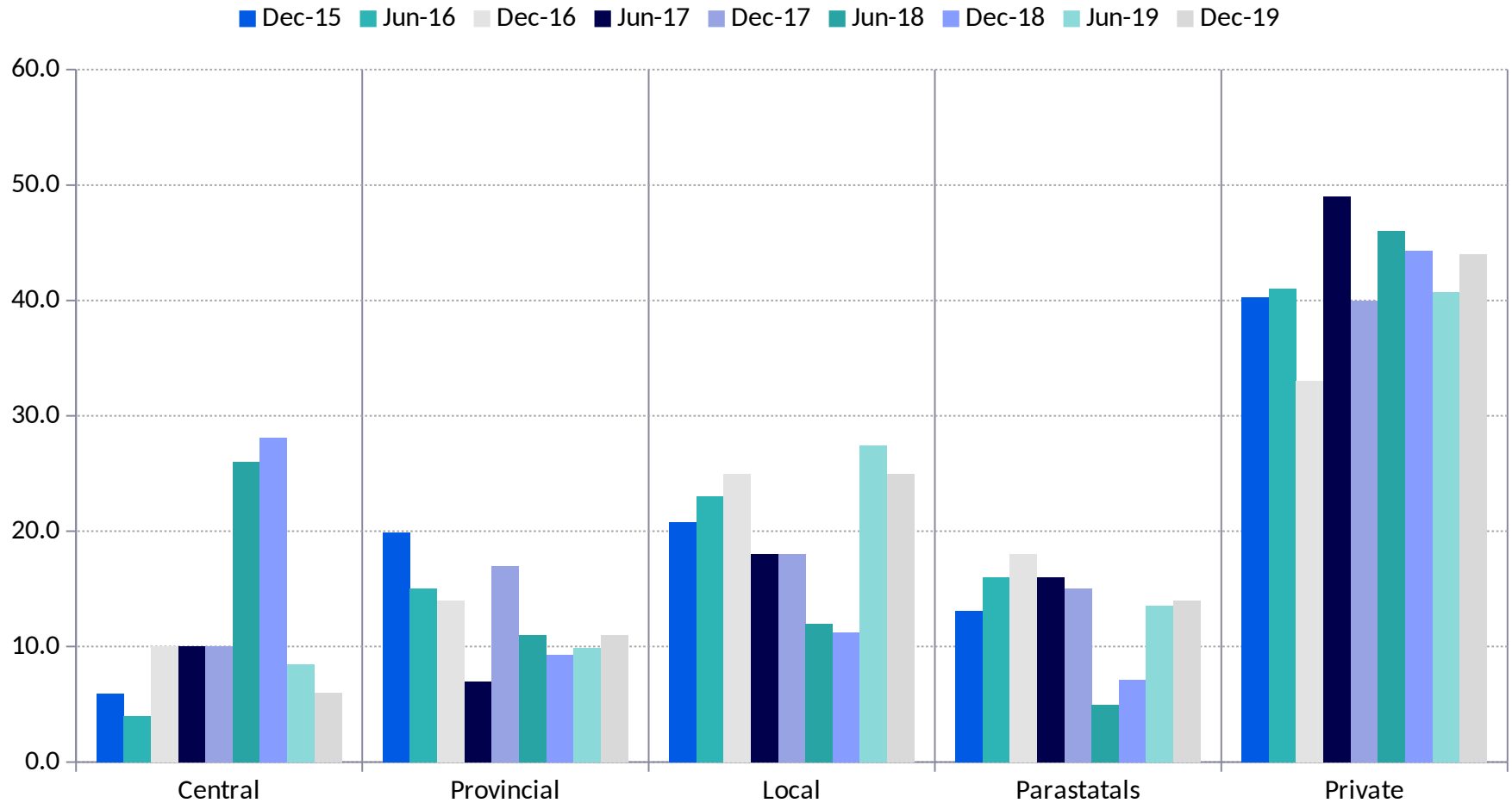


Fee income earned by type of client Percentage share as at Dec 2019



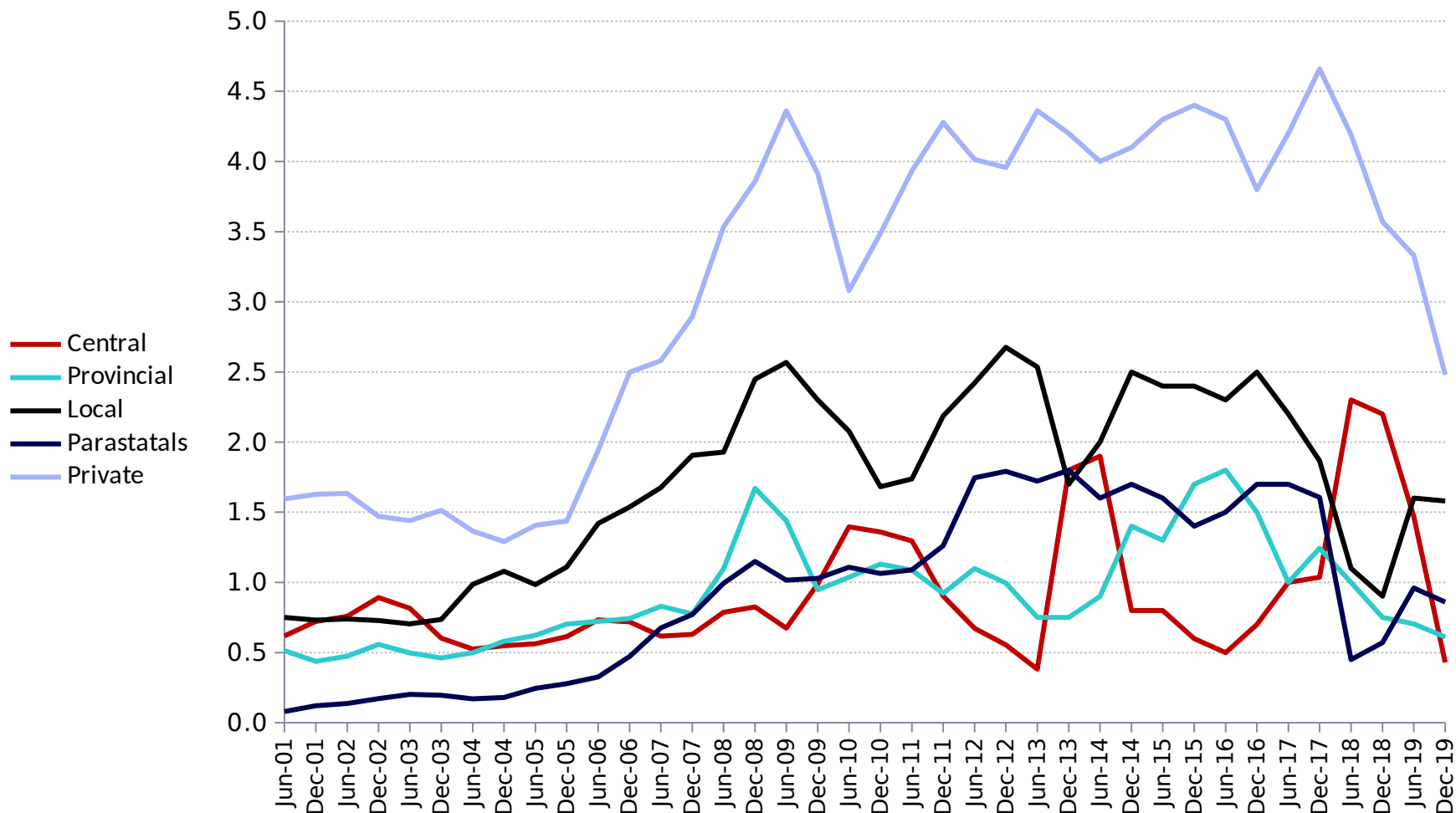
Fee income earned by type of client

Percentage share



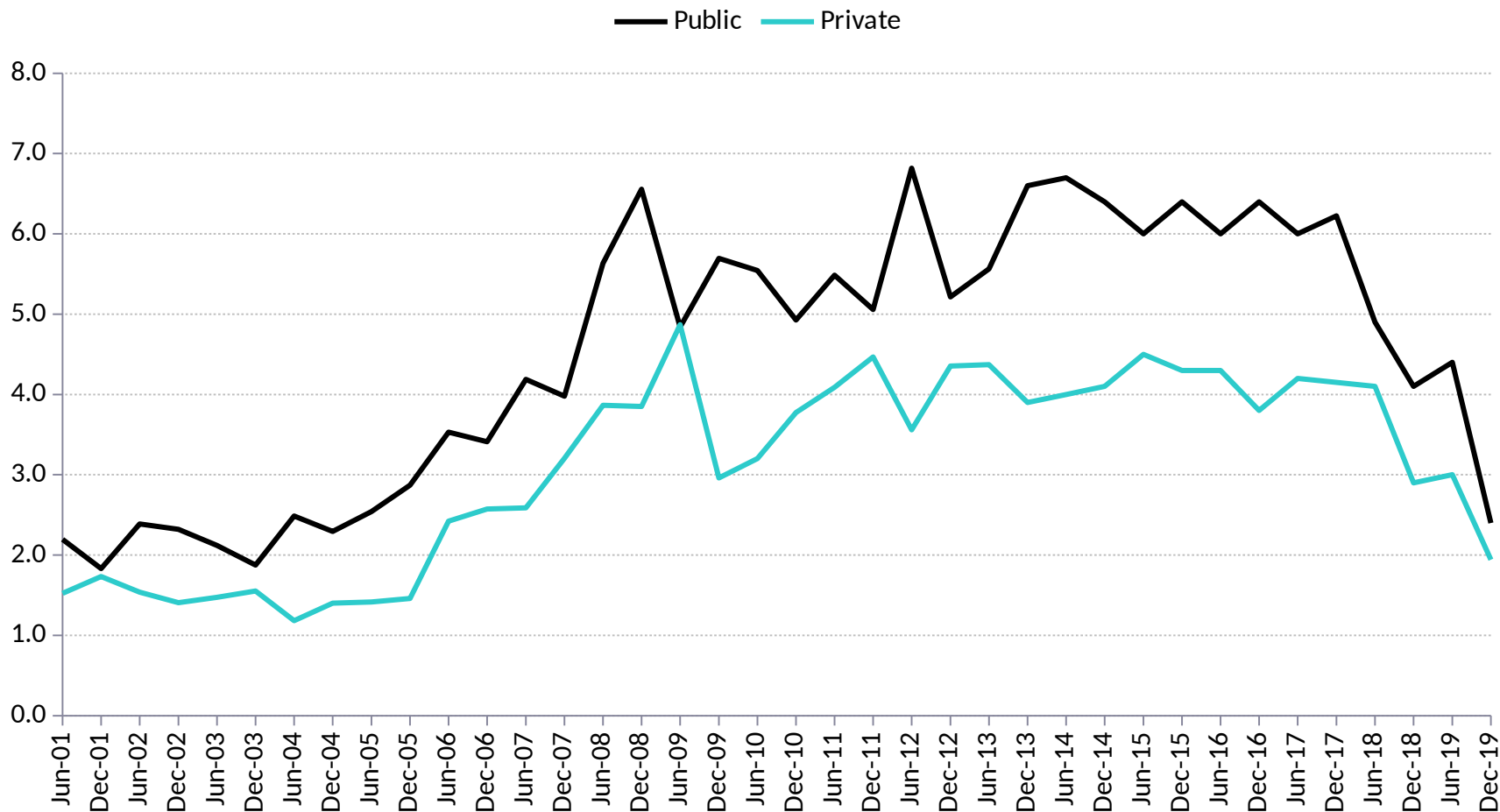
Fee income earned by type of client

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



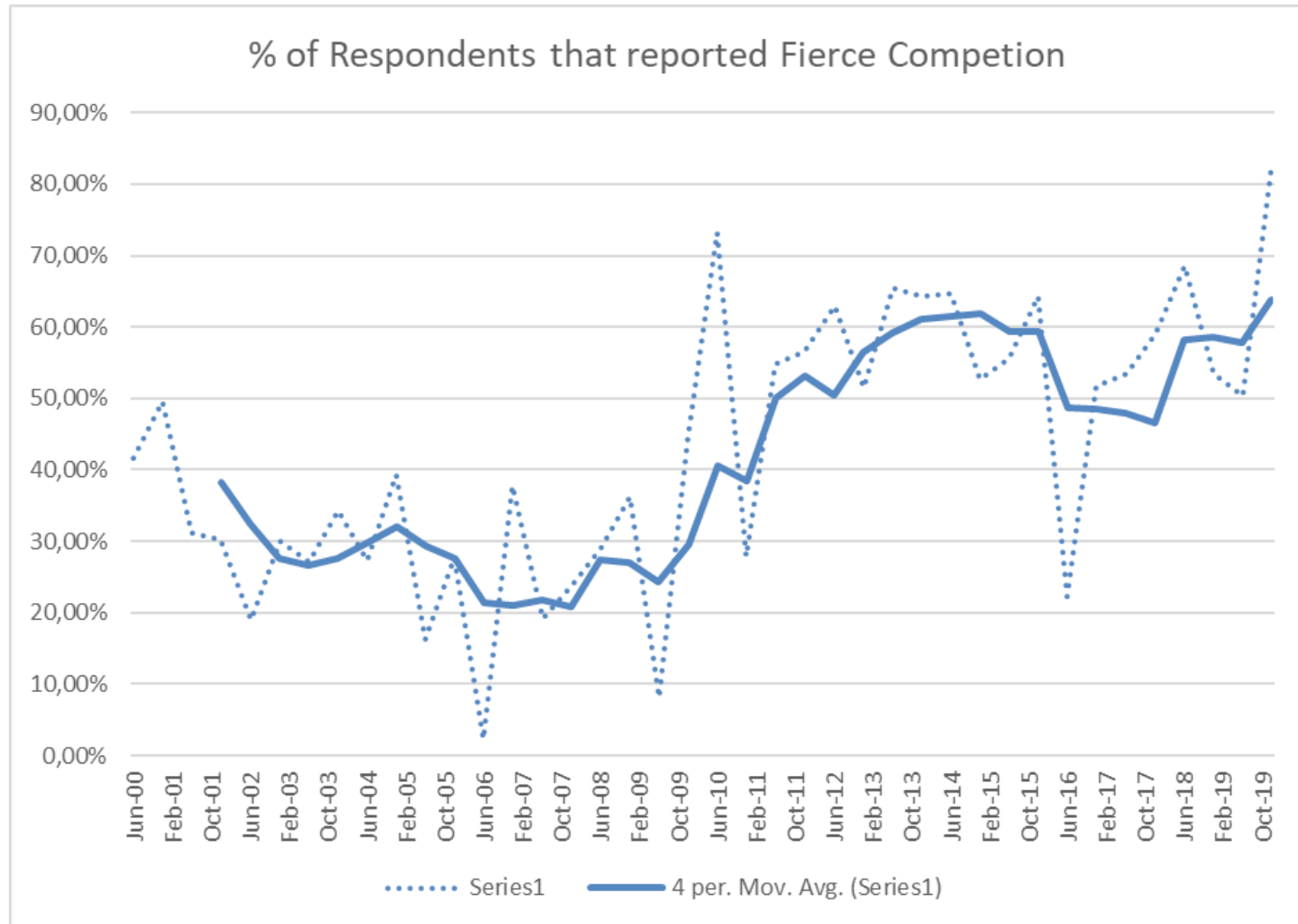
Fee income earned by type of client

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

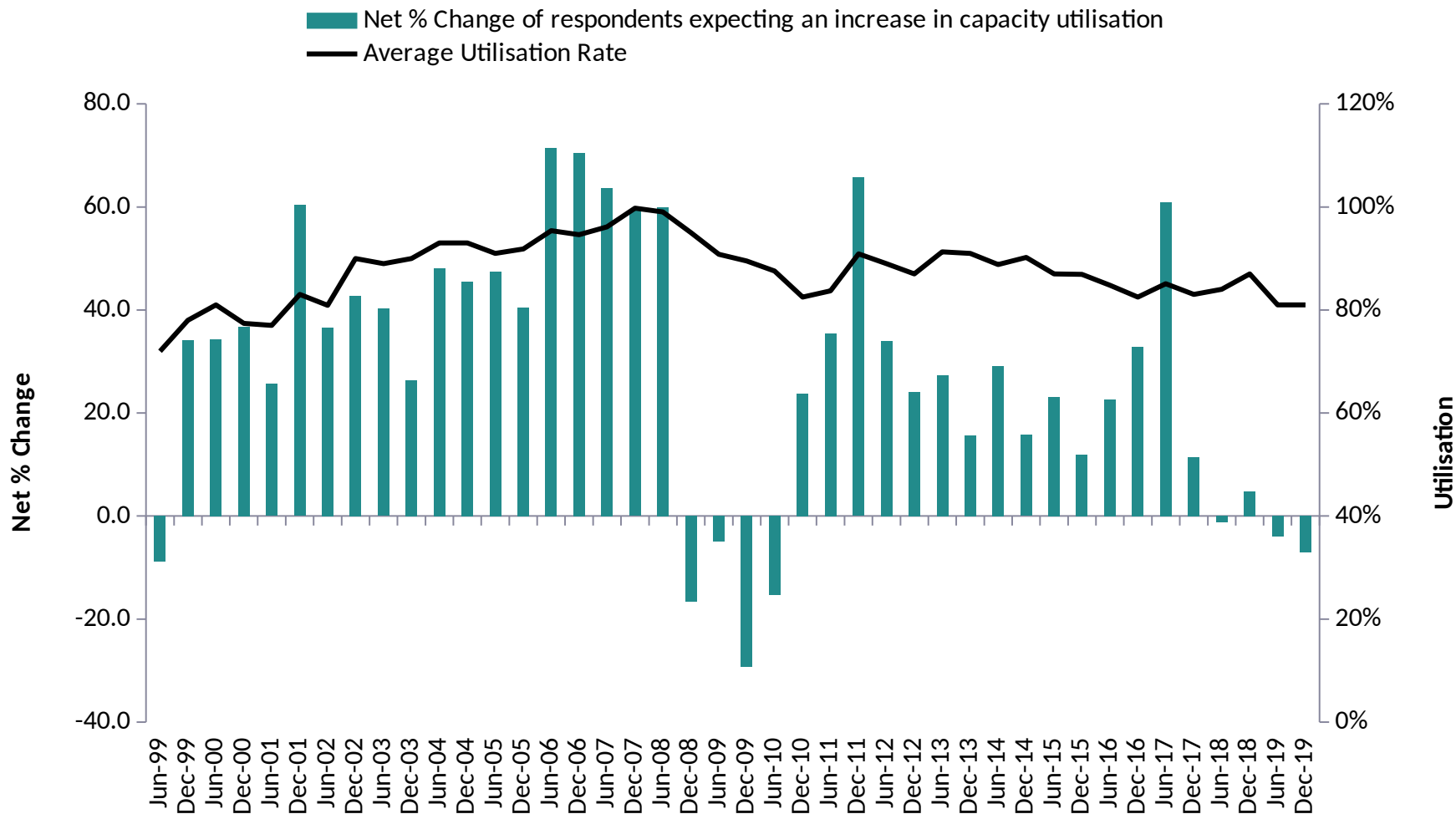


Competition in tendering

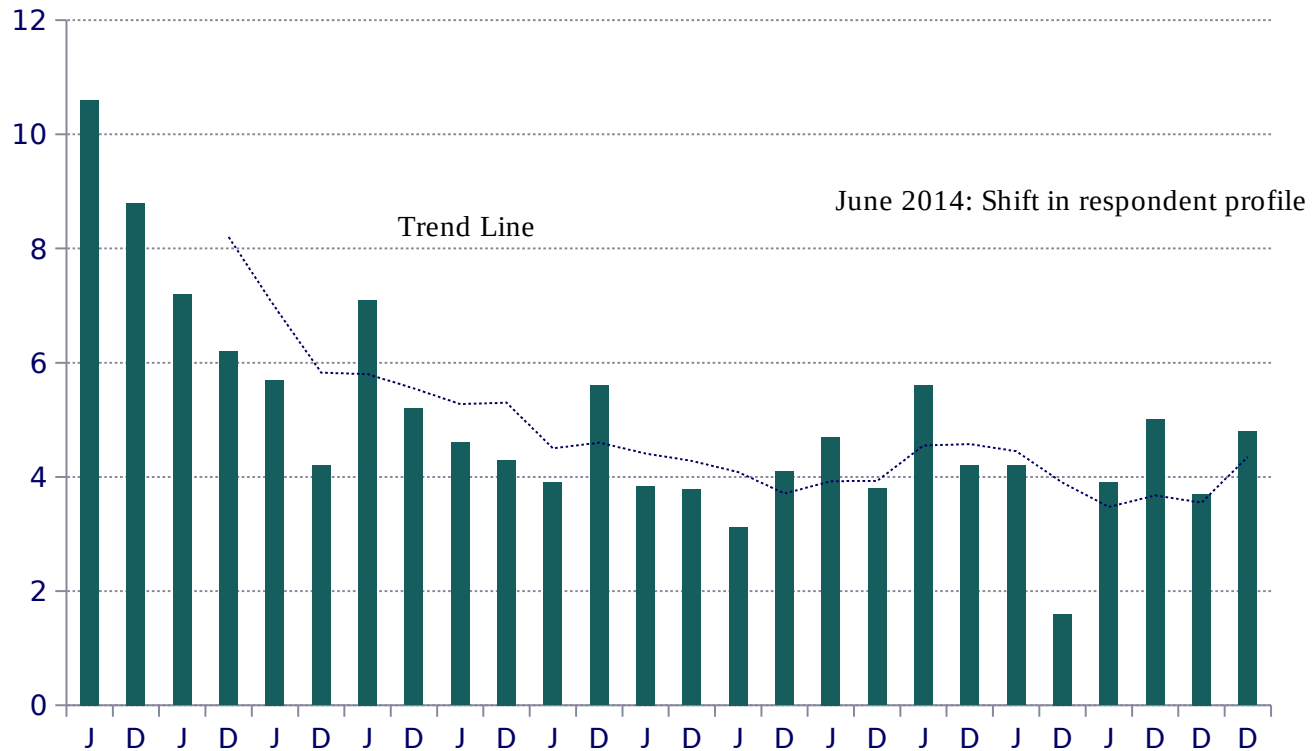
Percentage of respondents that reported “Fierce” competition



Industry Capacity Utilisation Of existing technical staff

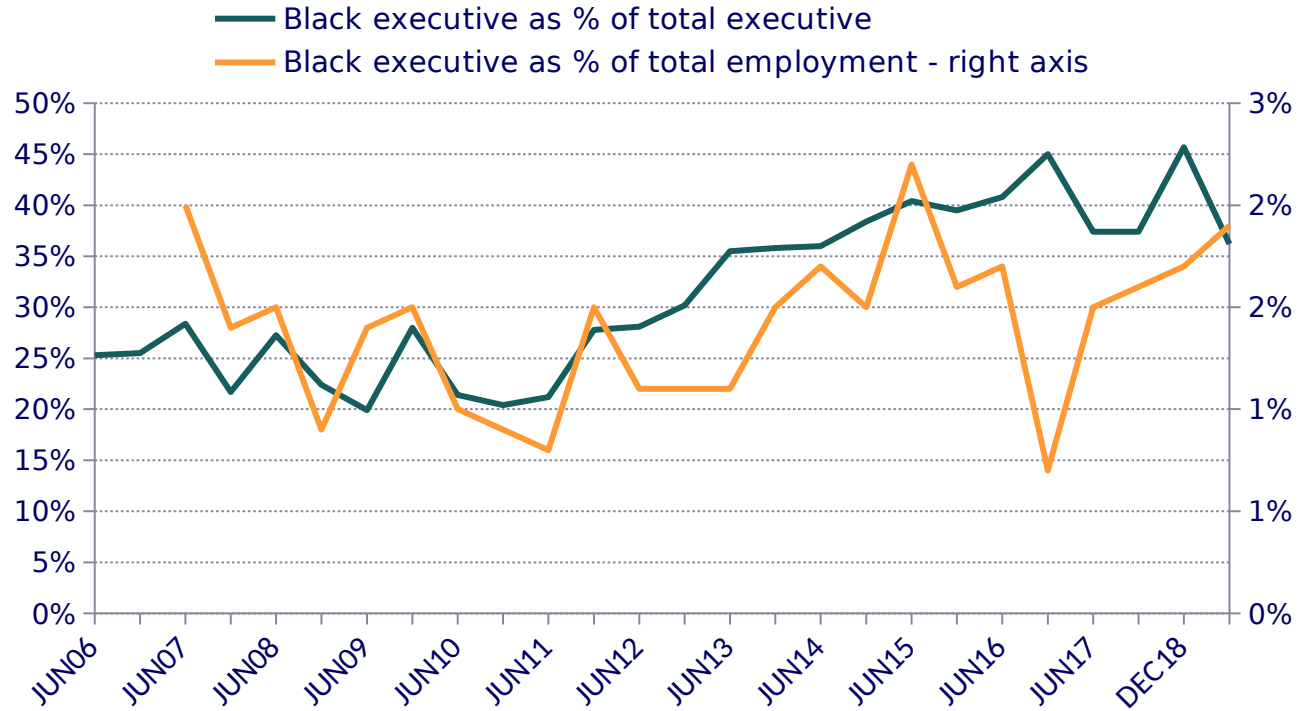


Executive Staff: % Share of total employment
PTY, CC & Partnerships



Source: CESA BECS

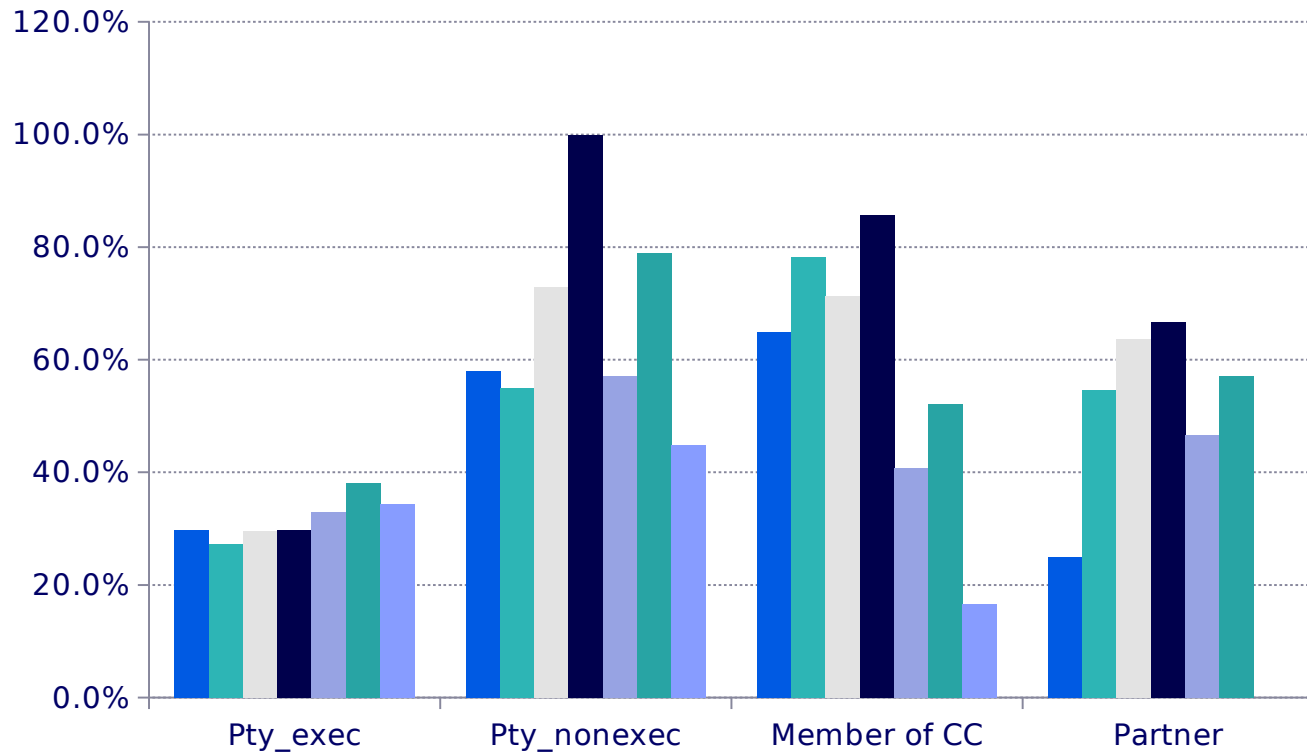
Black Executive Staff : (including Asian and Coloured)
% Share of total Executive Staff



Source: CESA BECS

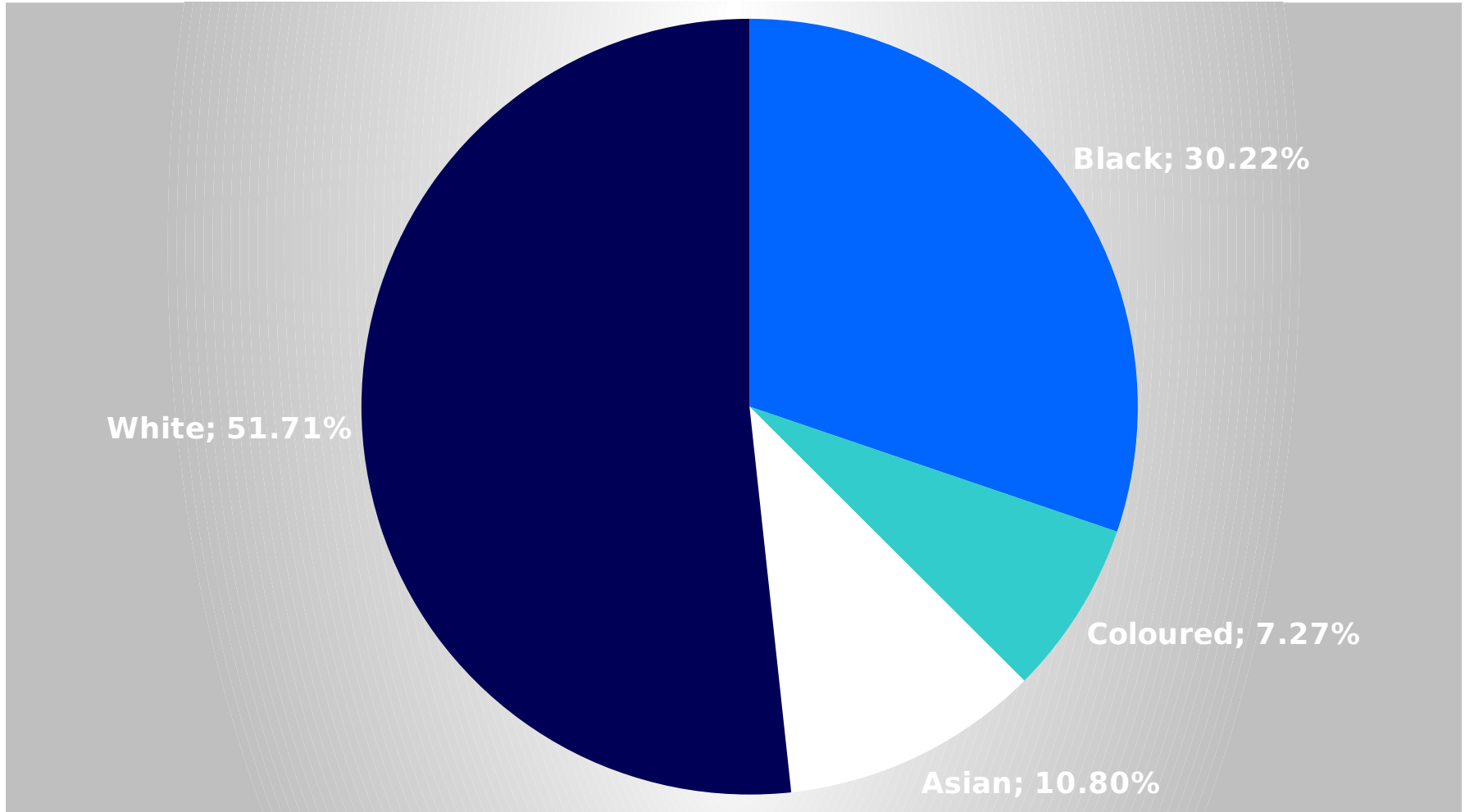
Black (including Asian and Coloured) Executive Staff

as % of total Executive | December 2013 – December 2019

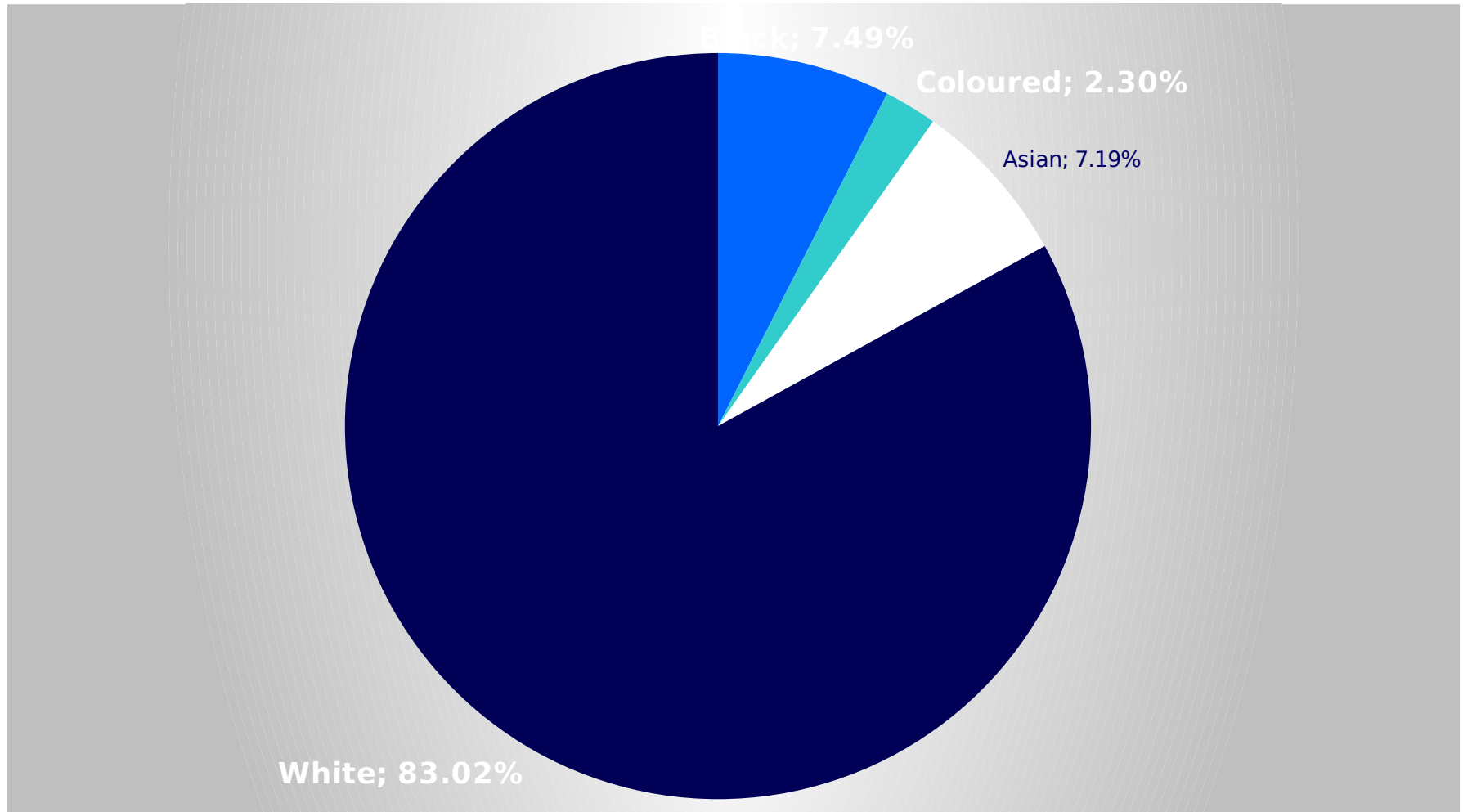


Source: CESA BECS

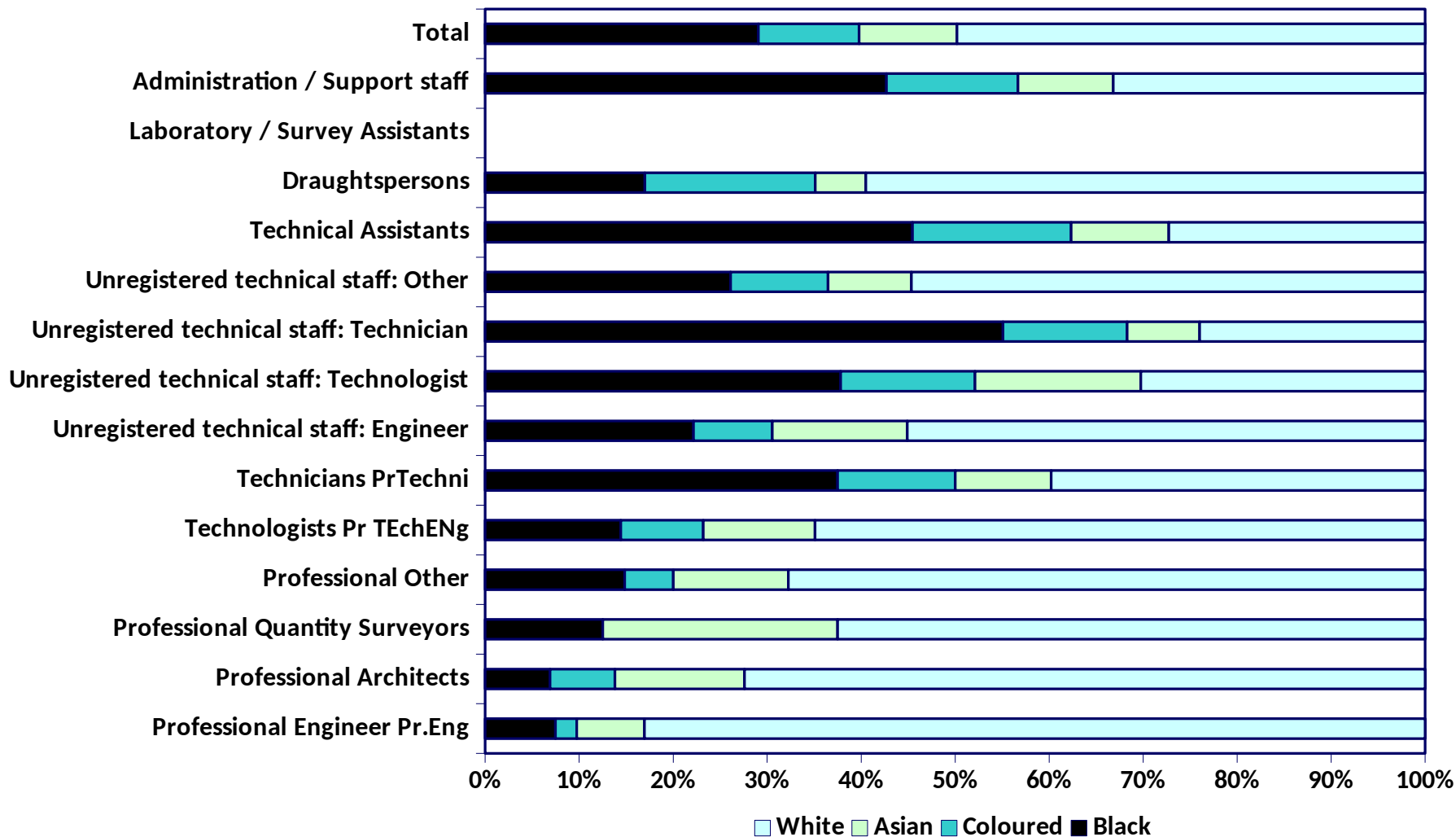
Profile by Race



Profile of Professional Engineers by Race

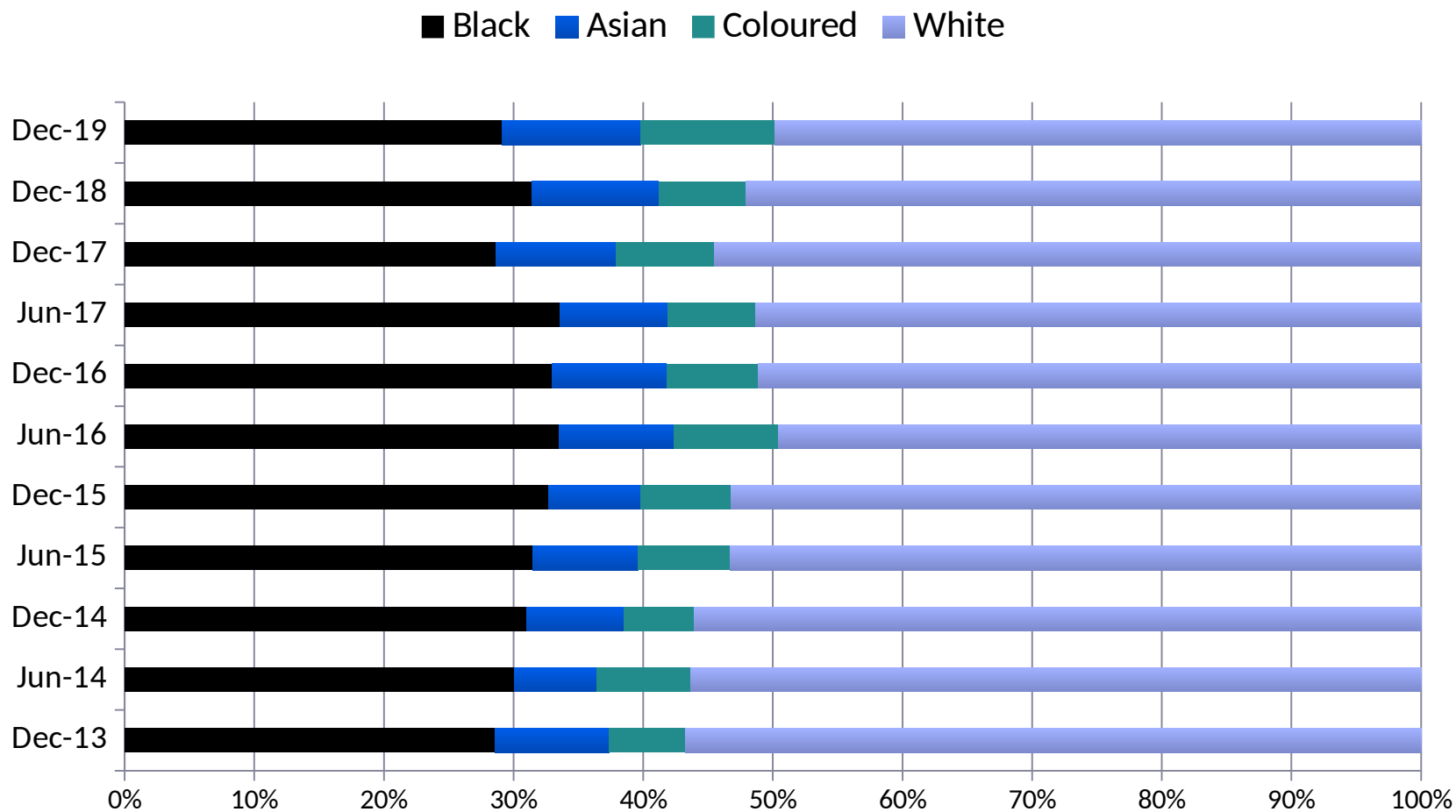


Typical Employment Breakdown January - December 2019



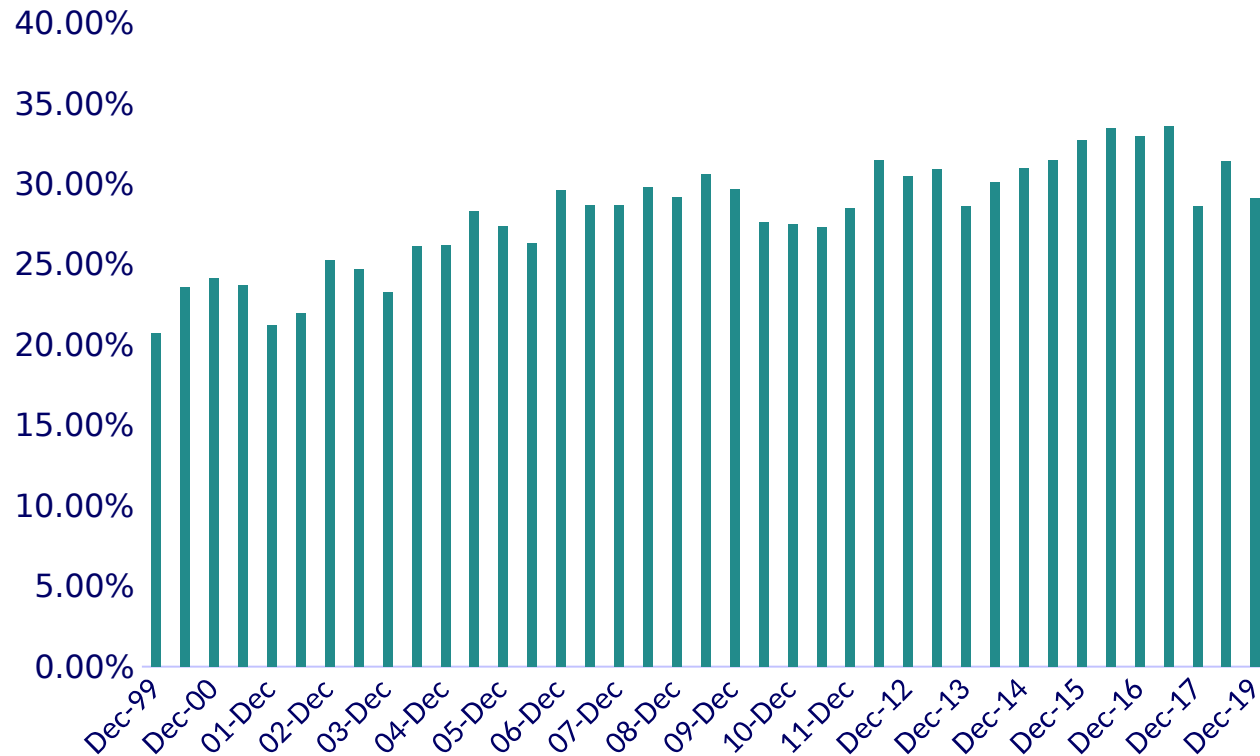
Overall Employment Breakdown, by race

December 2013 – December 2019



Employment profile

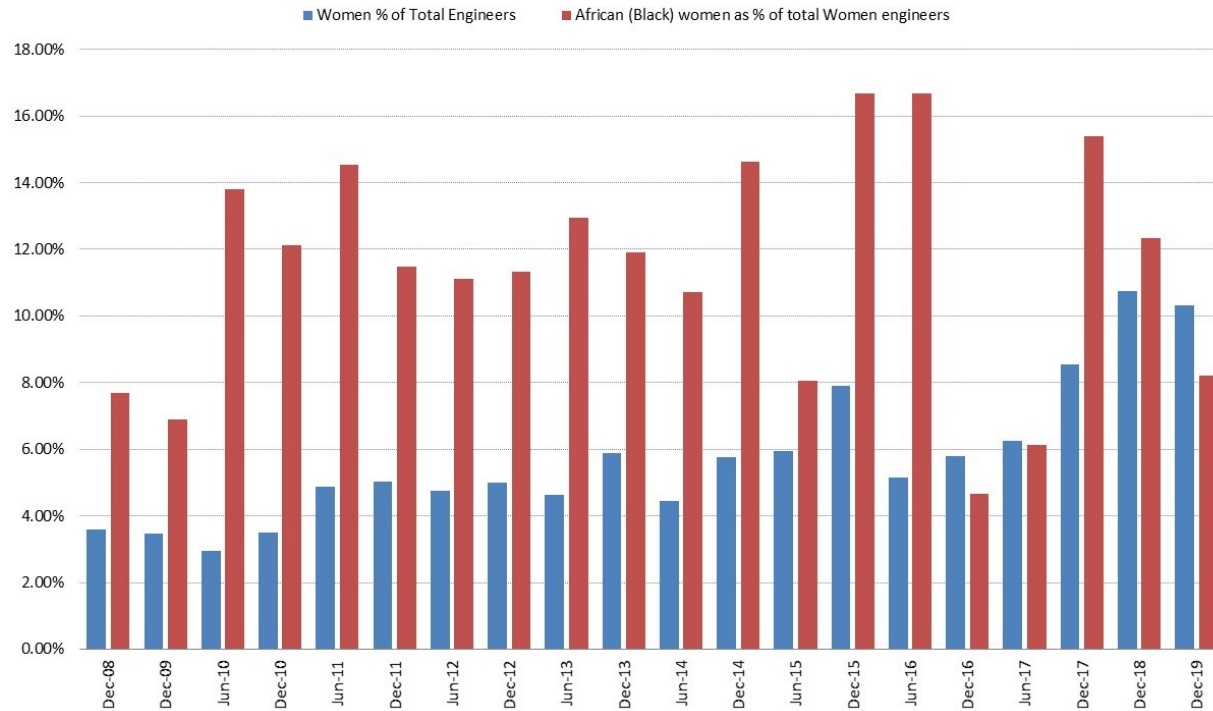
Black only (excluding Asian / Coloured) representation of total employment
% Share of total employment



Source: CESA BECS

Changing profile of female engineers

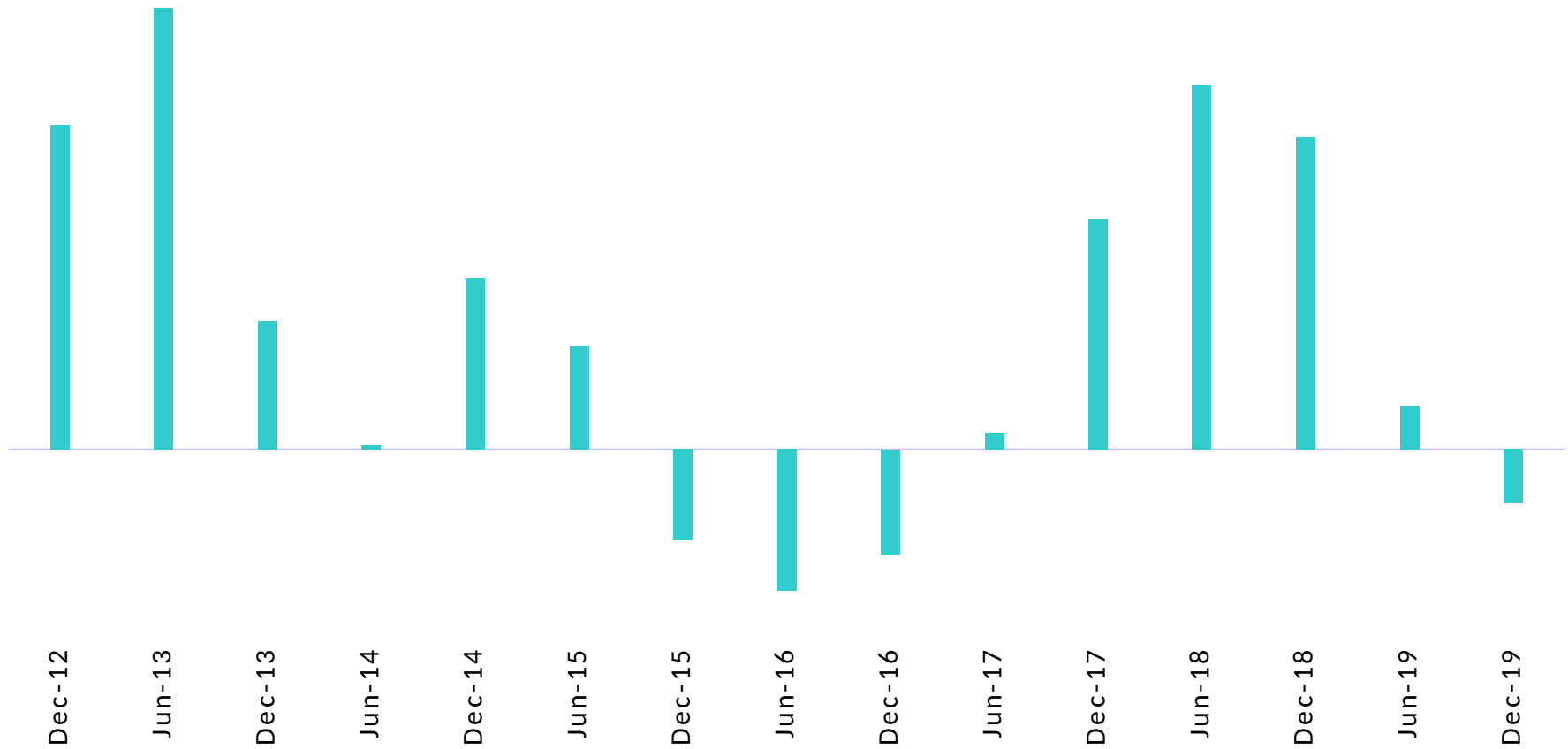
The changing role of female ENGINEERS in the
South African private consulting engineering industry



Source: CESA BECS

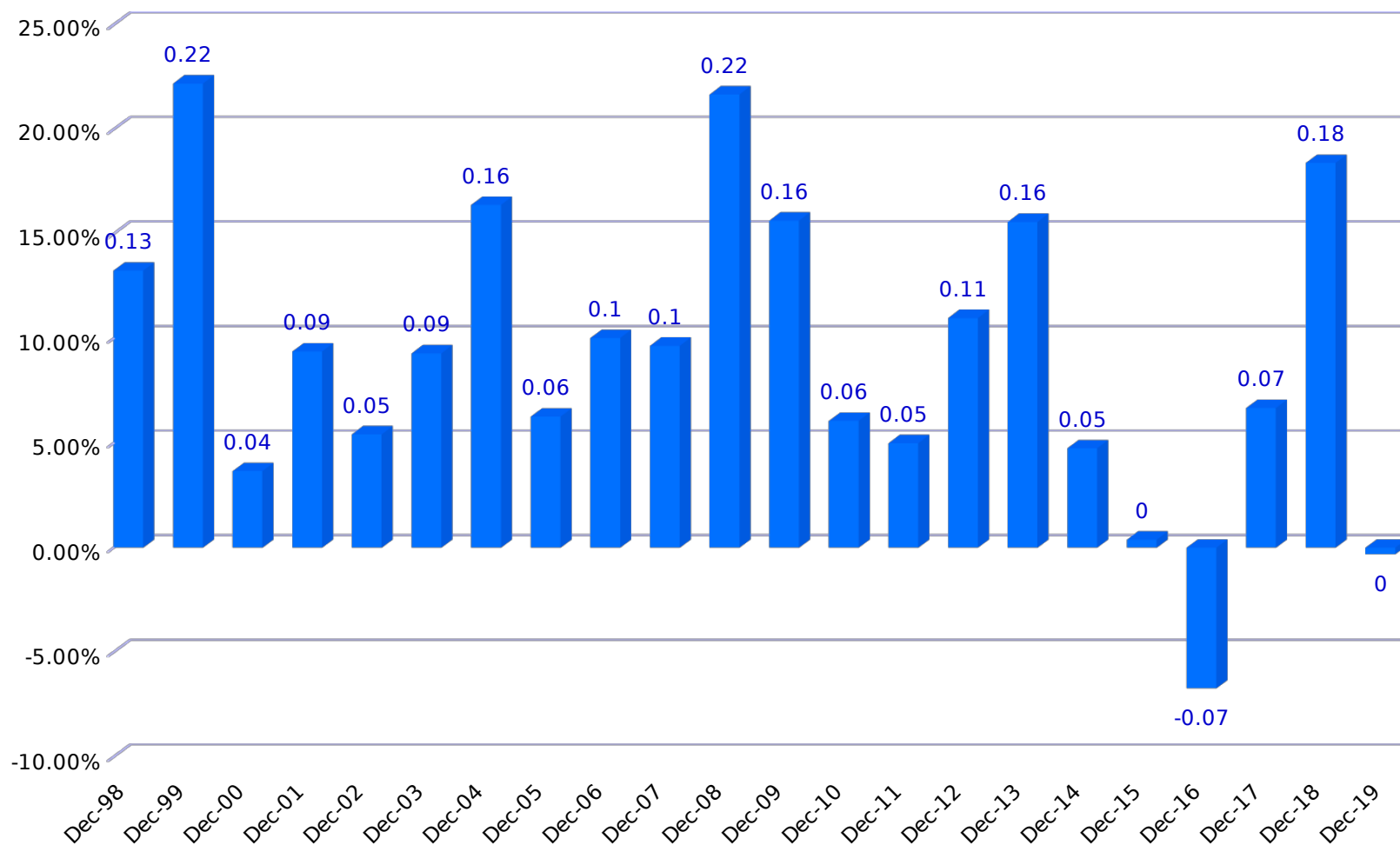
Labour unit cost indicator

Year-on-Year % Change (Smoothed)

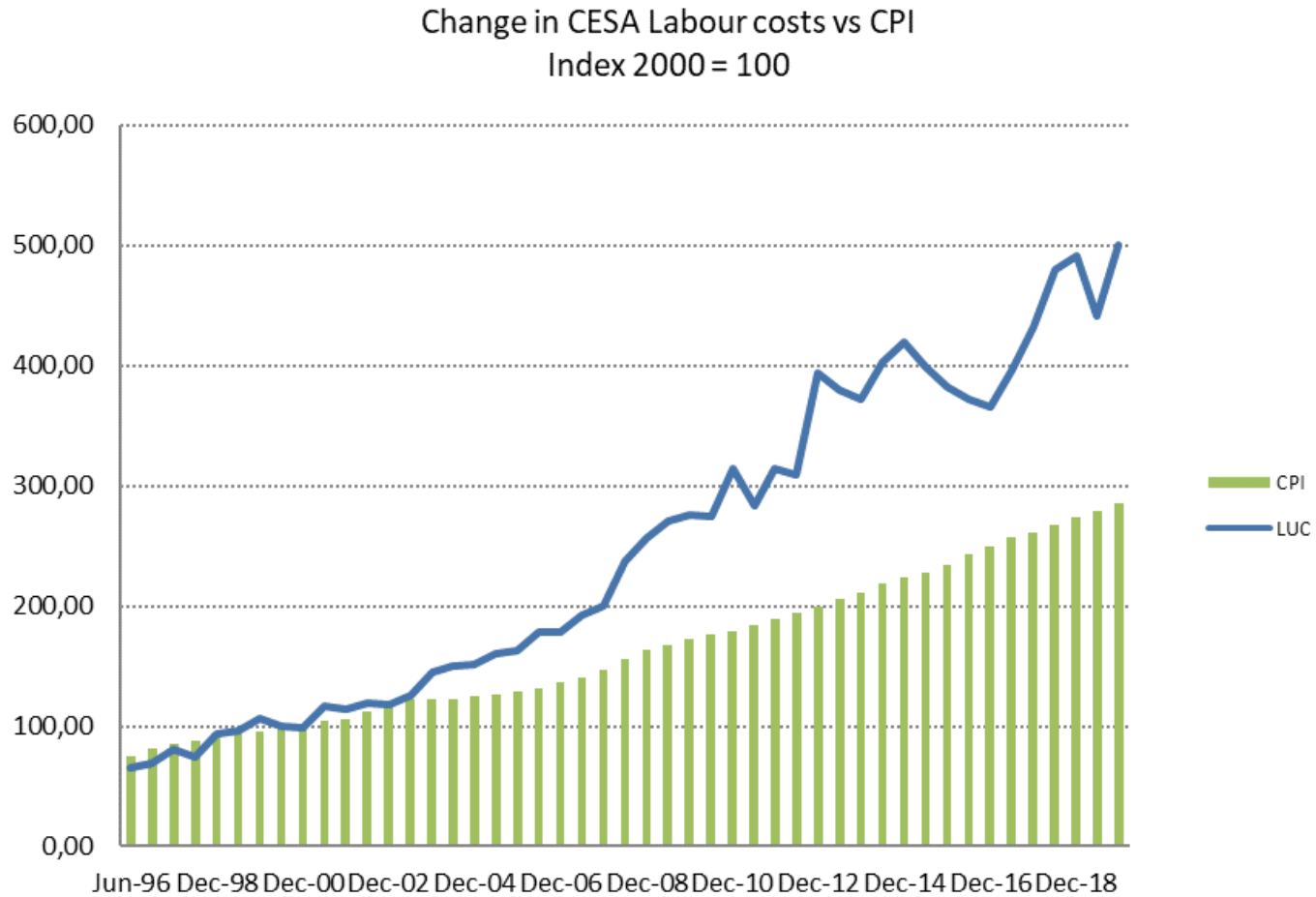


Labour unit cost indicator

Annual Average Year-on-Year Percentage Change



CESA labour costs outpace CPI



Thank you

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