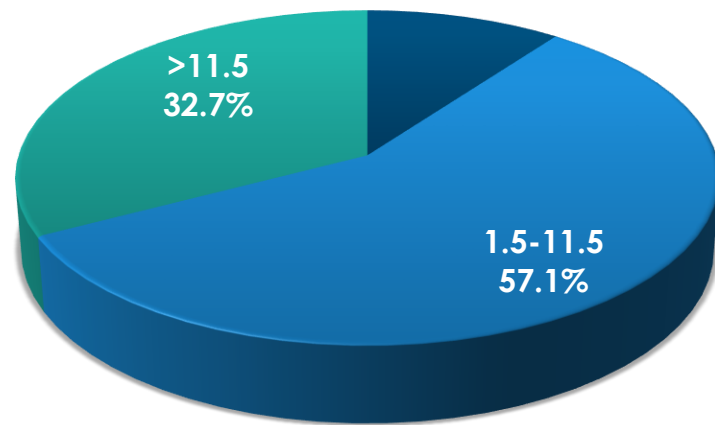


Biannual Economic and Capacity Survey

JULY – DECEMBER 2020

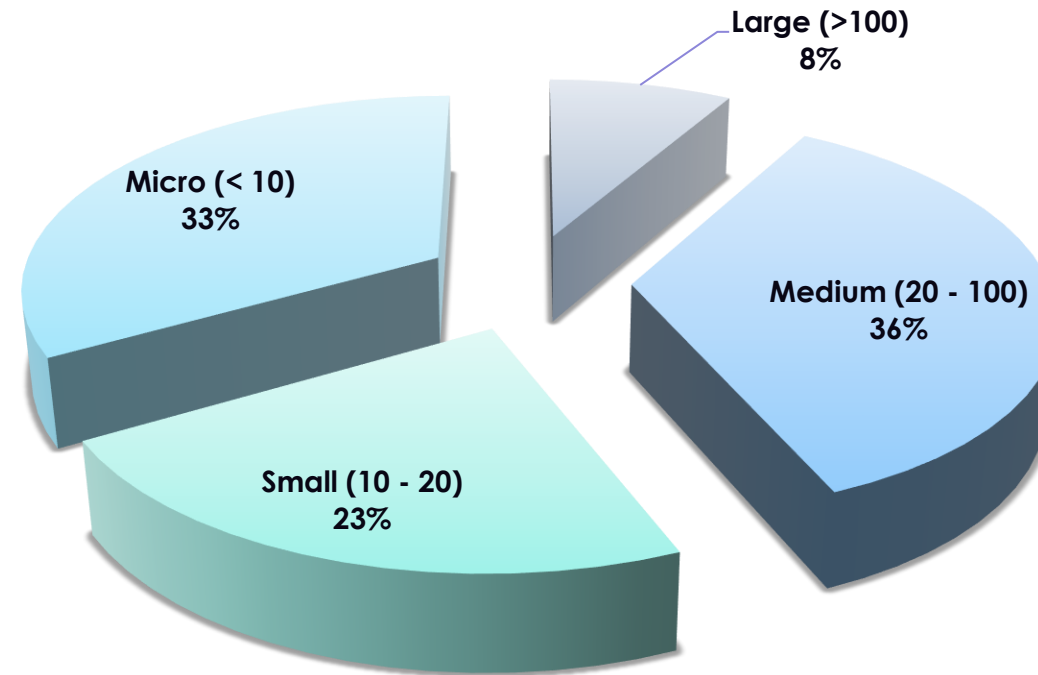
Firm distribution based on Annual turnover

July – December 2020



Category by gross annual income	% of firms
0 – R1,5m	38.5%
R1,5m – R11,5m	38.5%
> R11,5m	23.1%
Total	100.0%

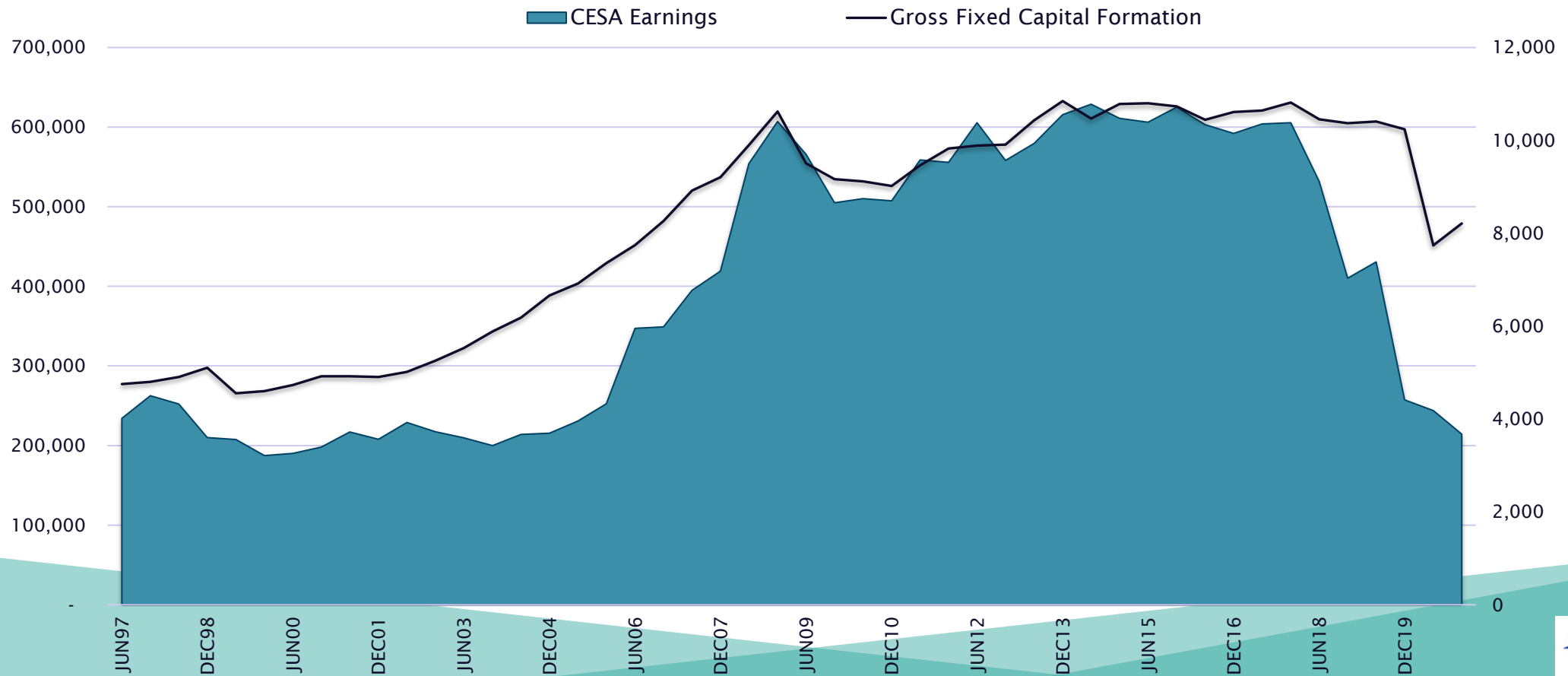
Profile of respondents by firm size



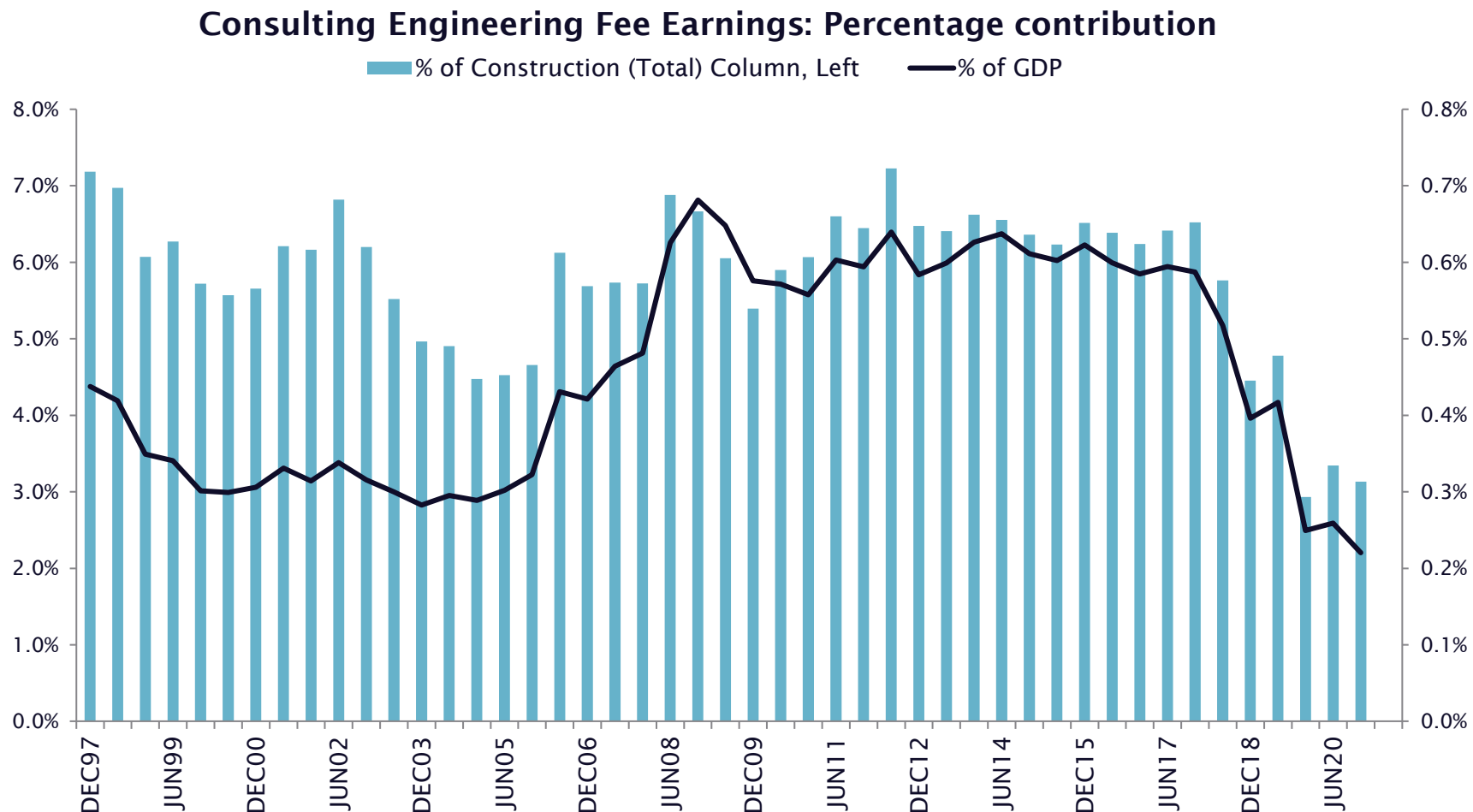
■ Large (>100) ■ Medium (20 - 100) ■ Small (10 - 20) ■ Micro (< 10)

Fee earnings vs GFCF

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



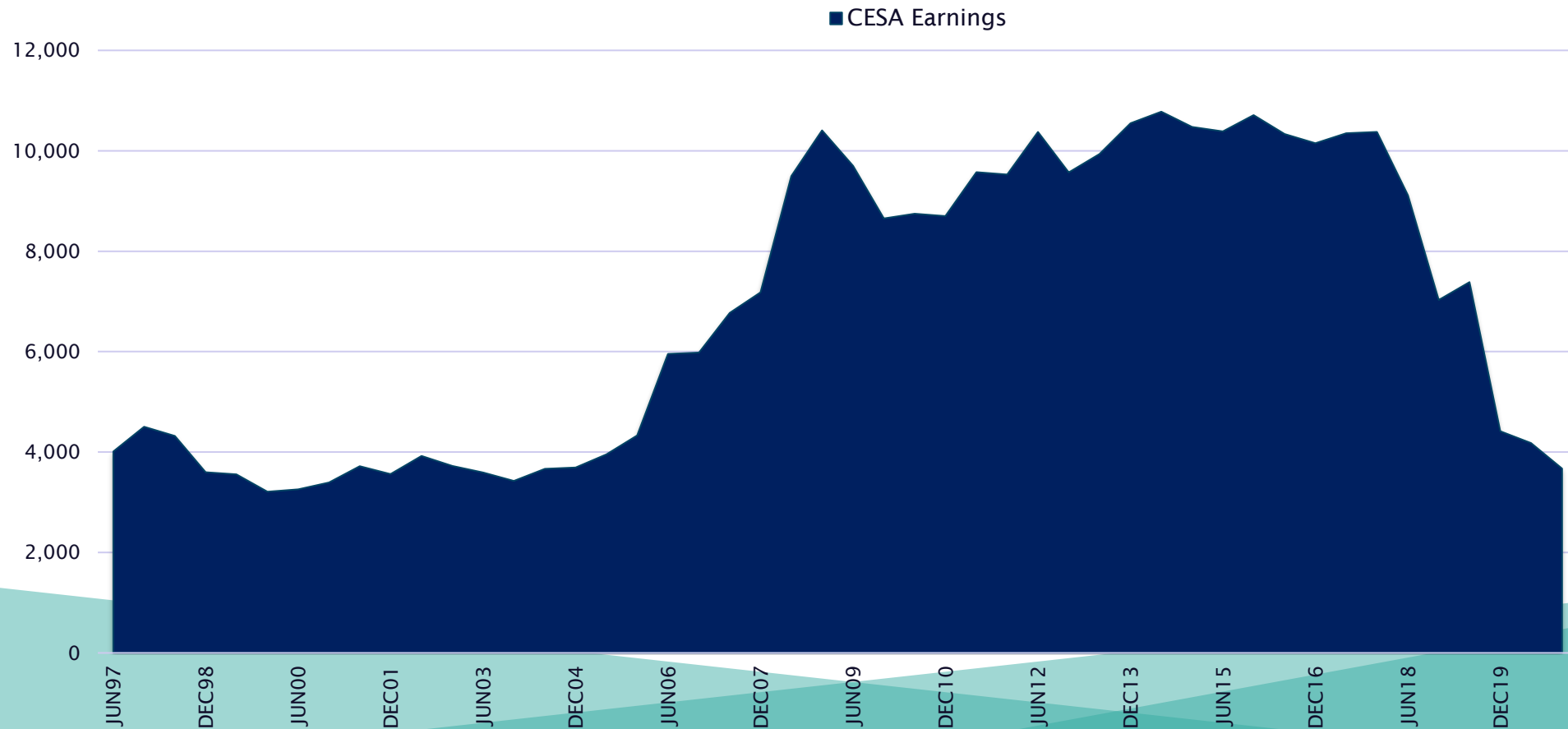
Earnings as % of GDP / GFCF Construction



Fee Income, Rbn 2000 prices

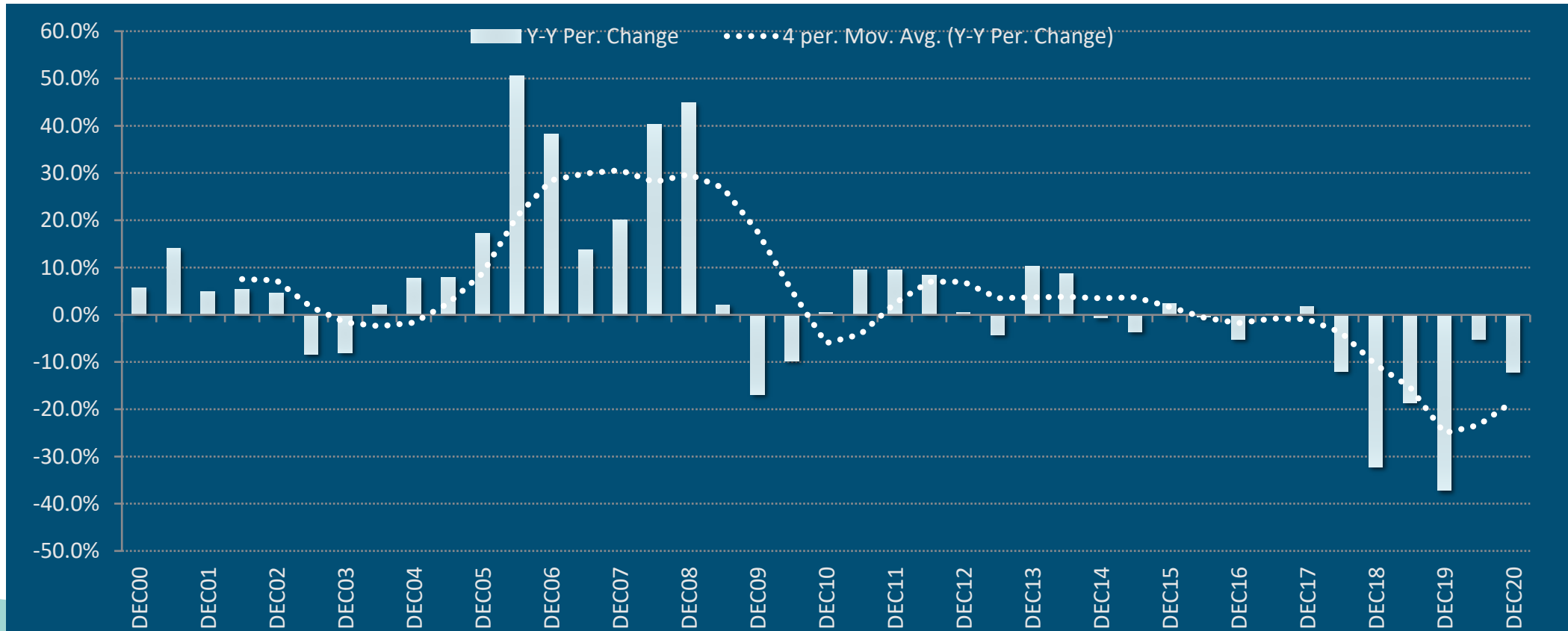
Annualised | Deflator CPI

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

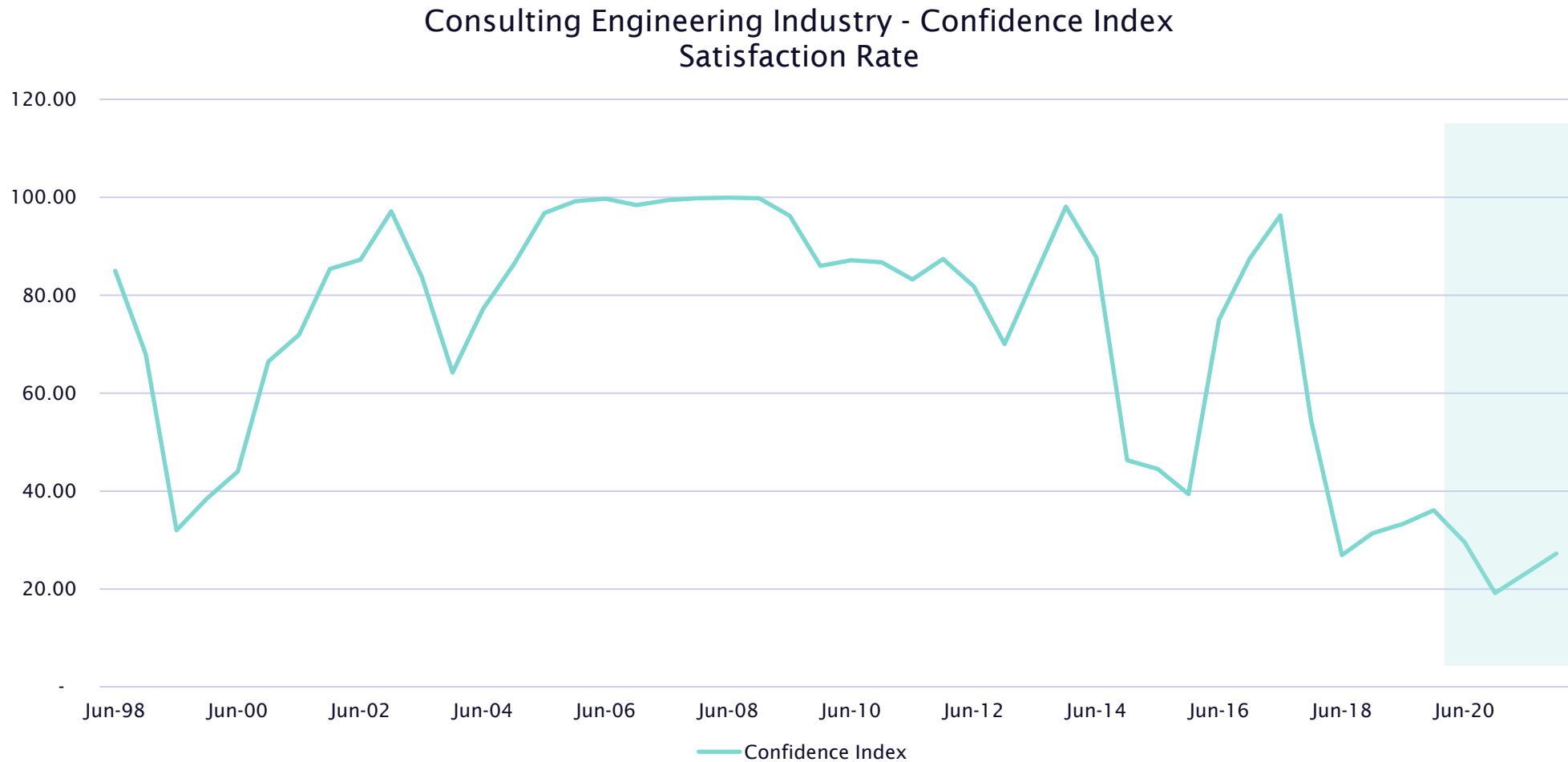


Real Fee income

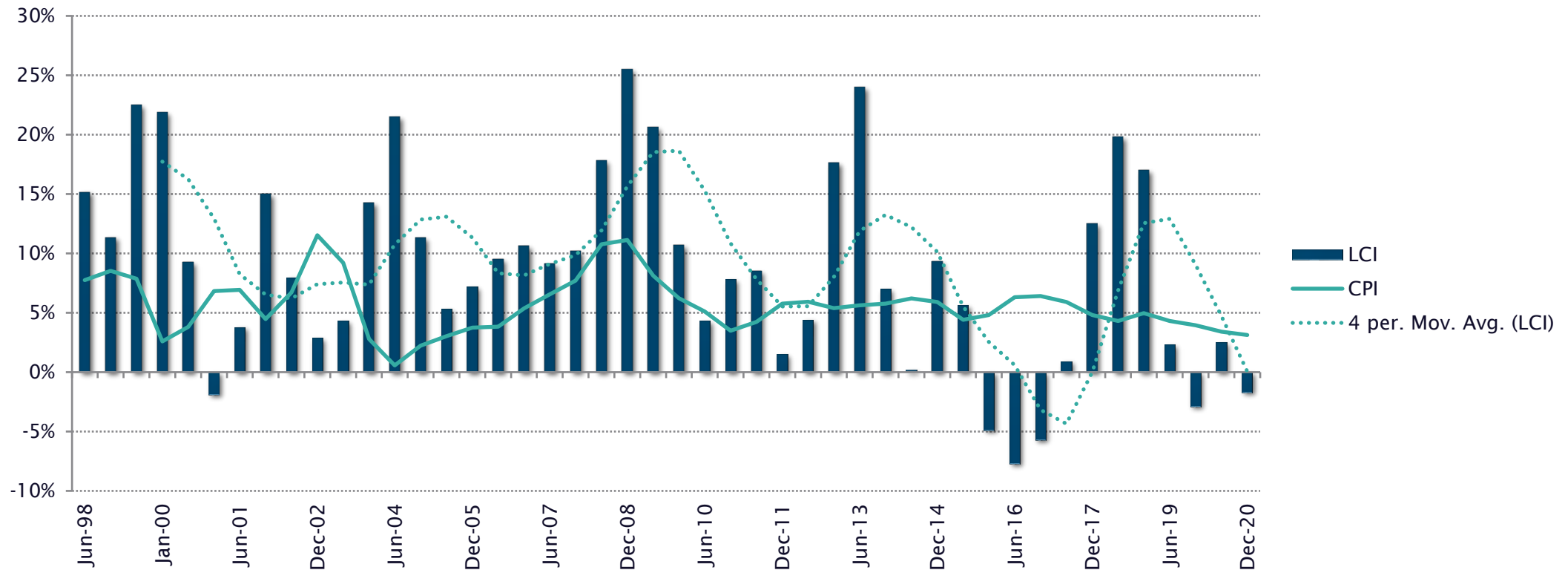
Annual Change



Confidence Index

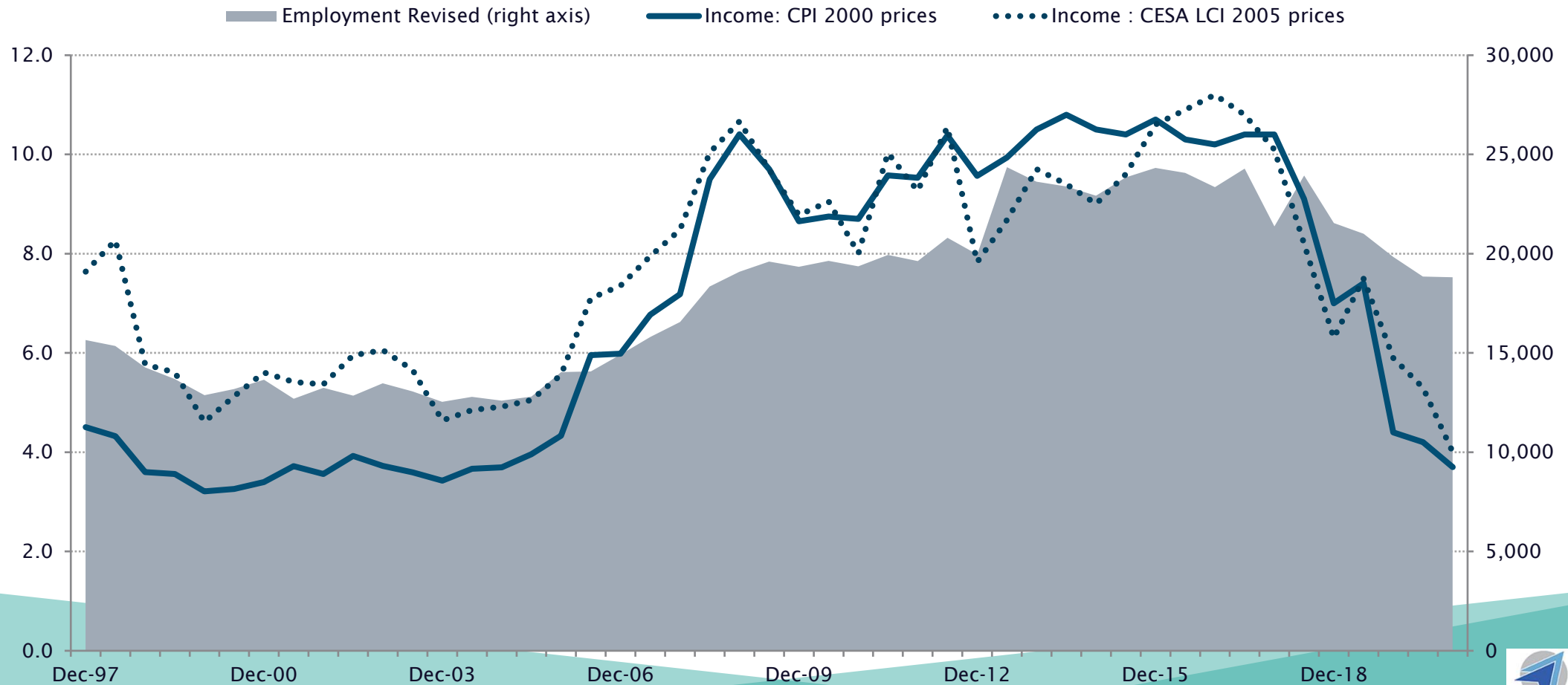


Labour Cost Indicator (LCI)

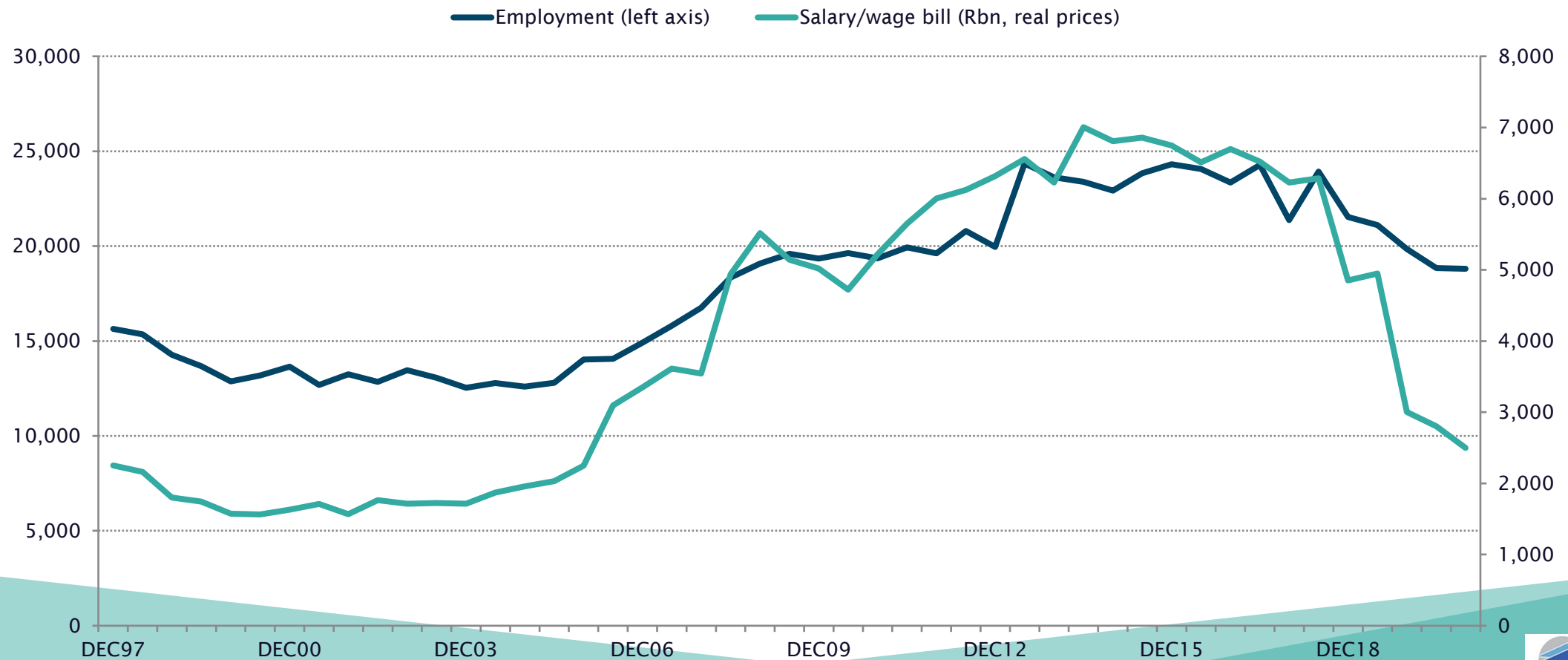


Employment vs Fee income (Constant prices)

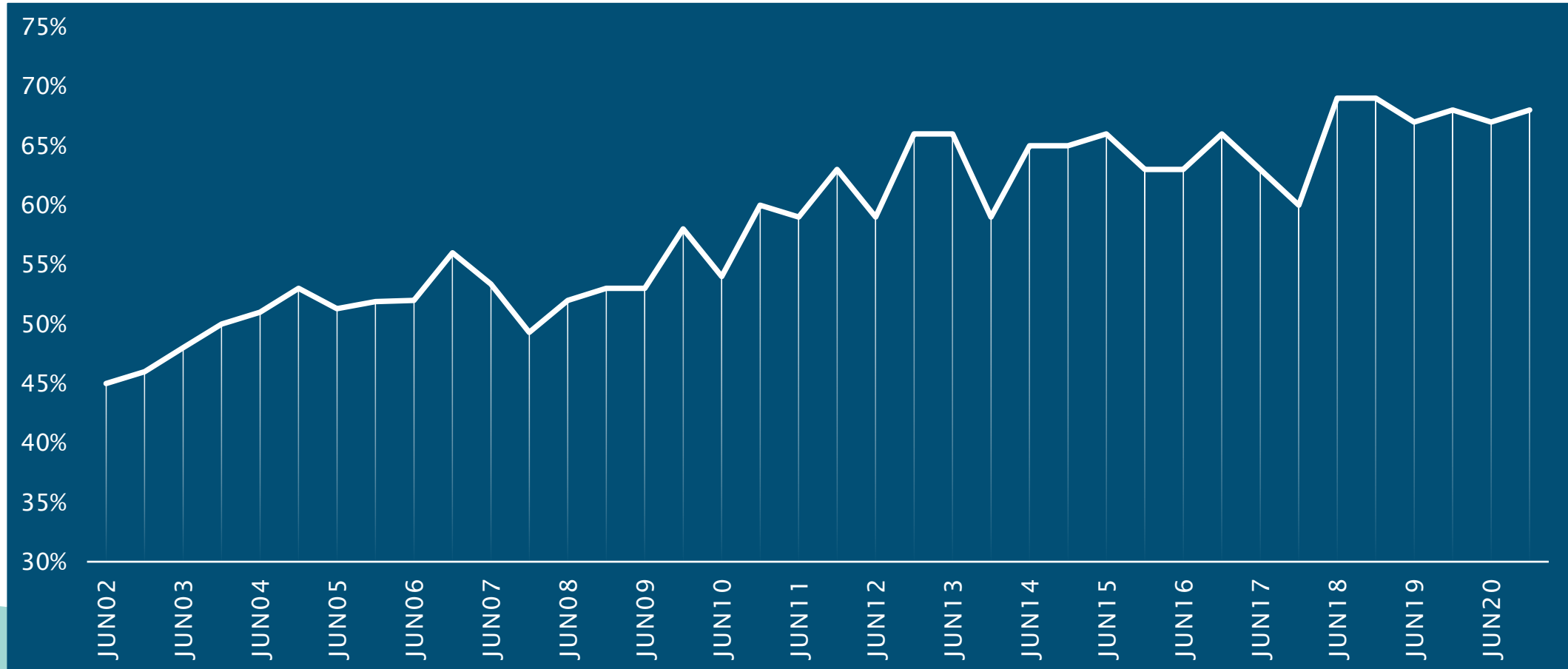
Using the CPI & LCI



Salary and Wages vs Employment



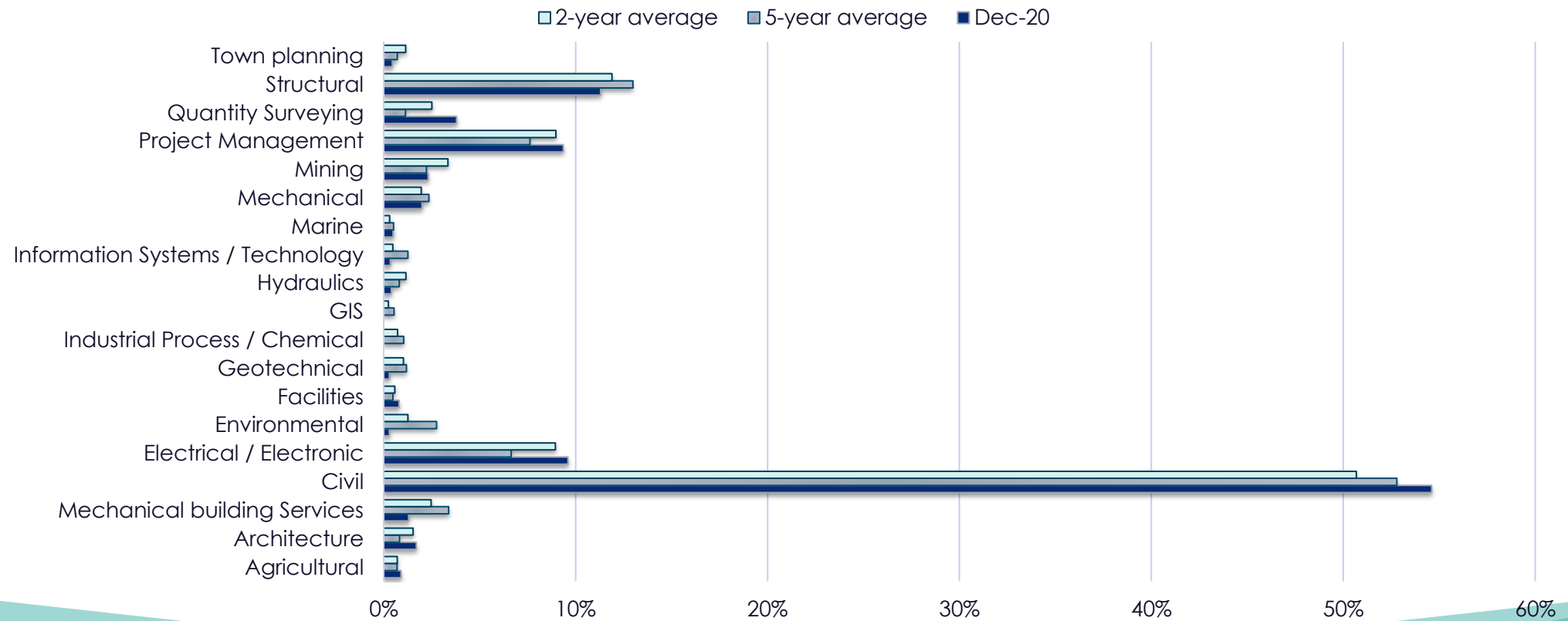
Salary and wage bill % of gross fee earnings



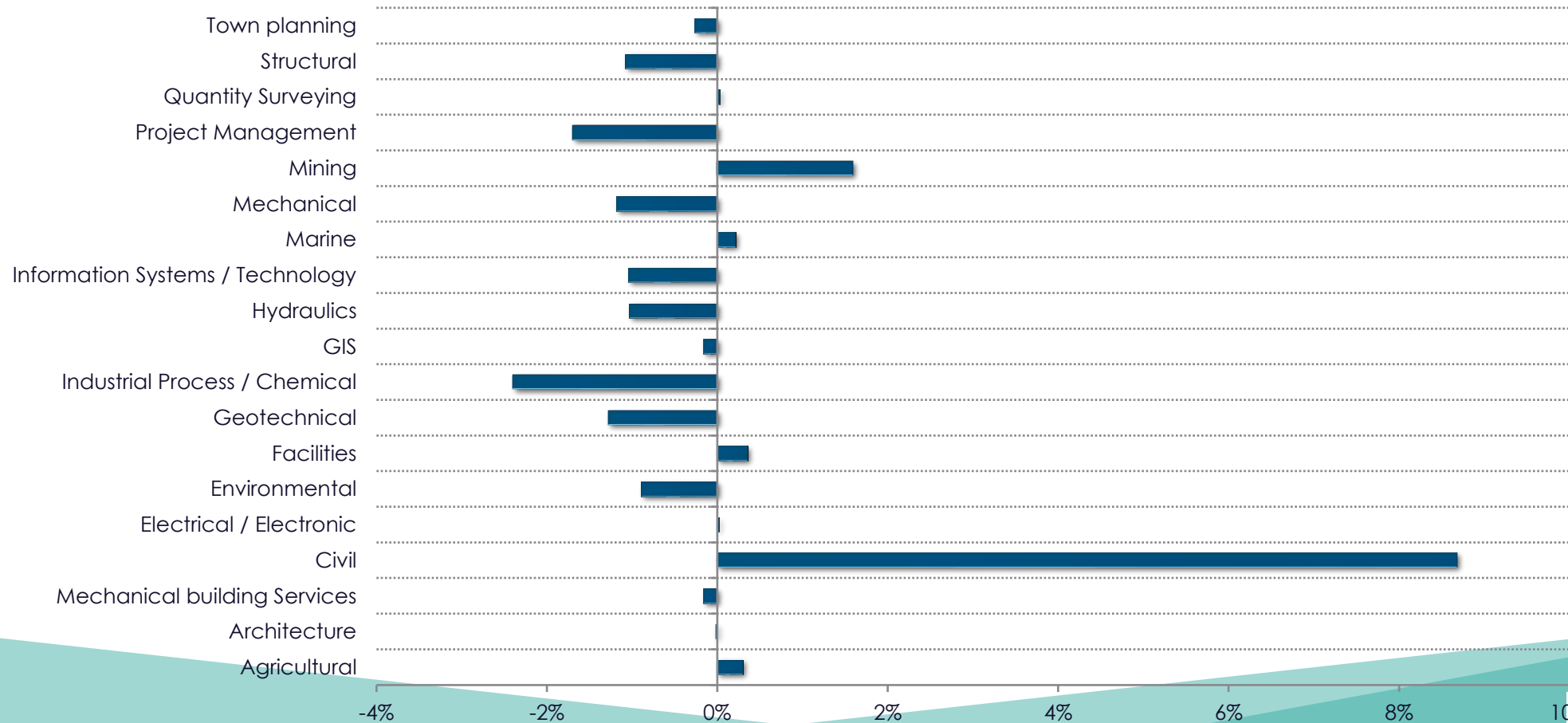
Industry Profile

DISCIPLINES, SECTOR, CLIENTS, GEOGRAPHIC PROFILE

Earnings by Sub-discipline: % Share

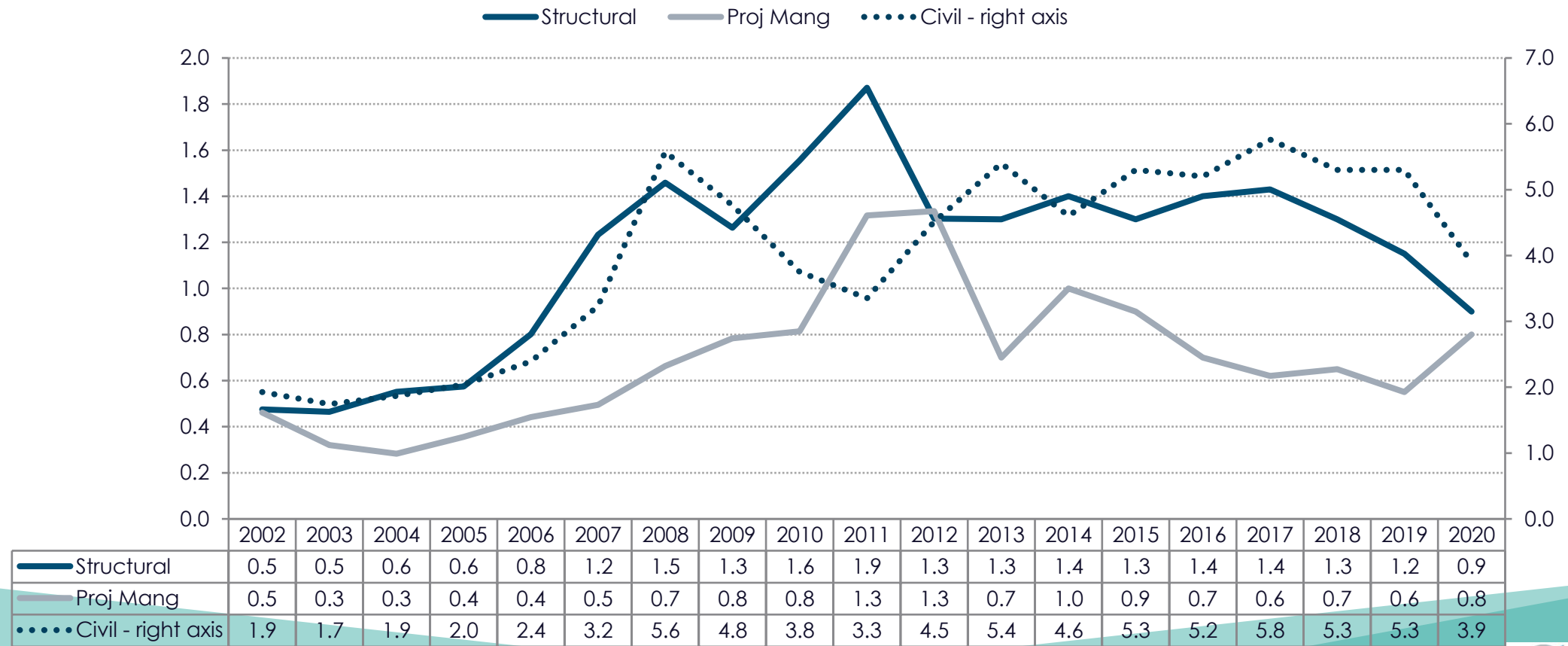


Change in last 6 months



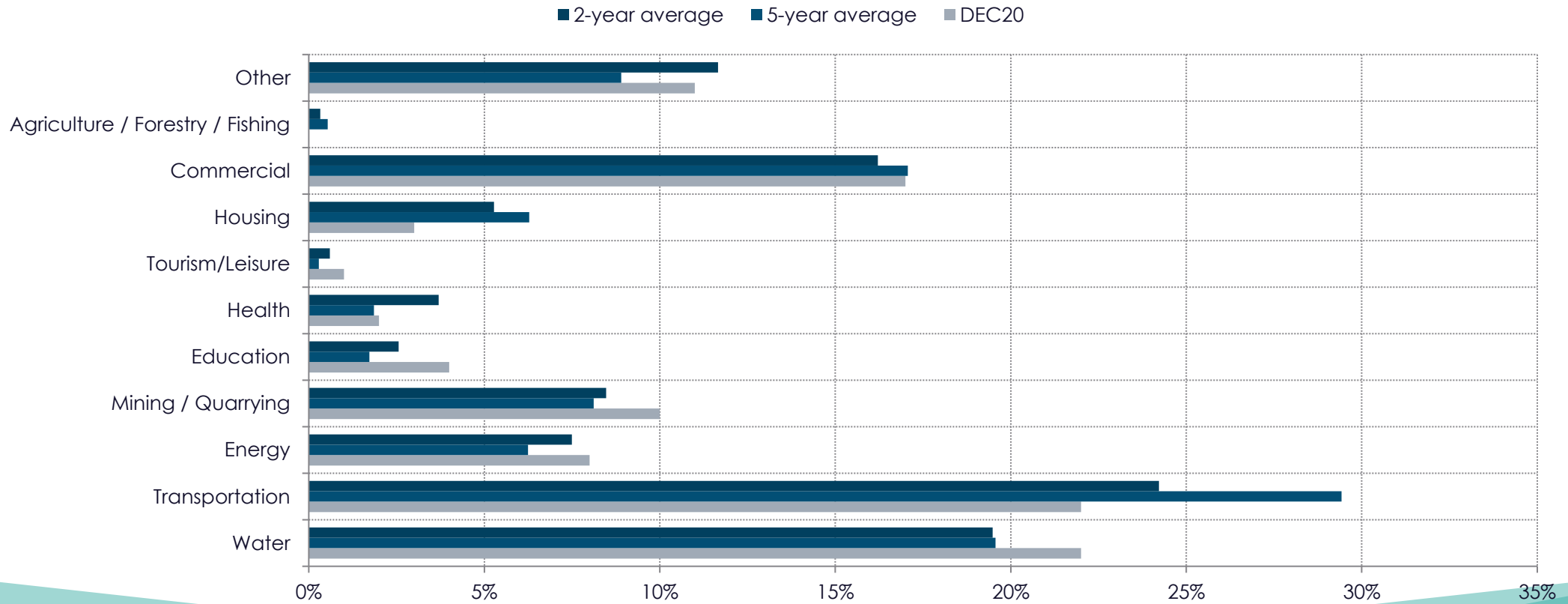
Earnings by top 3 disciplines

2 survey period Moving average, Rbn 2000 prices

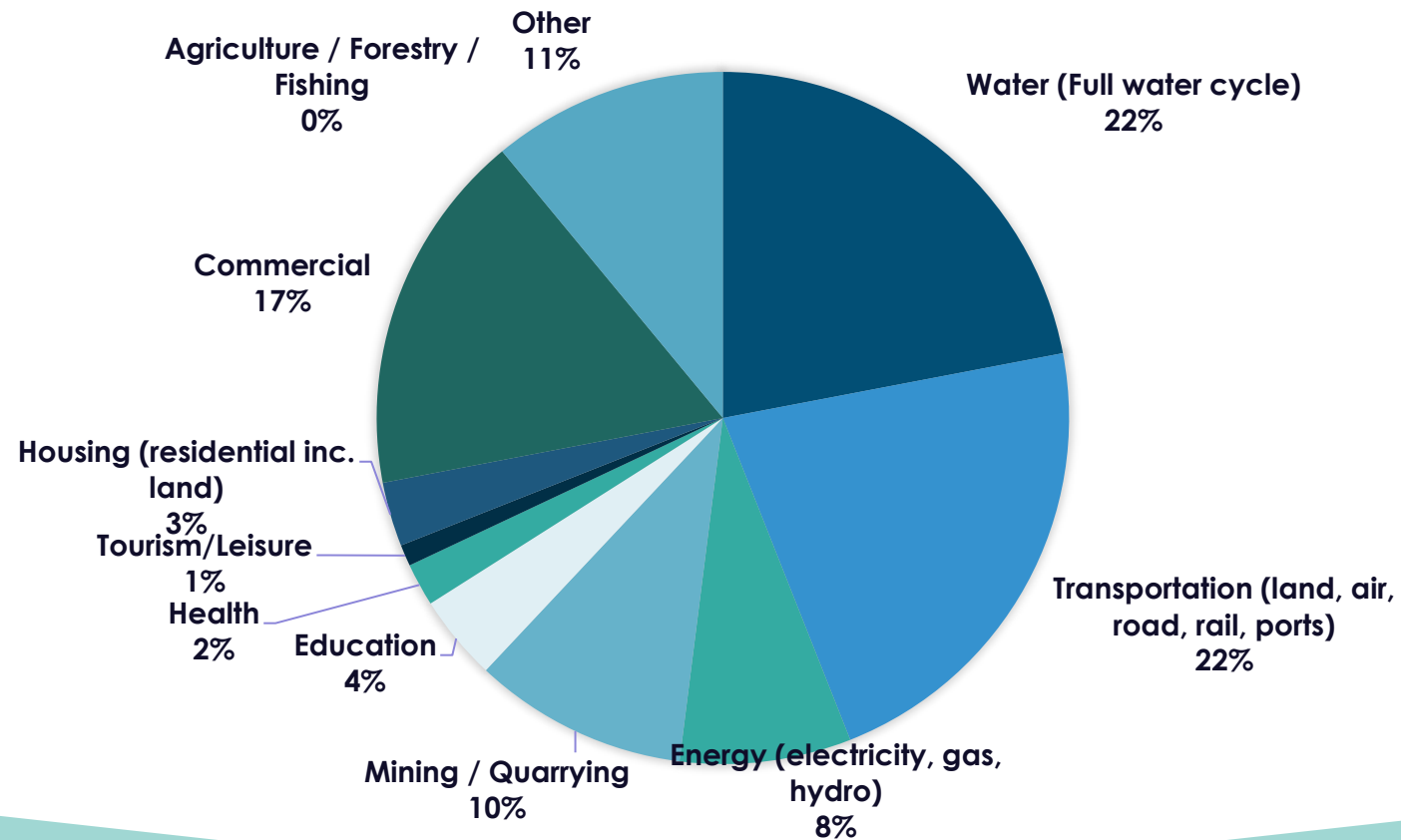


Earnings by Economic Sector

Percentage market share

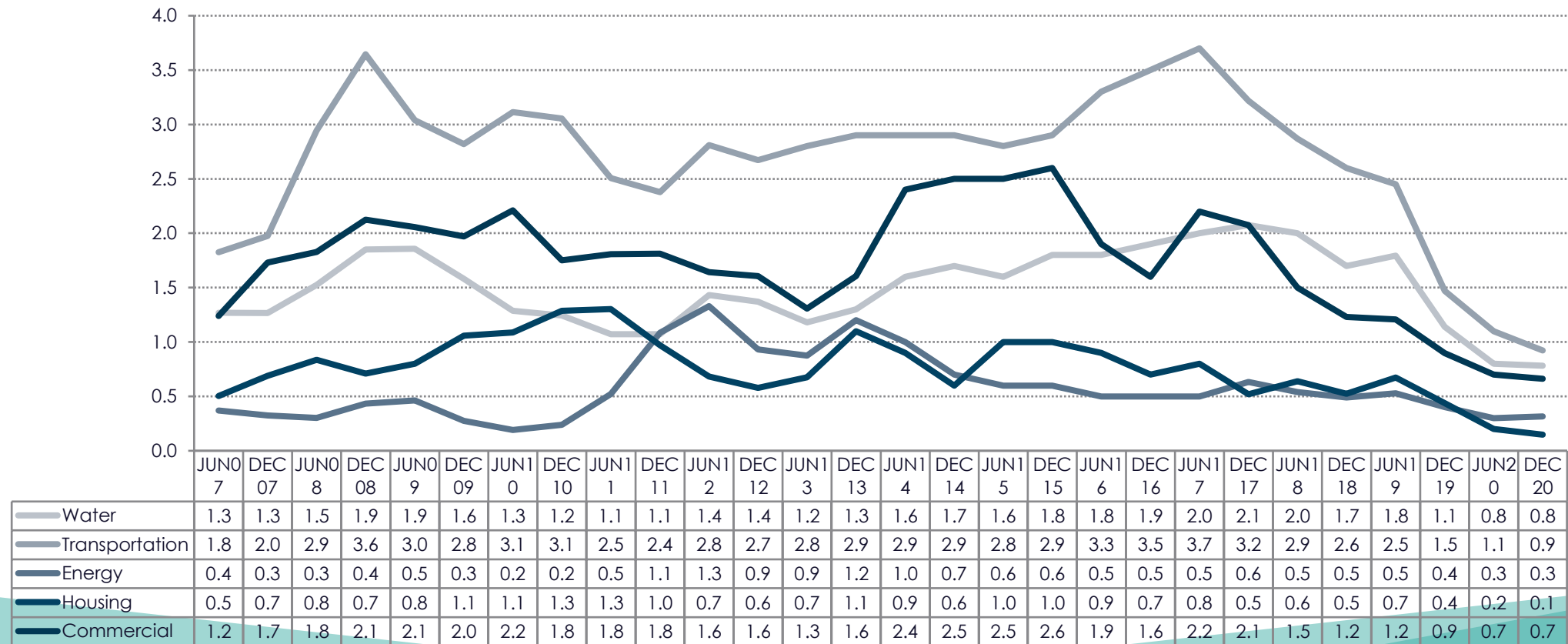


Earnings profile by Economic Sector

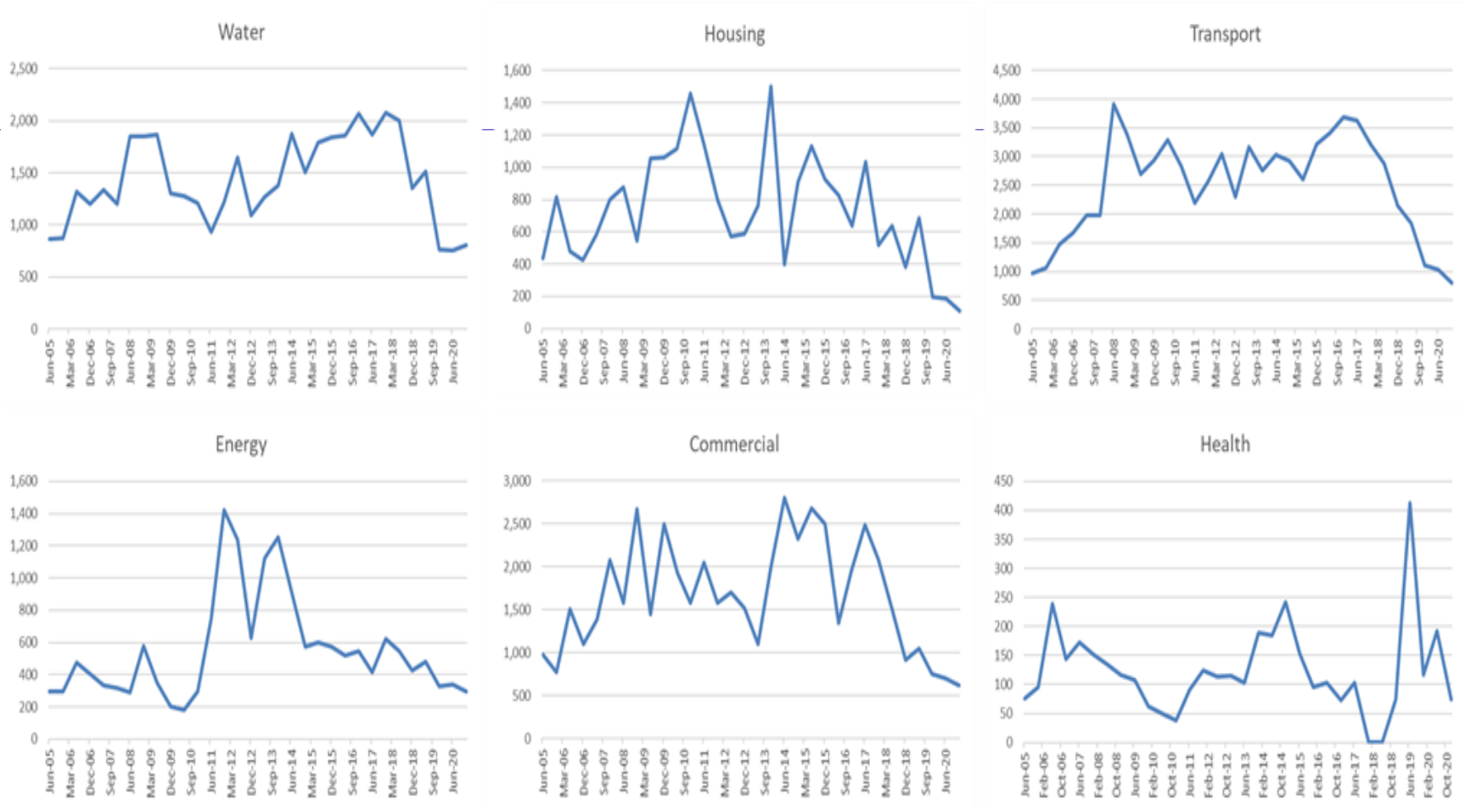


Earnings by selected sector

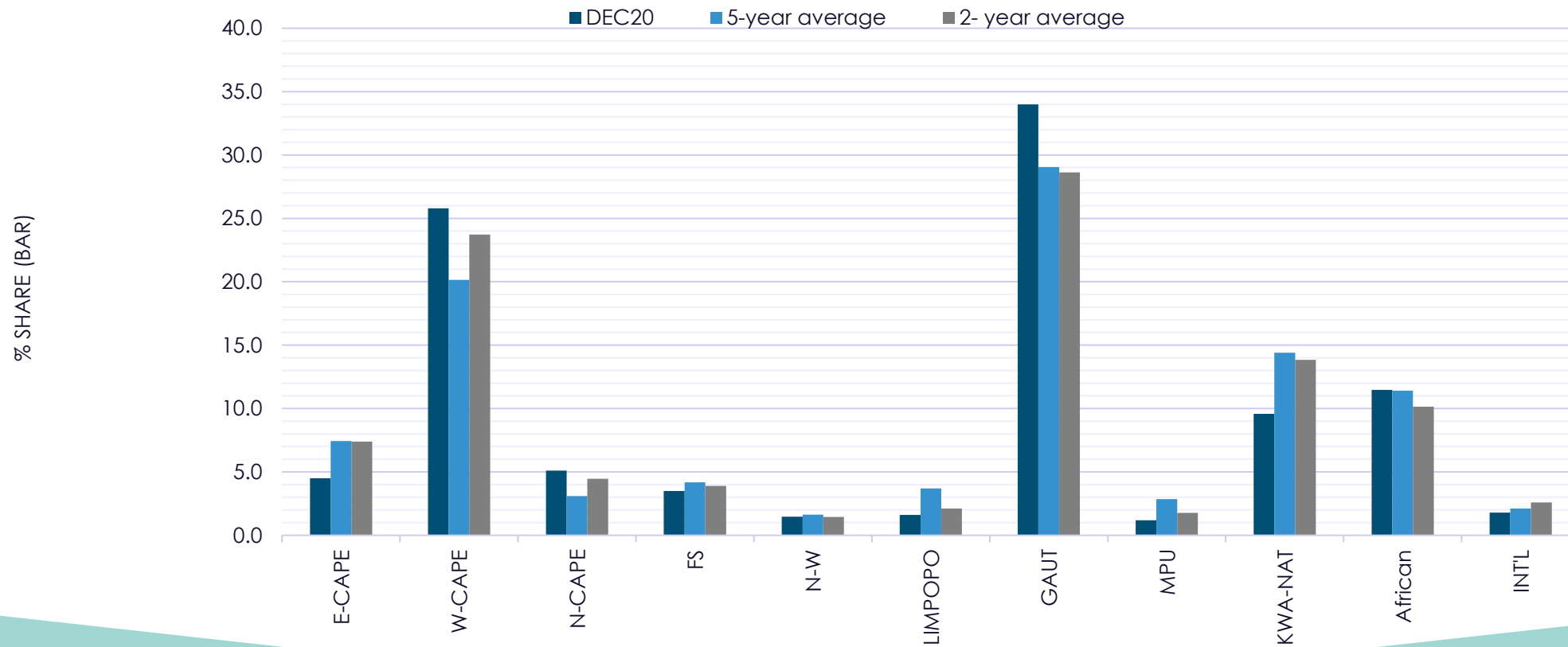
Rbn 2000 prices | Smoothed | 2 survey period moving average



Annualised Earnings by key economic sector

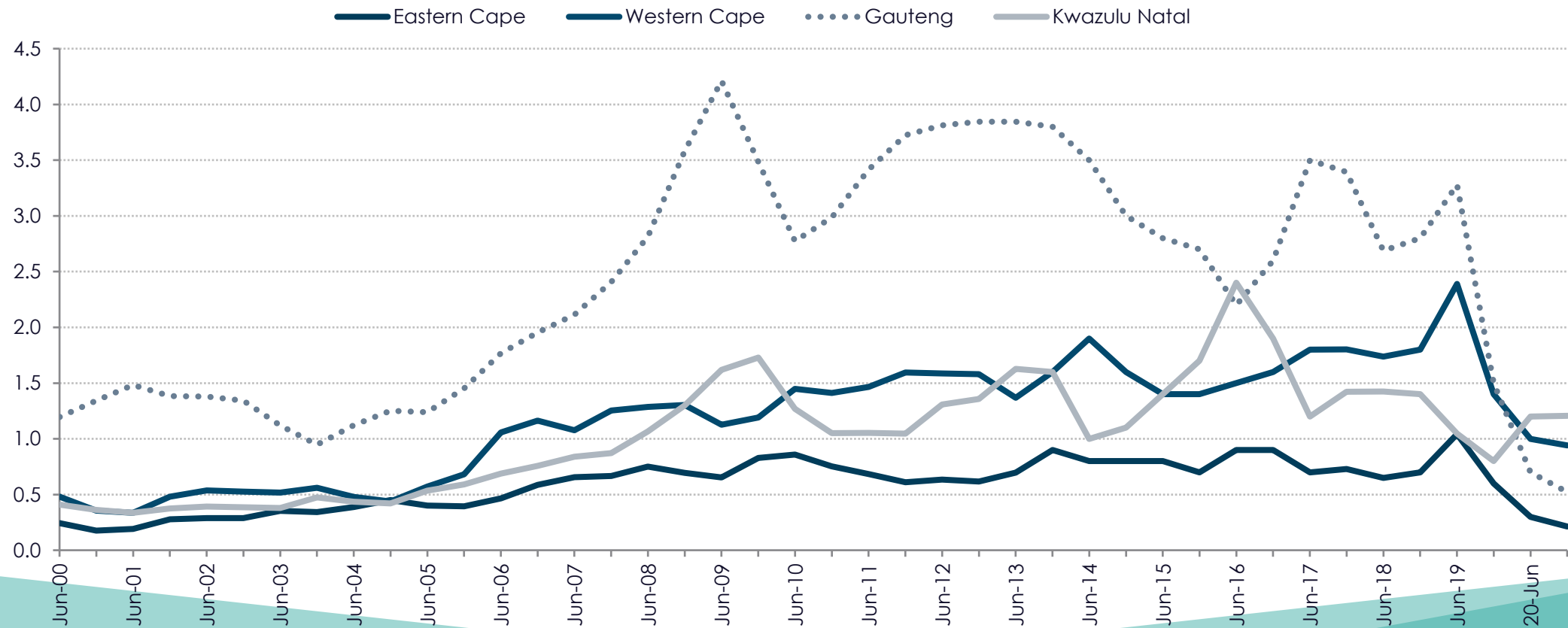


Provincial Market Share



Earnings by province

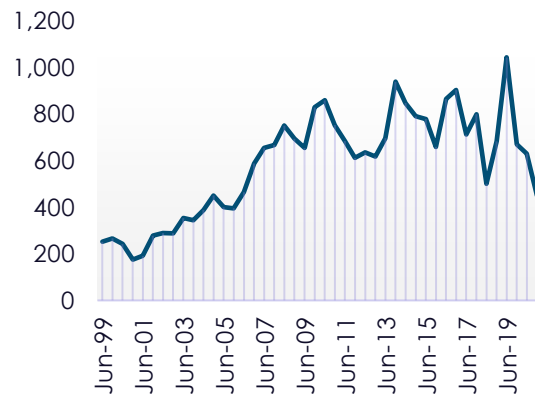
Rbn constant prices | High capacity provinces | Smoothed | 2 survey period



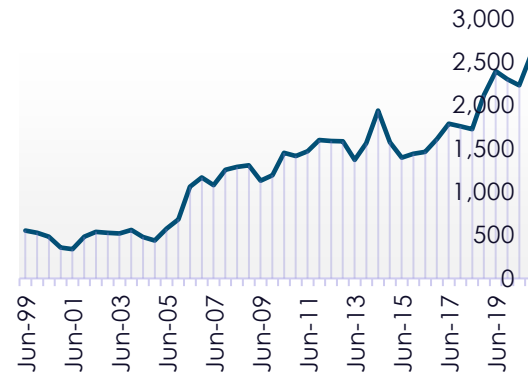
Earnings by province

Rm constant prices

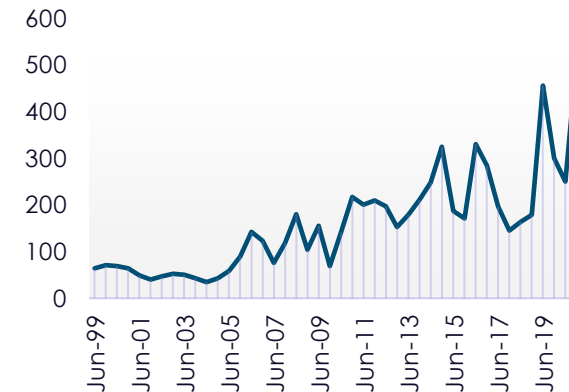
Eastern Cape



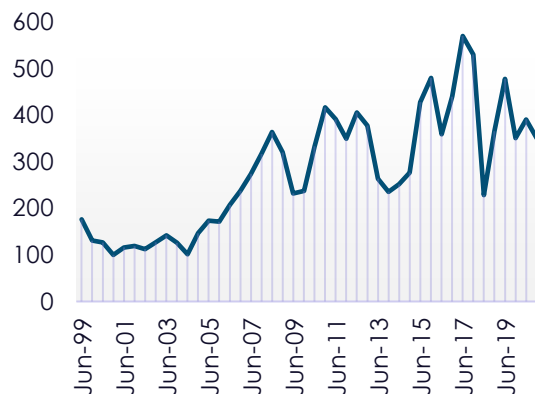
Western Cape



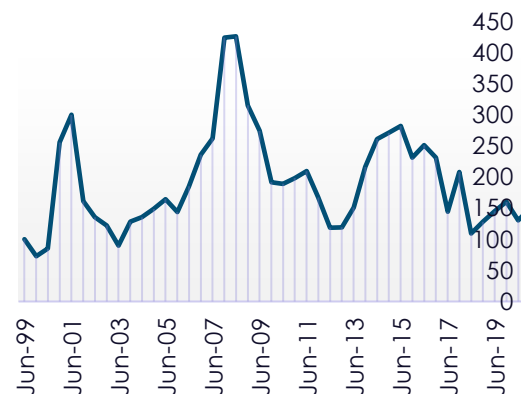
Northern Cape



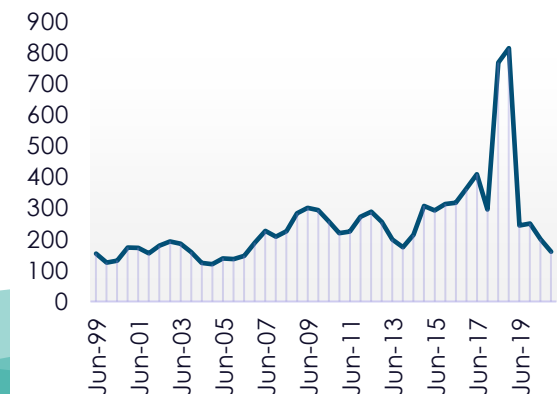
Free State



North West



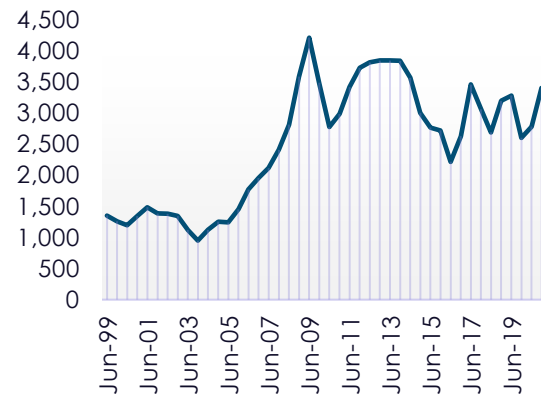
Limpopo



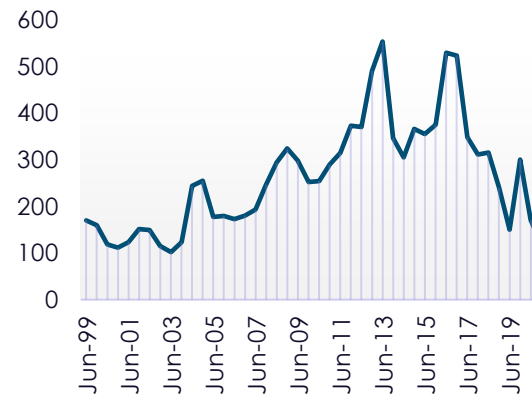
Earnings by province

Rm constant prices

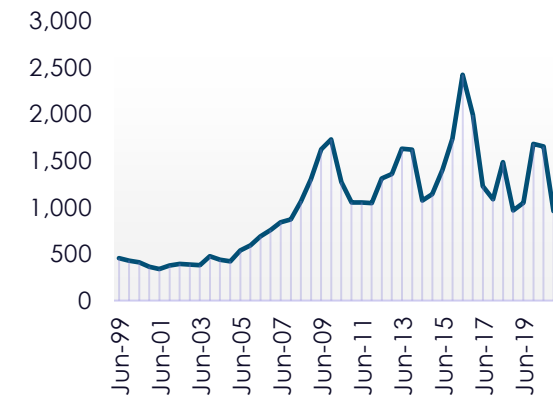
Gauteng



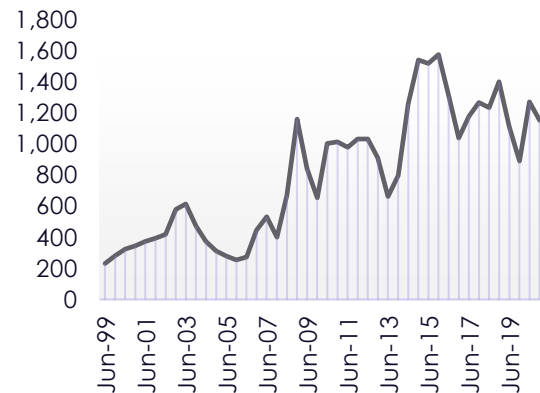
Mpumalanga



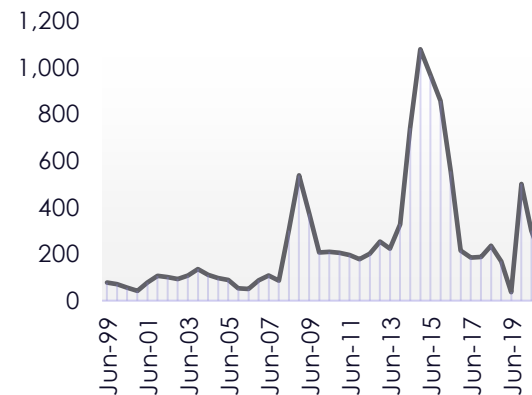
Kwazulu Natal



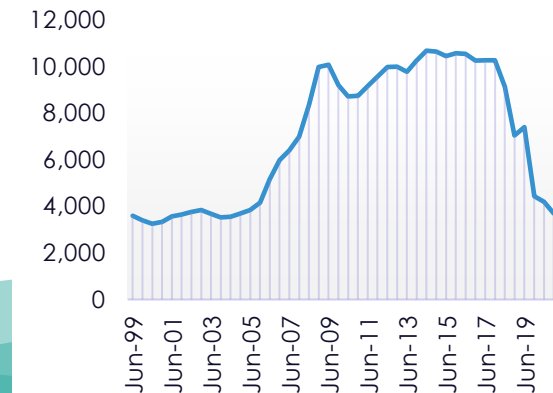
Africa



International

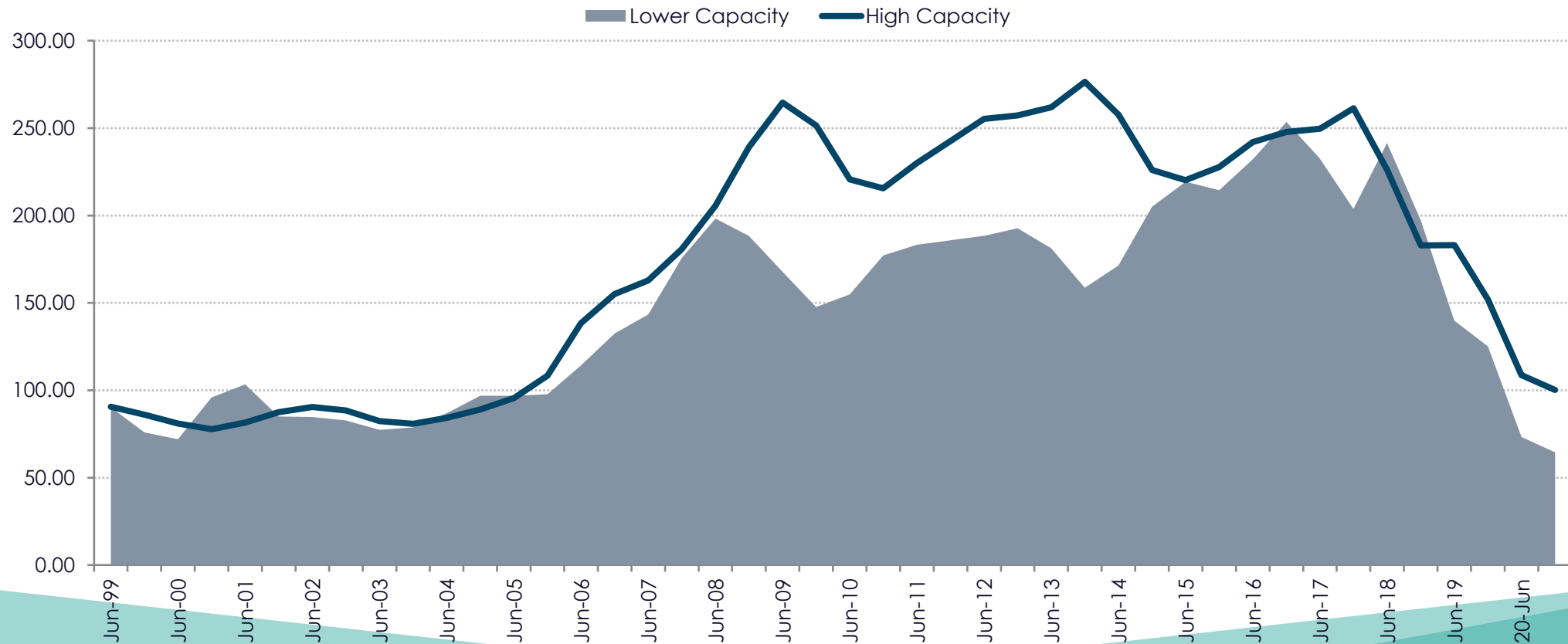


Total Fee Earnings



Earnings vs High and lower capacity provinces

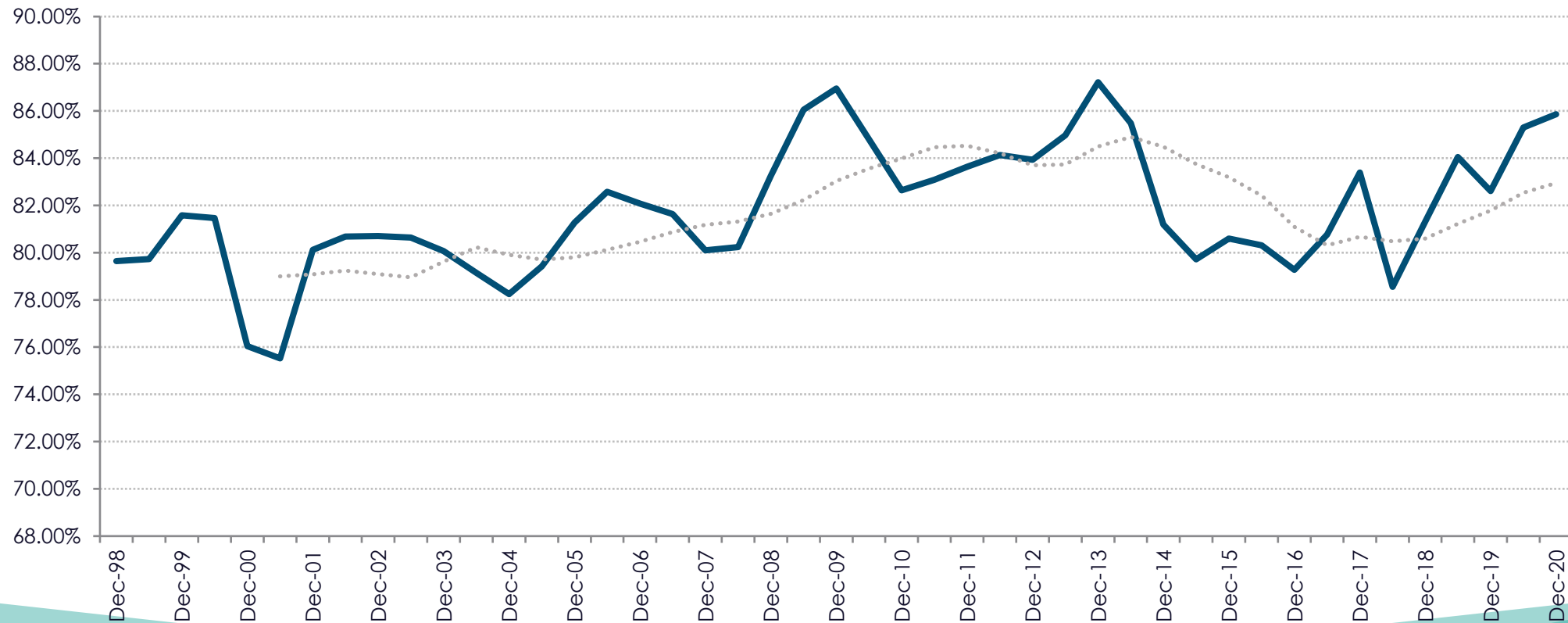
Index 1998 = 100



- High Capacity: Gauteng, Western Cape, Eastern Cape, Kwazulu Natal
- Low capacity: North West, Free State, Northern Cape, Limpopo, Mpumalanga

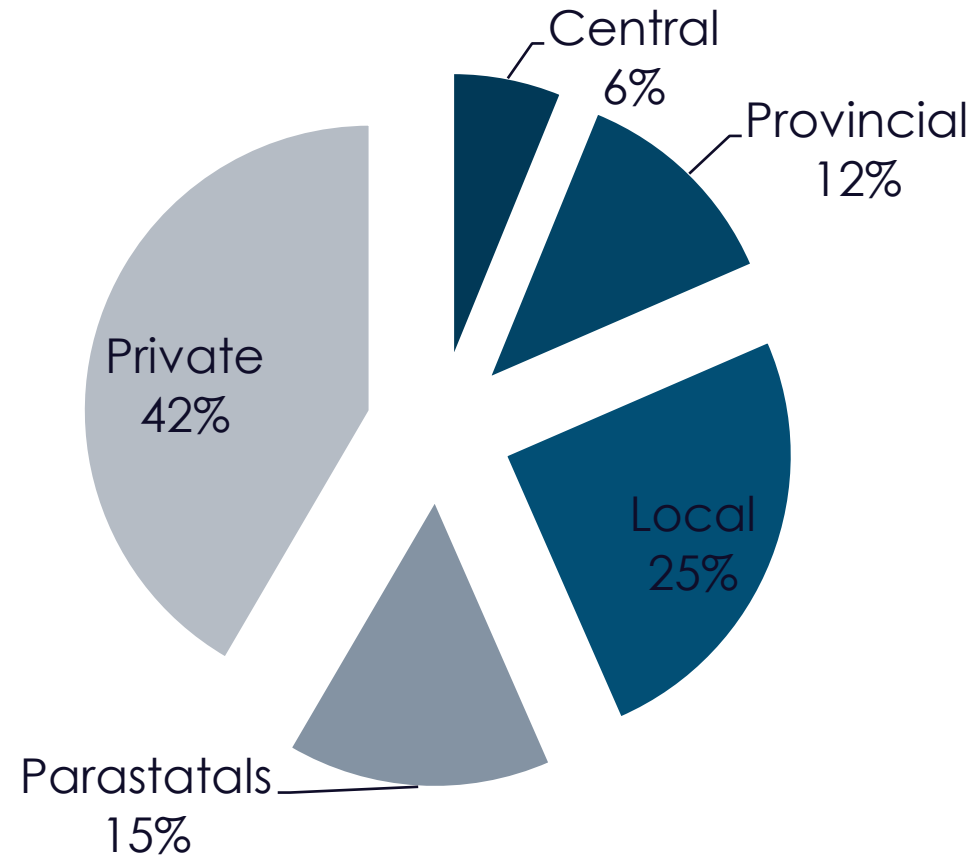
Contribution by higher capacity provinces

Percentage of total earnings

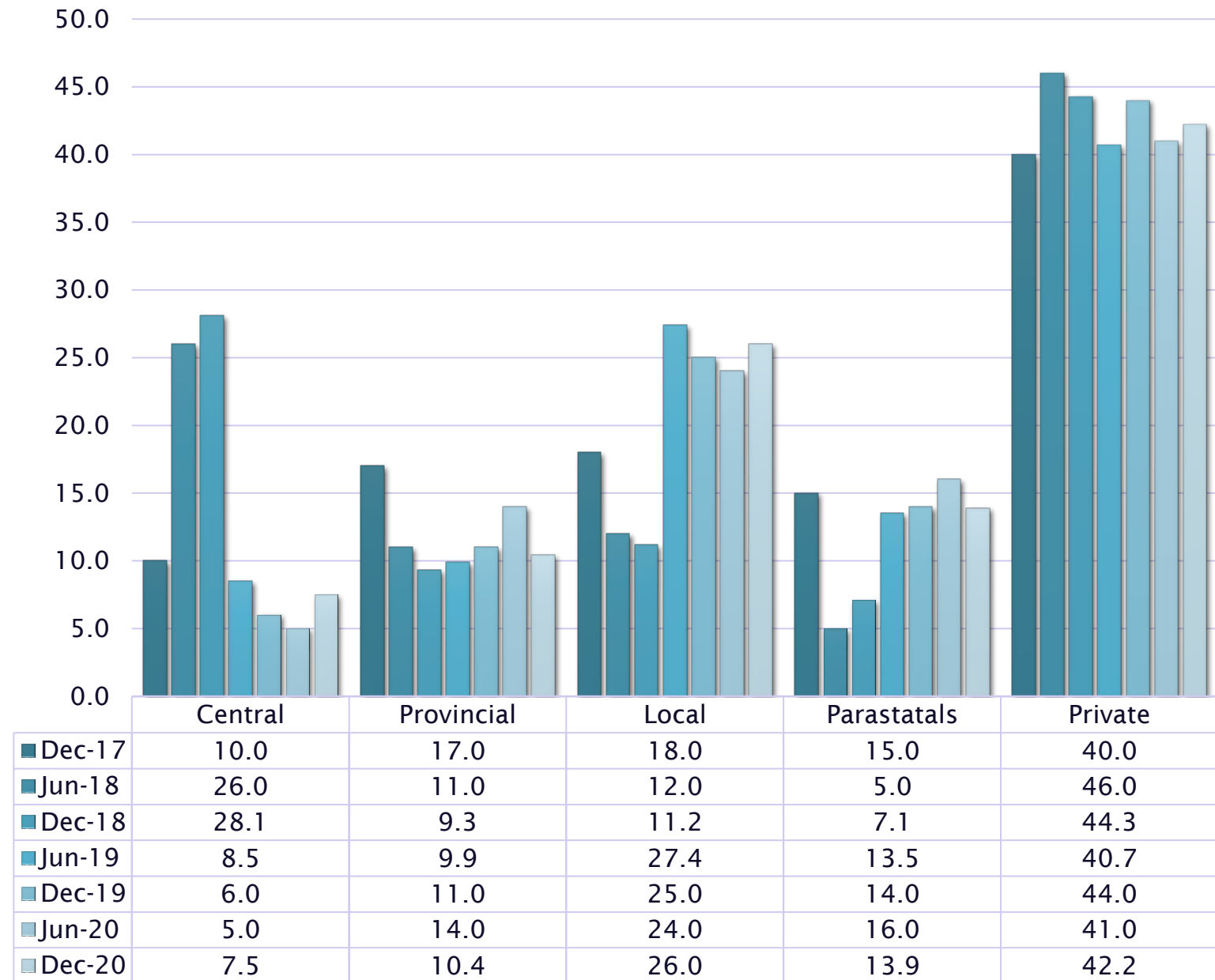


- High Capacity: Gauteng, Western Cape, Eastern Cape, Kwazulu Natal
- Low capacity: North West, Free State, Northern Cape, Limpopo, Mpumalanga

Earnings by Client Type

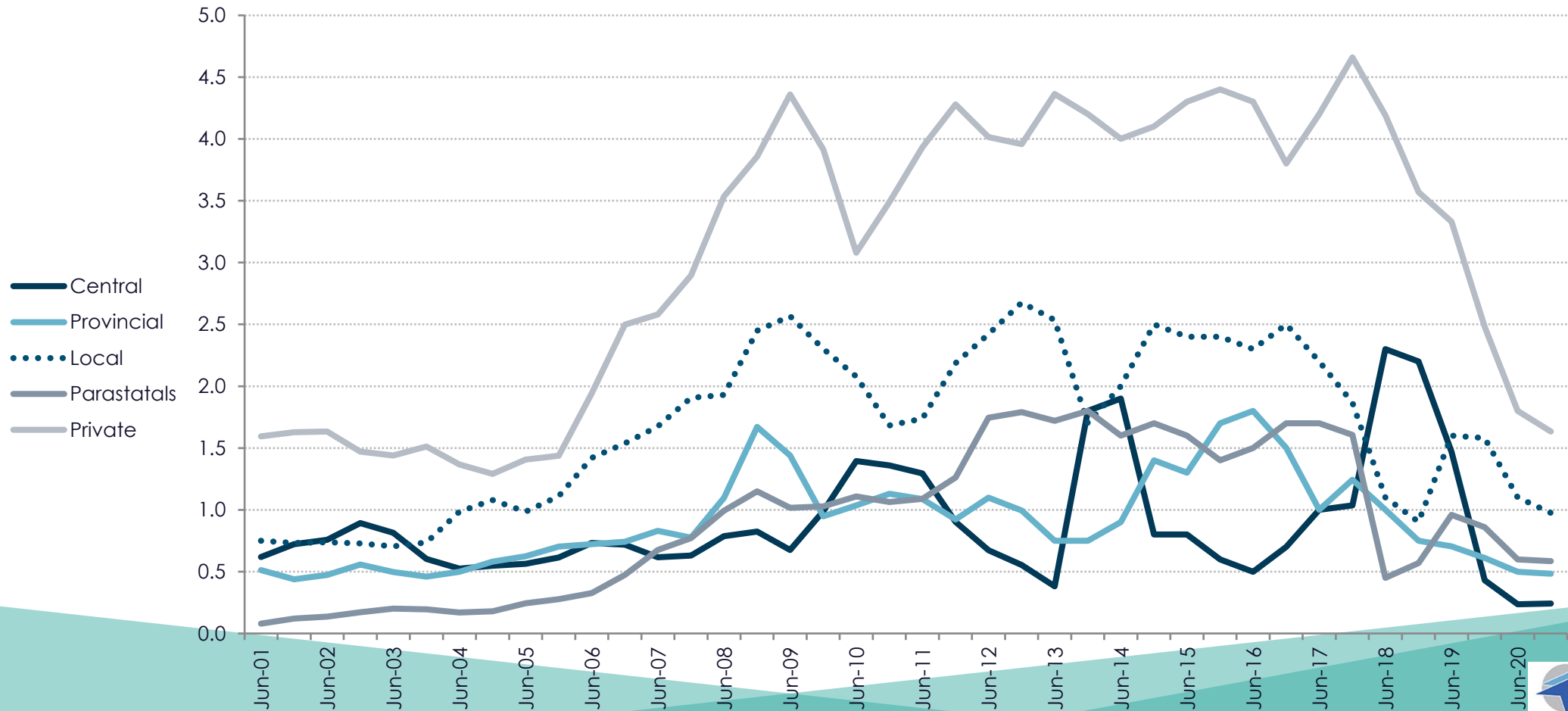


Earnings by Client Type



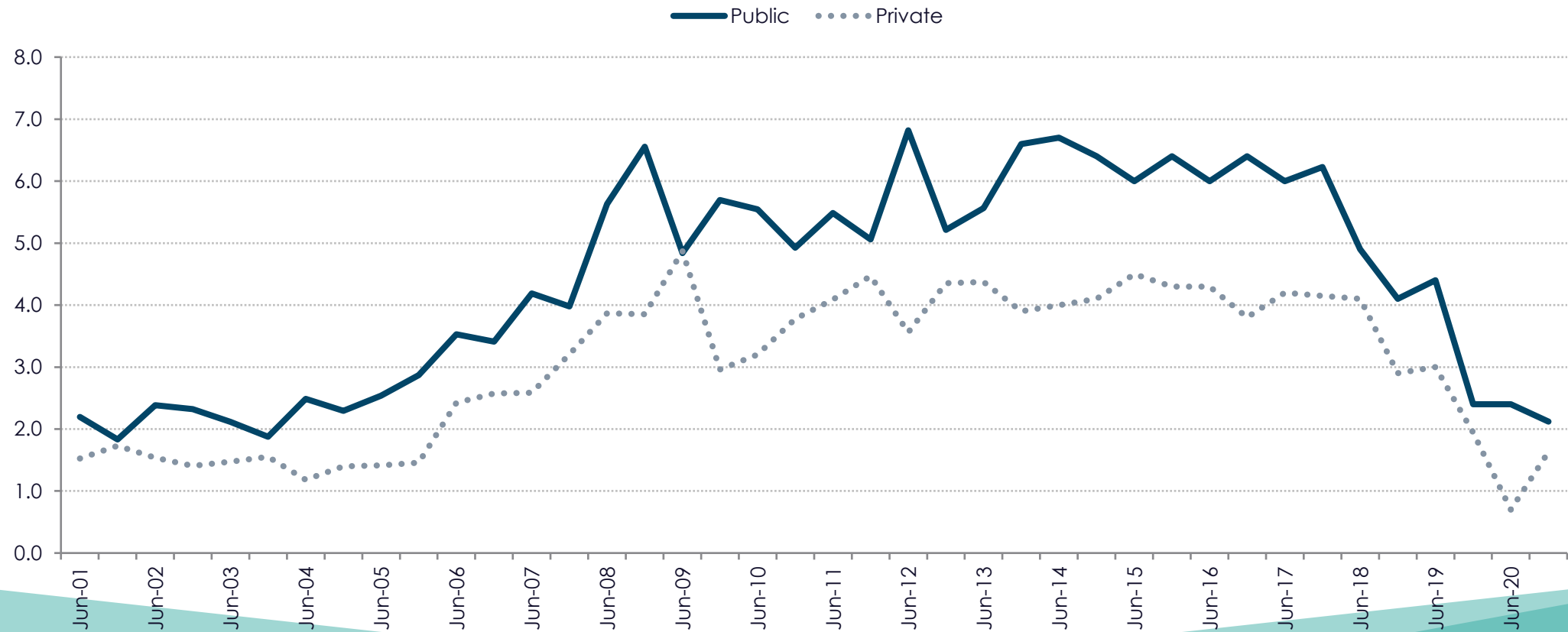
Earnings by Client Type

Rbn constant prices | Smoothed Annualised



Earnings by Client Type: Private vs Public

Rbn constant prices | Smoothed Annualised

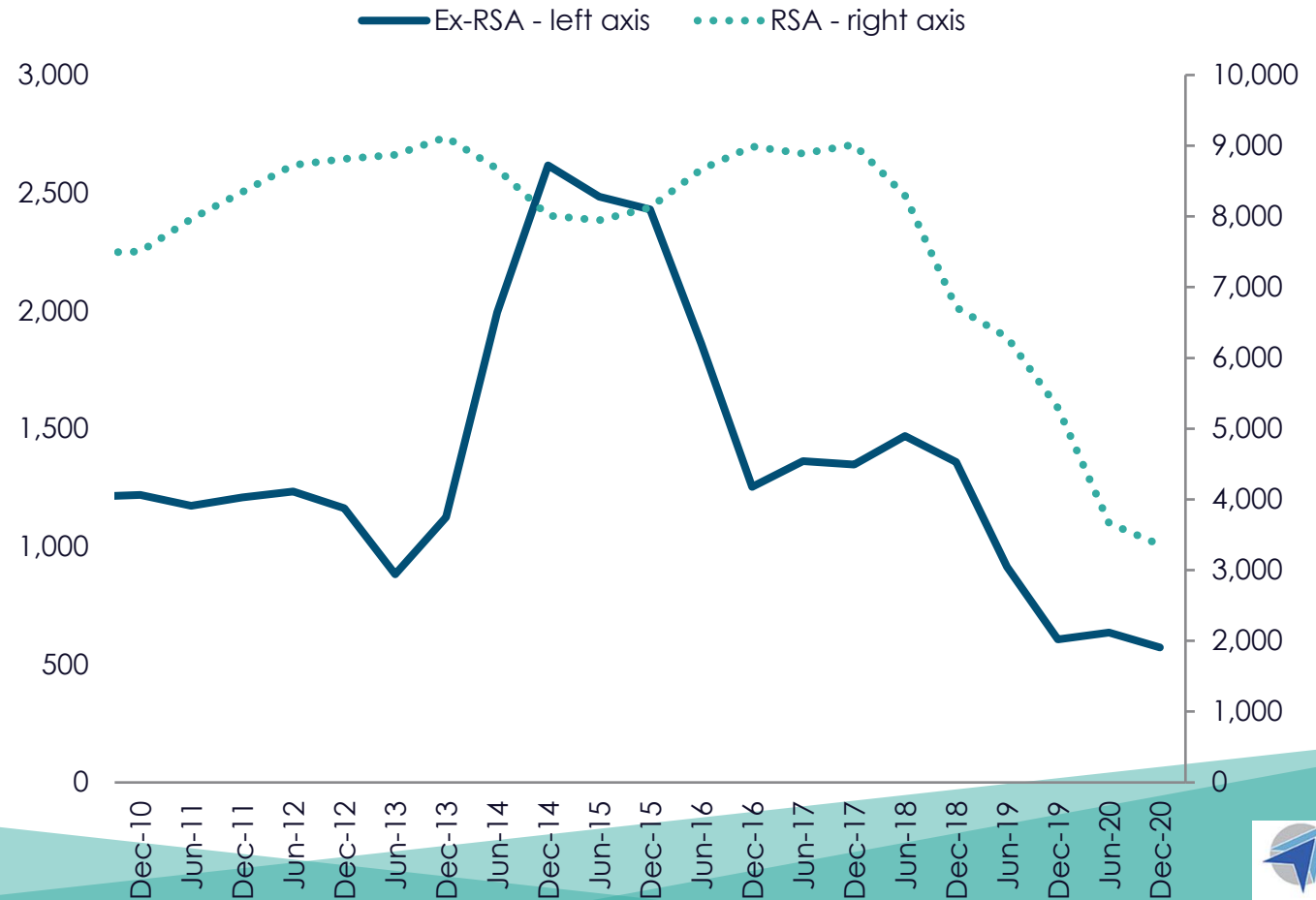
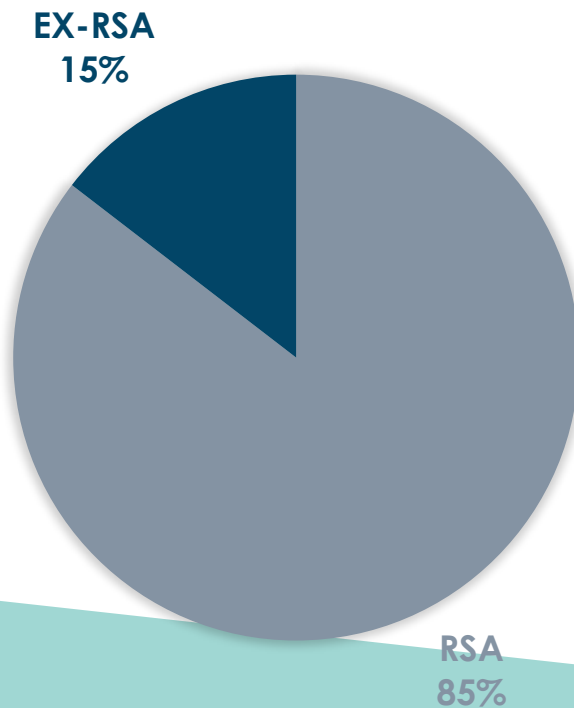


Ex-RSA

Earning: RSA vs Ex-RSA

Rm, constant 2000 prices | Annualised smoothed

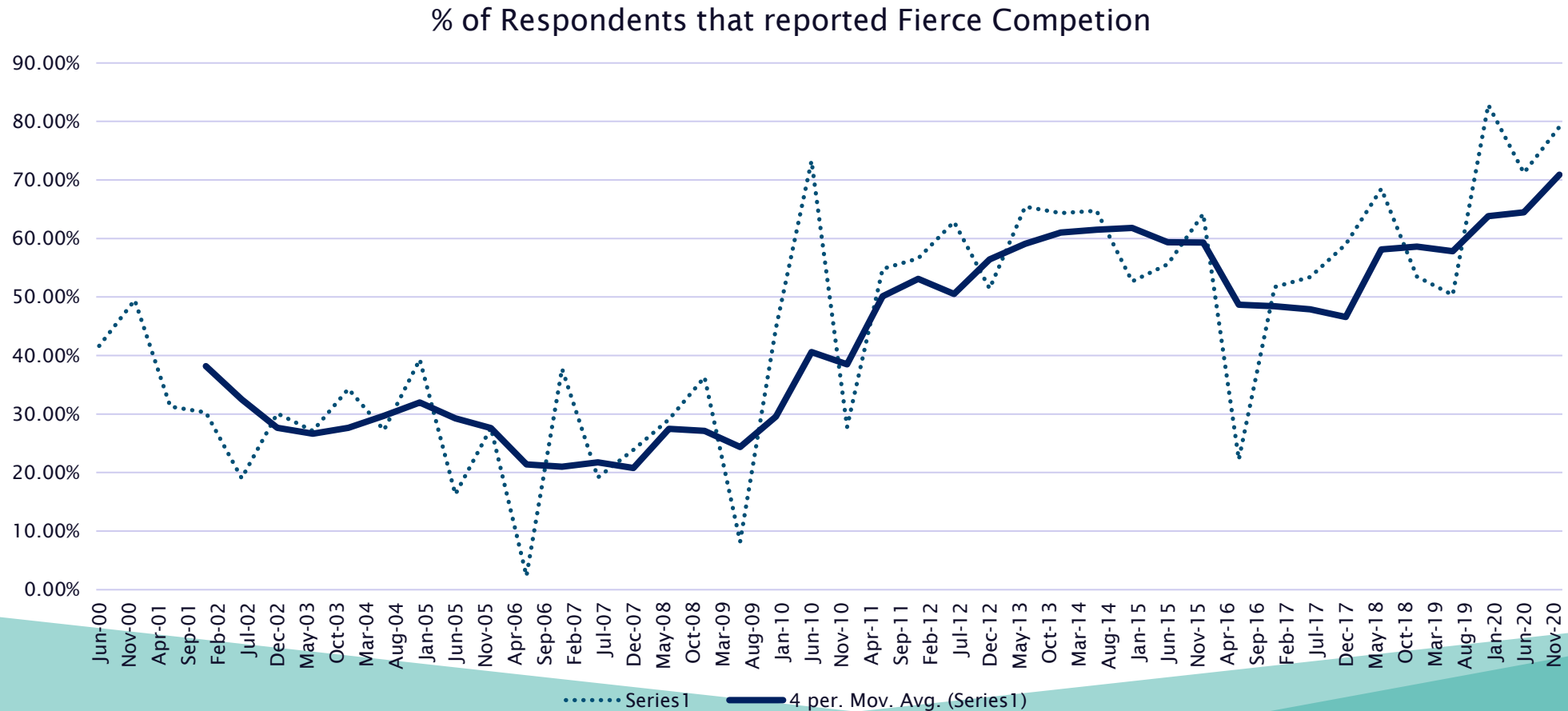
RM, CONSTANT PRICES



Business Cycle Indicators

Competition in Tendering

Percentage of respondents that reported “*fierce*” competition

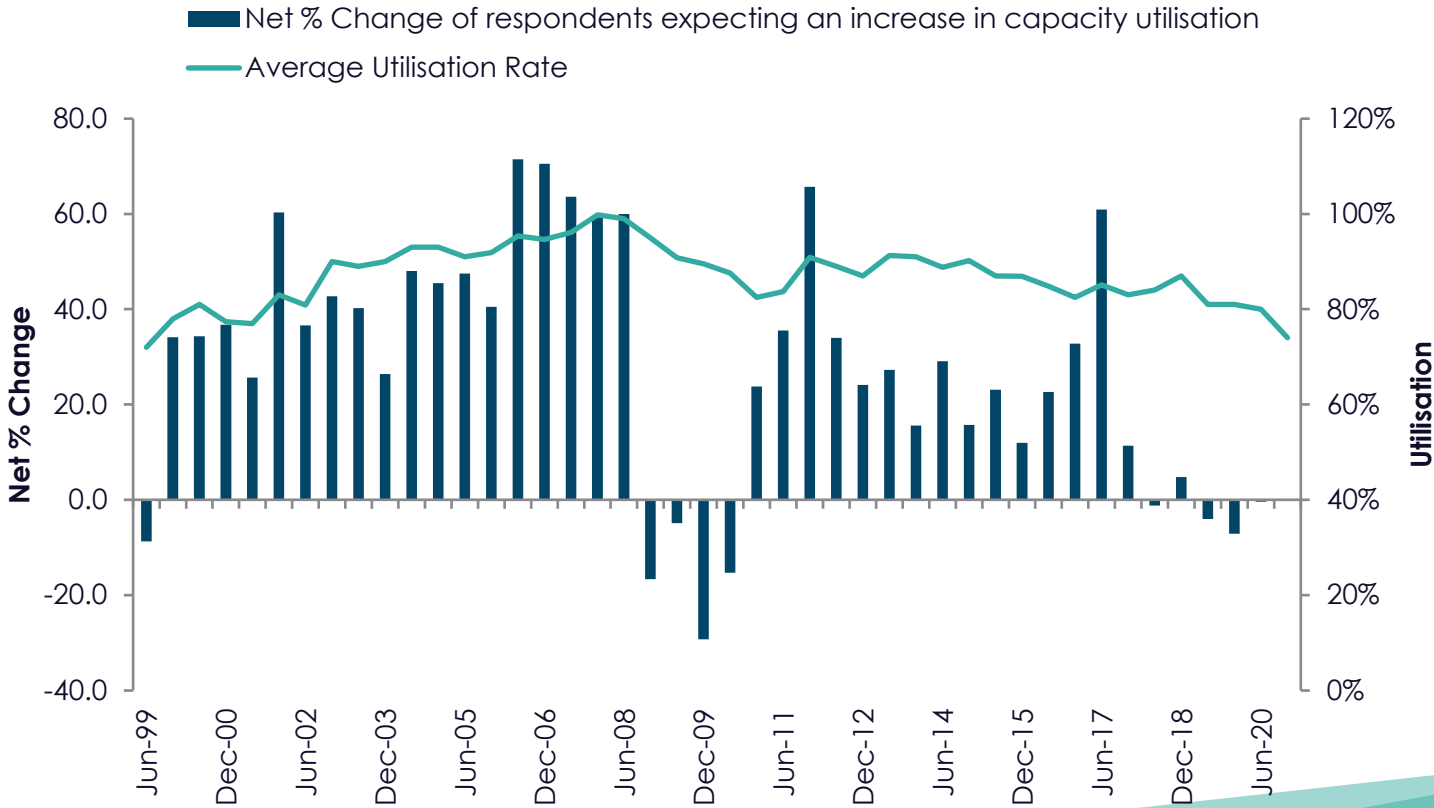


Industry Capacity Utilization

Existing technical staff

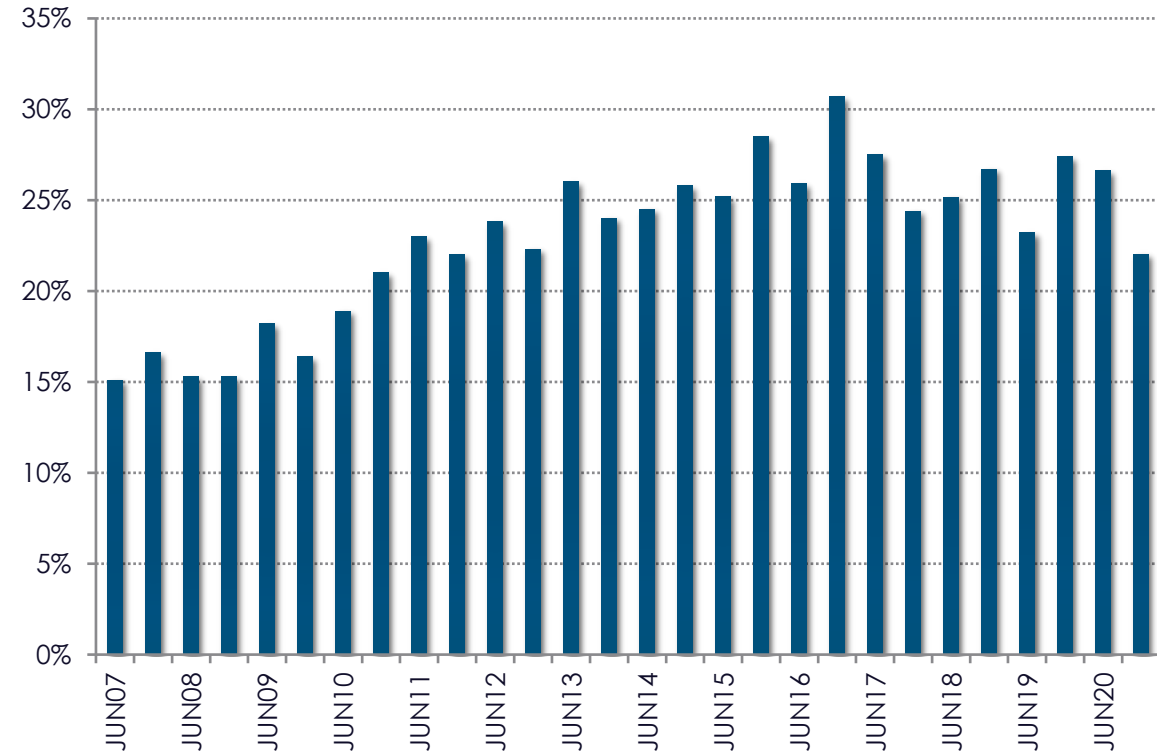
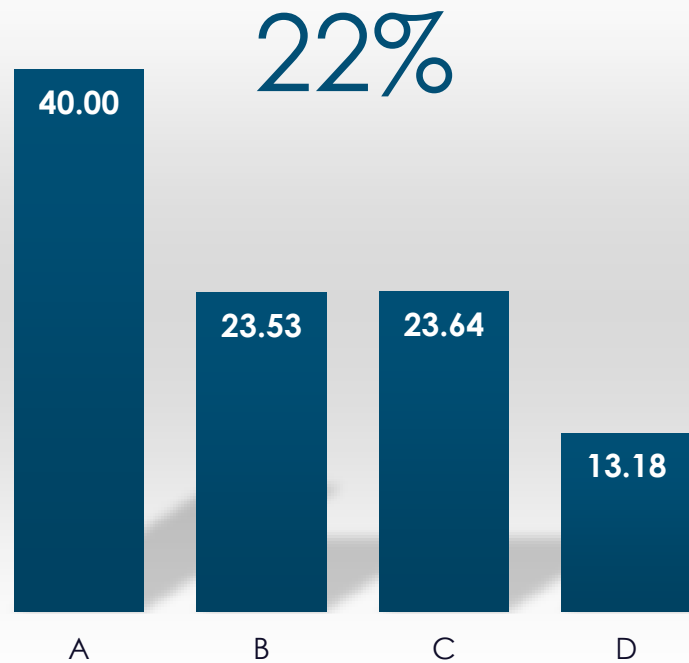
	Increase	Static	Decrease
July-Dec 2020	8.4%	87.9%	3.7%

74%



Average Discounting Rate

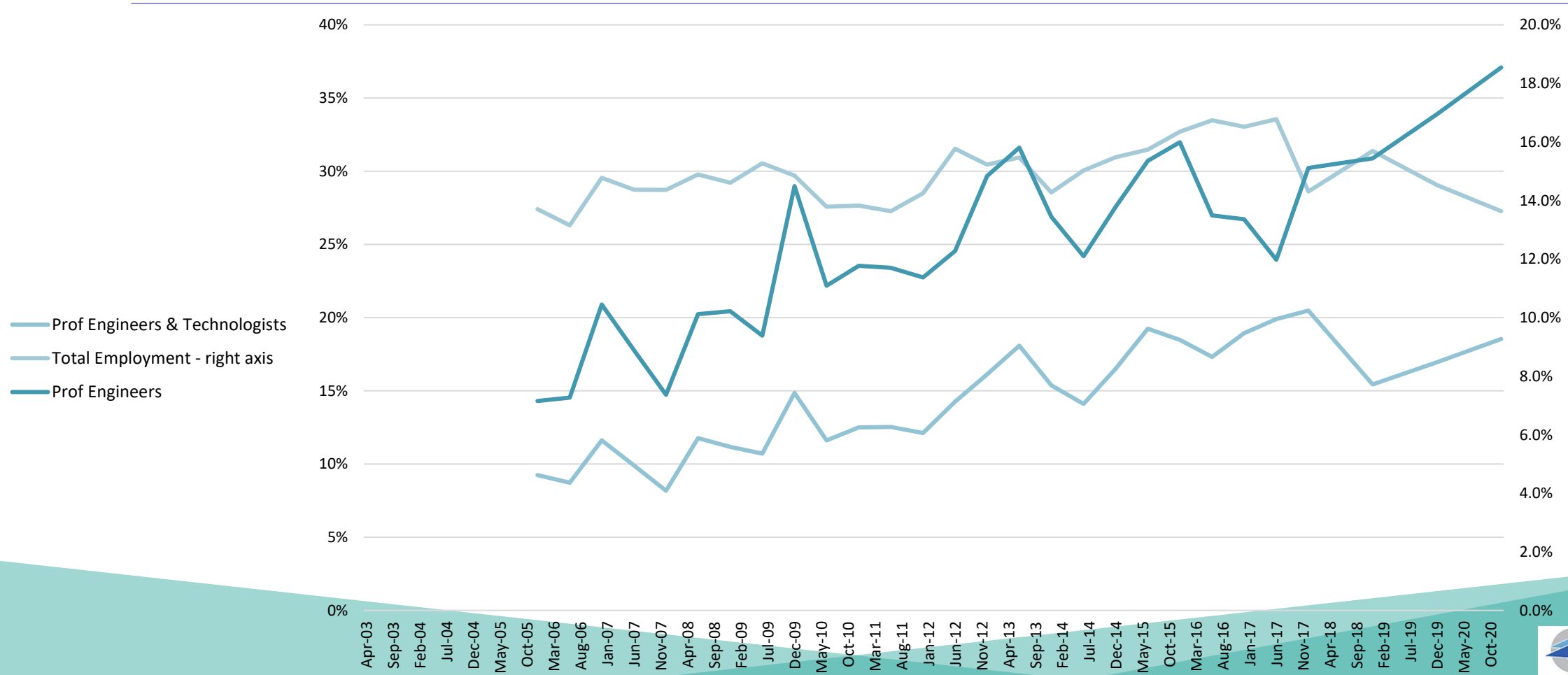
By firm category



Employment

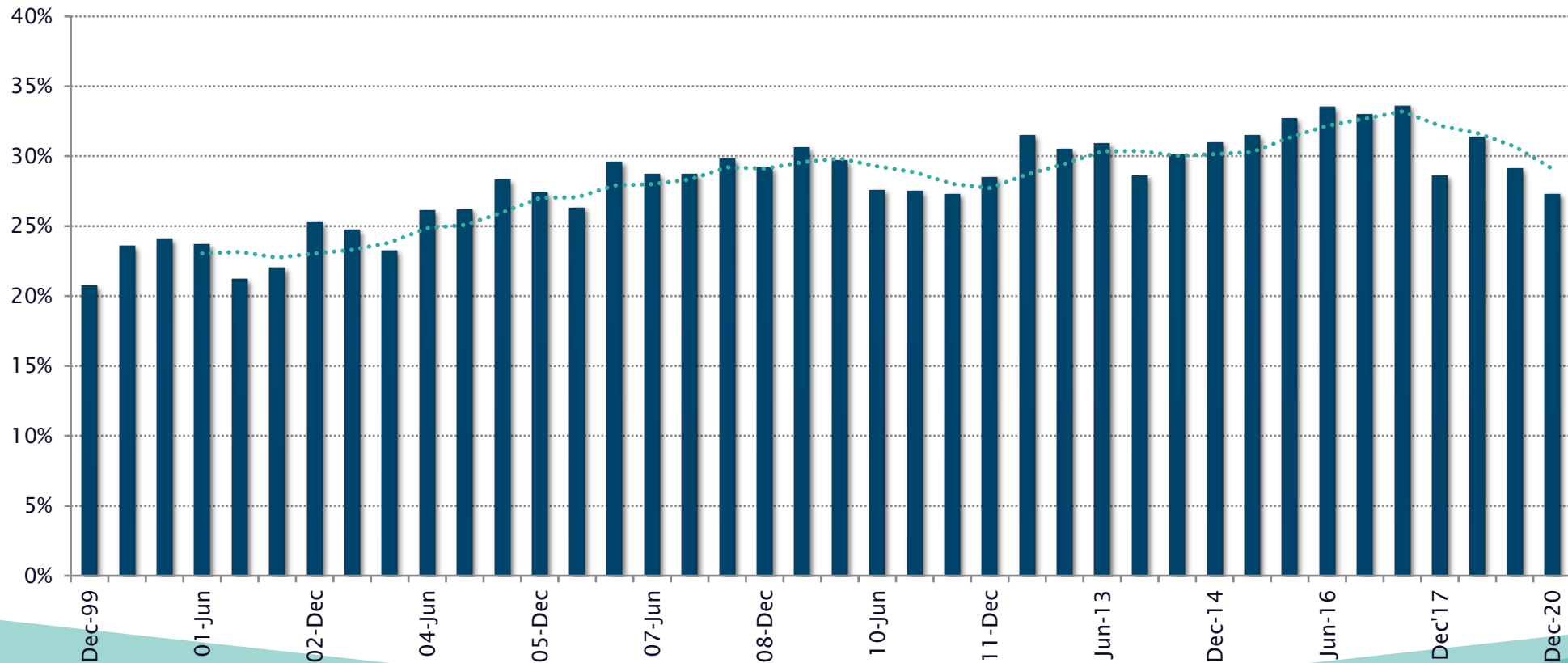
Employment by race

Contribution of Black, Coloured and Asian to total employment

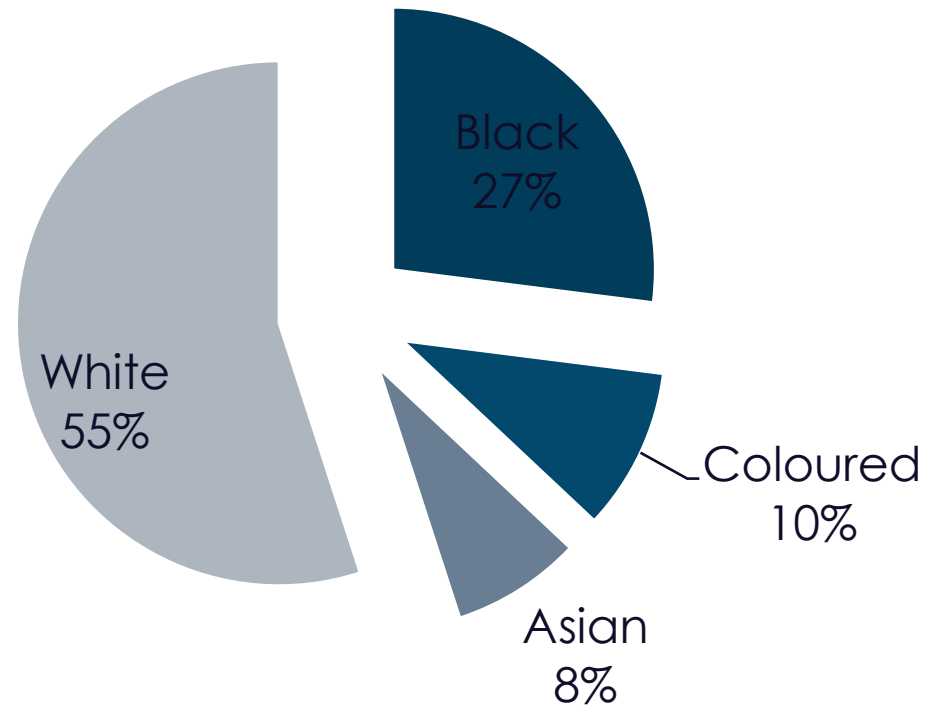


Employment profile

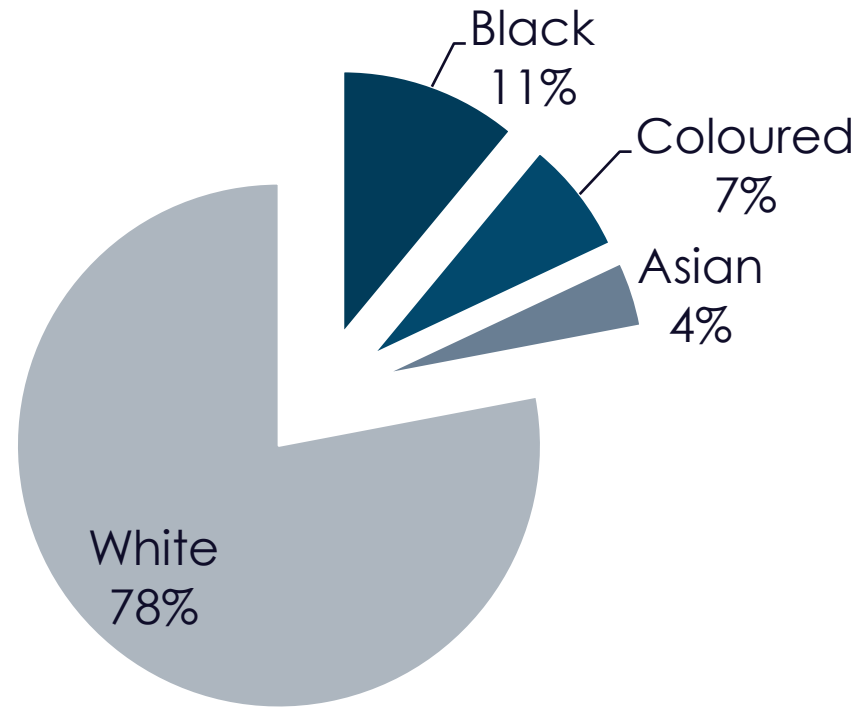
Black only (excluding Asian / Coloured) representation of total employment
% Share of total employment



Employment profile by race



Employment profile by race (engineers and technologists)



Employment by gender

Woman's contribution (professional engineers)

