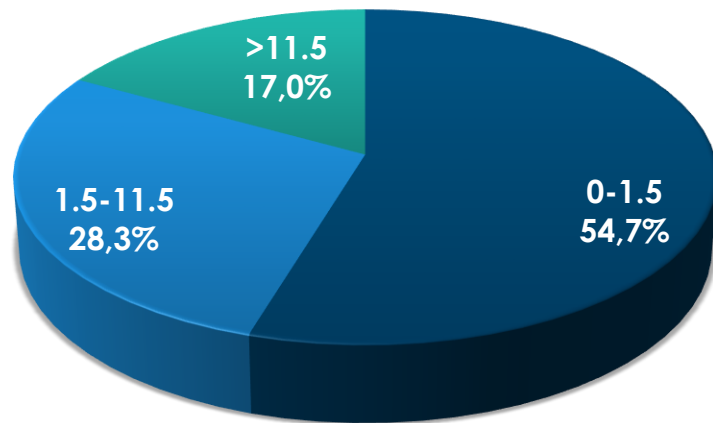


Biannual Economic and Capacity Survey

JANUARY – JUNE 2021

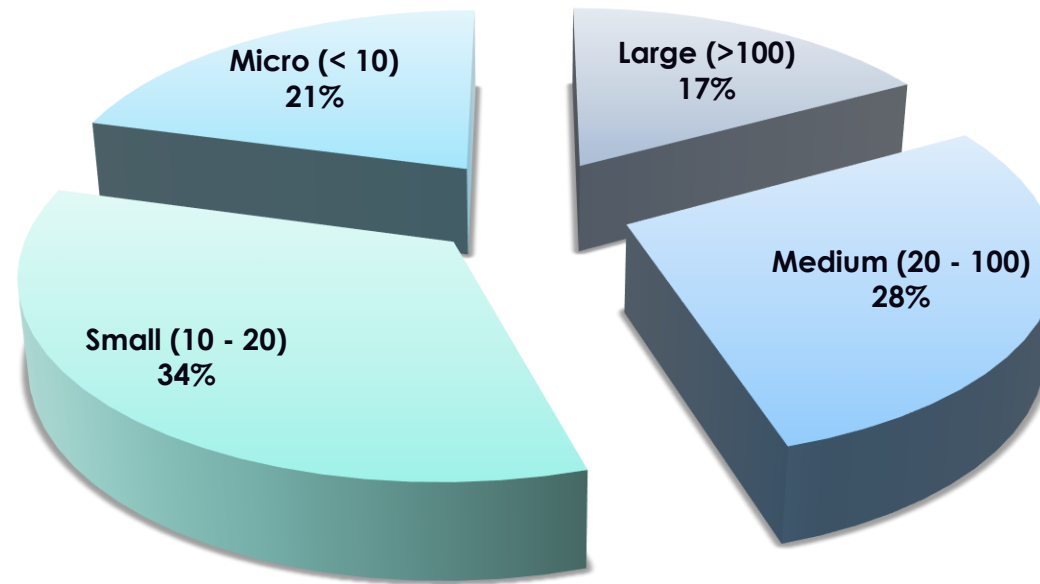
Firm distribution based on Annual turnover

January – June 2021



Category by gross annual income	% of firms
0 – R1,5m	54.7%
R1,5m – R11,5m	28.3%
> R11,5m	17.0%
Total	100.0%

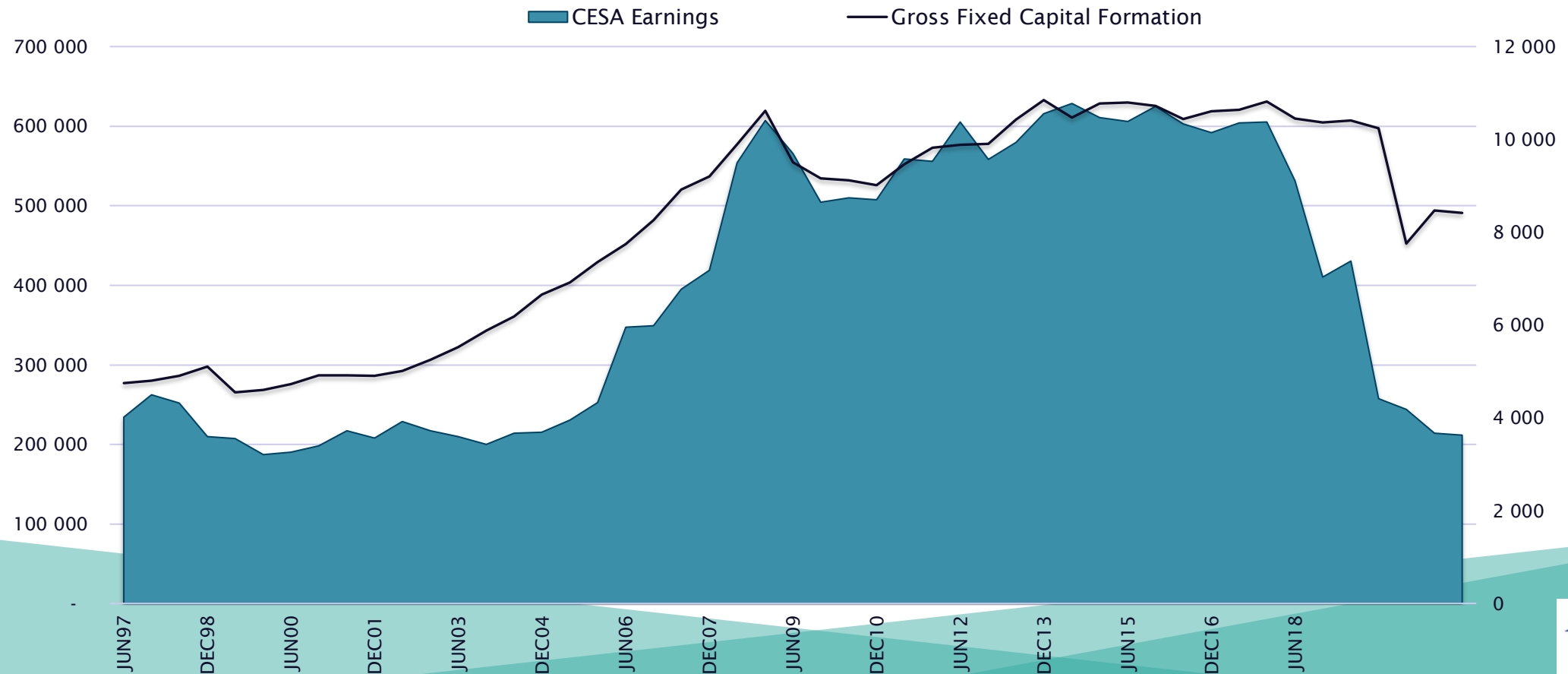
Profile of respondents by firm size



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

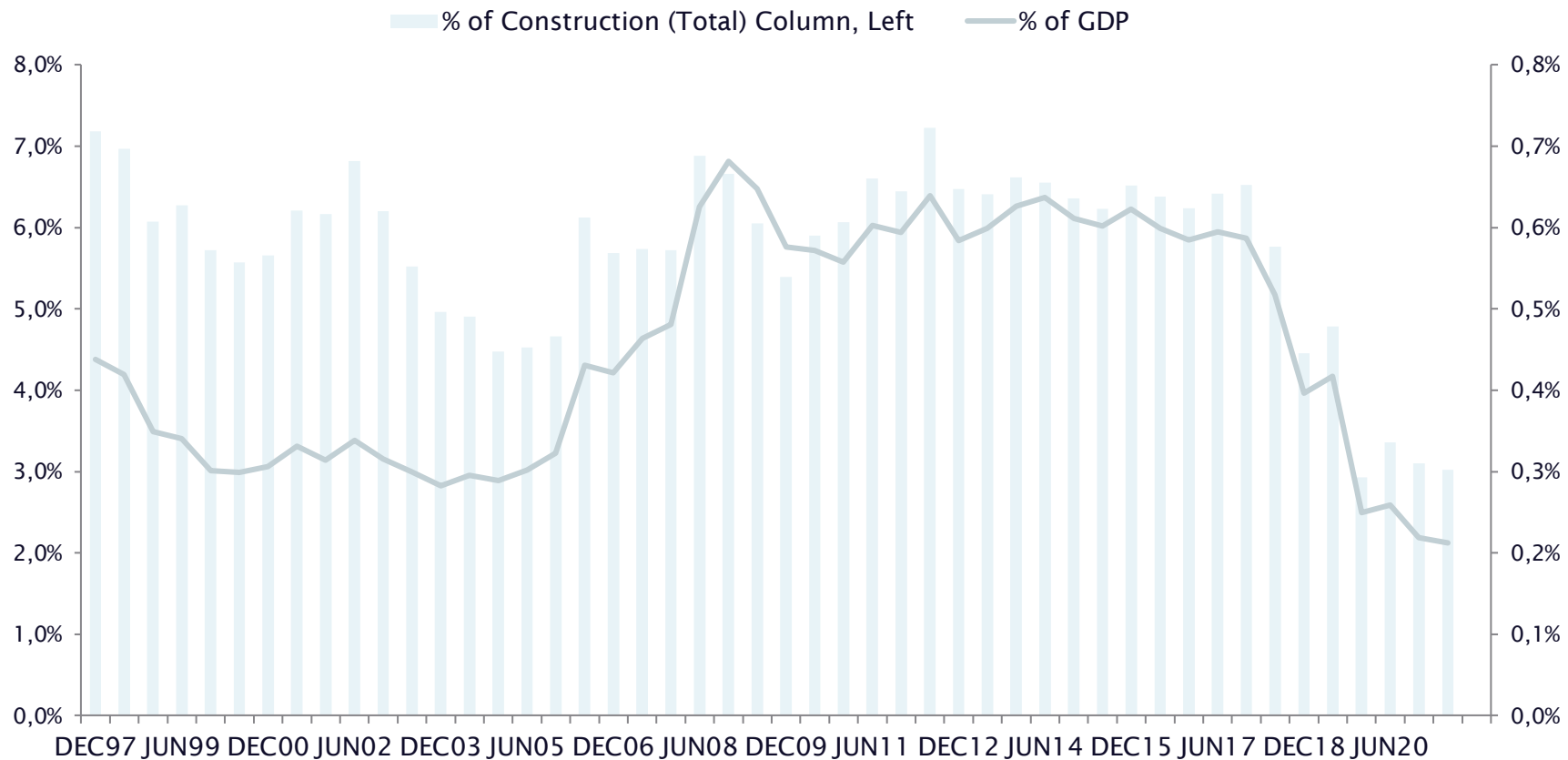
Fee earnings vs GFCF

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



Earnings as % of GDP / GFCF Construction

Consulting Engineering Fee Earnings: Percentage contribution

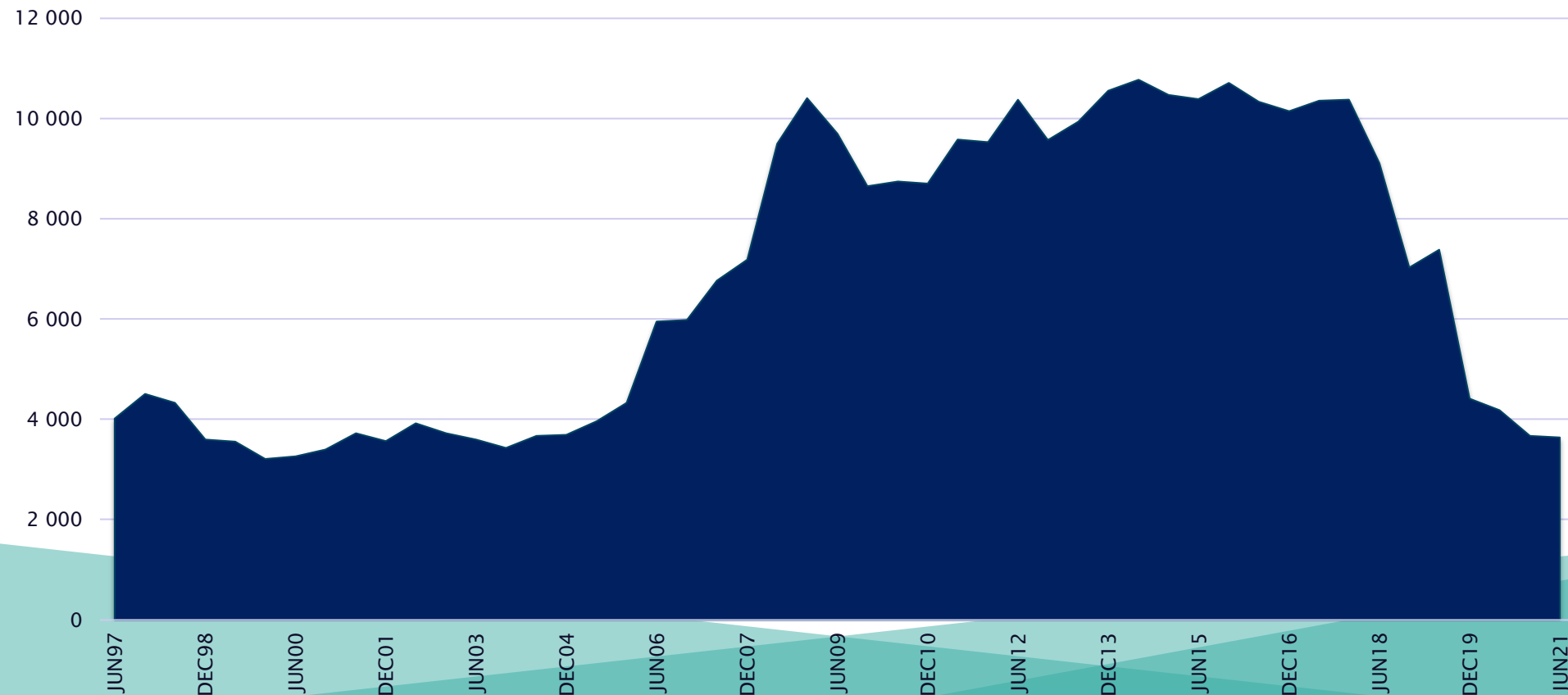


Fee Income, Rbn 2000 prices

Annualised | Deflator CPI

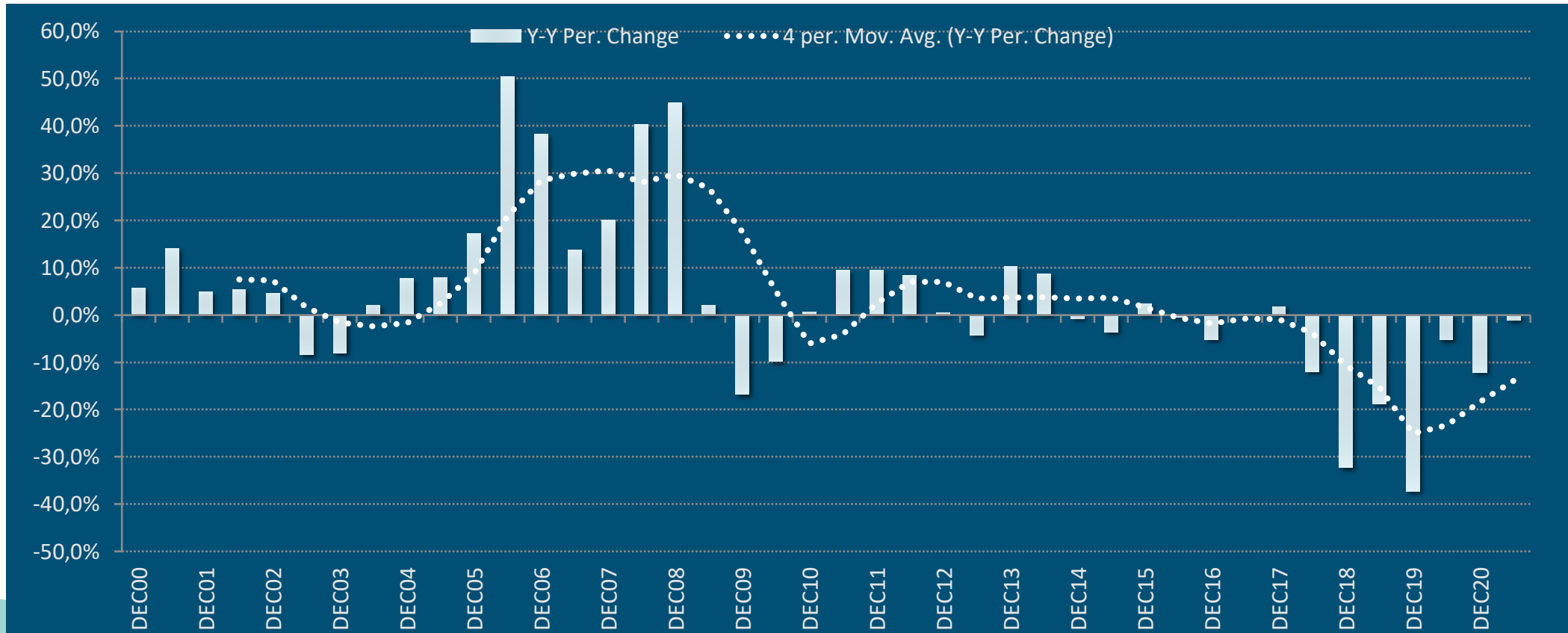
Consulting earnings vs GFCF: Civil construction works (2000 prices)

■ CESA Earnings



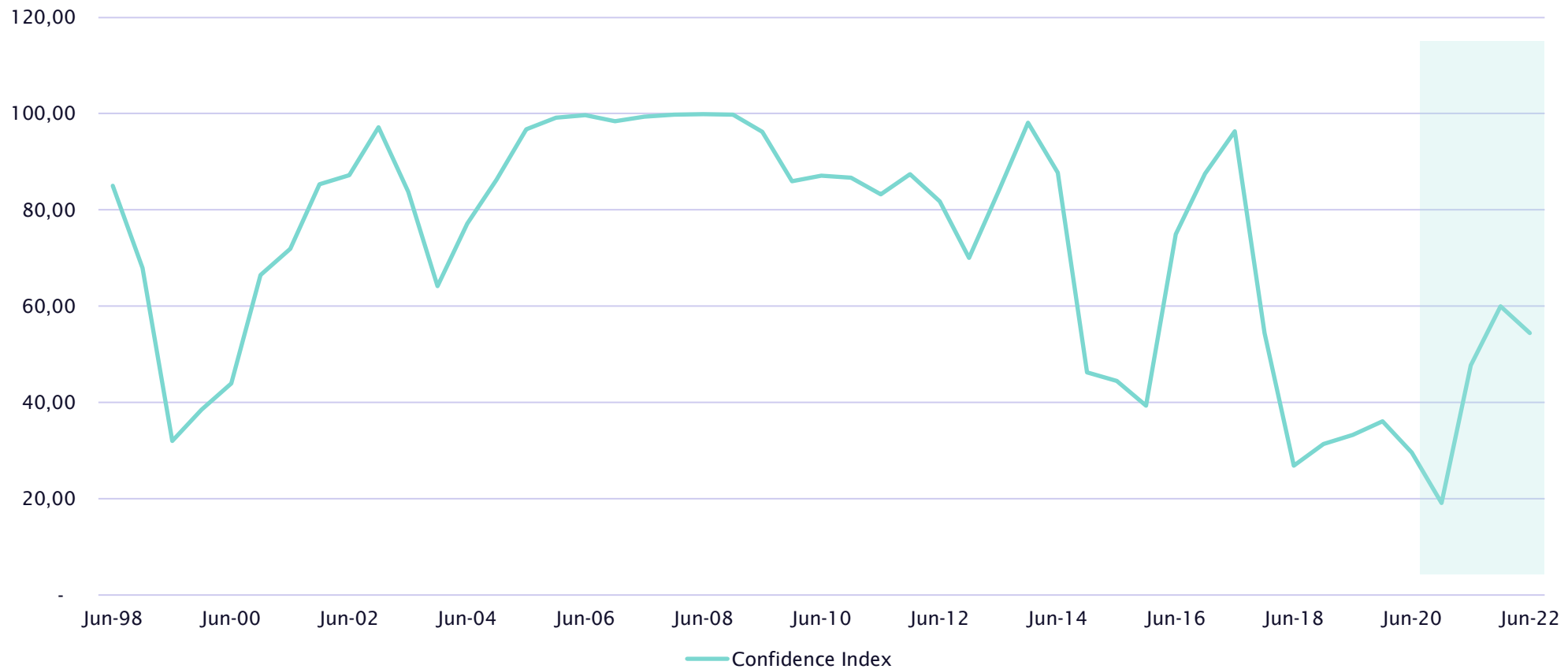
Real Fee income

Annual Change

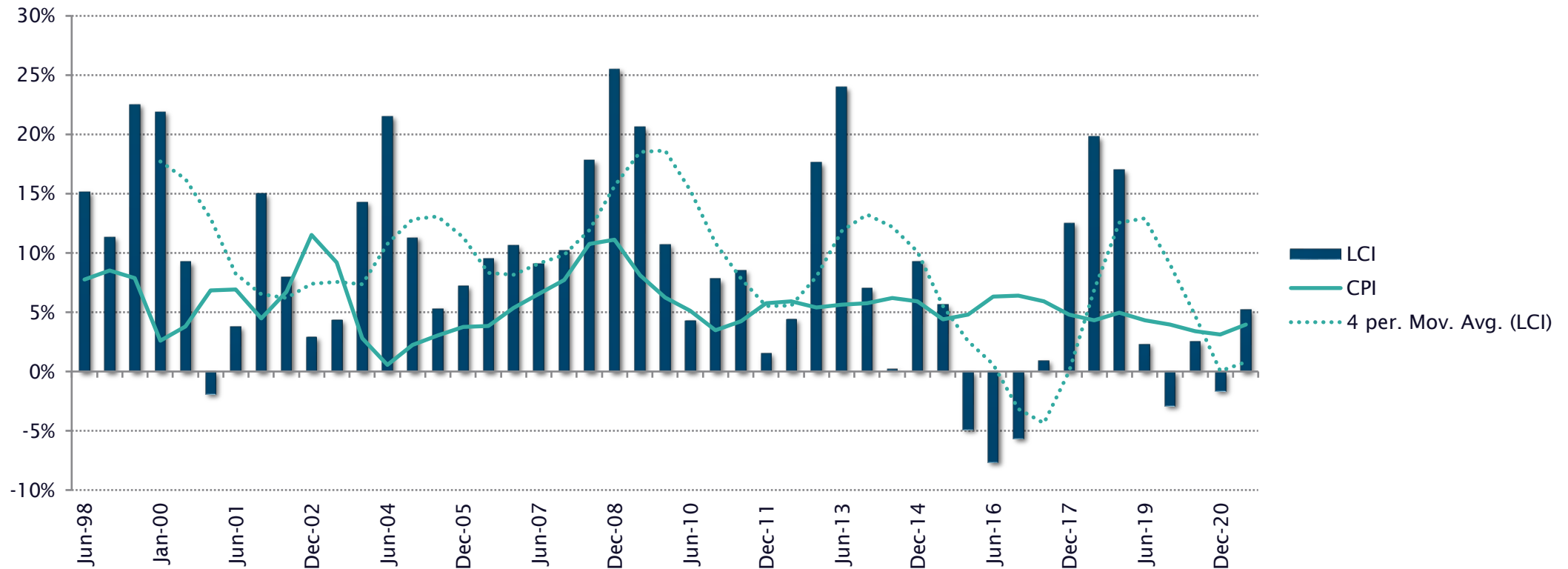


Confidence Index

Consulting Engineering Industry - Confidence Index
Satisfaction Rate

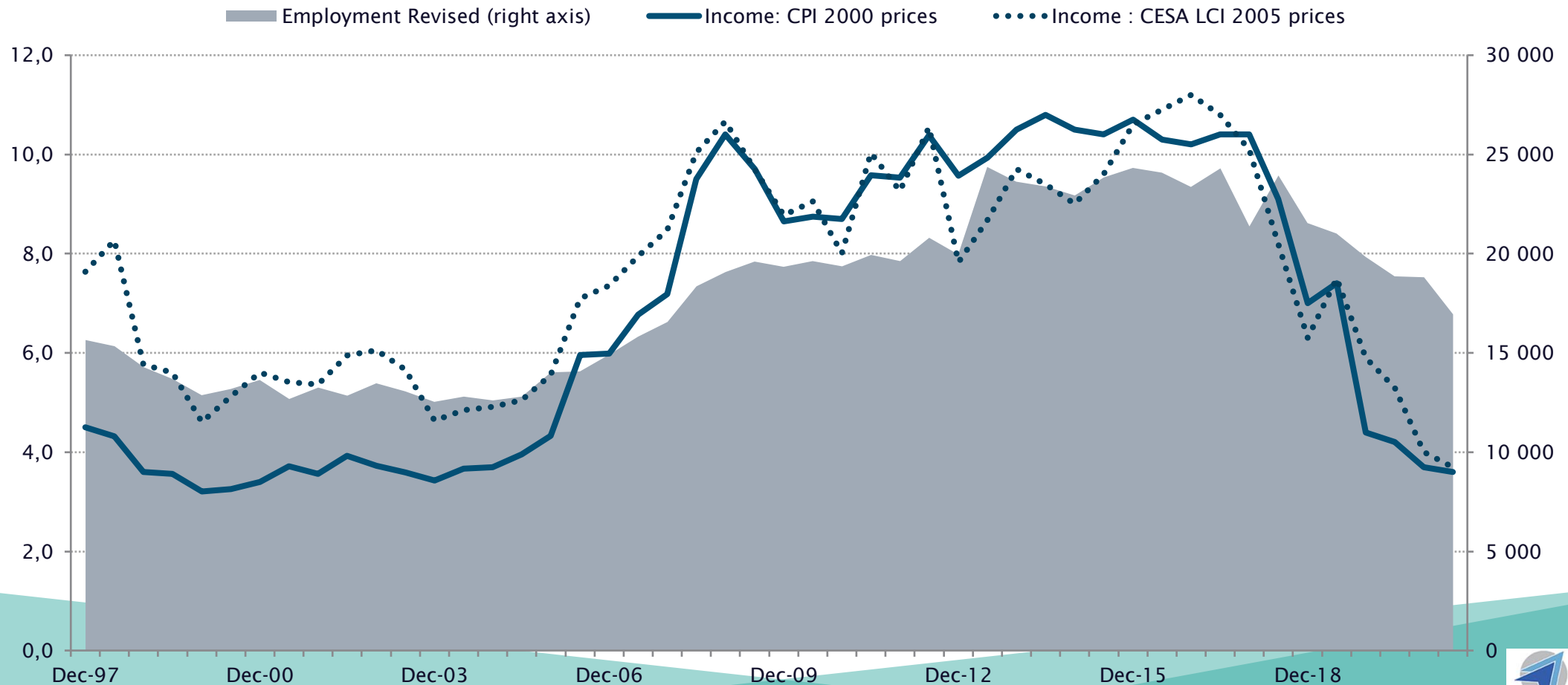


Labour Cost Indicator (LCI)

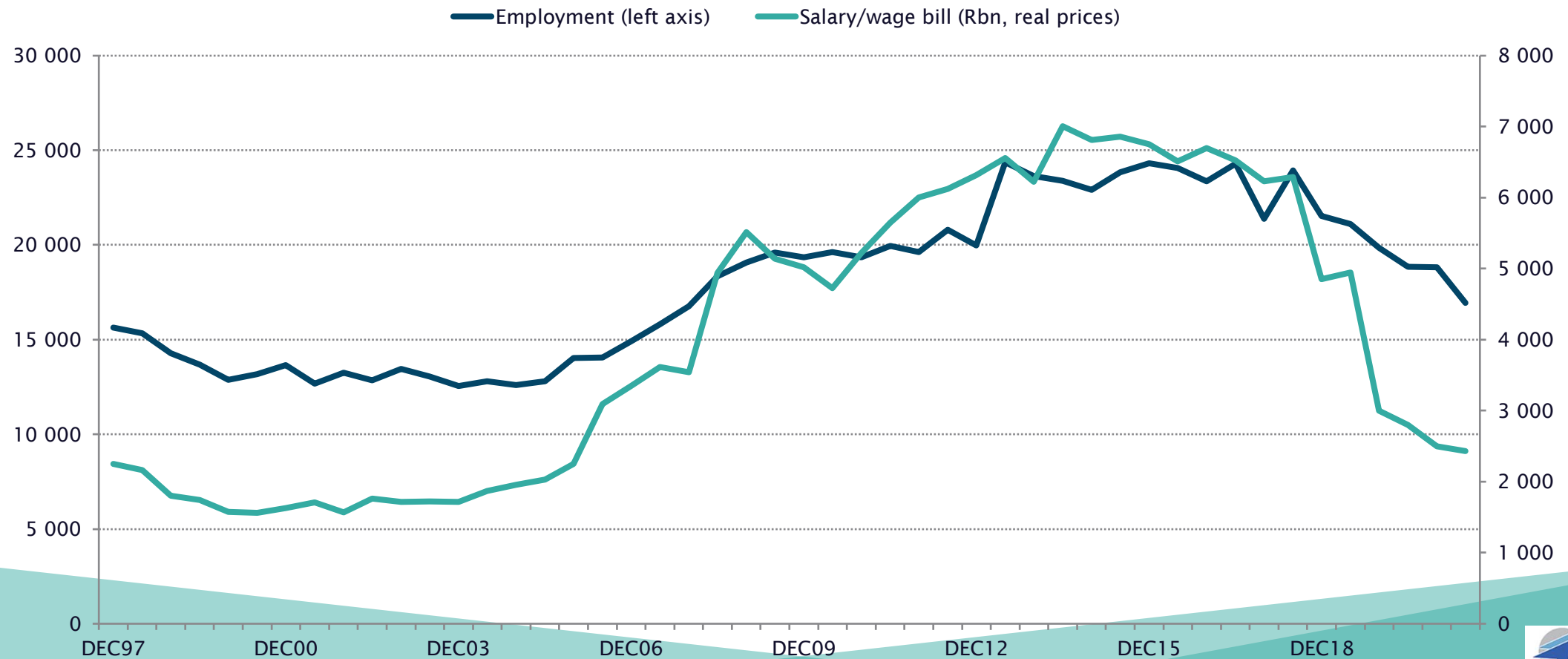


Employment vs Fee income (Constant prices)

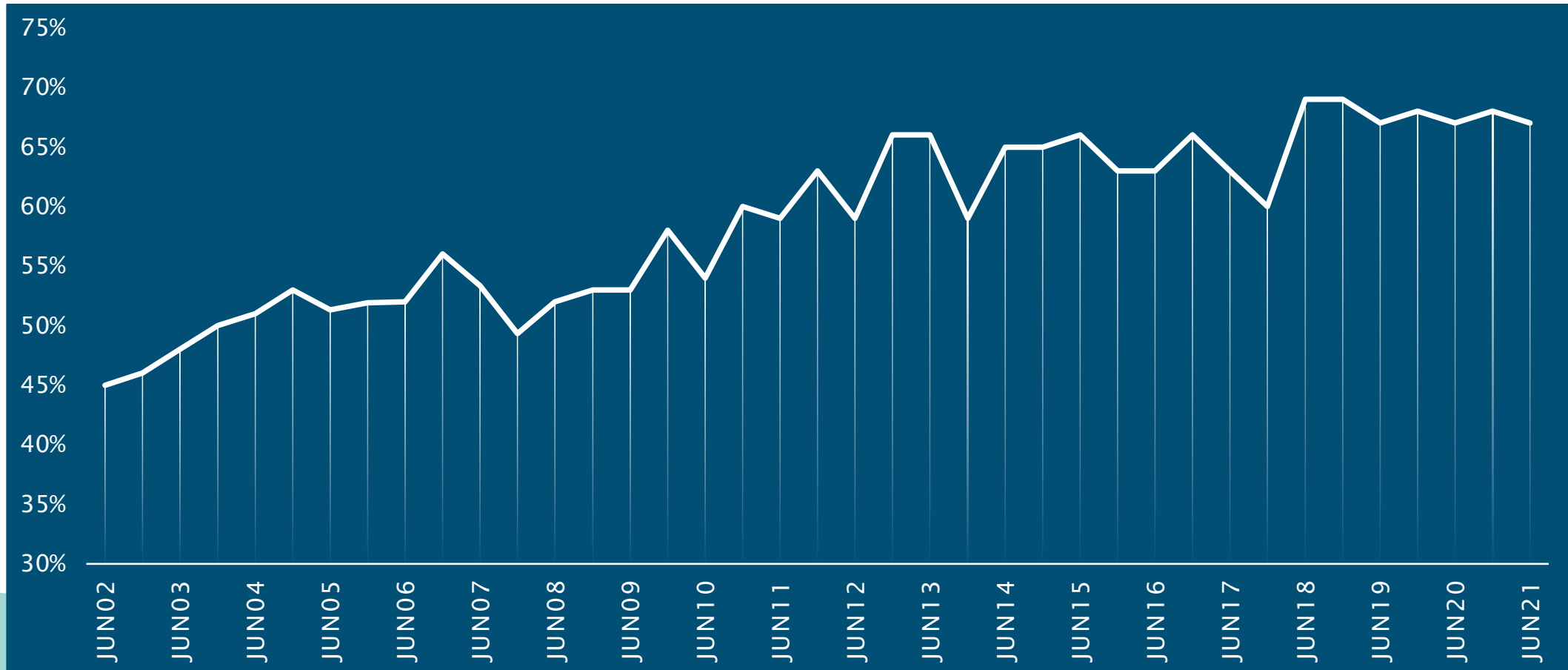
Using the CPI & LCI



Salary and Wages vs Employment



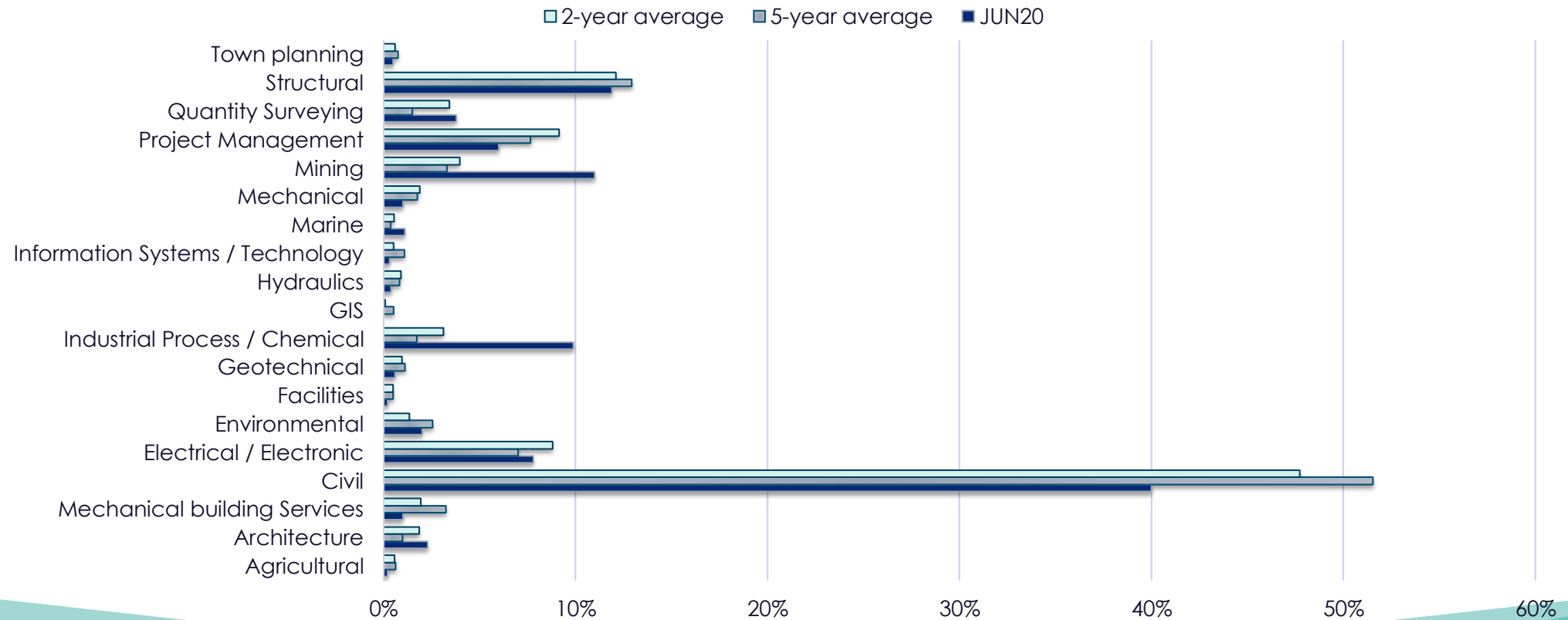
Salary and wage bill % of gross fee earnings



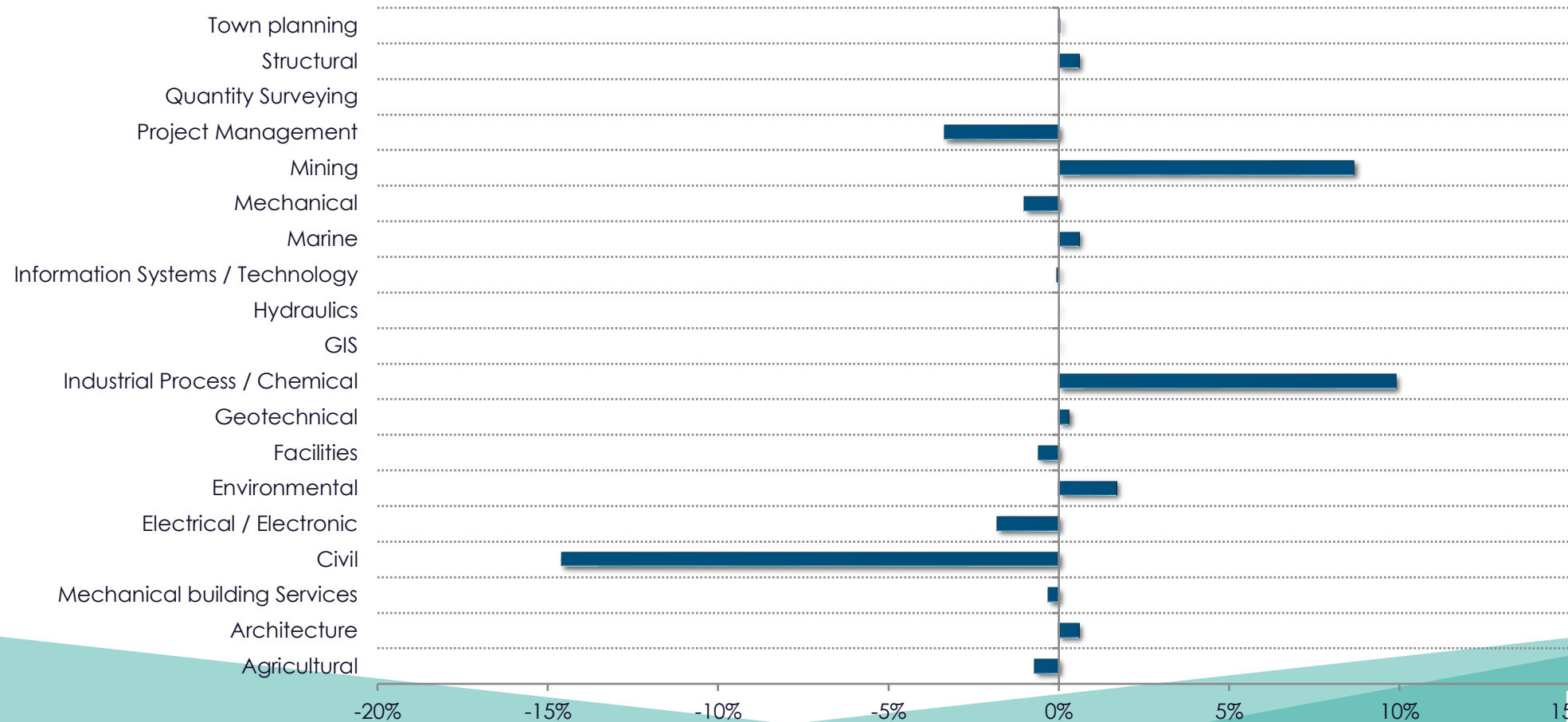
Industry Profile

DISCIPLINES, SECTOR, CLIENTS, GEOGRAPHIC PROFILE

Earnings by Sub-discipline: % Share

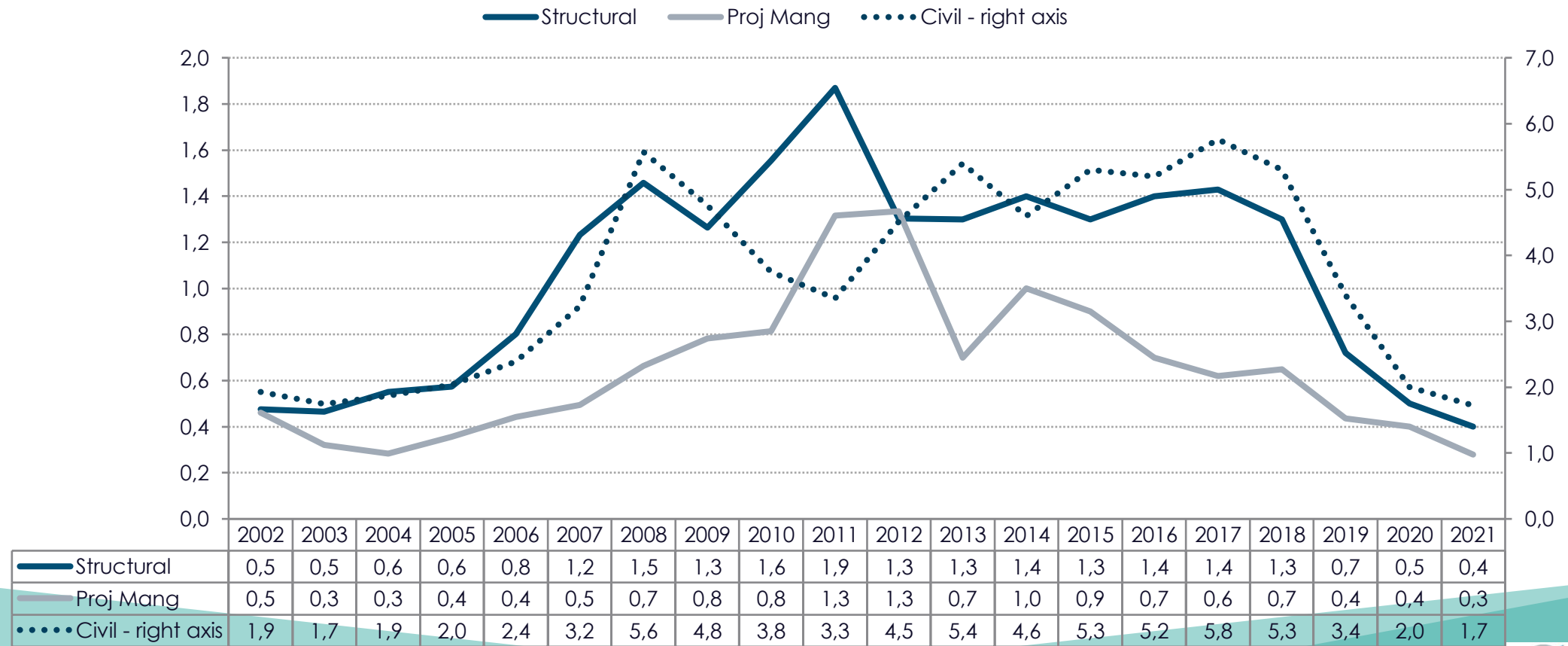


Change in last 6 months



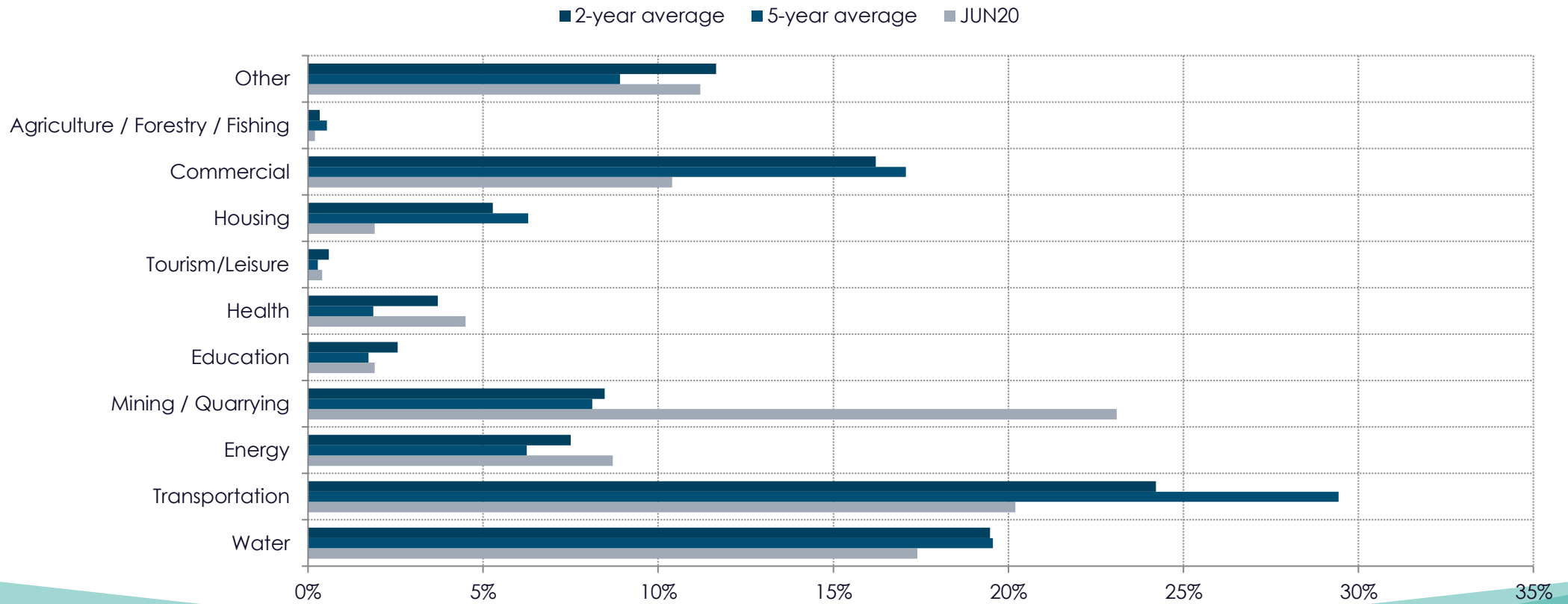
Earnings by top 3 disciplines

2 survey period Moving average, Rbn 2000 prices

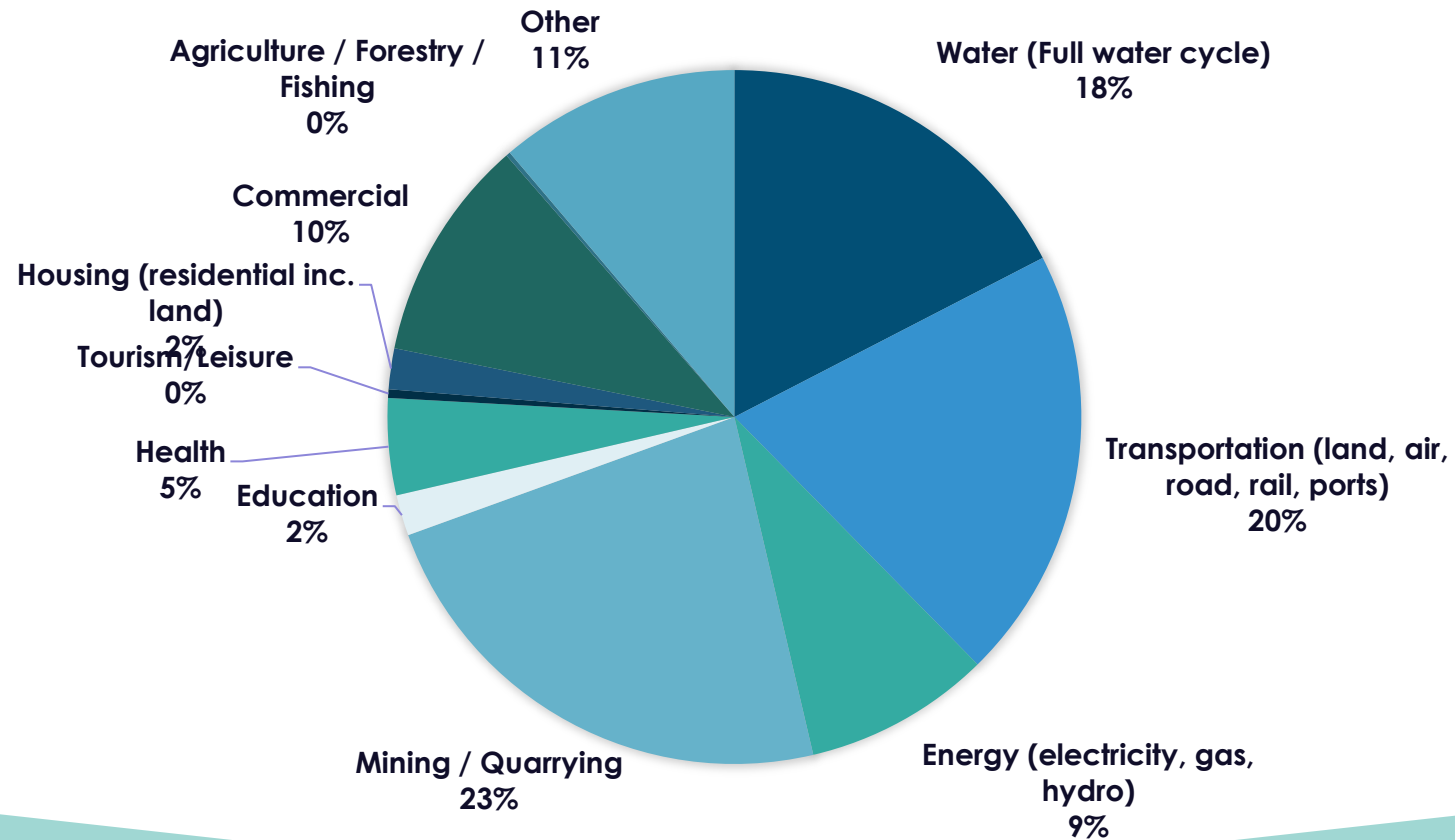


Earnings by Economic Sector

Percentage market share

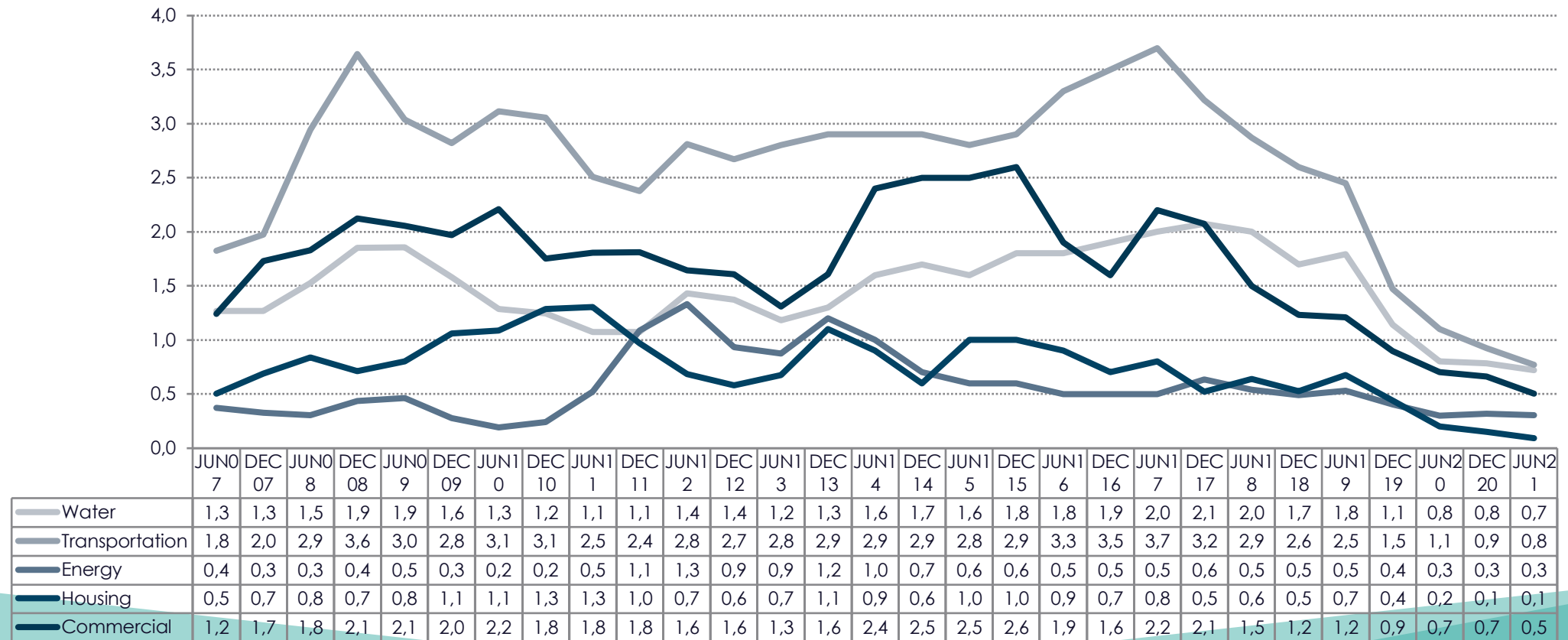


Earnings profile by Economic Sector

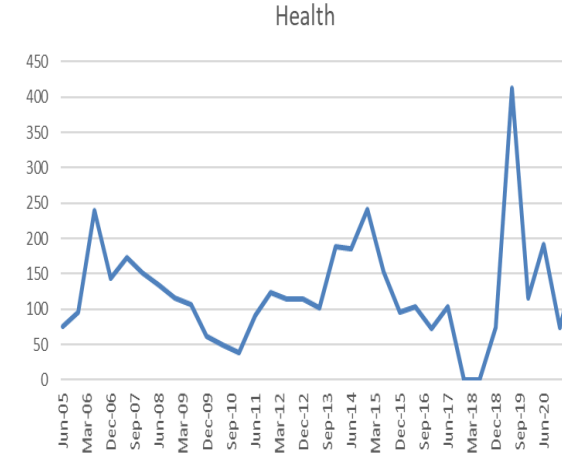
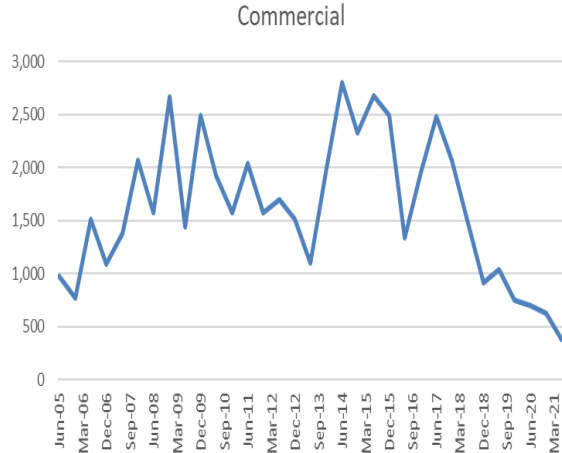
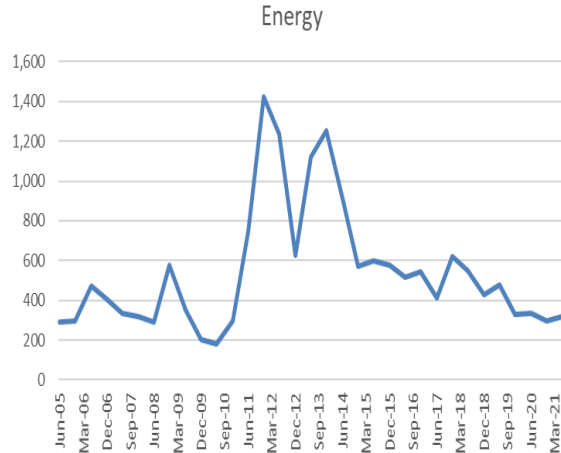
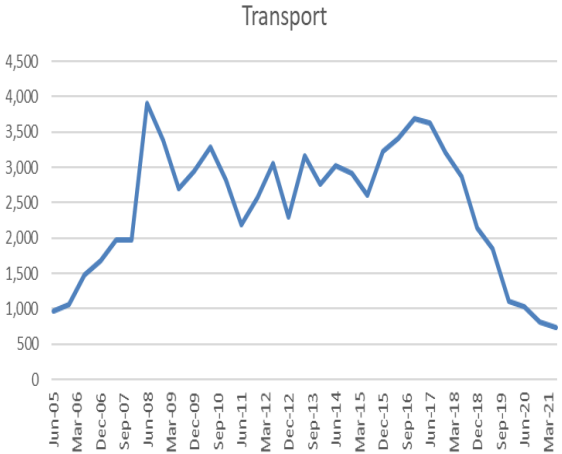
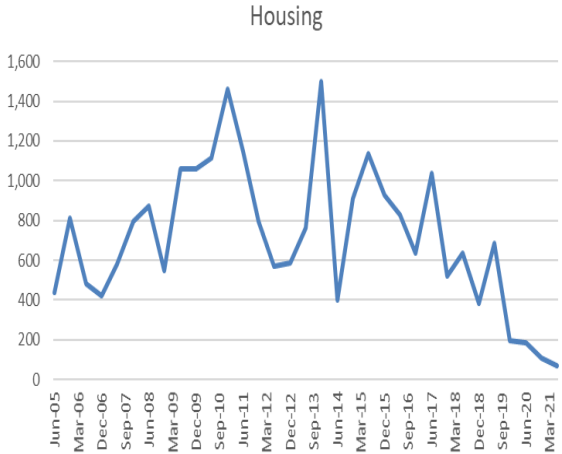
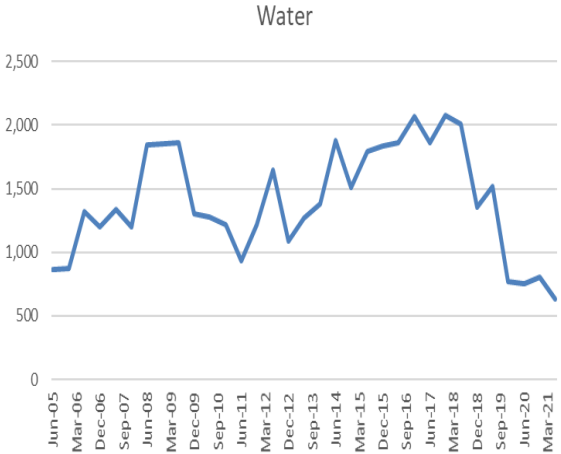


Earnings by selected sector

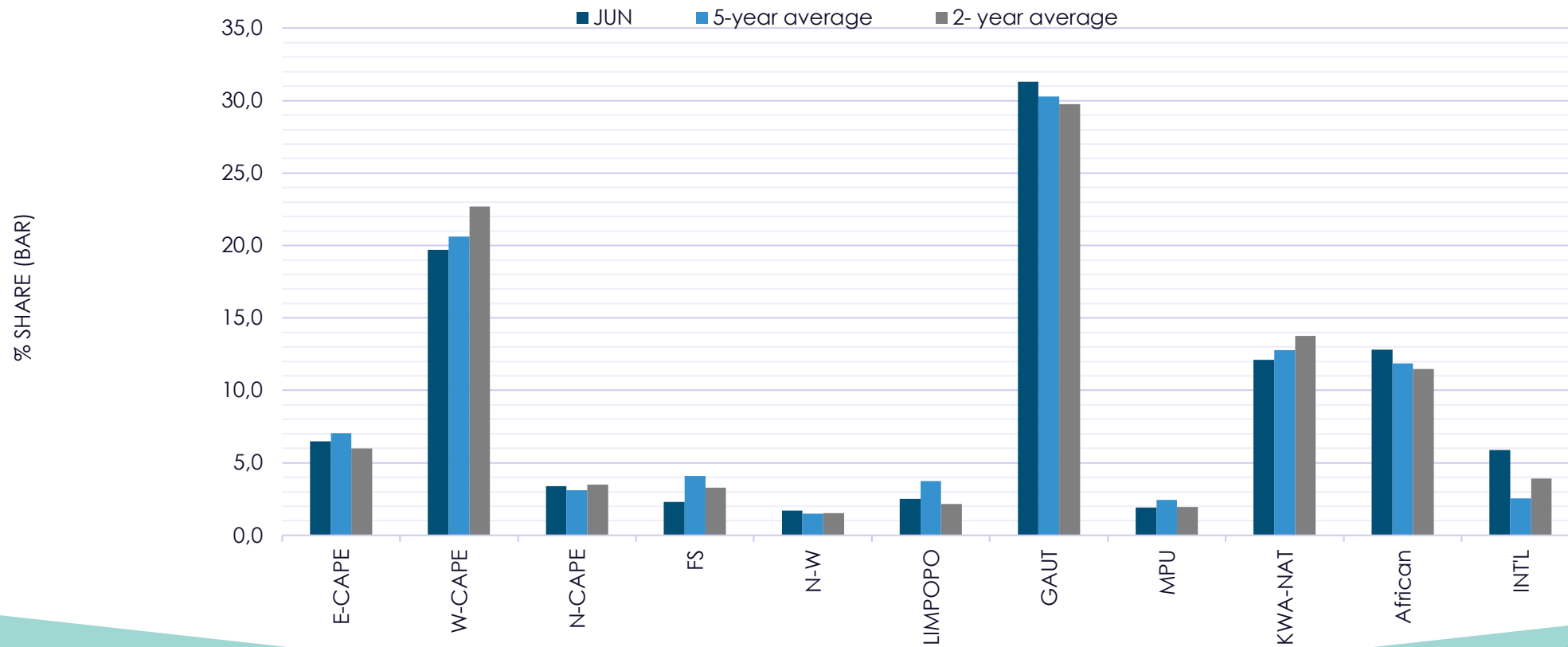
Rbn 2000 prices | Smoothed | 2 survey period moving average



Annualised Earnings by key economic sector

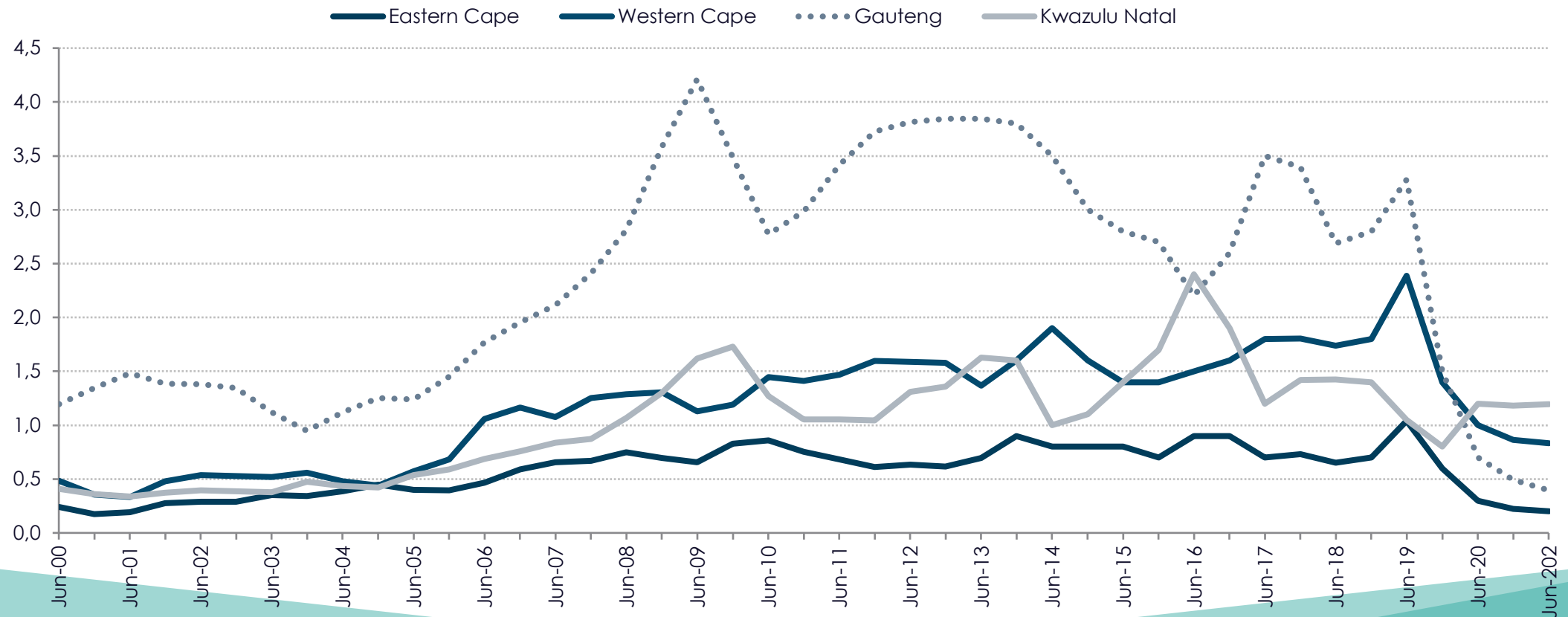


Provincial Market Share



Earnings by province

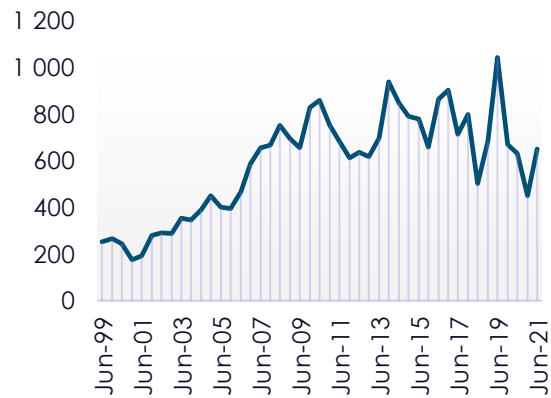
Rbn constant prices | High capacity provinces | Smoothed | 2 survey period



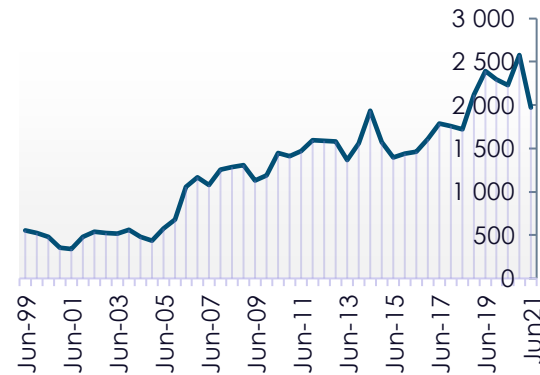
Earnings by province

Rm constant prices

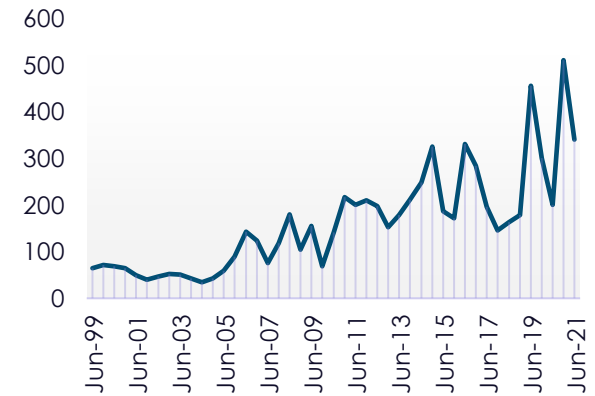
Eastern Cape



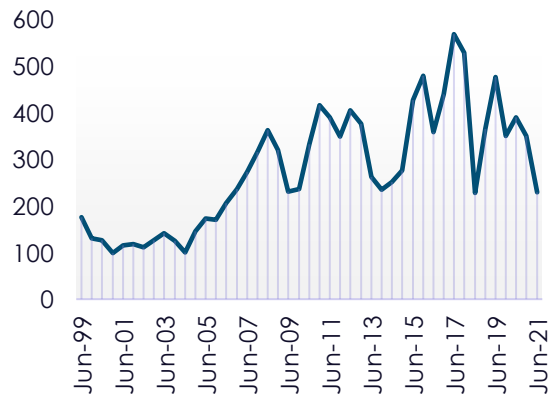
Western Cape



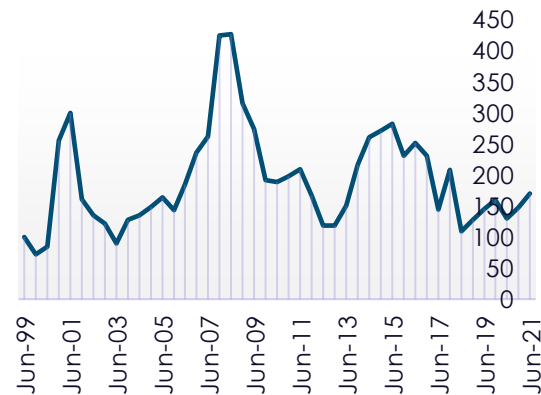
Northern Cape



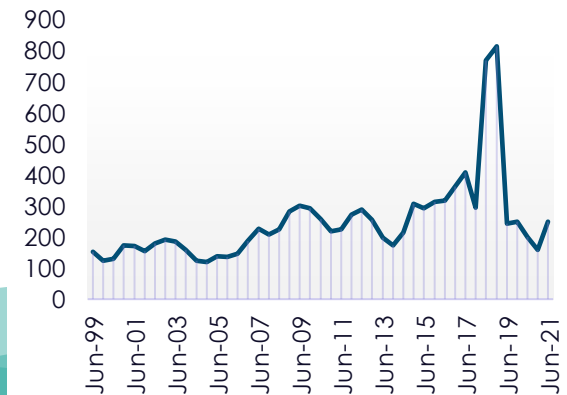
Free State



North West



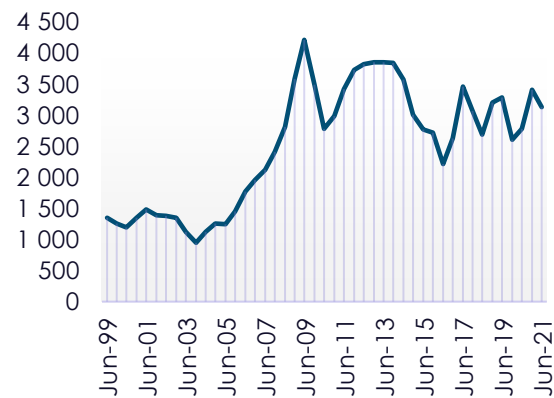
Limpopo



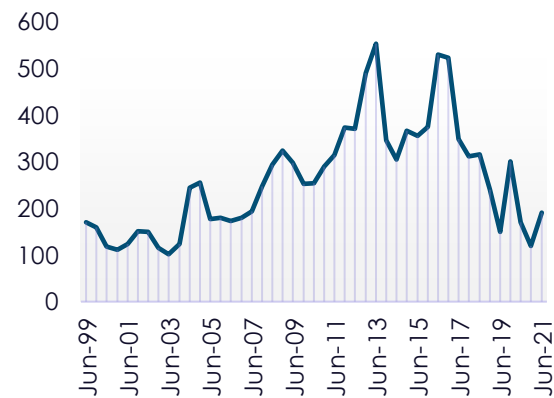
Earnings by province

Rm constant prices

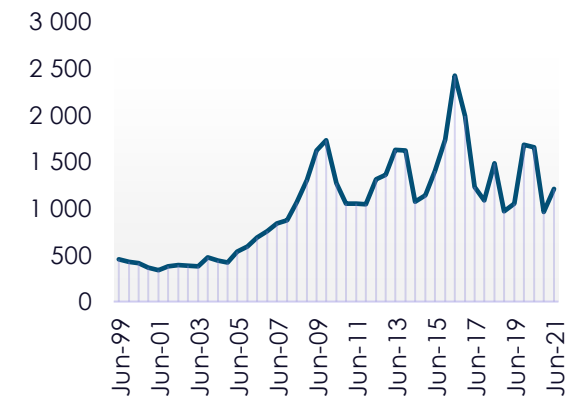
Gauteng



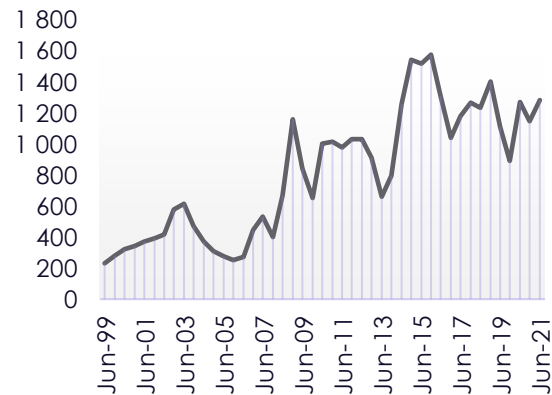
Mpumalanga



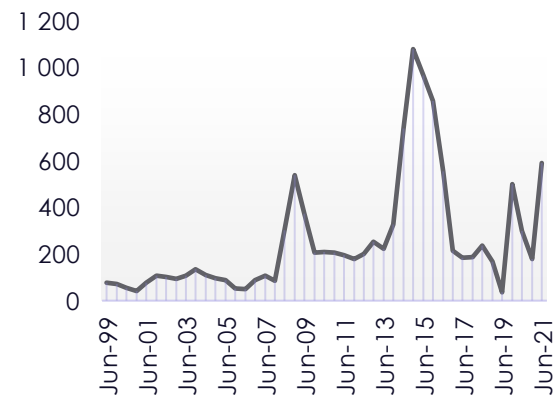
Kwazulu Natal



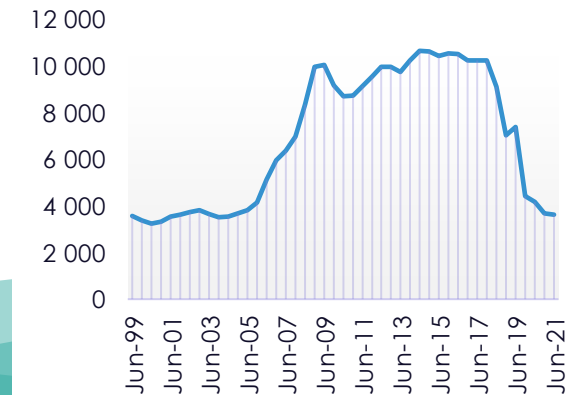
Africa



International

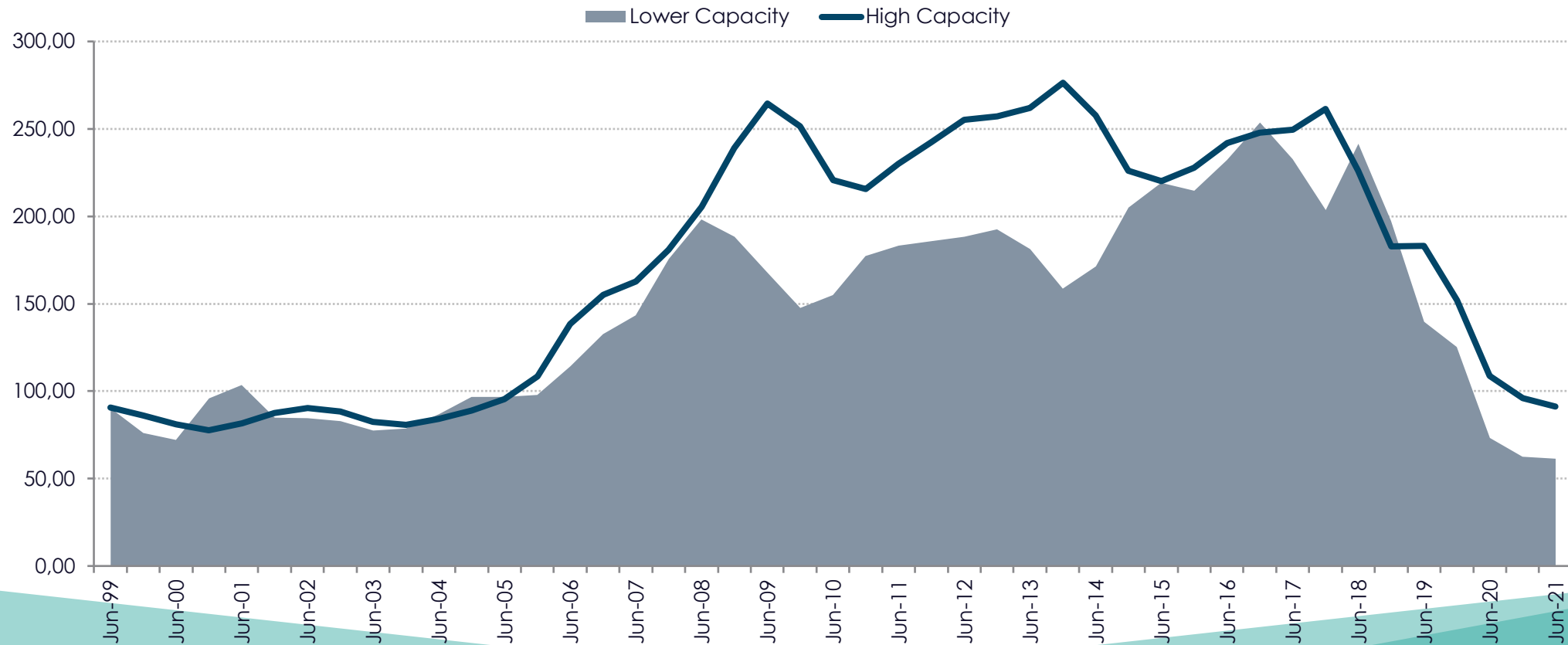


Total Fee Earnings



Earnings vs High and lower capacity provinces

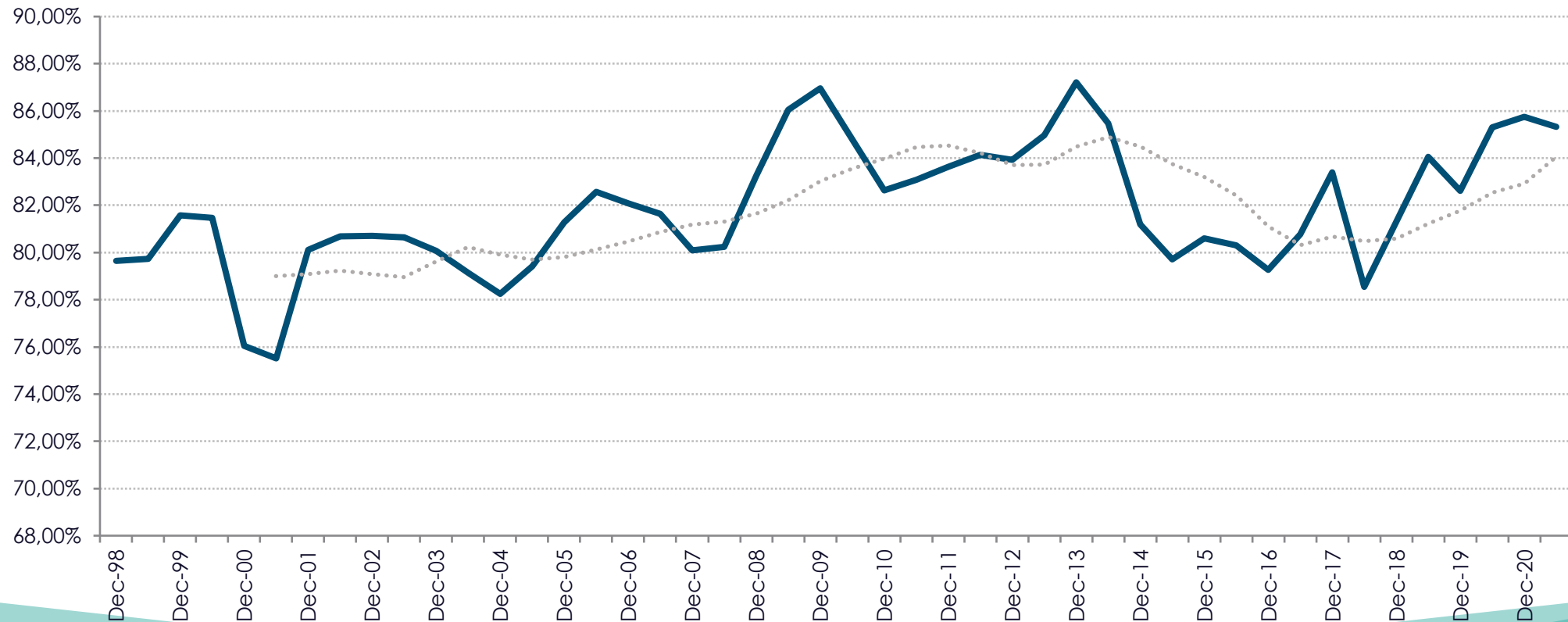
Index 1998 = 100



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

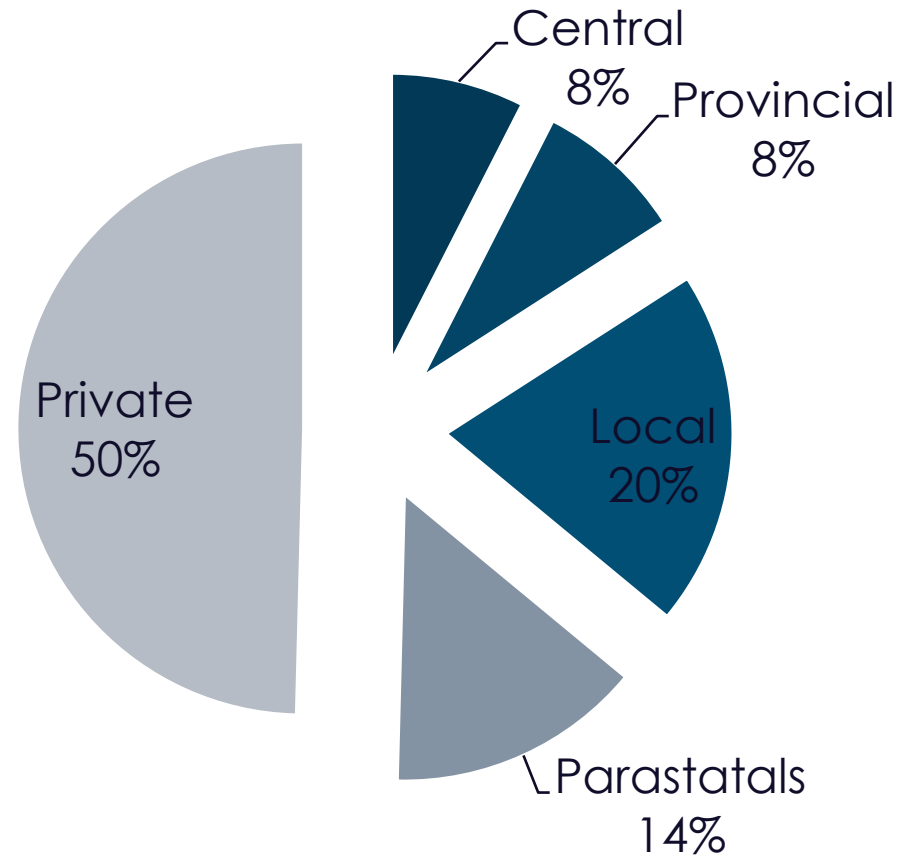
Contribution by higher capacity provinces

Percentage of total earnings

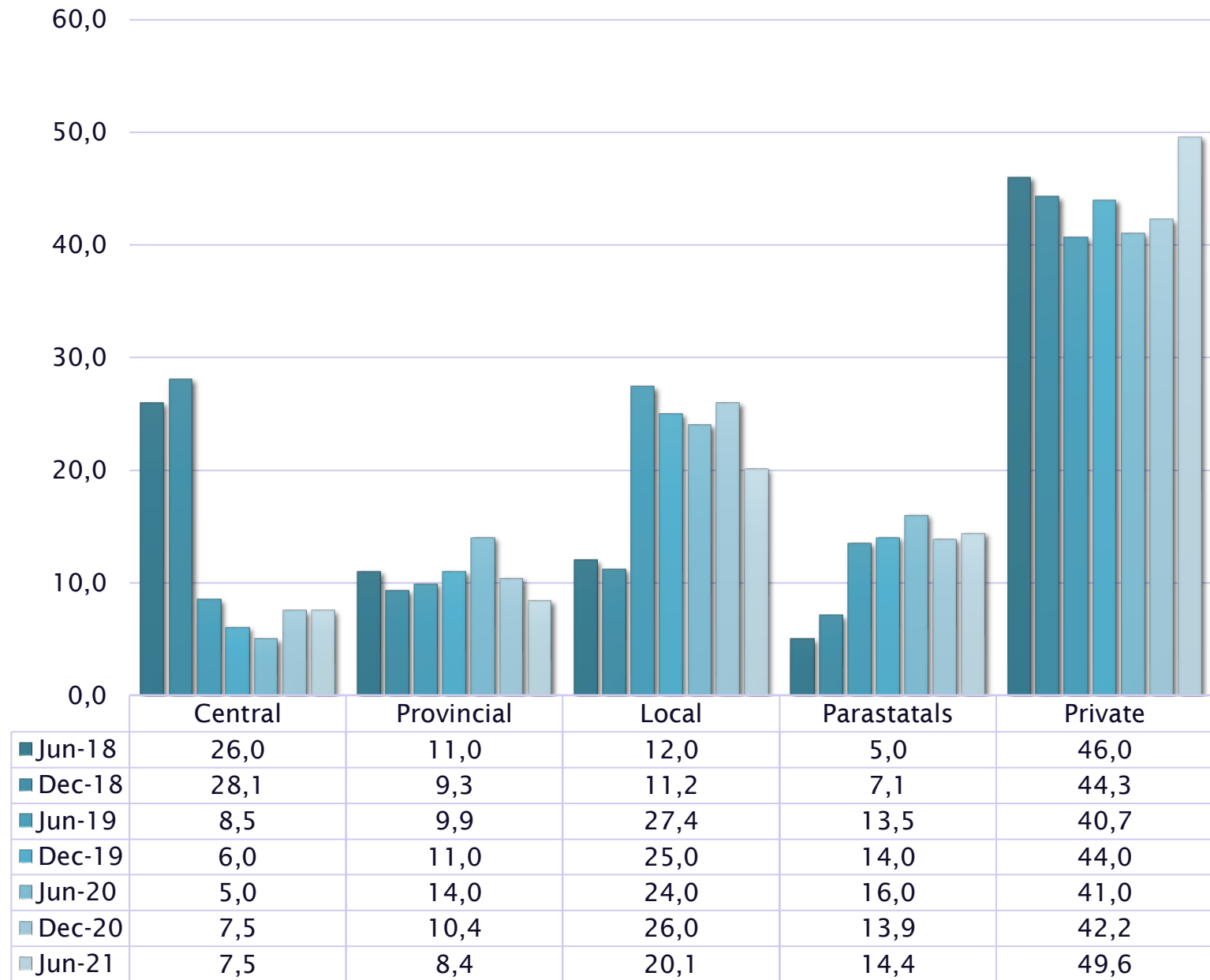


- High Capacity: Gauteng, Western Cape, Eastern Cape, Kwazulu Natal
- Low capacity: North West, Free State, Northern Cape, Limpopo, Mpumalanga

Earnings by Client Type

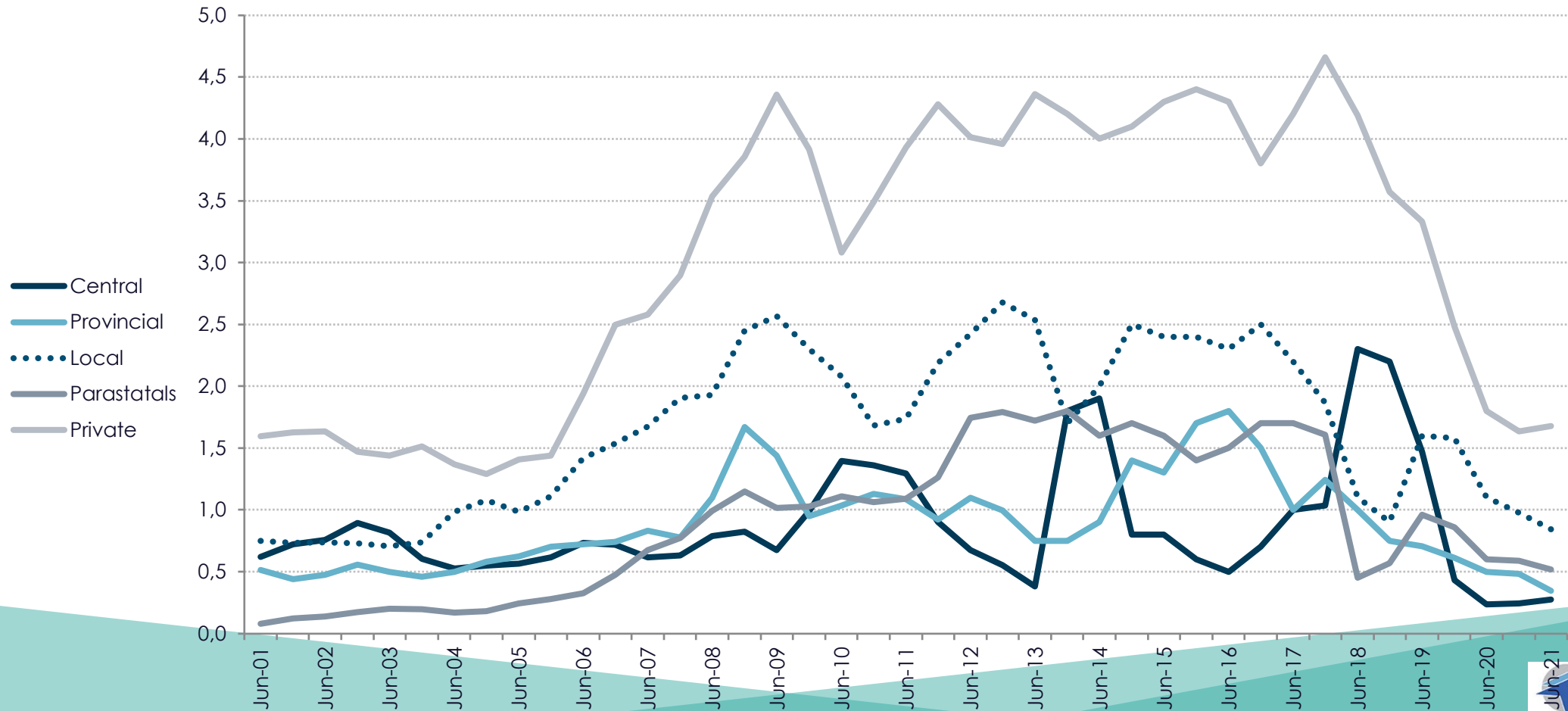


Earnings by Client Type



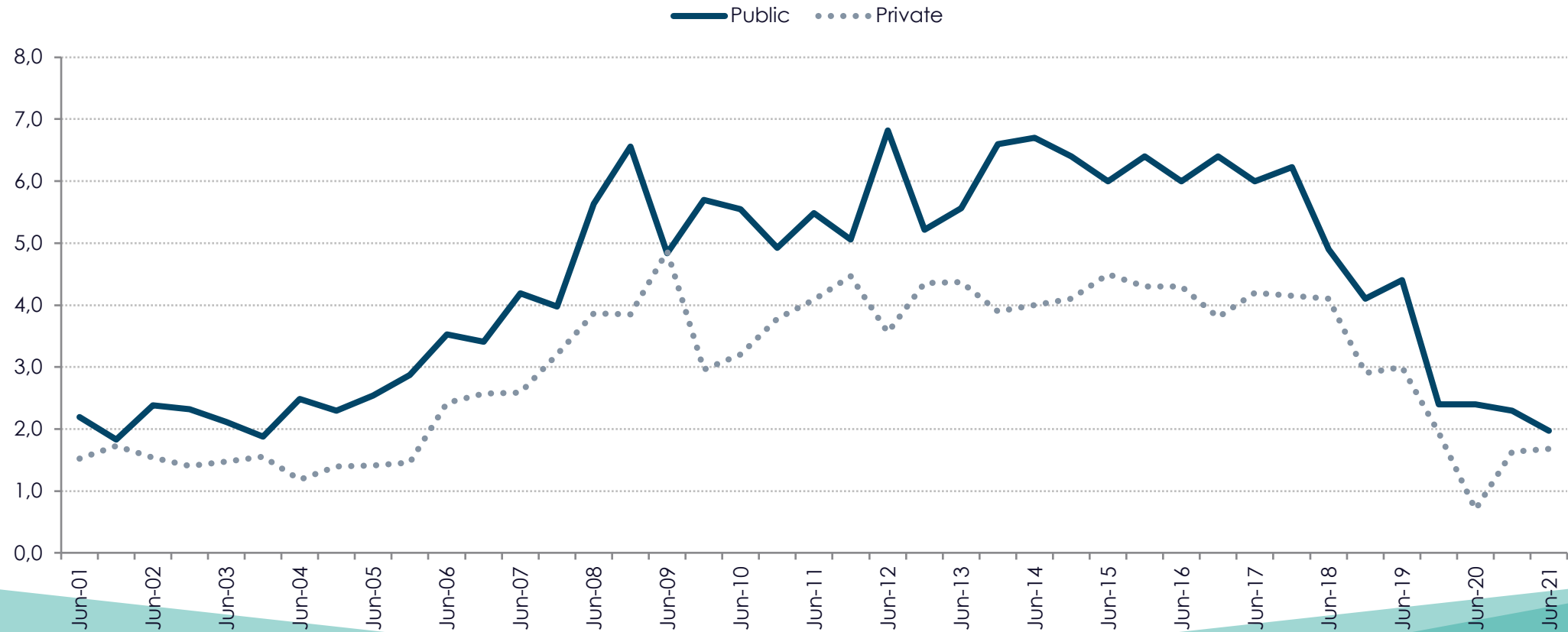
Earnings by Client Type

Rbn constant prices | Smoothed Annualised



Earnings by Client Type: Private vs Public

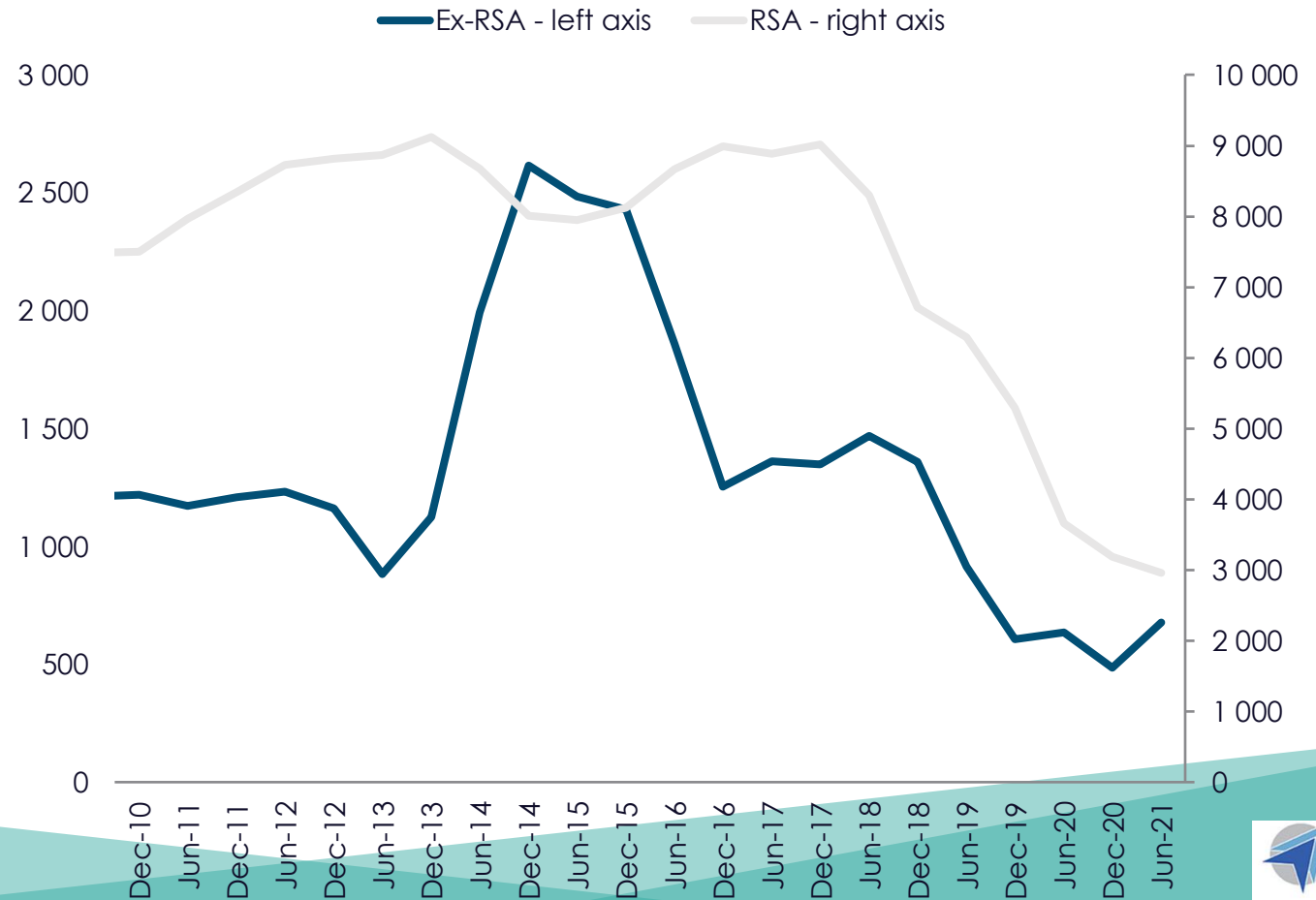
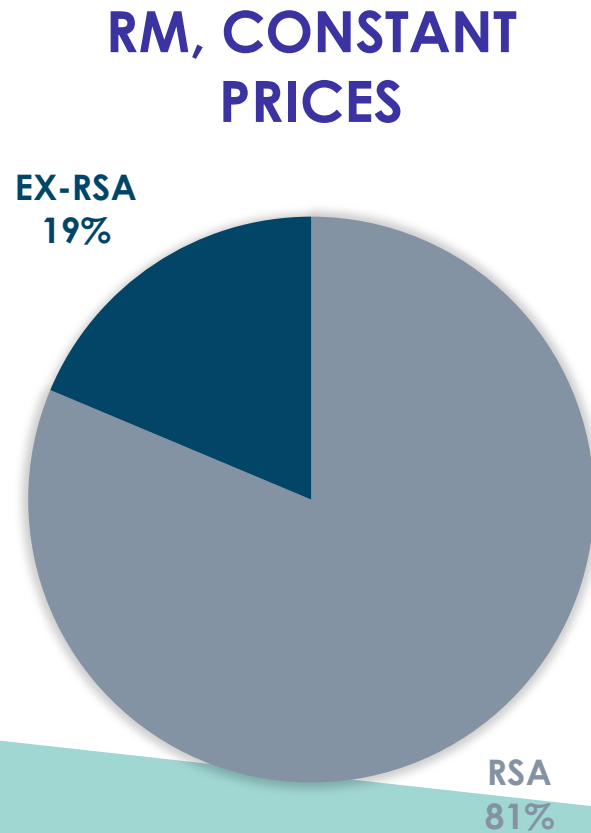
Rbn constant prices | Smoothed Annualised



Ex-RSA

Earning: RSA vs Ex-RSA

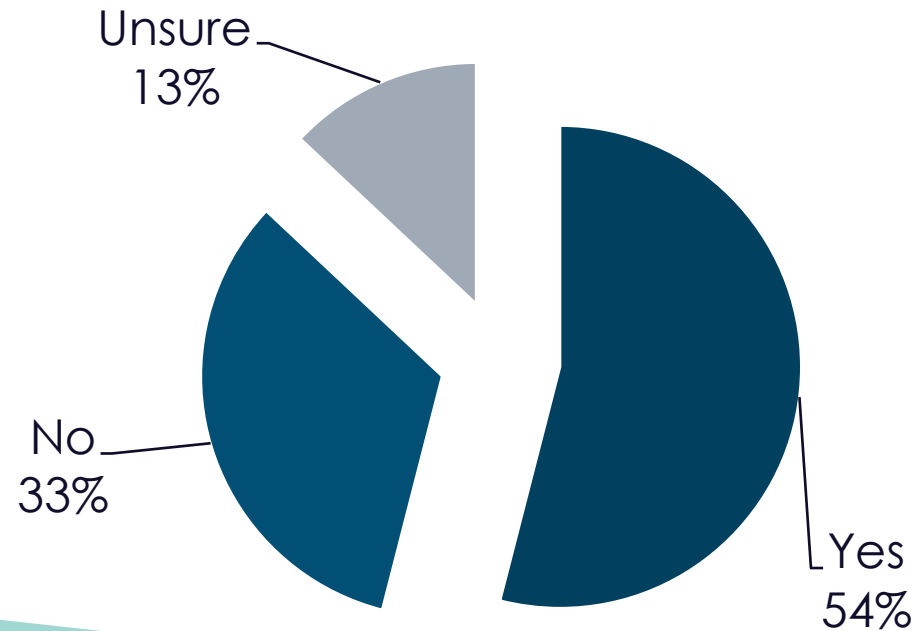
Rm, constant 2000 prices | Annualised smoothed



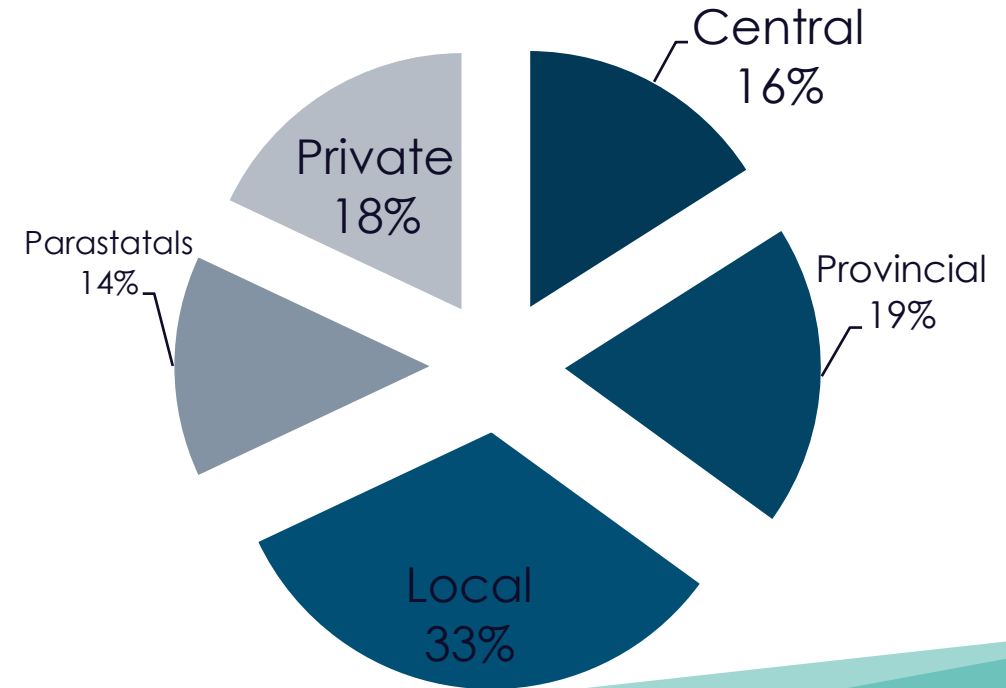
Business Cycle Indicators

Tender cancellations

Have you been involved in a tender that was later cancelled?

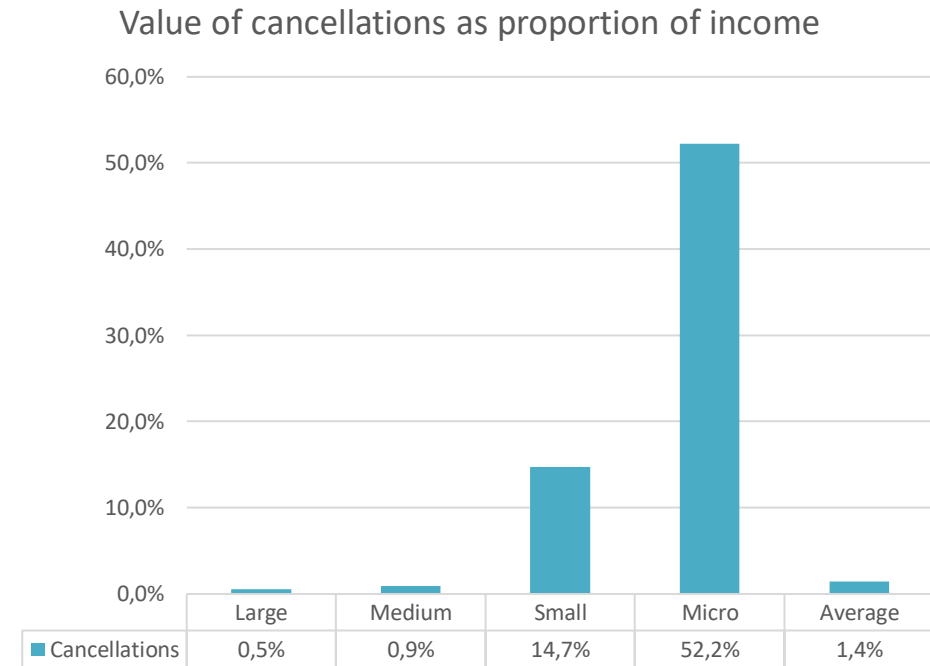


Origin of tender cancellation



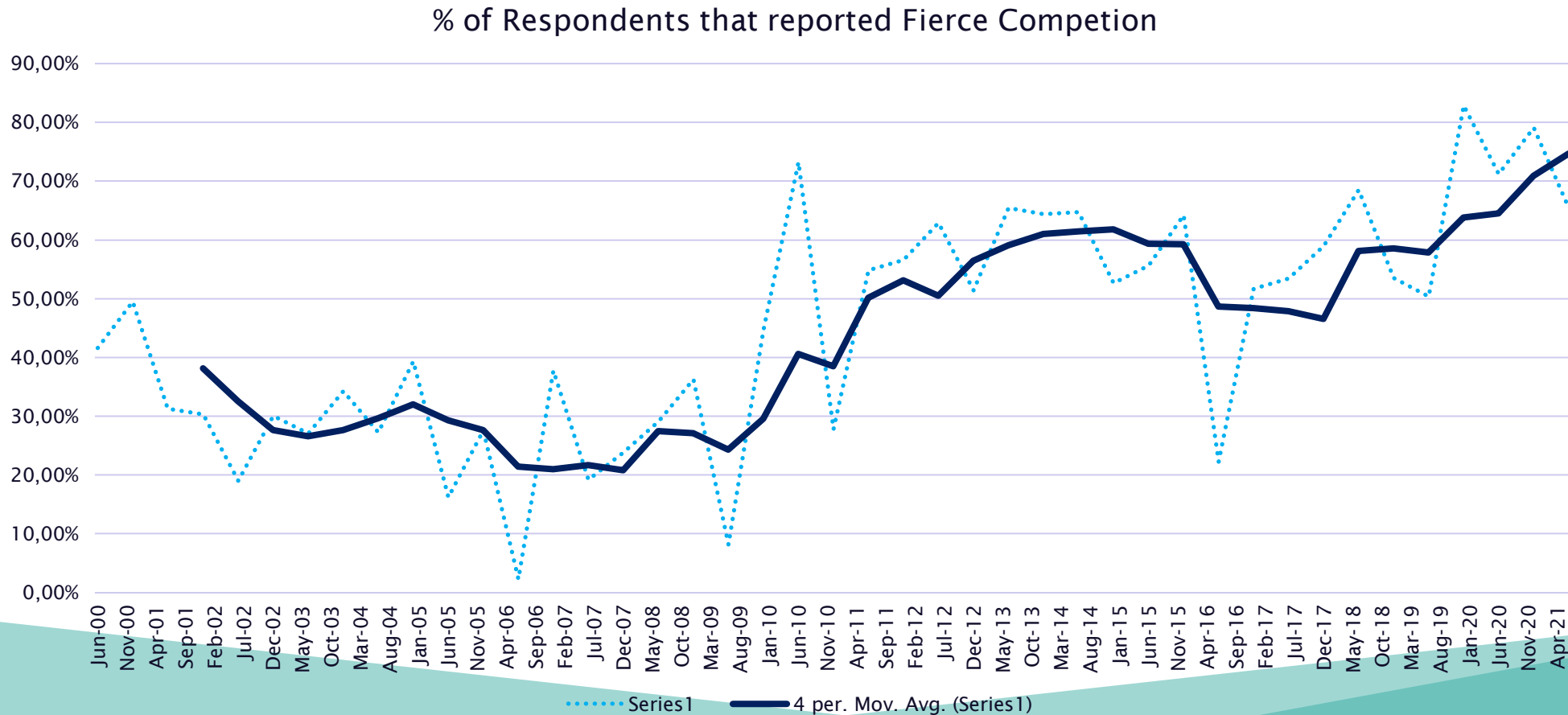
Tender cancellations

Firm size category	Total gross income	Project tendering cost (cancelled)	Percentage of Earnings
Large	2 295 082 610	12 046 391	0.5%
Medium	284 019 382	36 677 743	12.9%
Small	44 325 409	6 520 000	14.7%
Micro	32 901 924	17 181 000	52.2
Total	2 656 329 325	72 425 134	2.7%



Competition in Tendering

Percentage of respondents that reported “*fierce*” competition

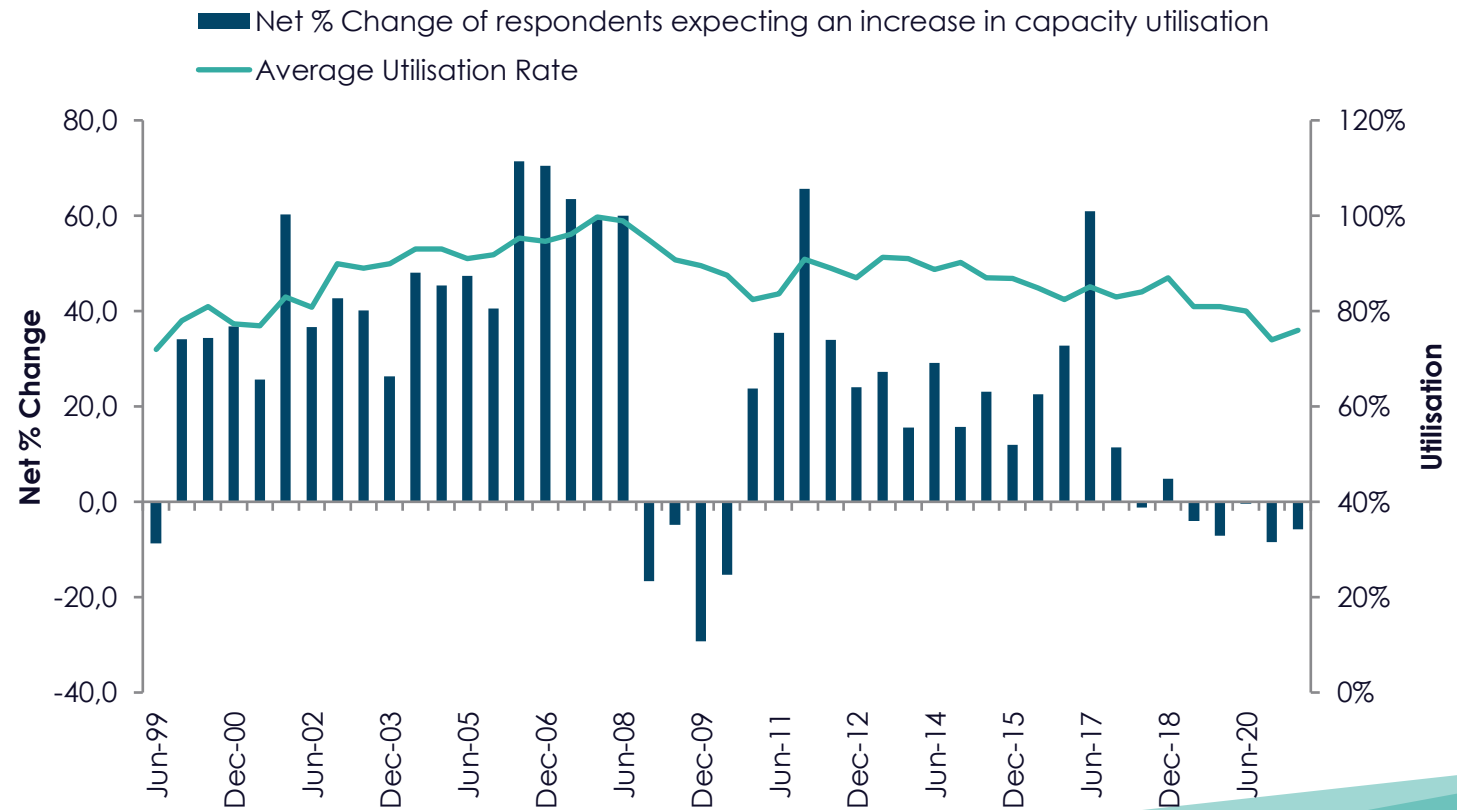


Industry Capacity Utilization

Existing technical staff

	Increase	Static	Decrease
Jan-Jun 2020	13.8%	76.9%	9.3%

76%



Average Discounting Rate

By firm category

27.1%

