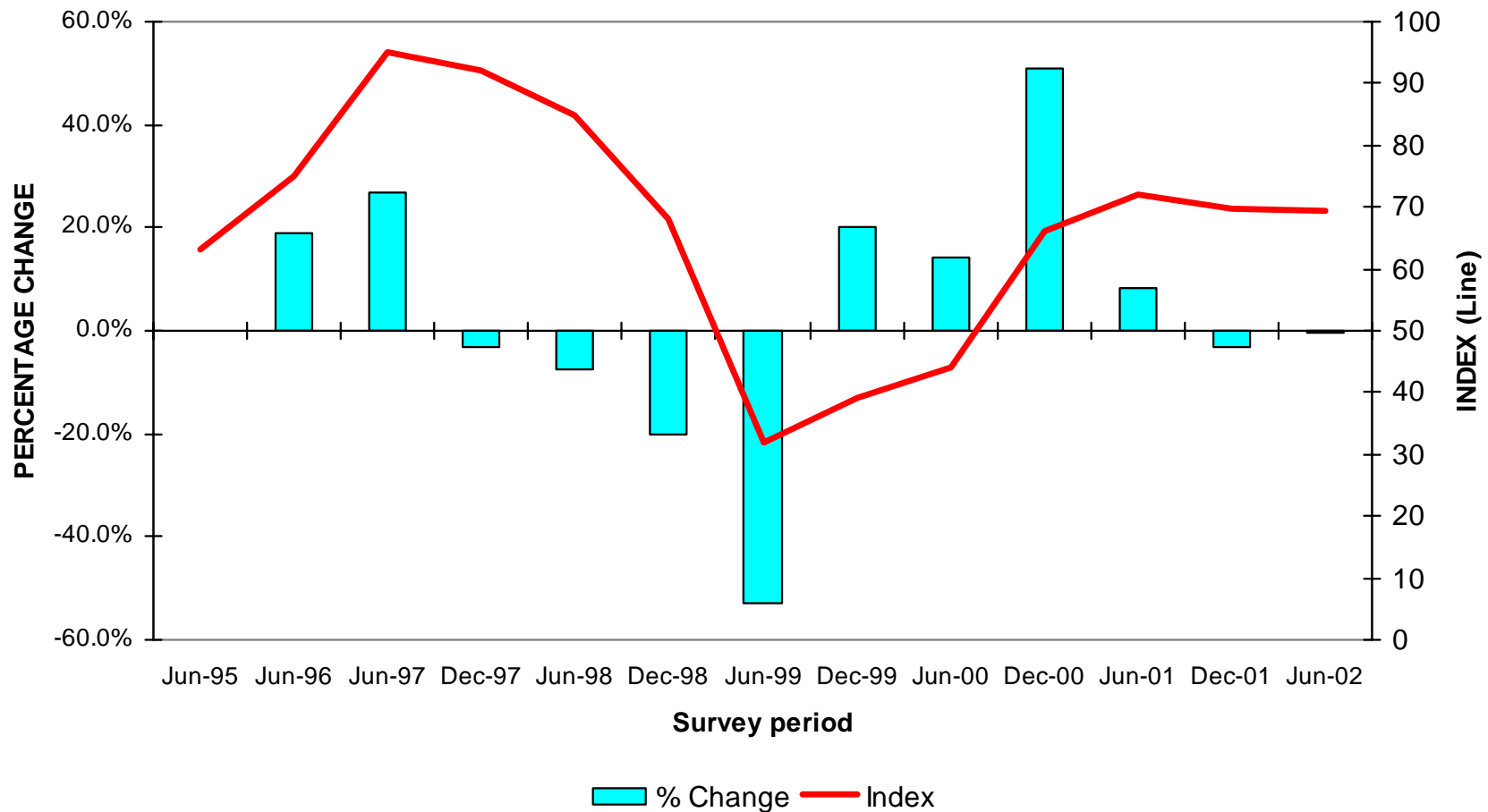
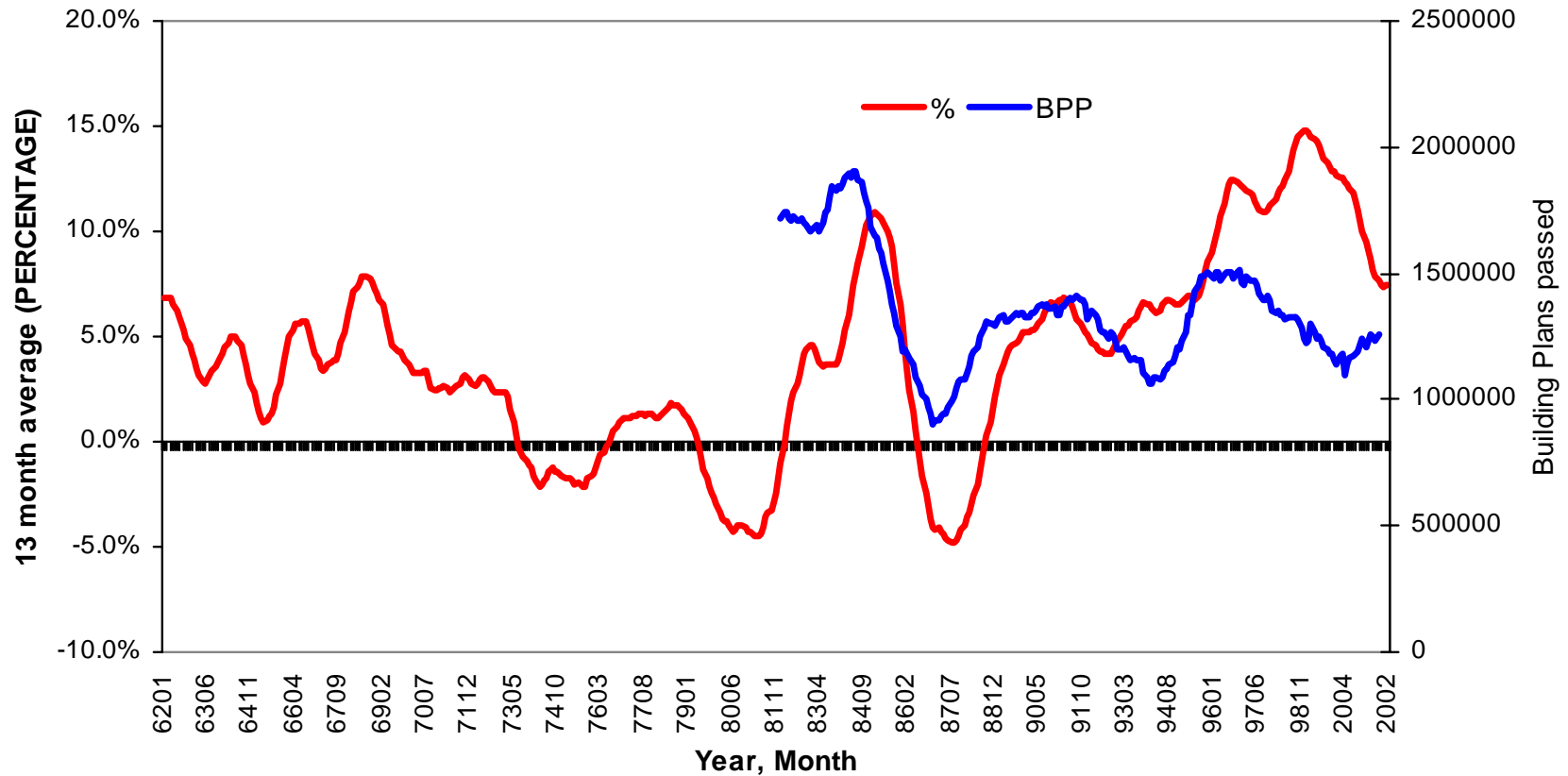


# SAACE MIS SURVEY

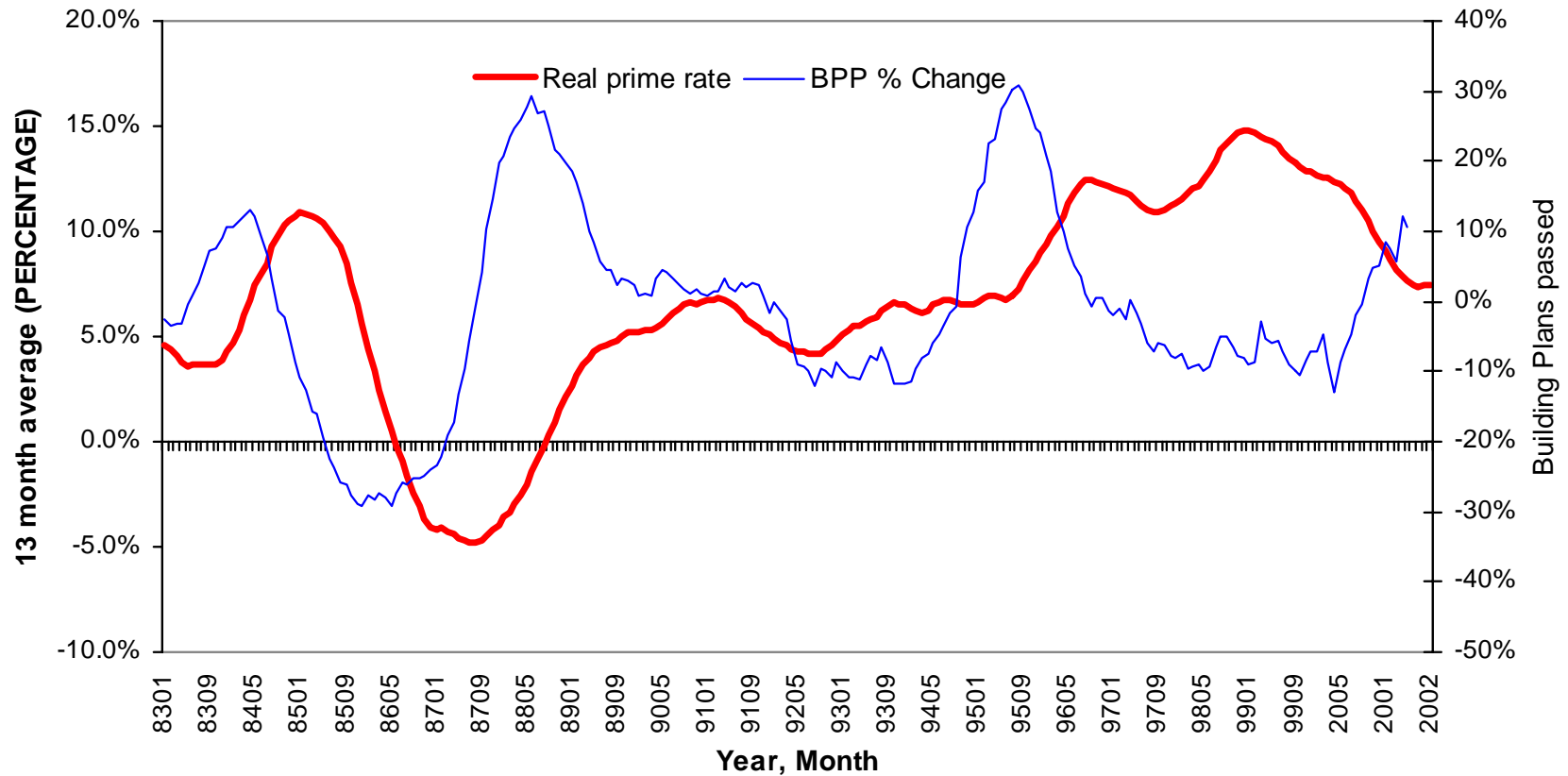
## CONFIDENCE INDEX



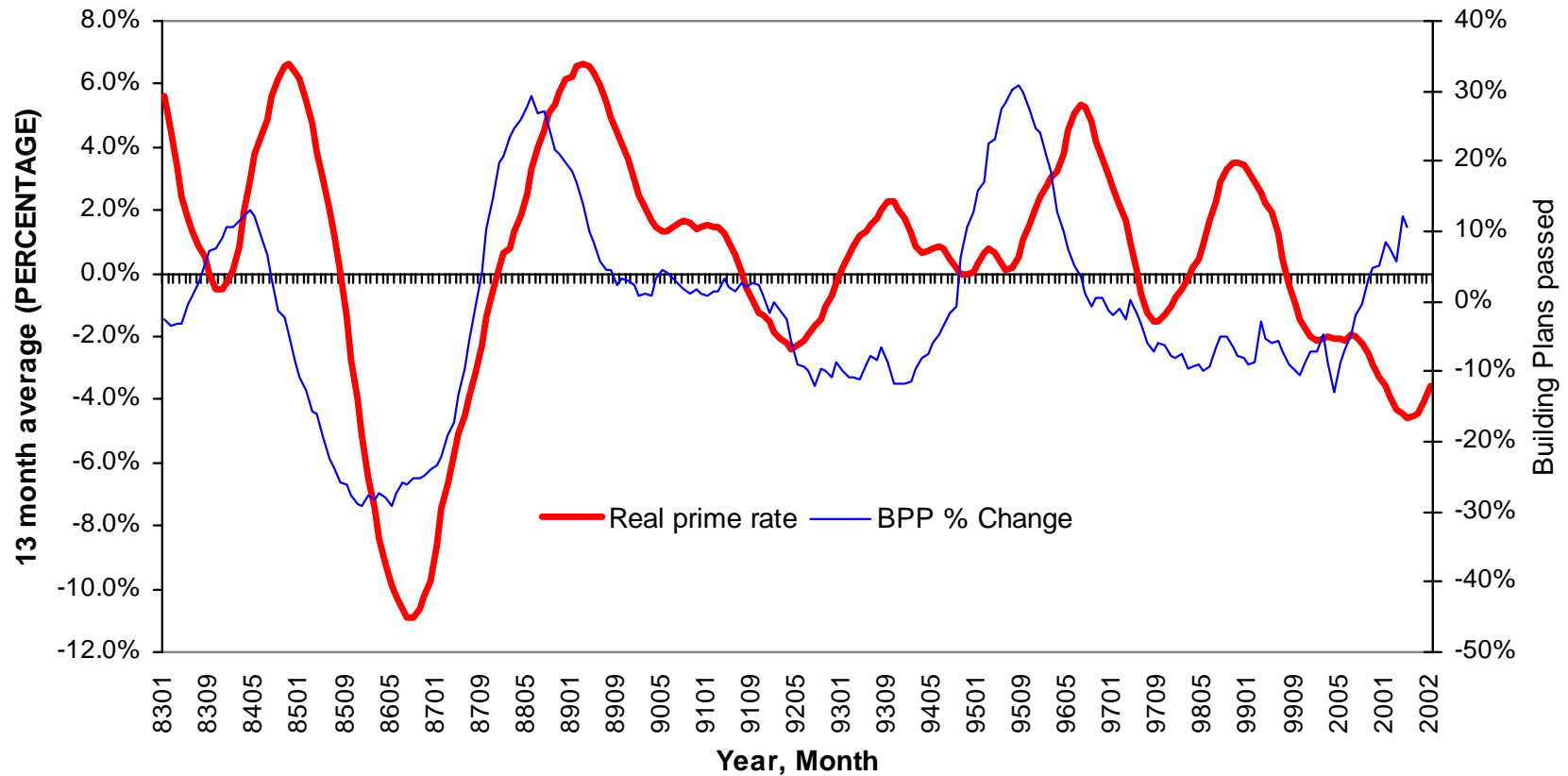
# Trend in REAL PRIME INTEREST RATE and Building plans passed Based on 13 month moving average 1960 - 2001



# Trend in REAL PRIME INTEREST RATE and Building plans passed Based on 13 month moving average 1983 - 2001



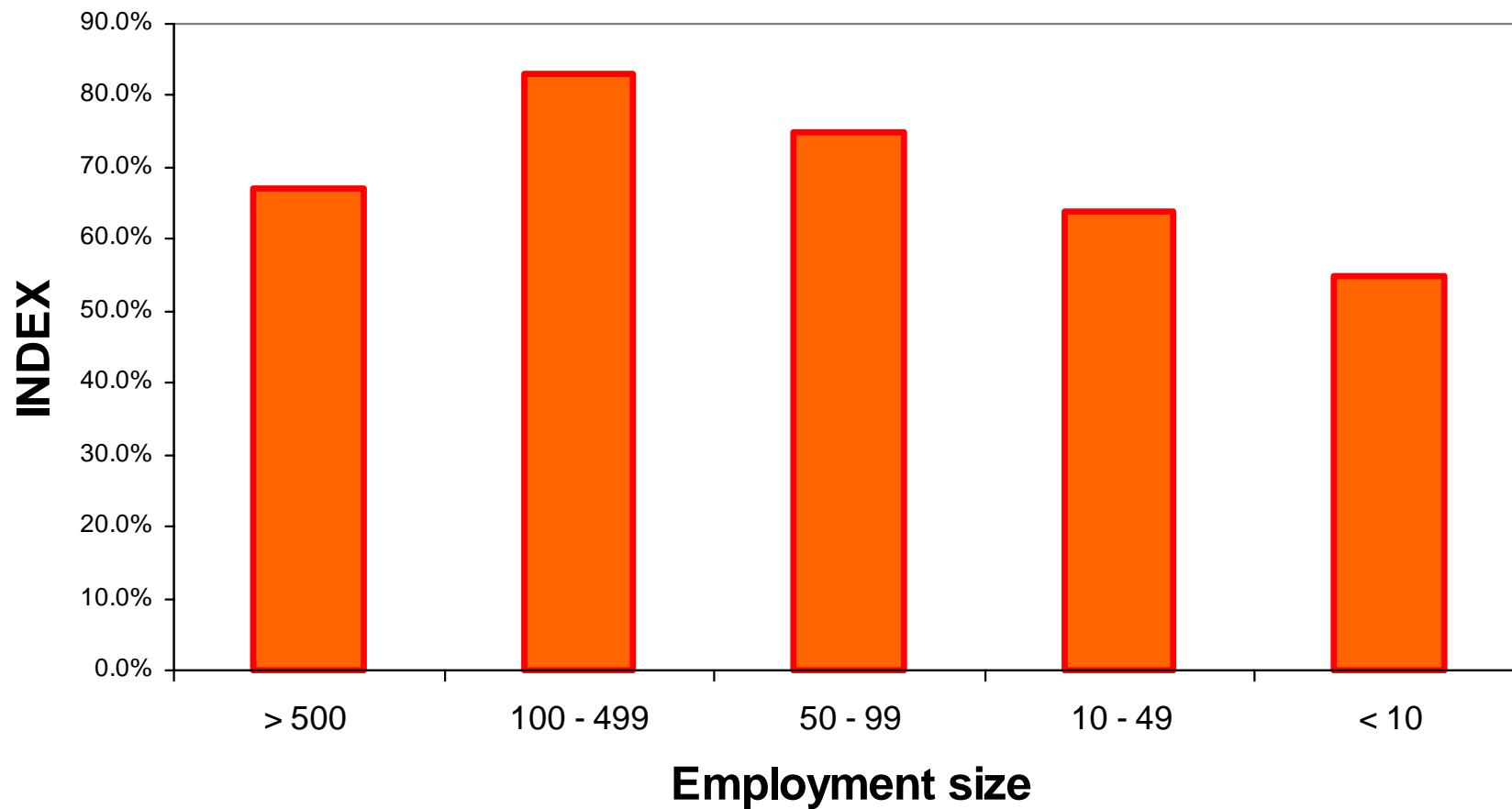
**Percentage change in REAL PRIME INTEREST RATE**  
**vs % change in Building plans passed**  
 Based on 13 month moving average  
 1983 - 2001





# SAACE CONFIDENCE

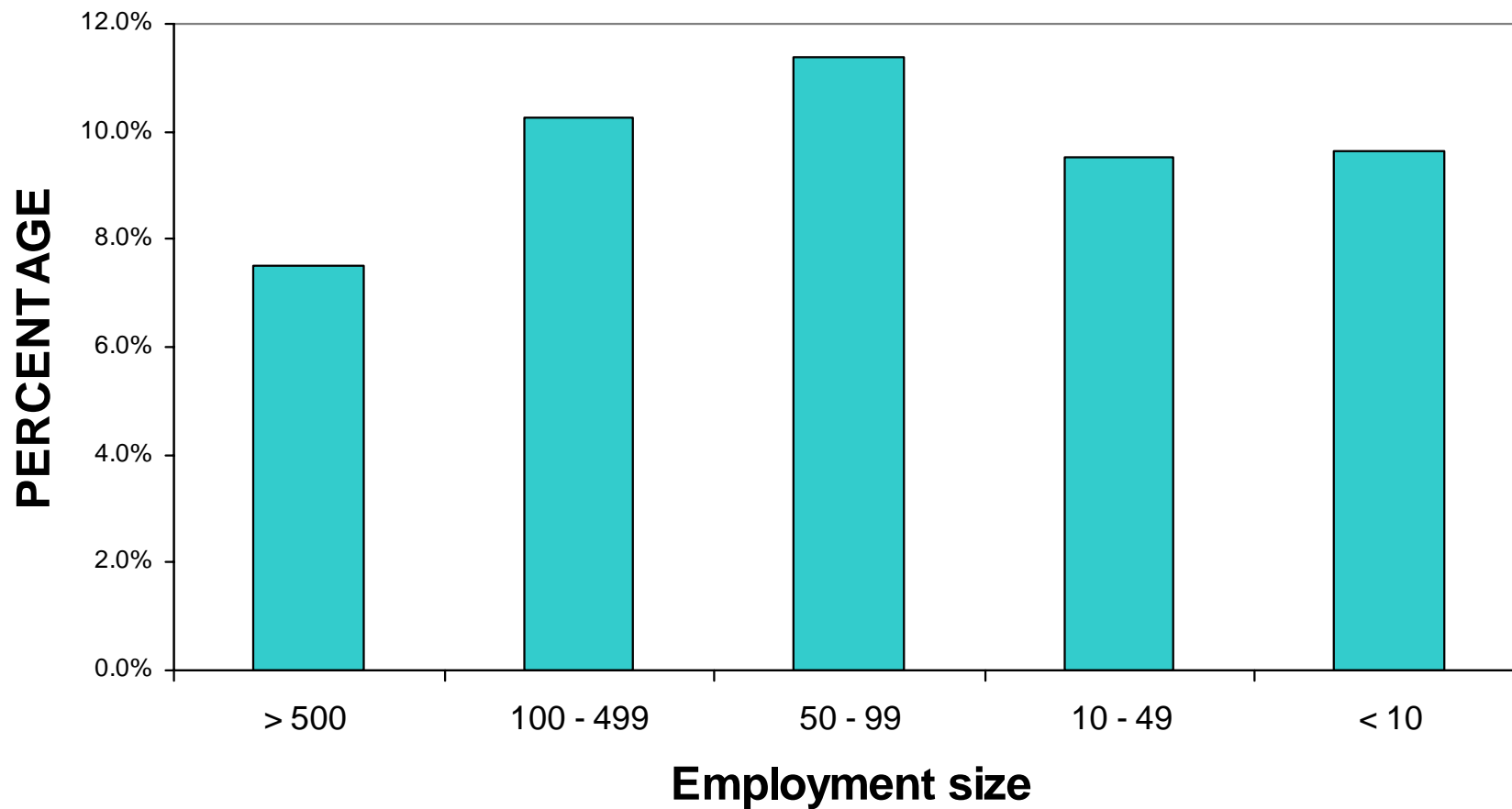
## According to size of company





# SAACE Profitability

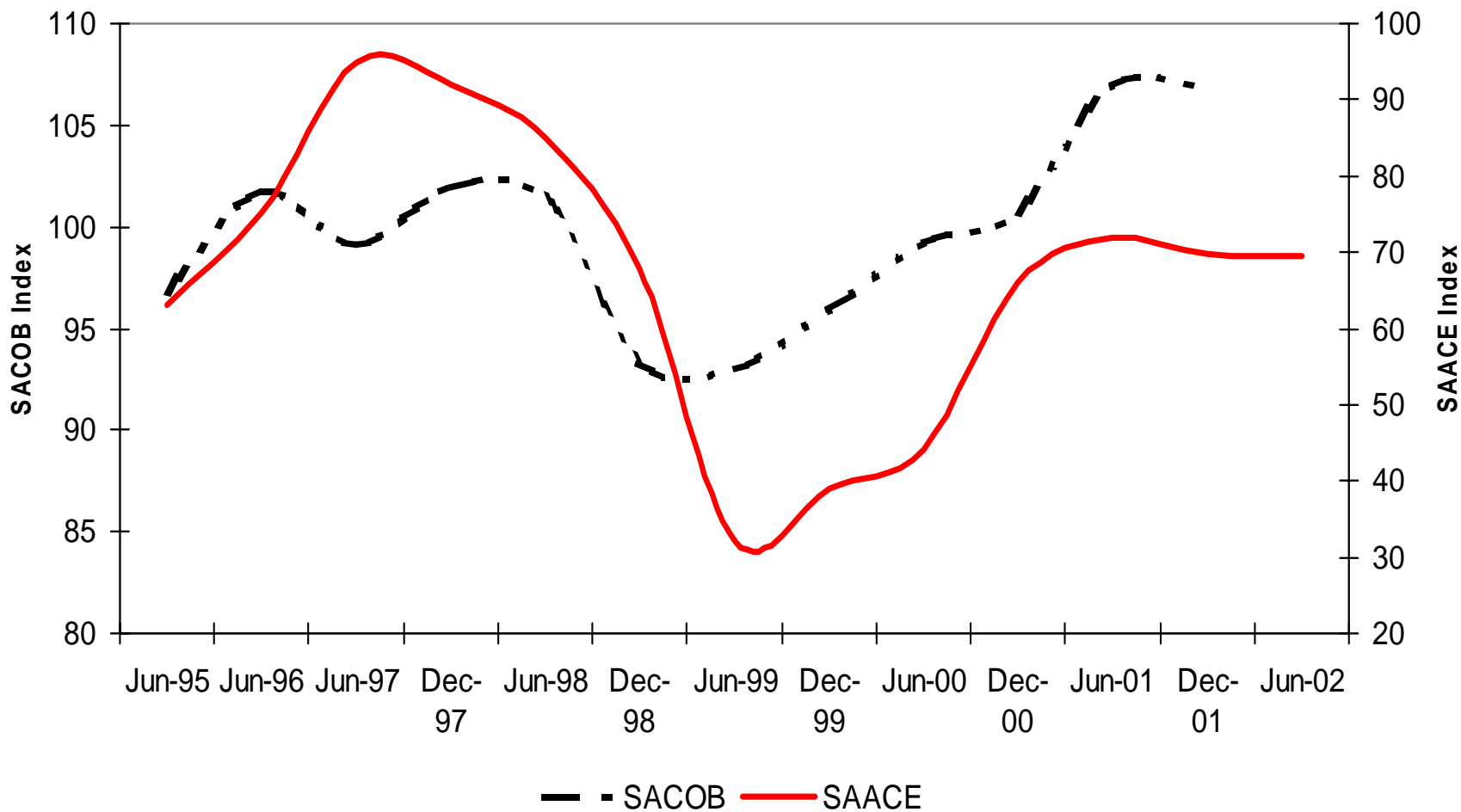
## According to size of company





# Leading indicators

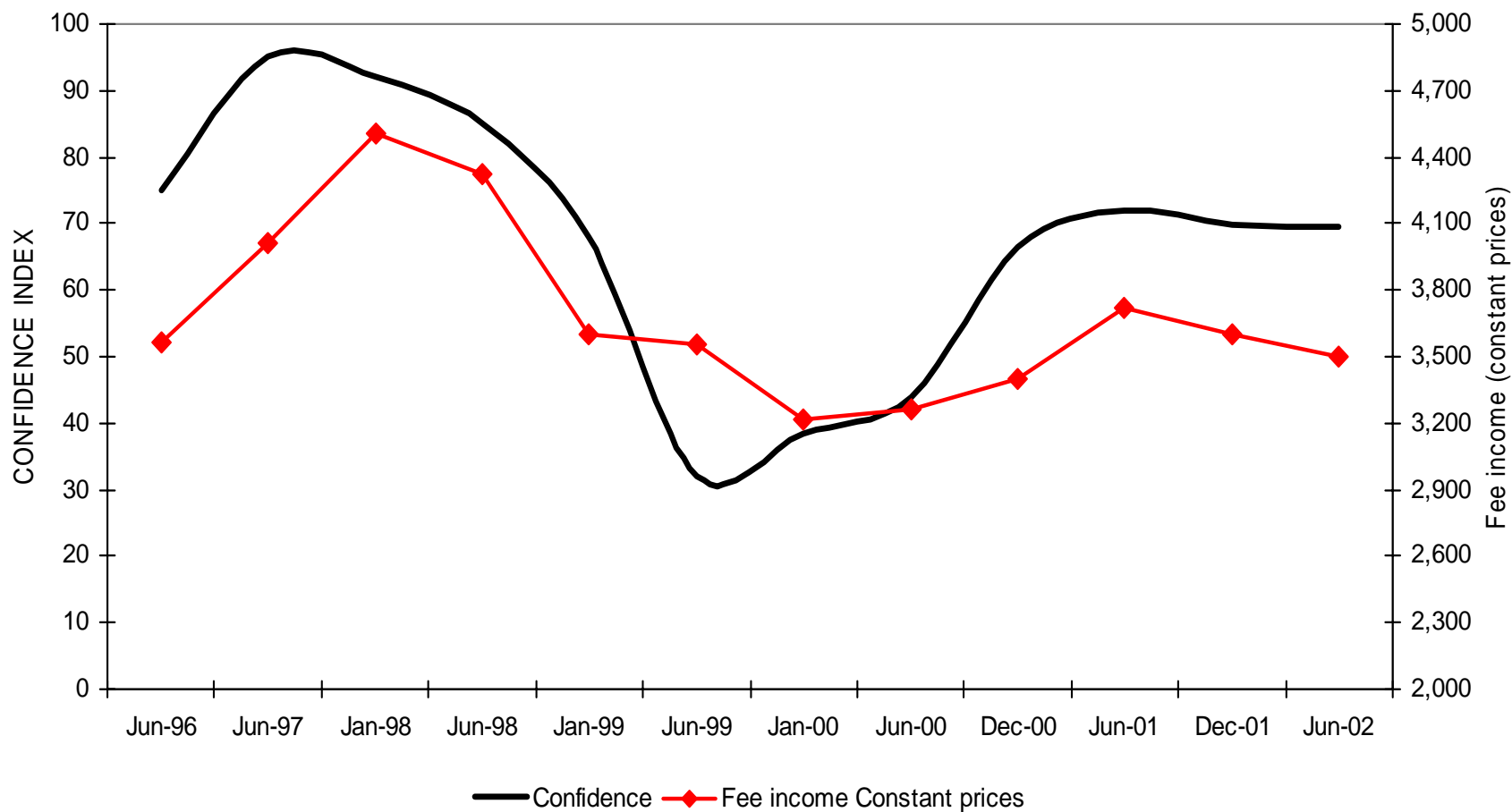
## SACOB vs SAACE





# SAACE

## Fee income vs confidence

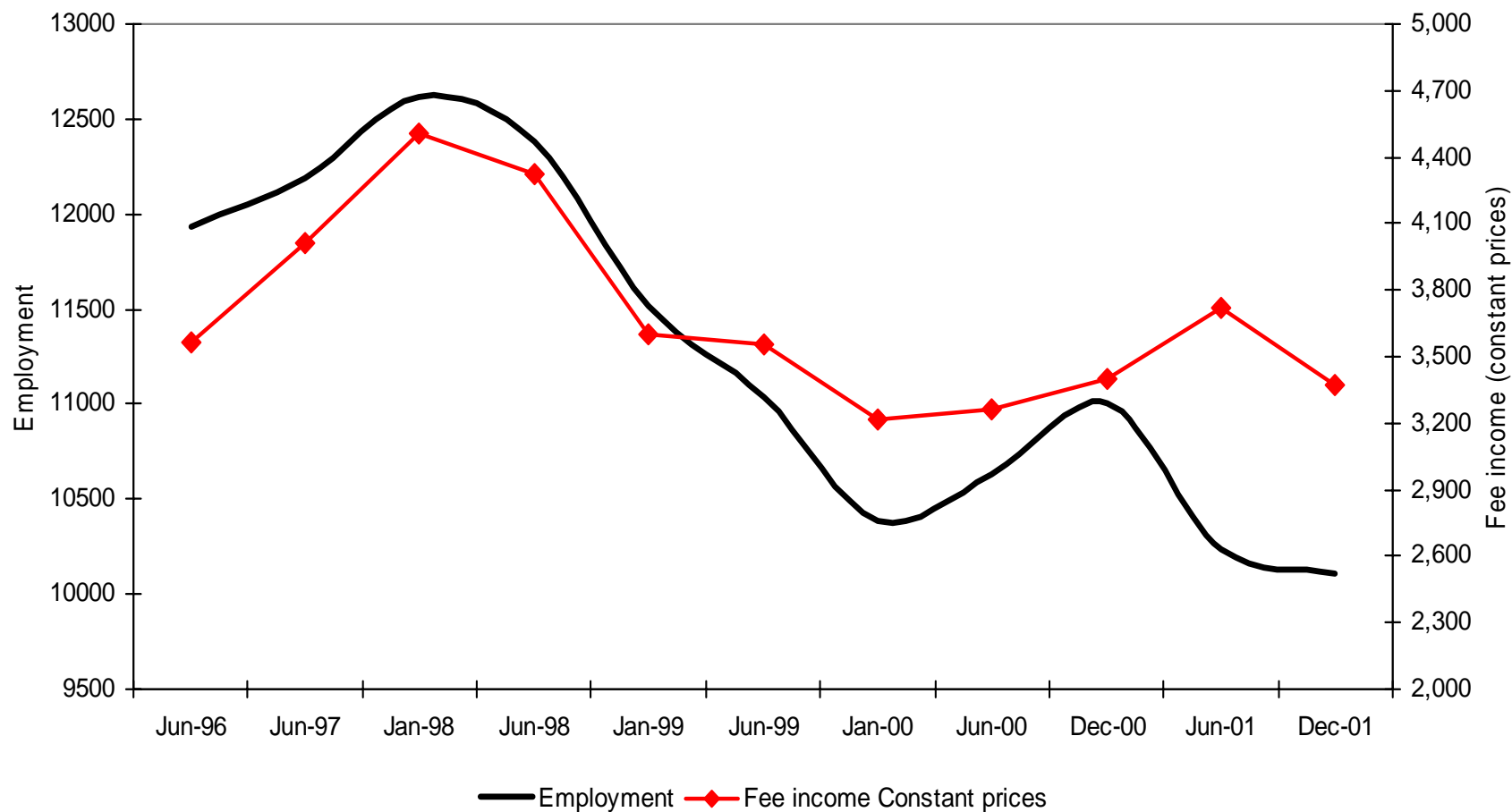






# SAACE

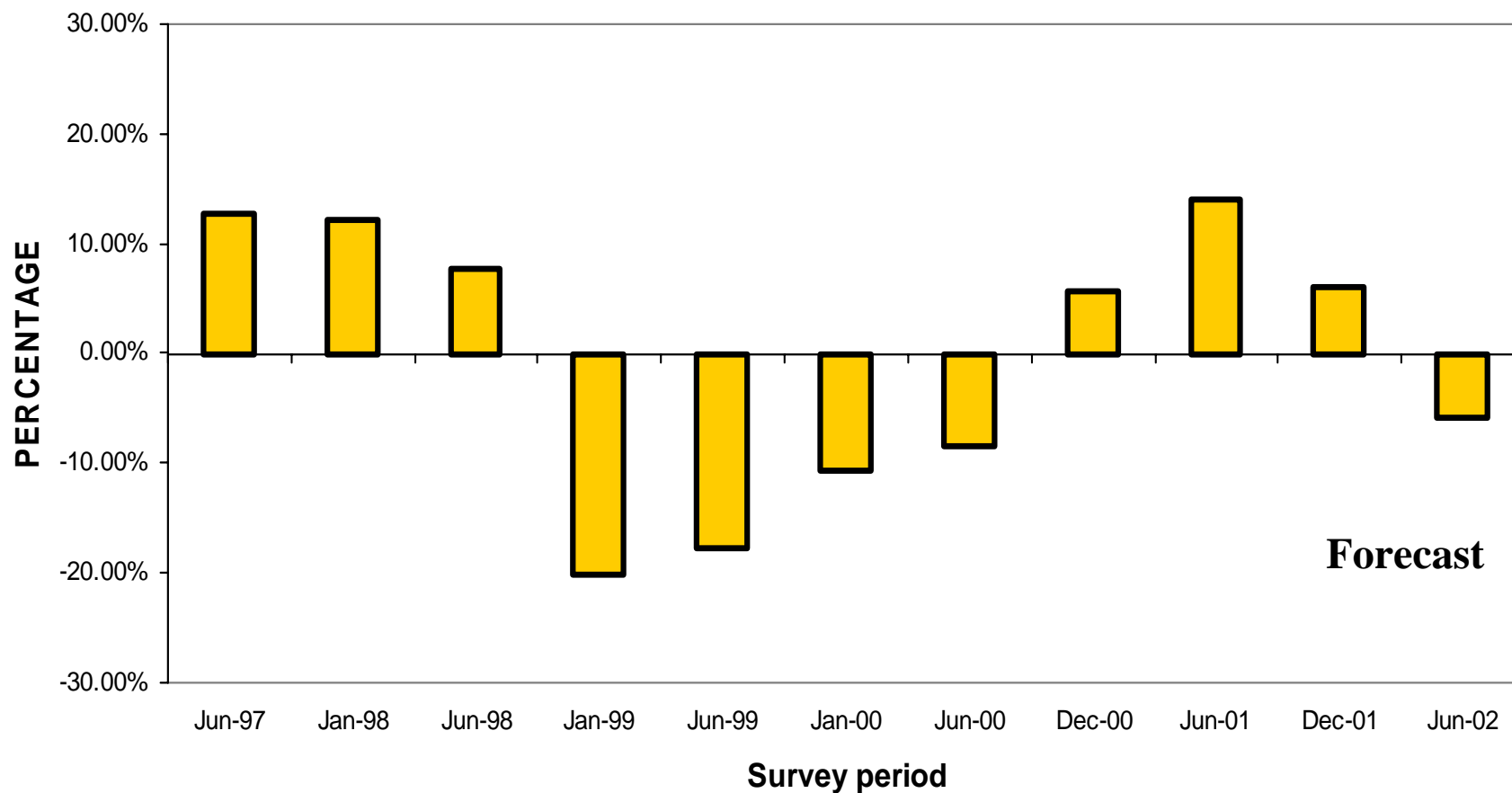
## Employment vs Real Value of Fee income





# FEE INCOME

## Real percentage change

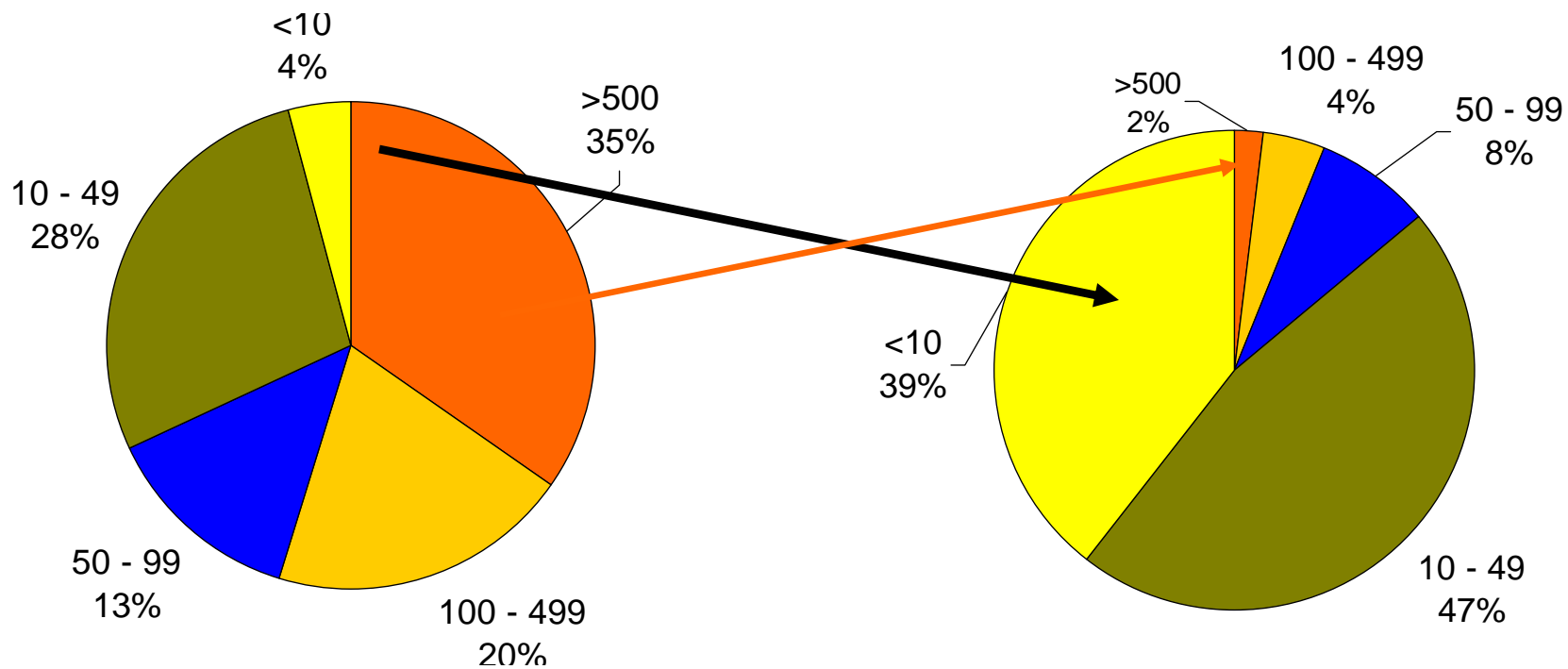


# Company Profile

**Employment**



**Number of companies**



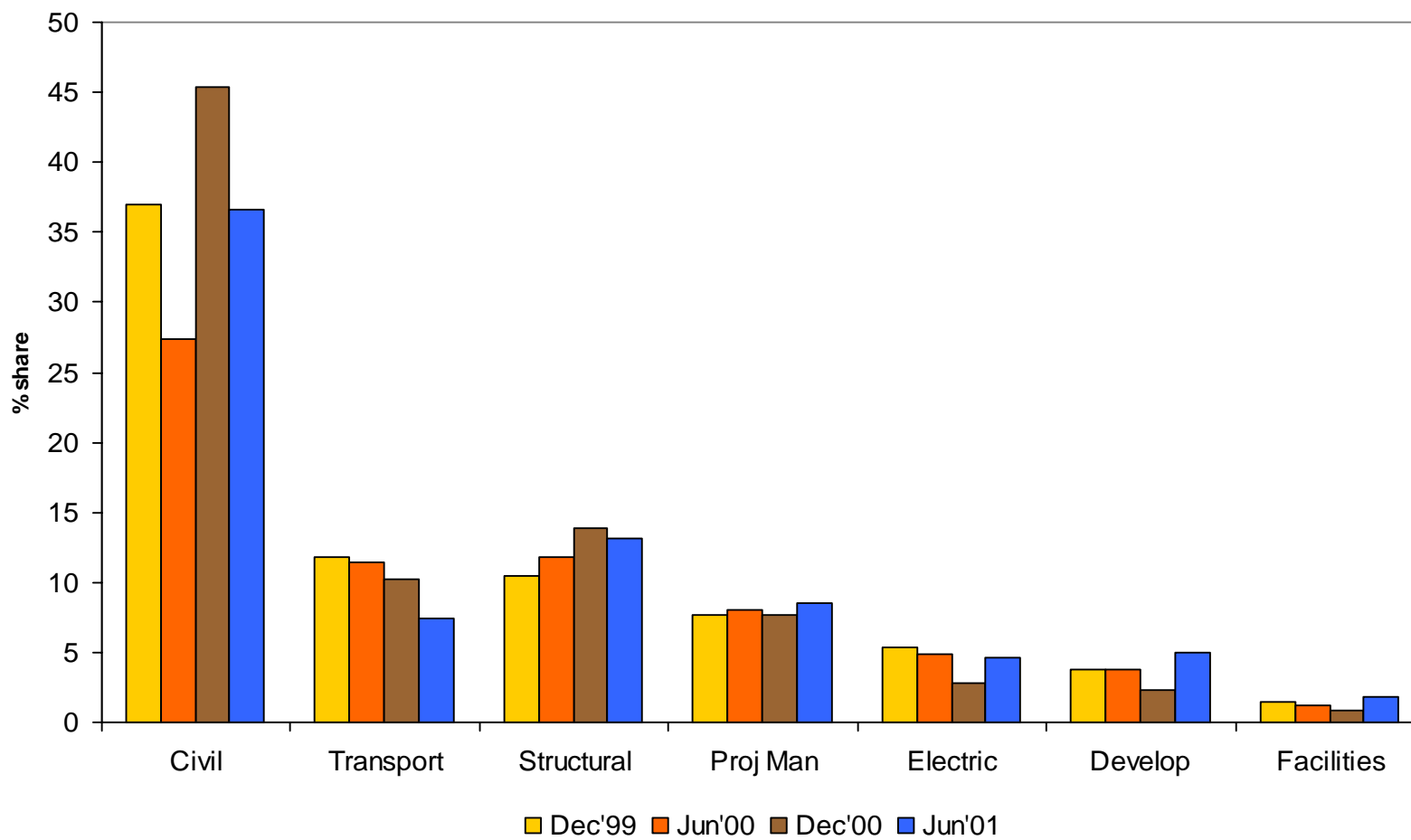


# Profit Margins

Group	Jun-00	Dec-00	Jun-01	Expected trend (Jul-Dec'01)
A > 500	3%	5%	8%	74% improving. 26% static
B 100 – 499	1%	8%	13%	62% Static, 38% improving
C 50 – 99	7%	8%	12%	30% receding, 39% static, 31% improving
D 10 – 49	12%	13%	11%	50% receding, 44% static, 6% improving
E < 10	14.2%	14.9%	18%	48% receding 31% static, 21% improving

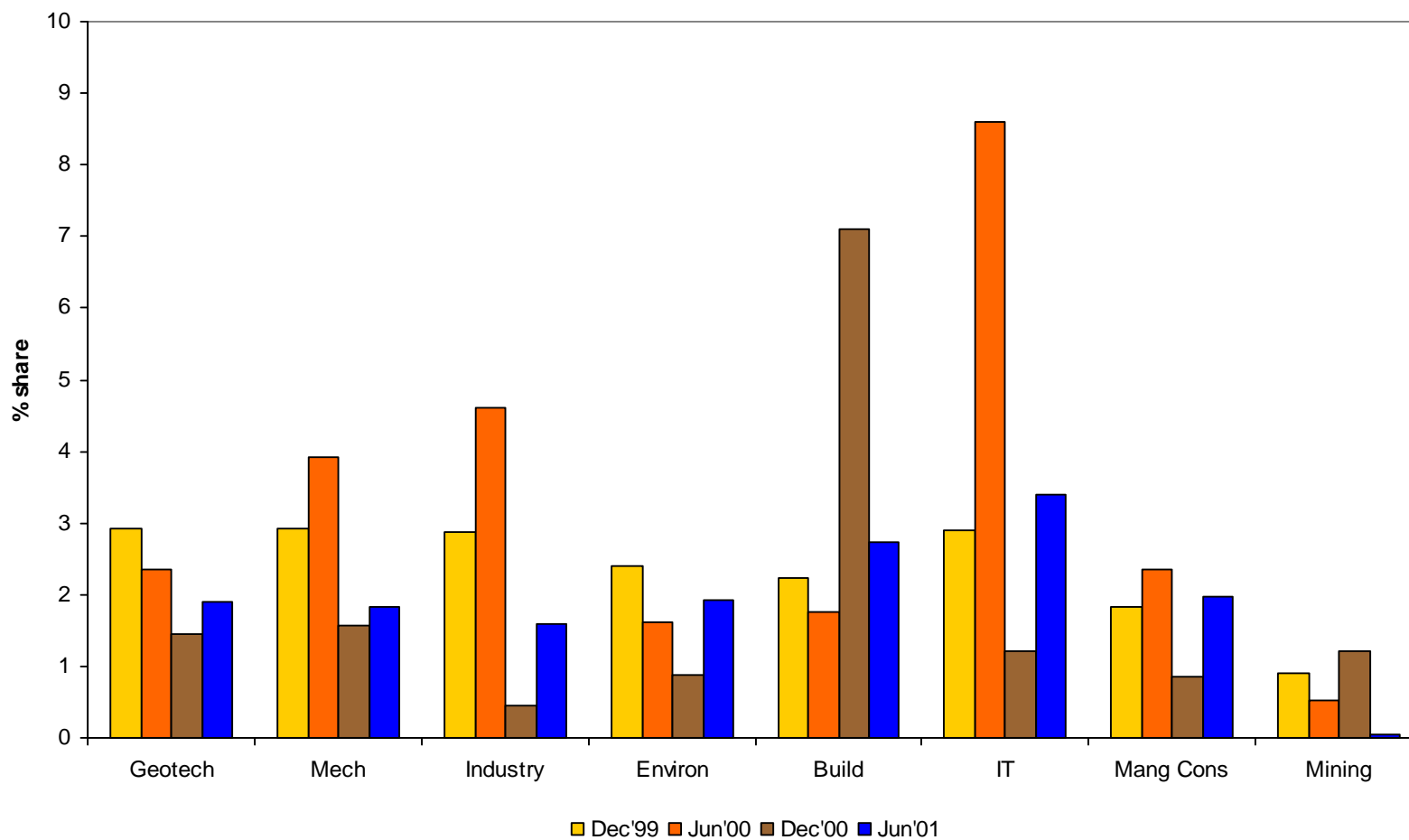
# Sub-markets

.../page 1 (New definition)



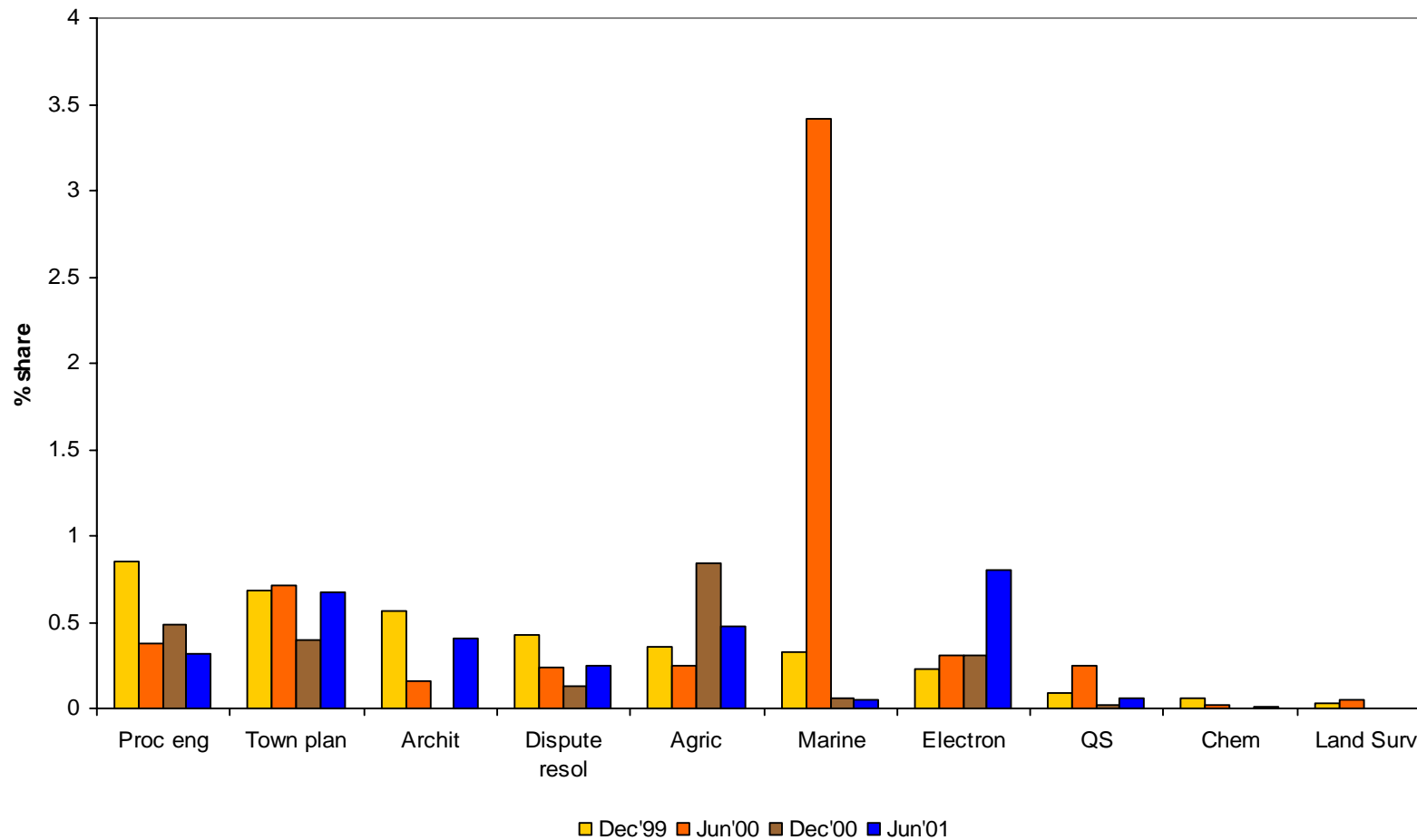
# Sub-markets

.../page 2



# Sub-markets

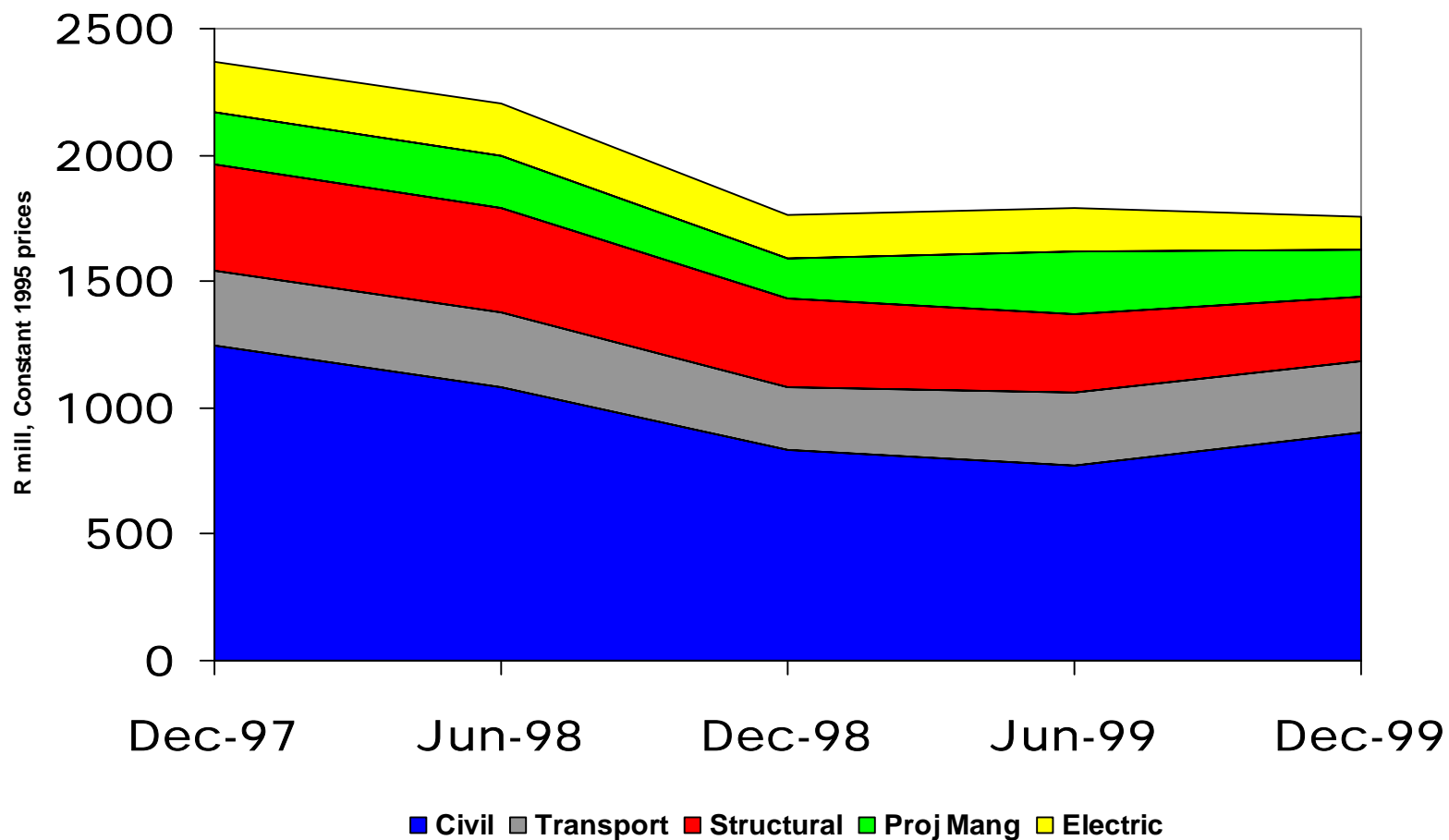
.../page 3



# Sub-markets

## R mill, constant prices

Top five sub-markets (Based on old definitions)



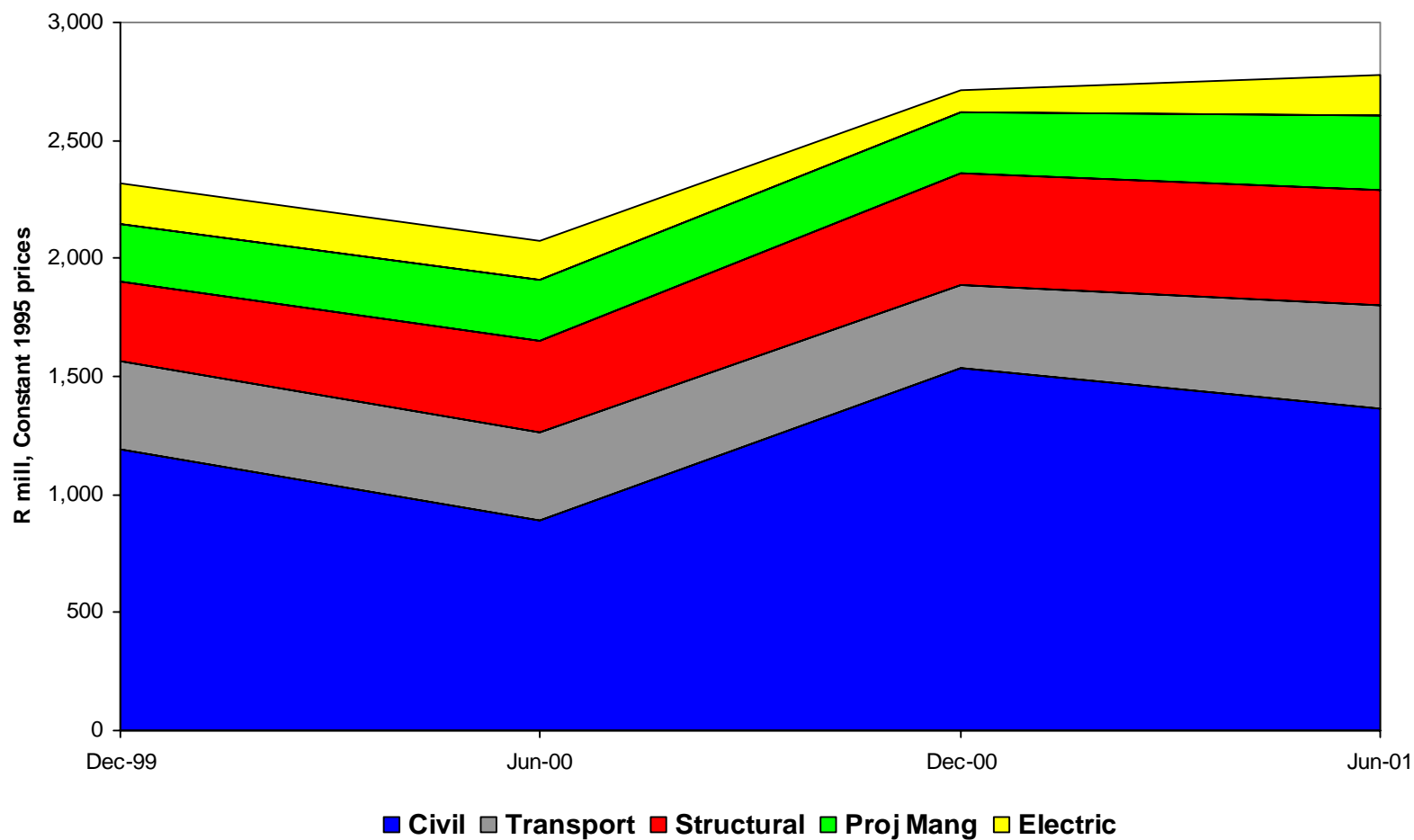




# Sub-markets

## R mill, constant prices

Top five sub-markets



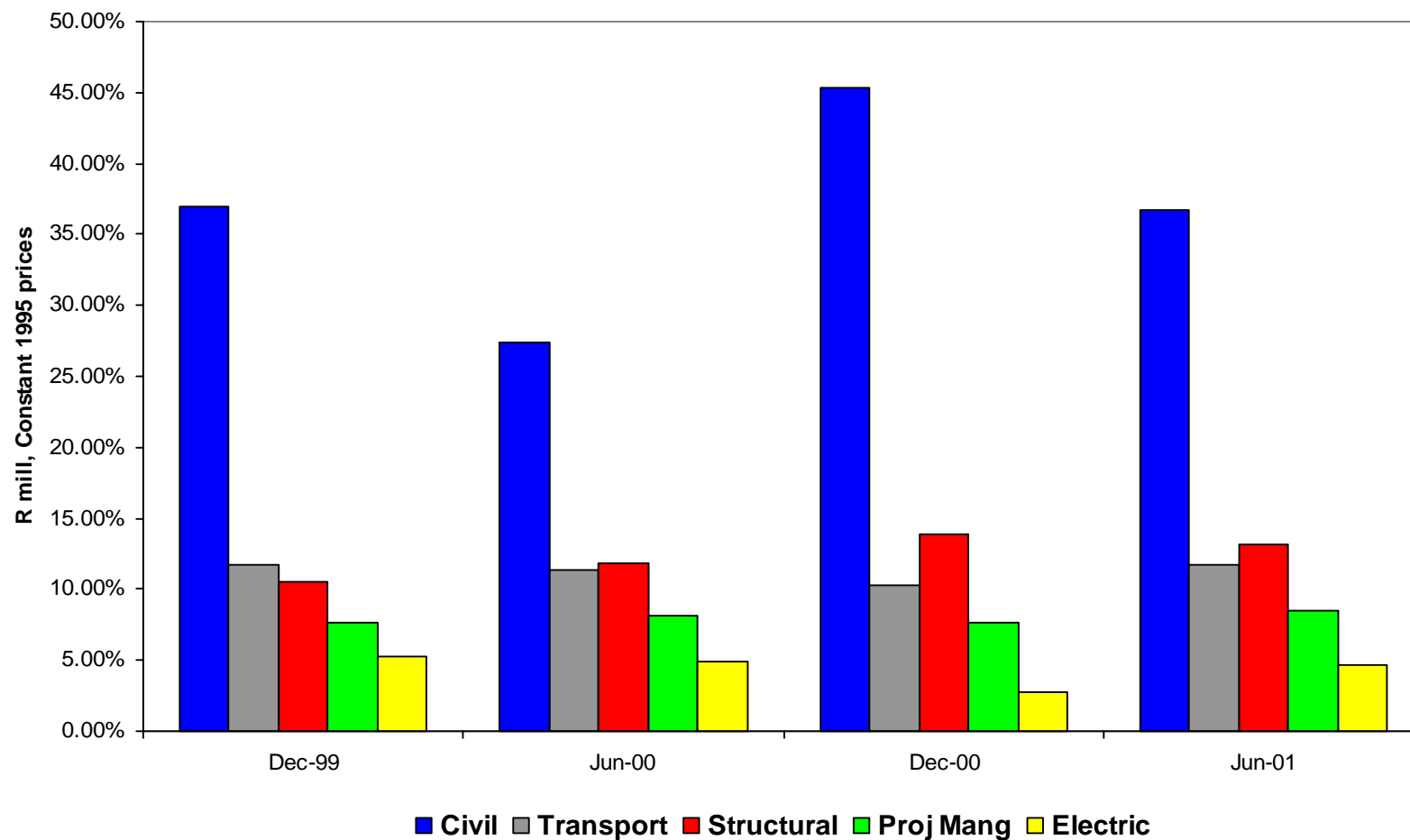


# Sub-markets

## Market Share:

Top five sub-markets

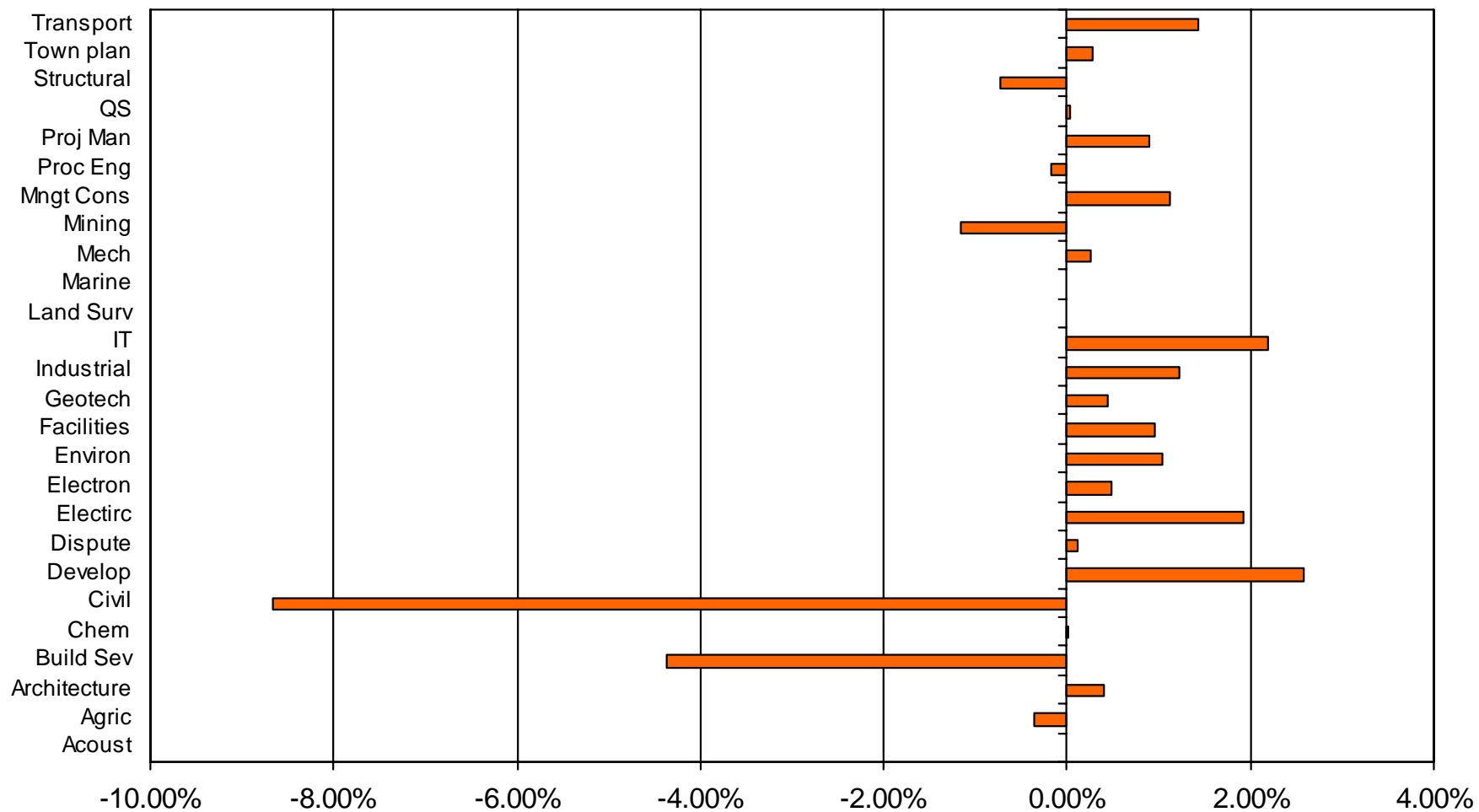
**Combined these sectors represent 75% of the market**





# Sub-markets

Change Jun'01 / Jun'00

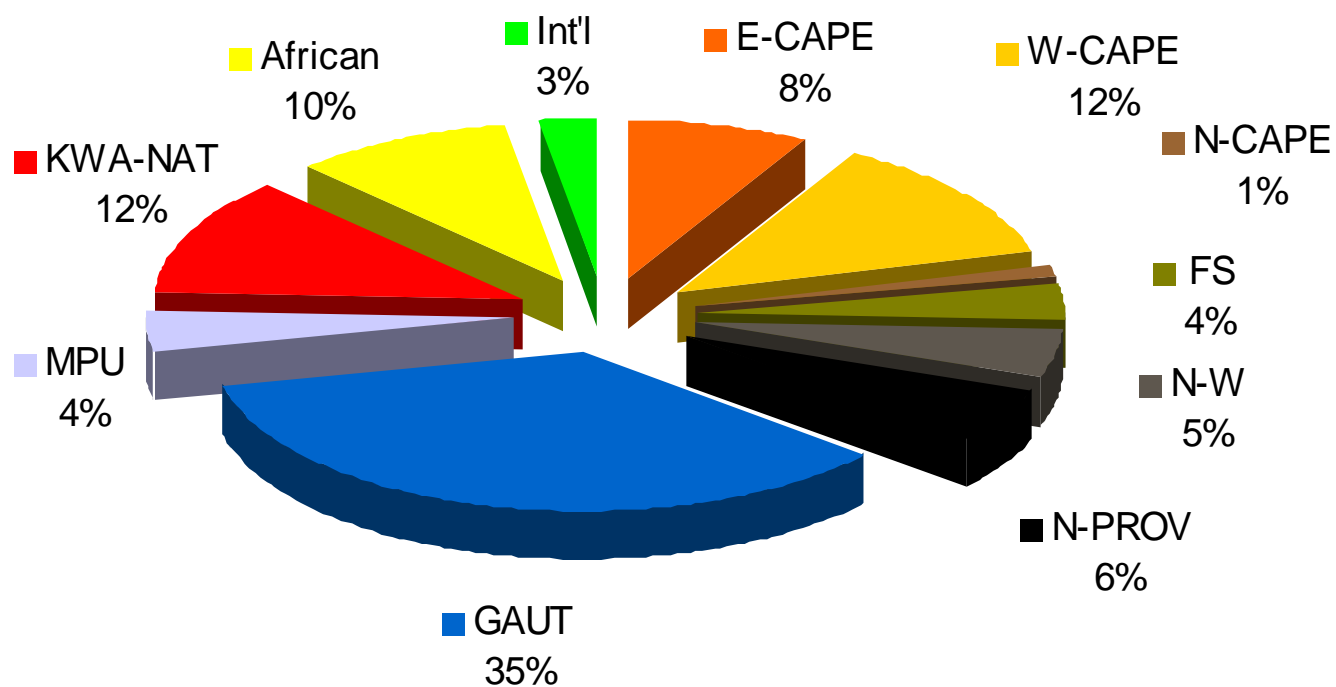




# Provincial Market Share

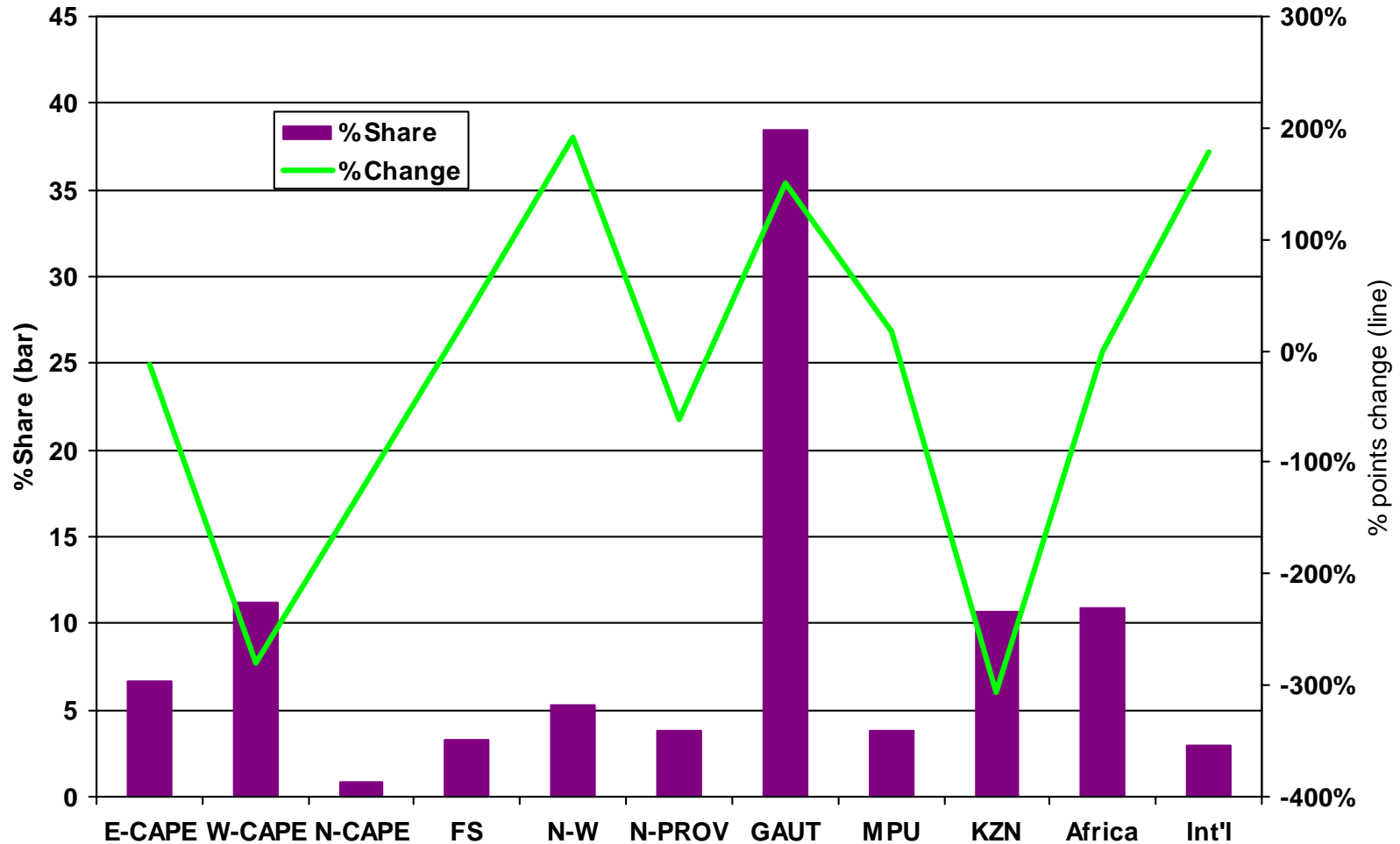
## January – June 2000

### Fee income



# Provincial Market Share

## As at Jun'01 and % Change on Jun'00

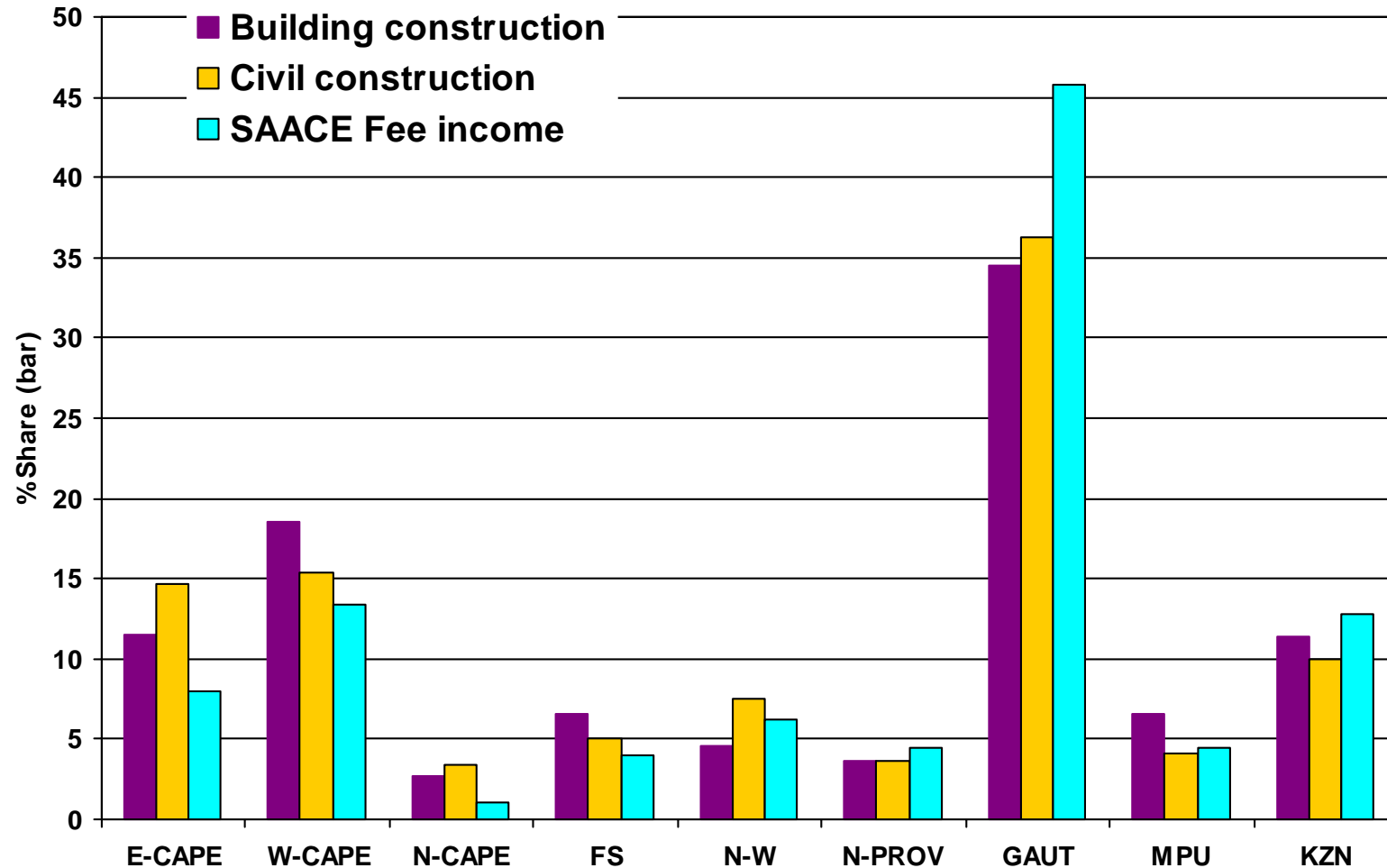


# Provincial Market Share: Construction

As at Jun'01

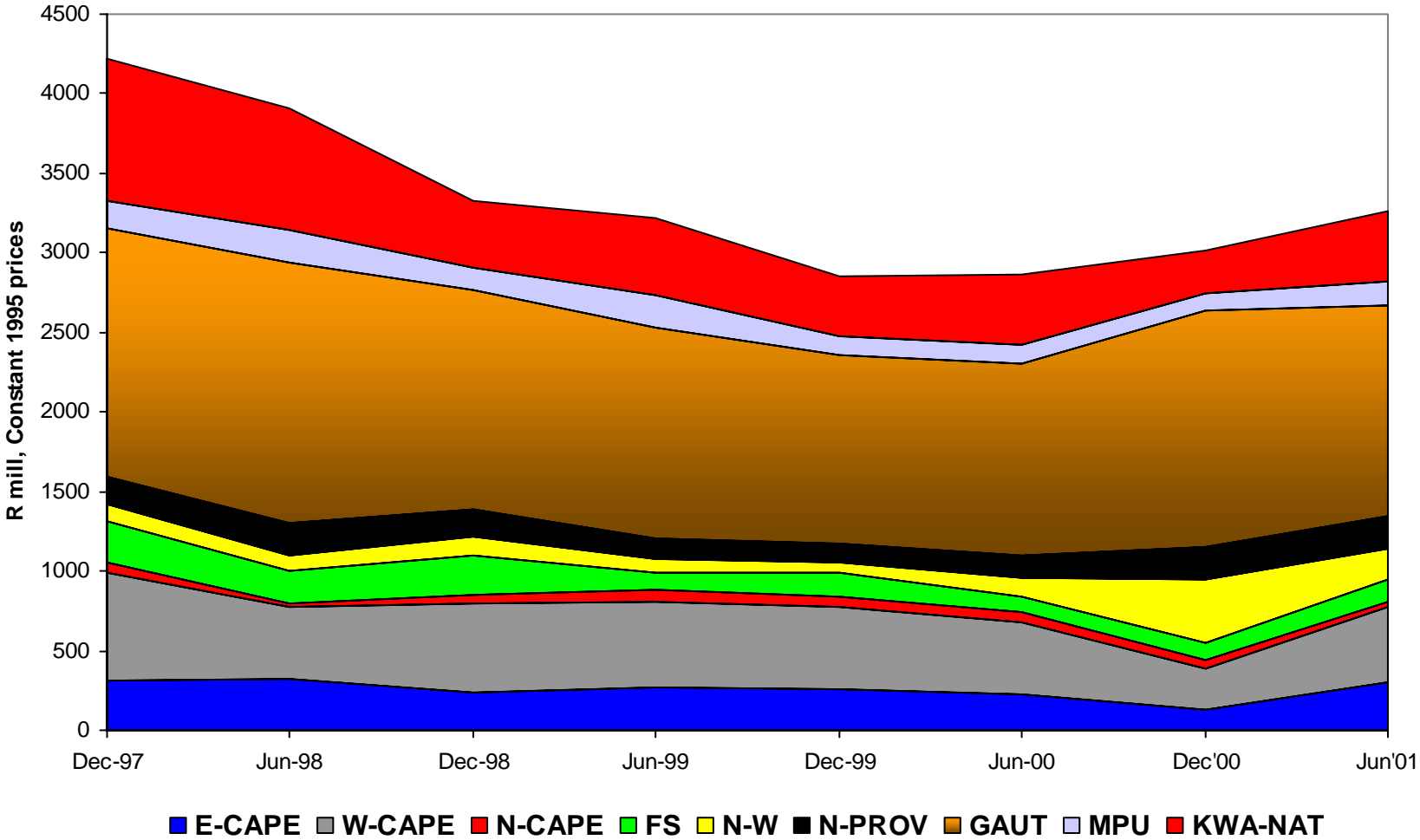


Based on contract awards: January – June 2001



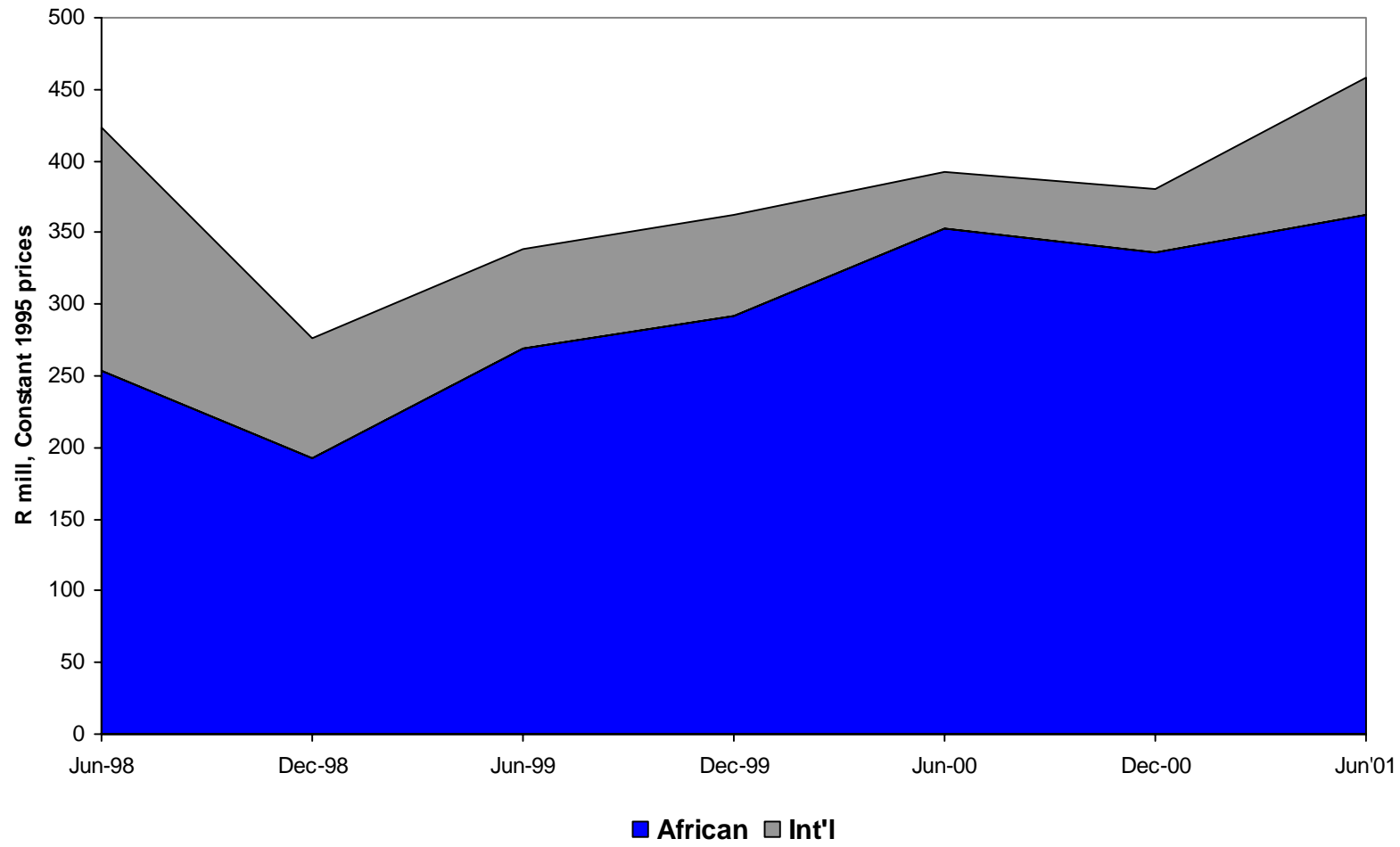
# Income per province

R mill, constant prices



# Income generated in Africa and across borders

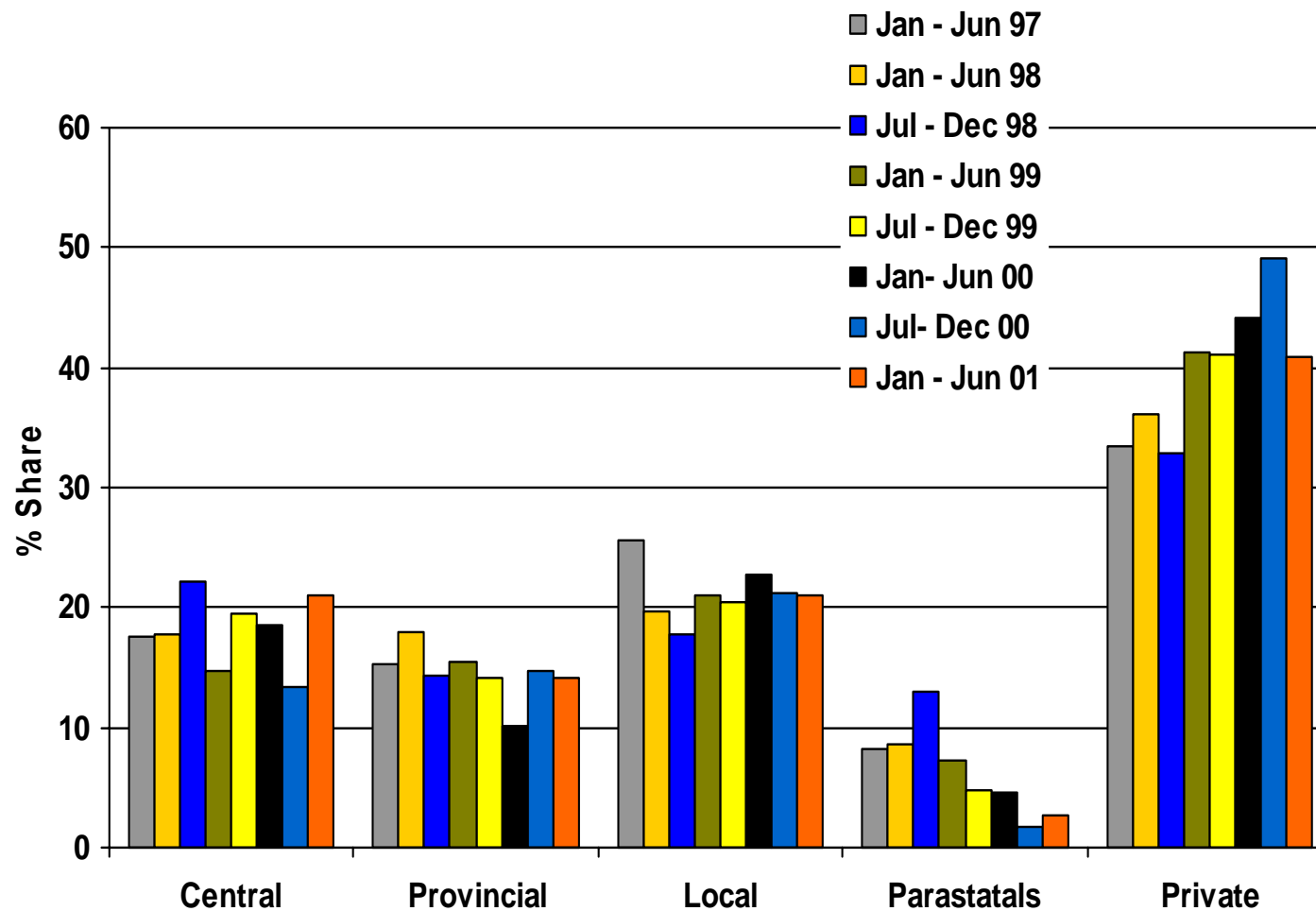
R mill, constant prices





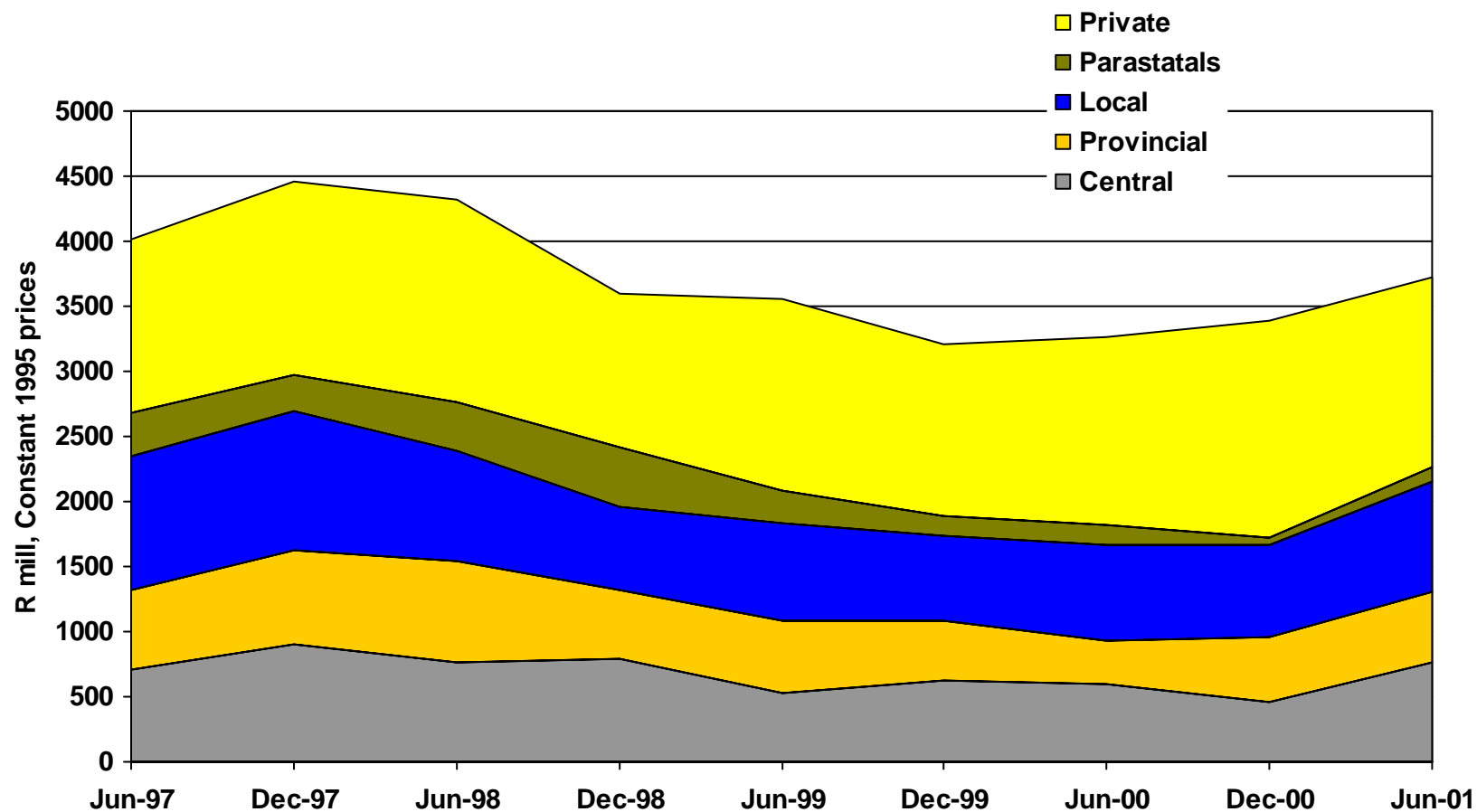


# Client distribution



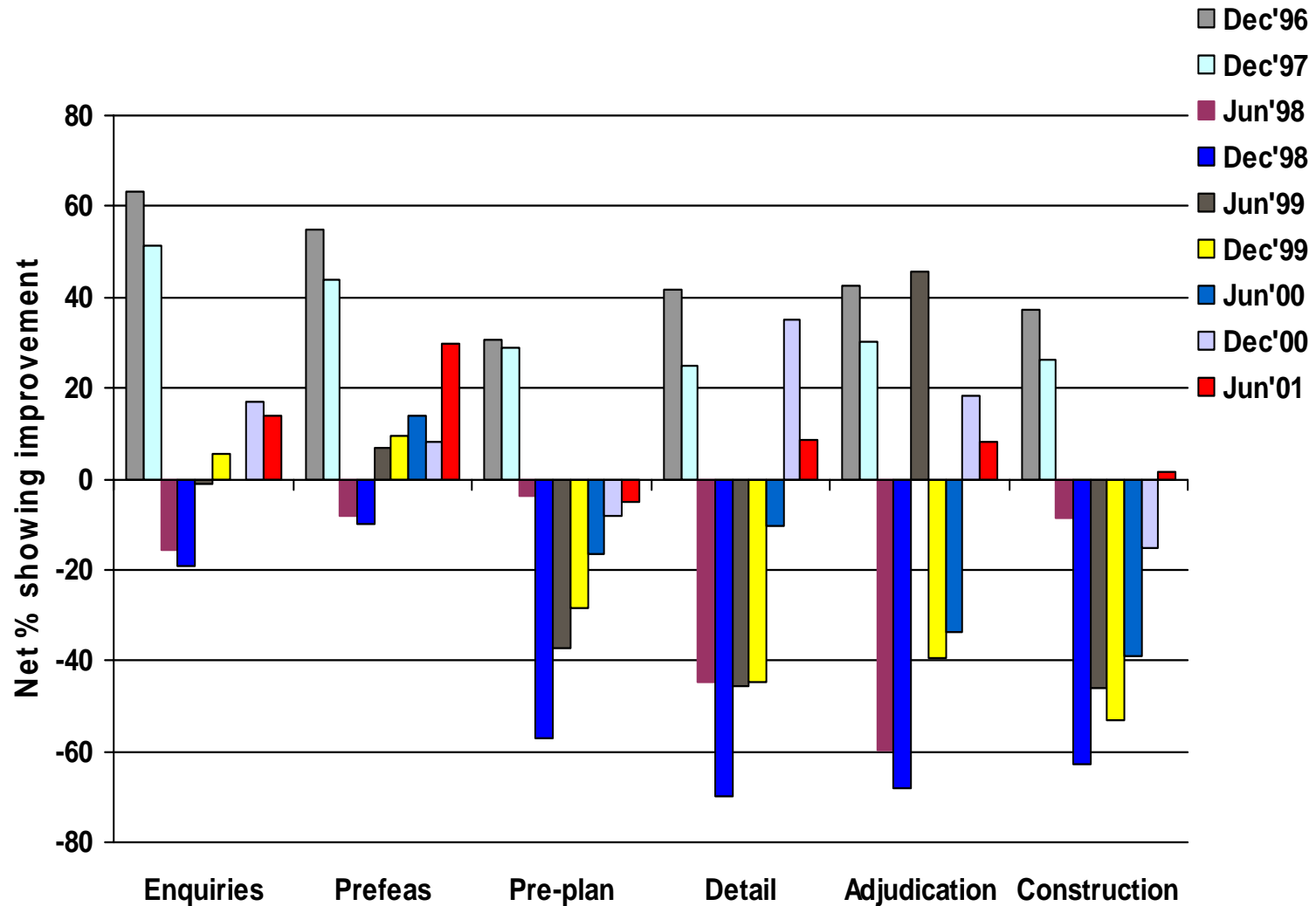
# Client distribution

R mill, Constant 1995 prices



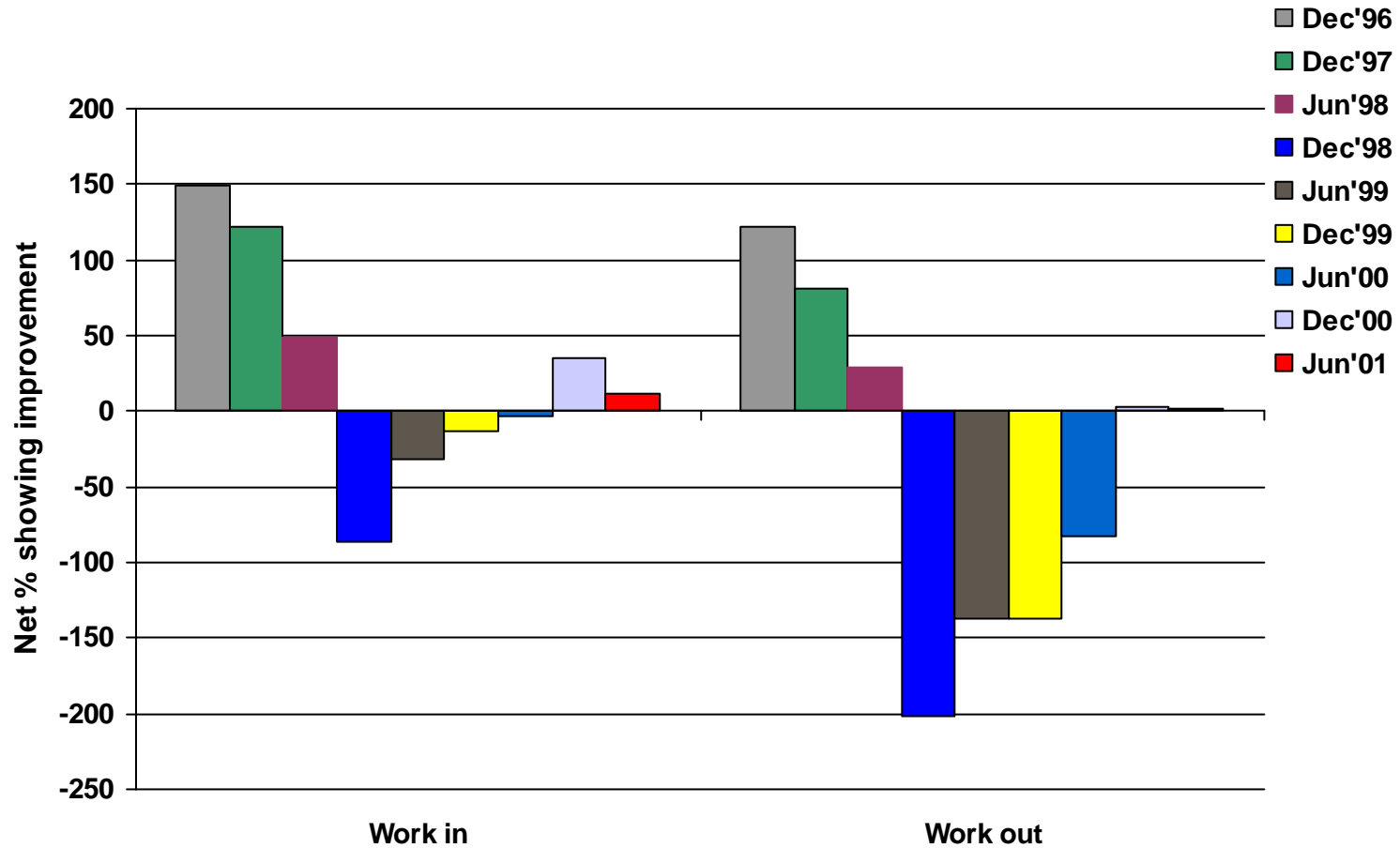


# Economic Product Cycle Indicators



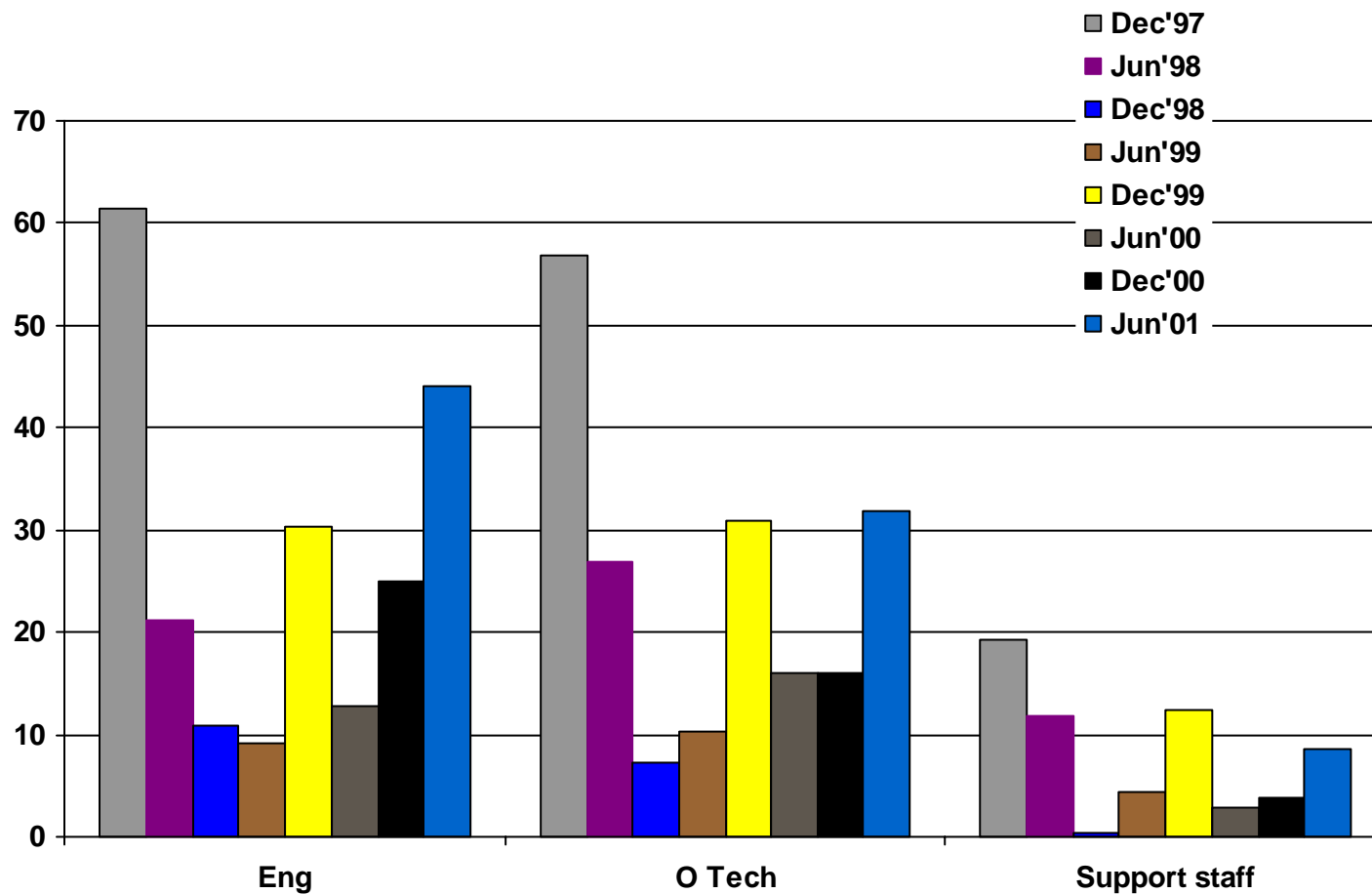
# Economic Product Cycle Indicators

## Summary

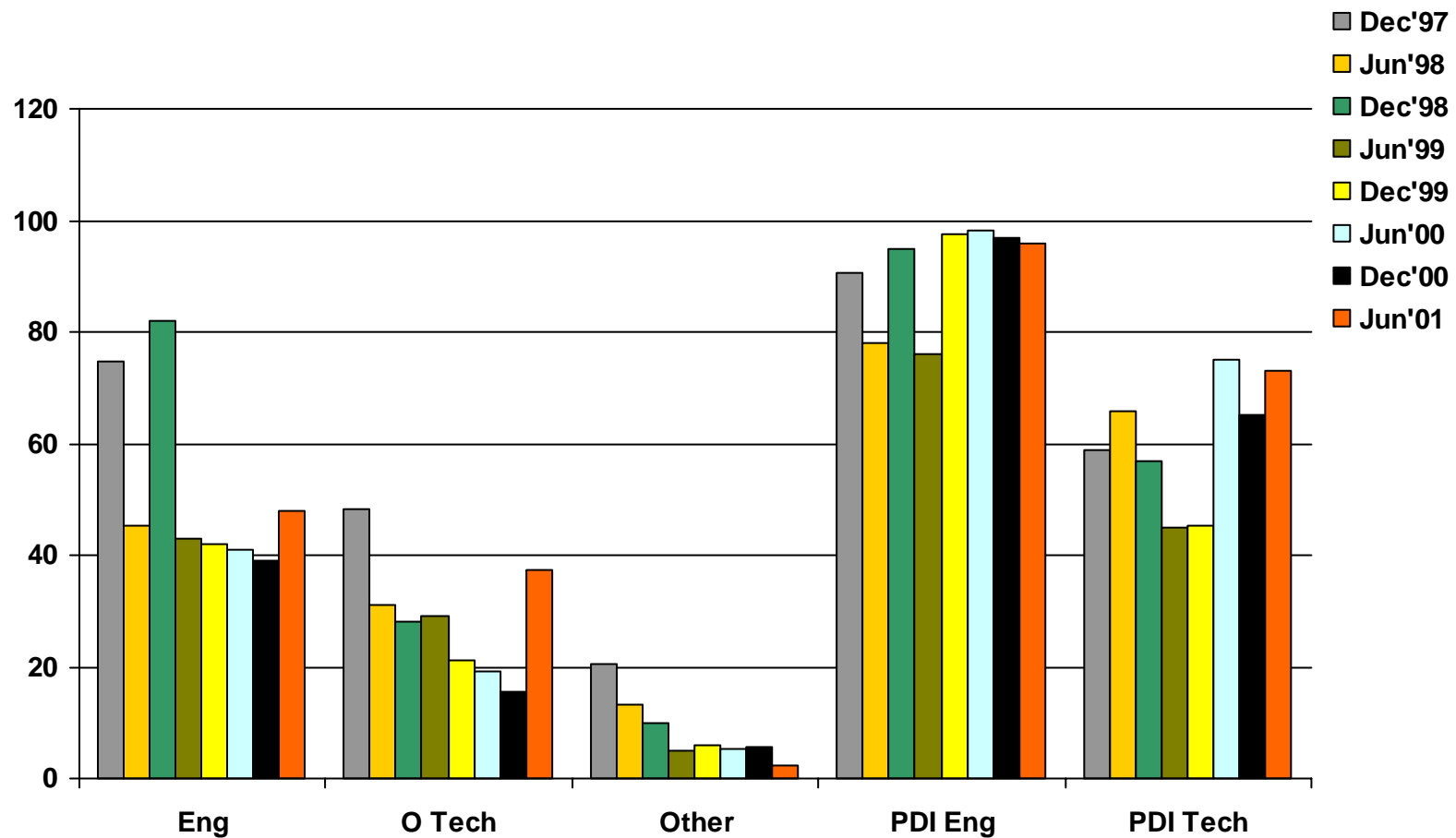


Work in: Enquiries, Pre-feasibility, Pre-plan  
 Work out: Detail plan, Adjudication, Construction

# % of Firms wanting to increase staff



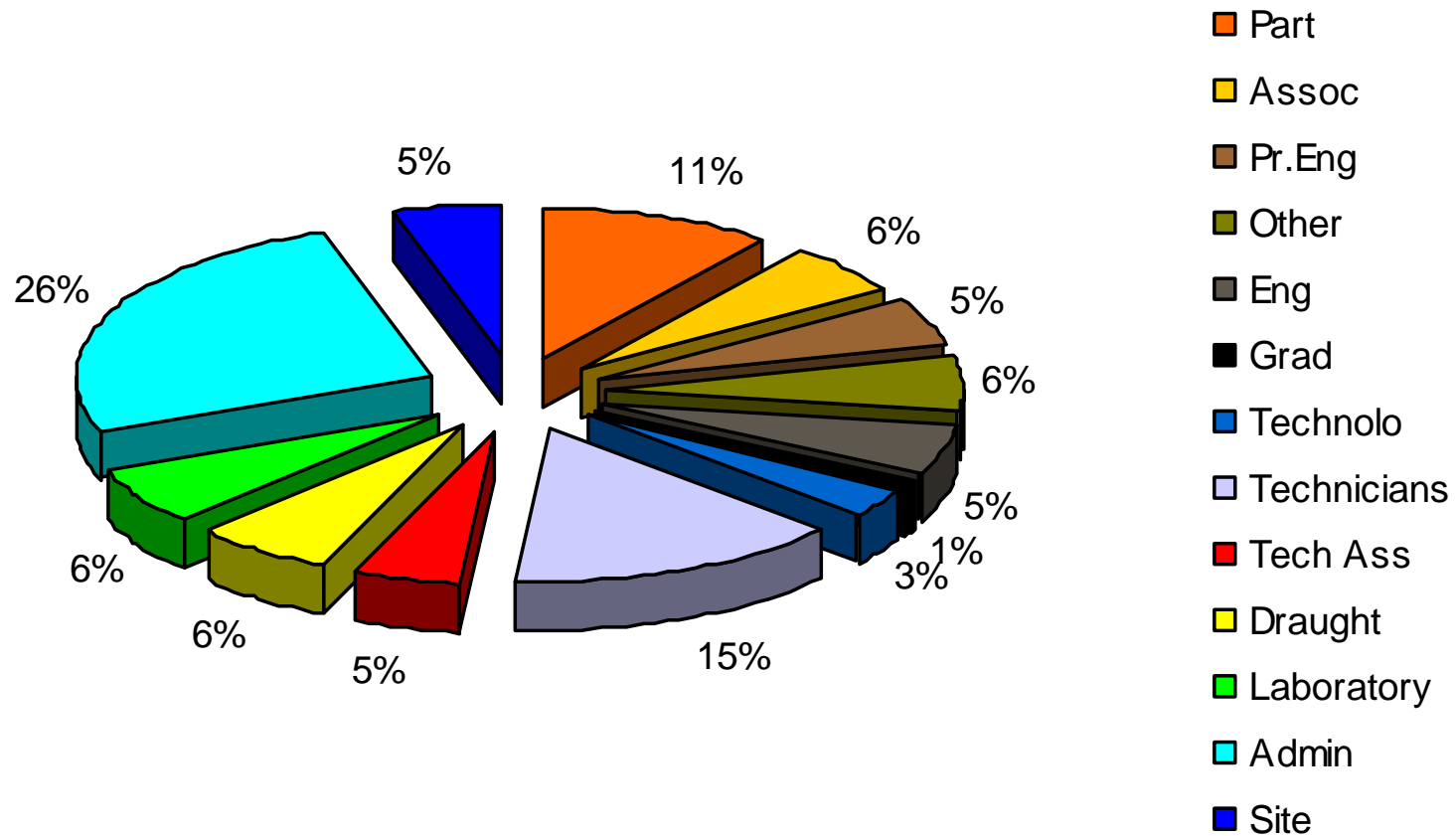
# Recruitment problems



# Employment Breakdown

## Workforce Analysis

### July – December 2000

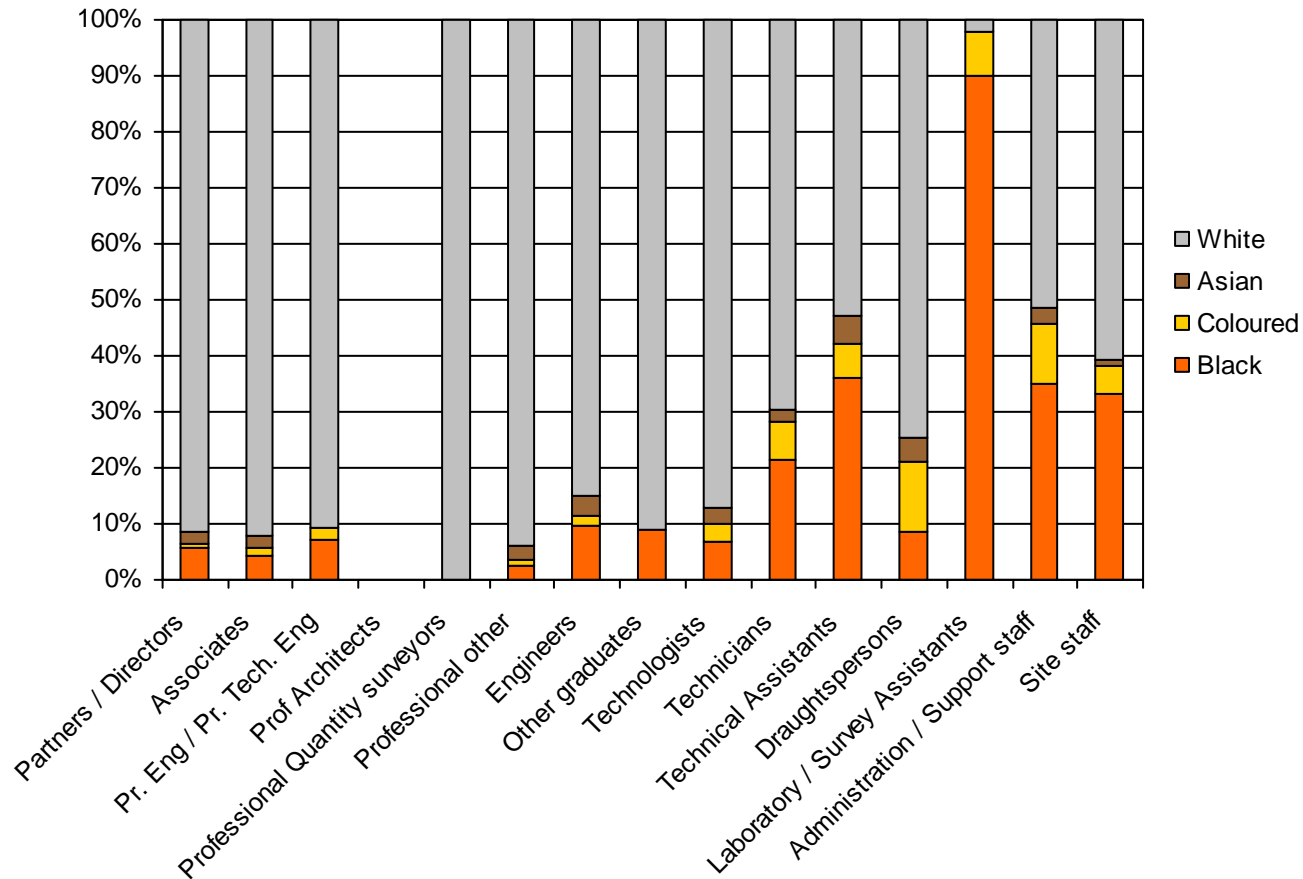


**Disabled = 0,6%**

# Employment Breakdown

## Workforce Analysis

### July – December 2000

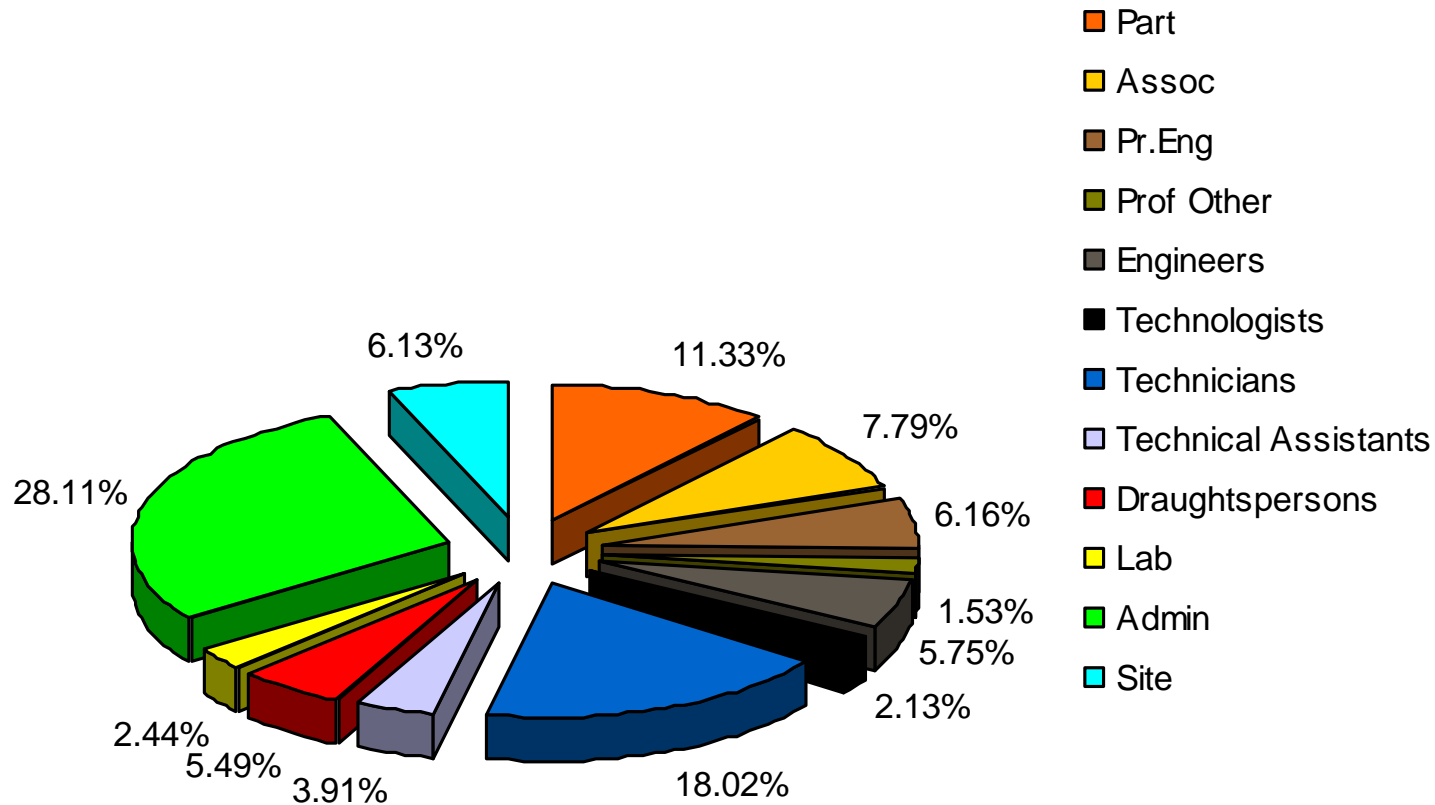




# Employment Breakdown

## Workforce Analysis

### January – June 2001

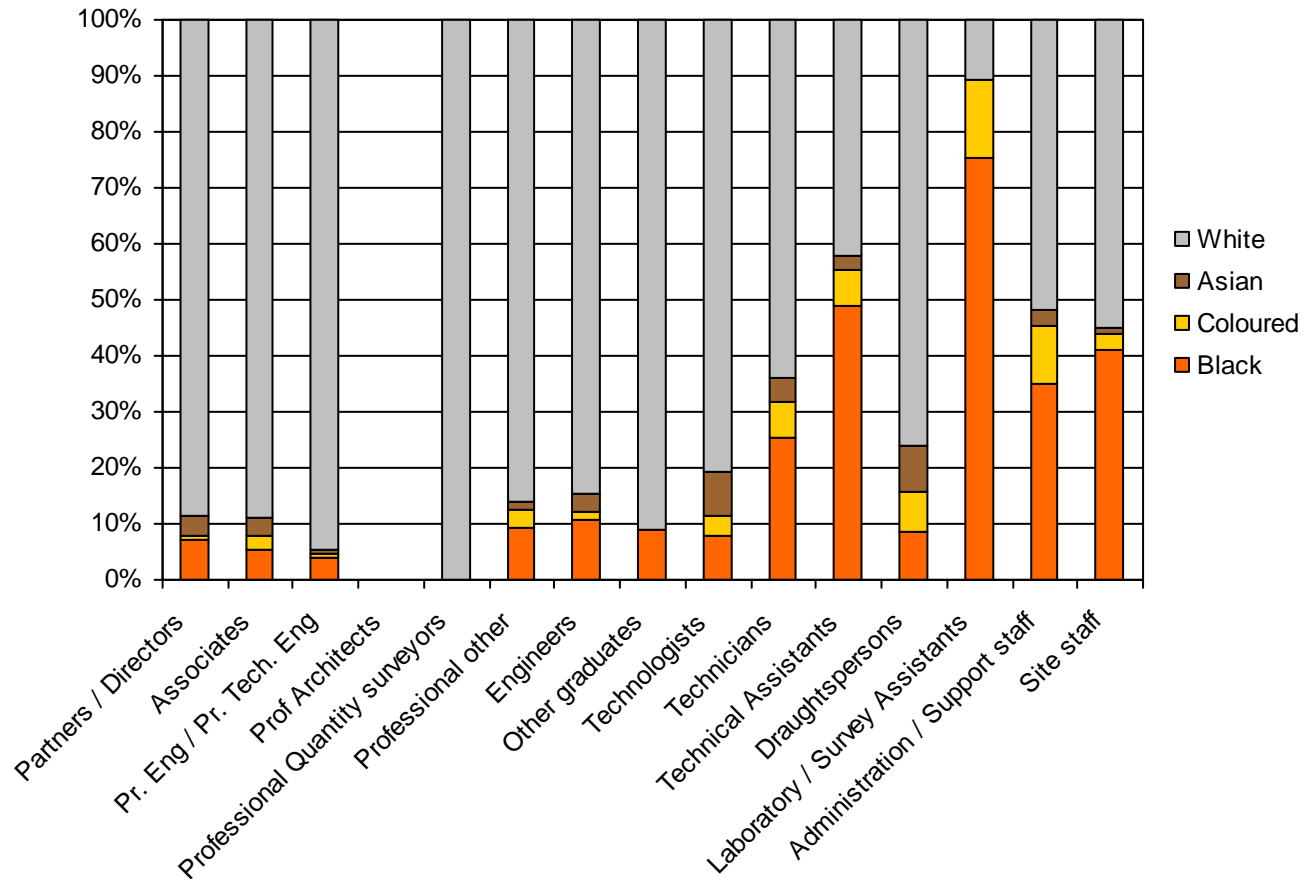


**Disabled = 0,2%**

# Employment Breakdown

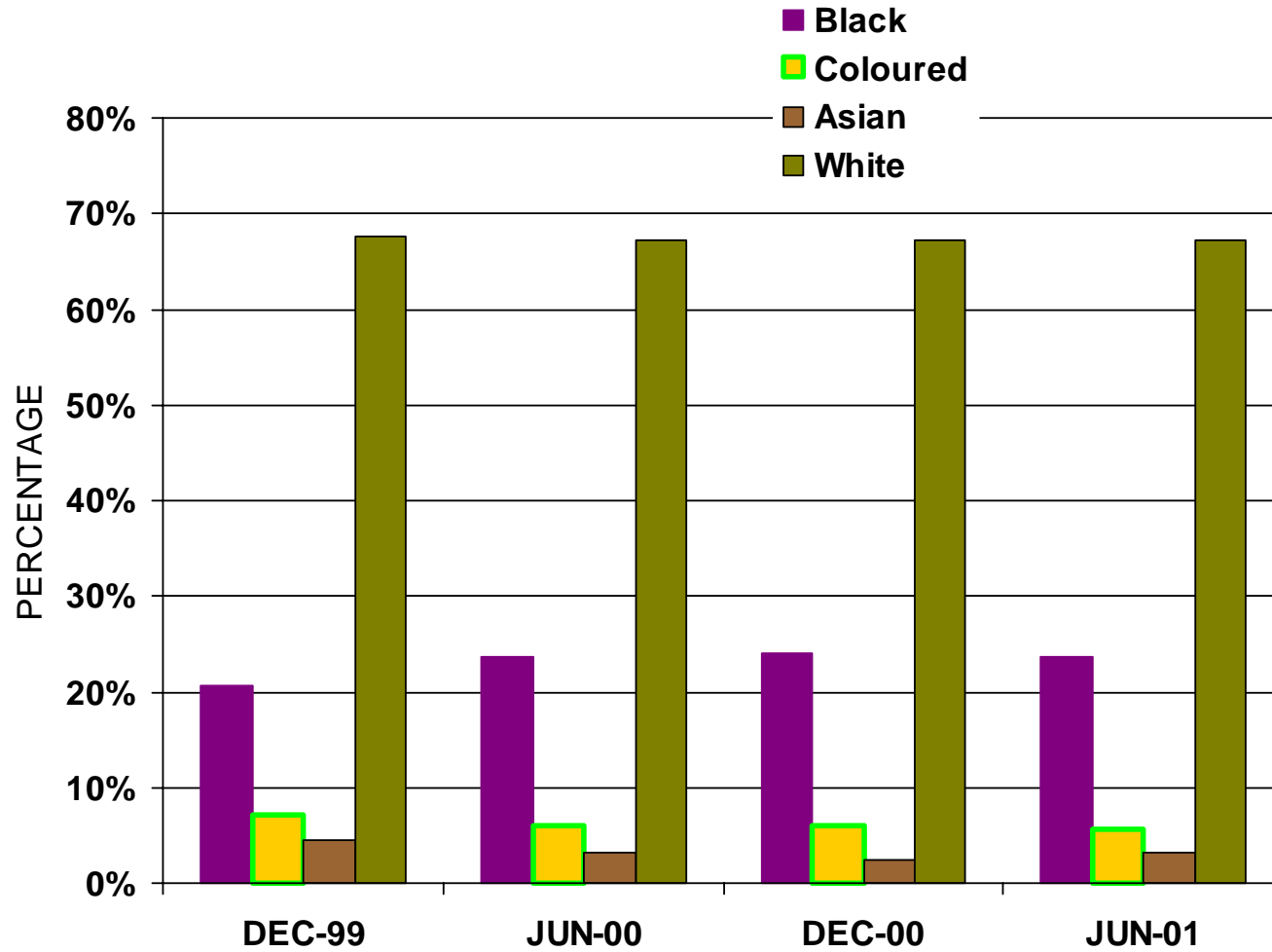
## Workforce Analysis

### January – June 2001



# Employment trends

## 1999 - 2001

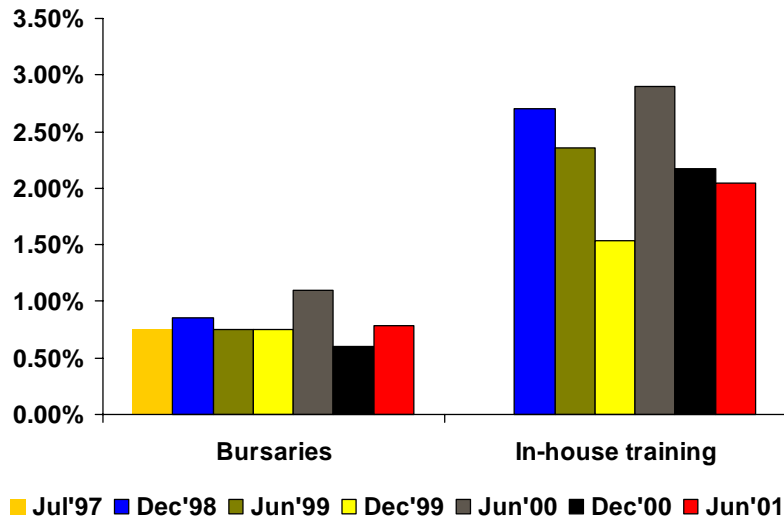


# Training

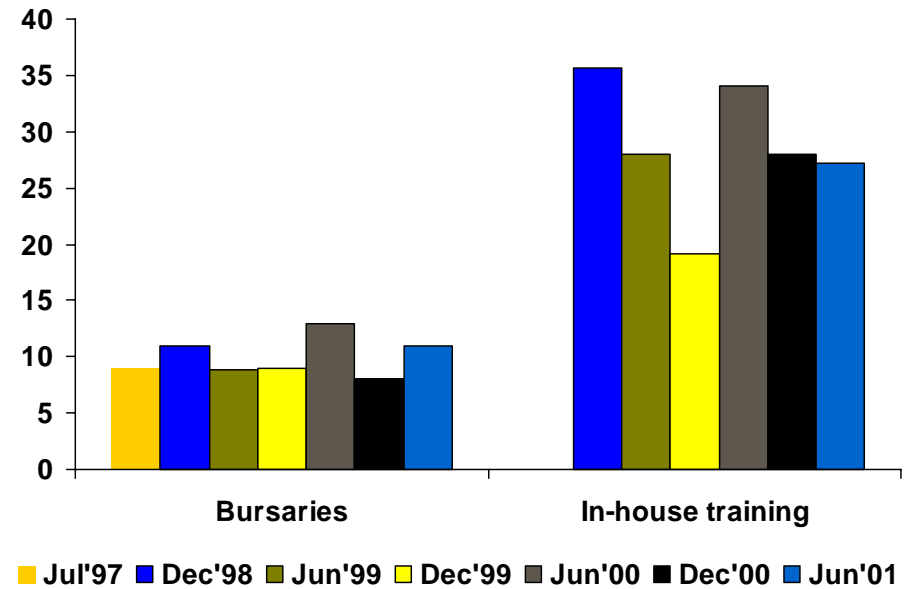
## Bursaries and in-house training



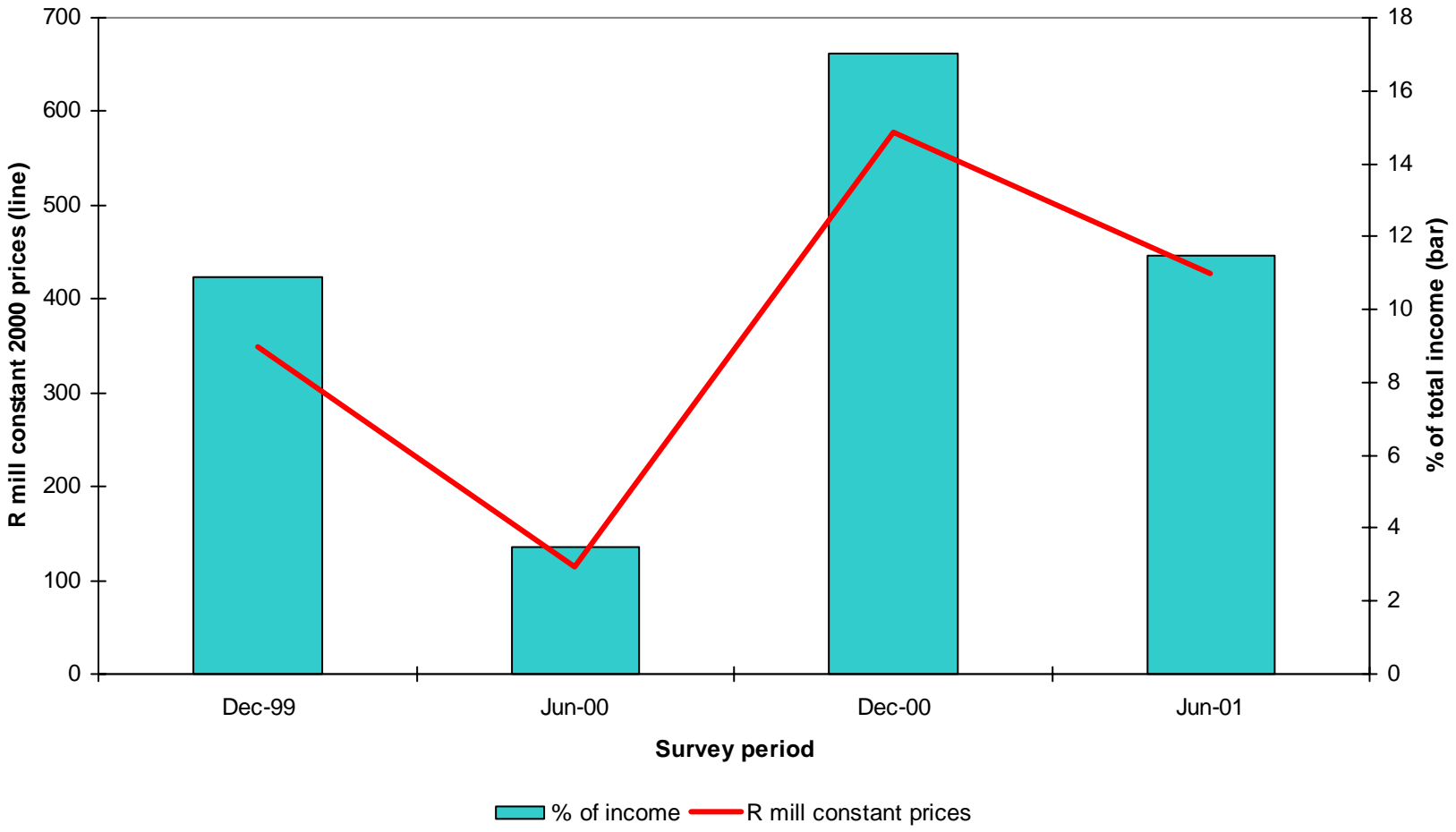
% of Salary / Wage bill



R mill (Constant prices)

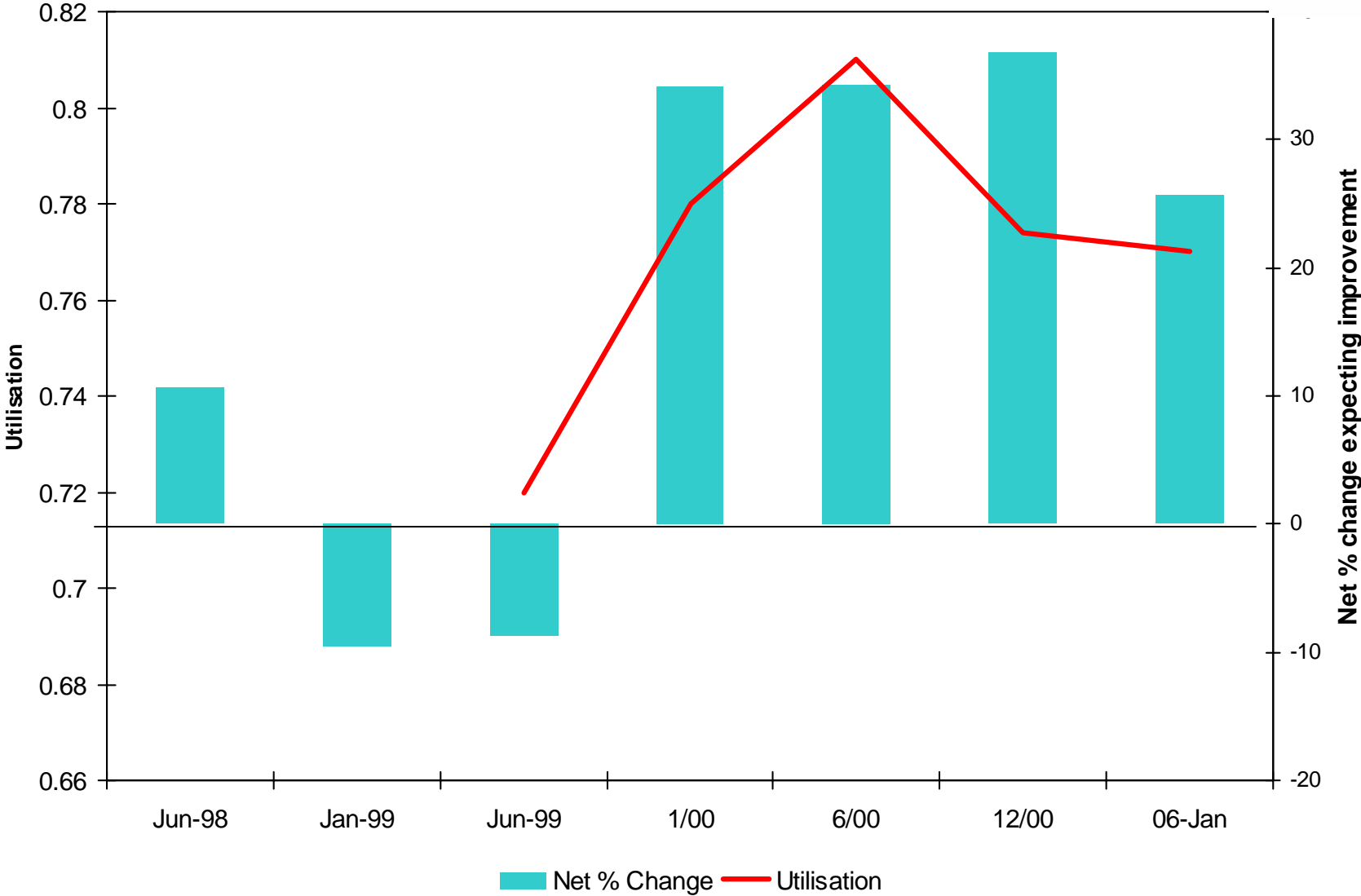


# PUBLIC PRIVATE PARTNERSHIPS



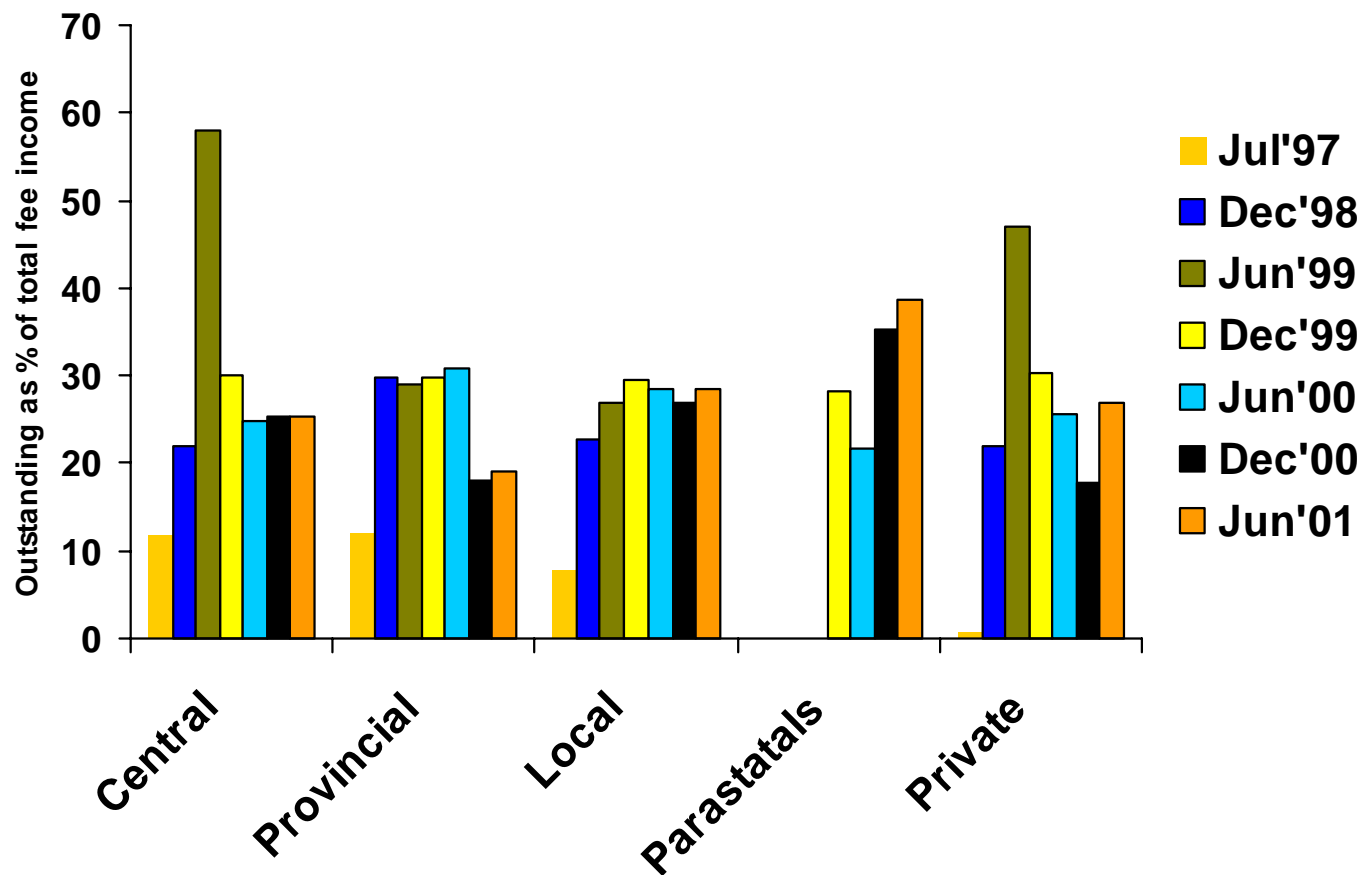
**Company involvement increased by 11% to represent just over 50% of total companies**

# INDUSTRY CAPACITY



# Total fee income outstanding as percentage of total potential fee income

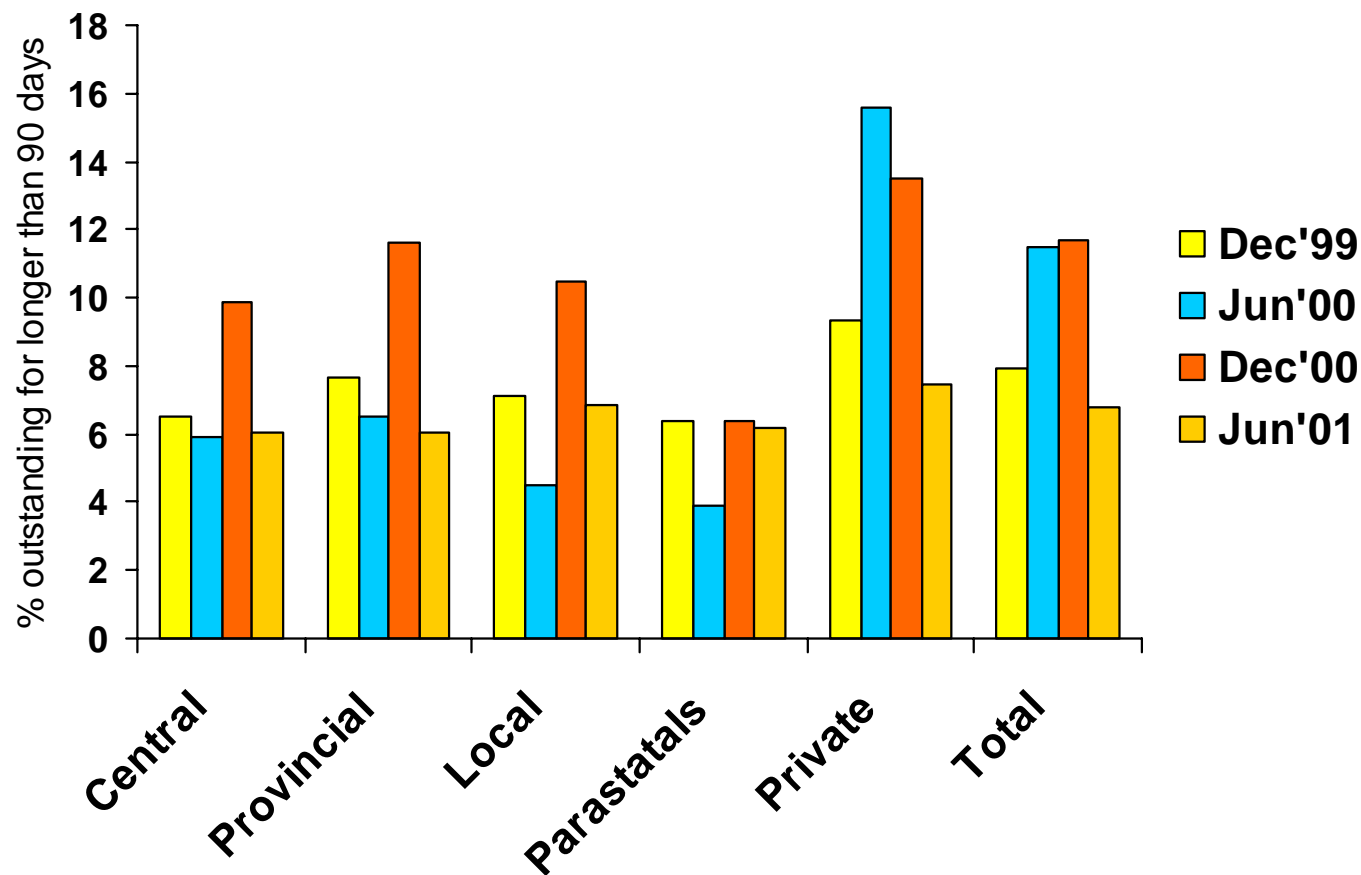
## By type of client





# Fee income outstanding for longer than 90 days as percentage of total potential fee income

## By type of client







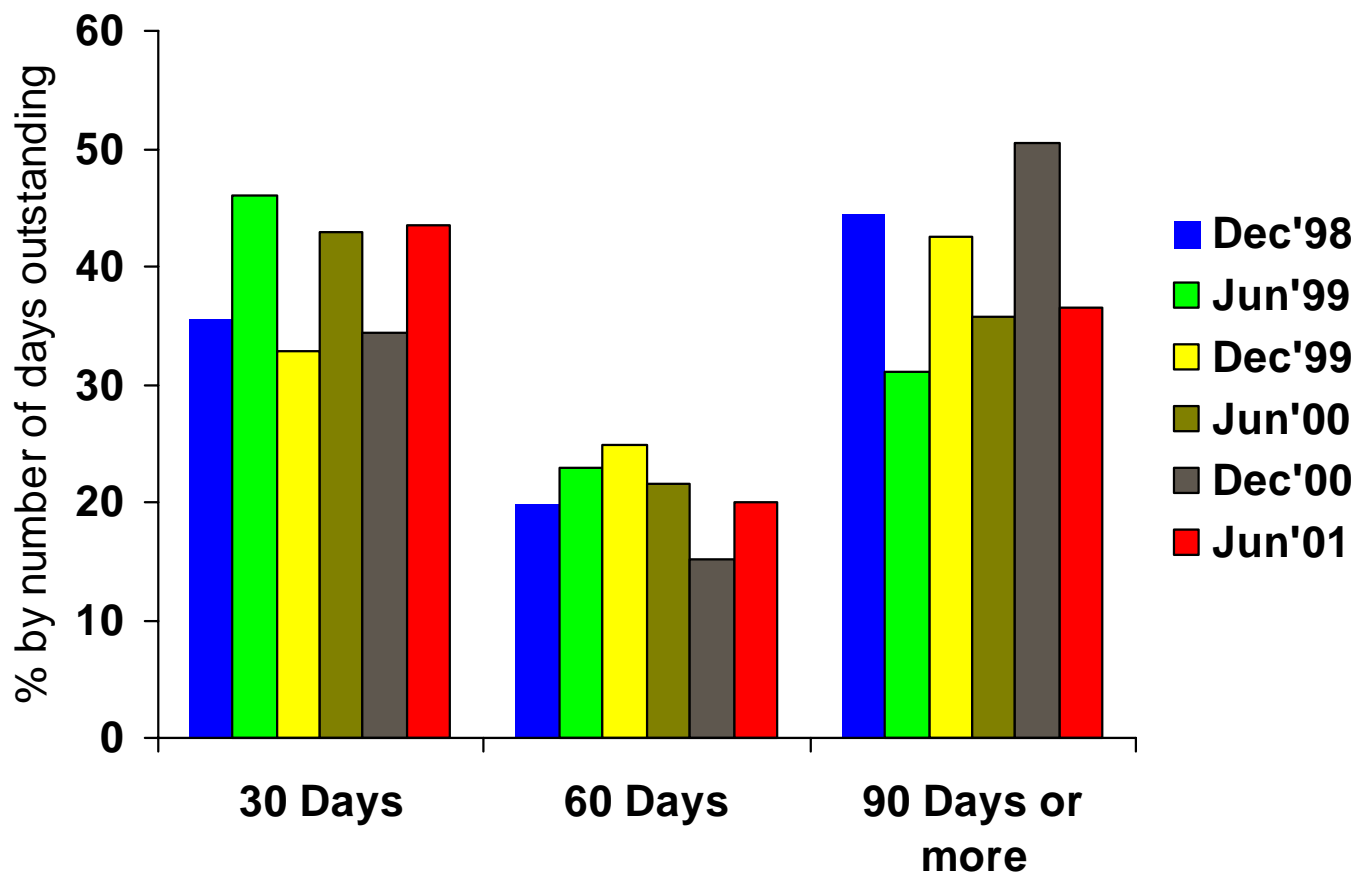
**Of the total fee income outstanding during the six months January - June 2001, **26%** has been outstanding for longer than 90 days**

**This amounts to approximately **R253 million** in real terms, divided as follows between the various clients:**

<b>Client</b>	<b>R mill 2000 prices</b>
<b>Central government</b>	<b>47</b>
<b>Provincial</b>	<b>29</b>
<b>Local</b>	<b>55</b>
<b>Parastatal</b>	<b>8</b>
<b>Private sector</b>	<b>114</b>

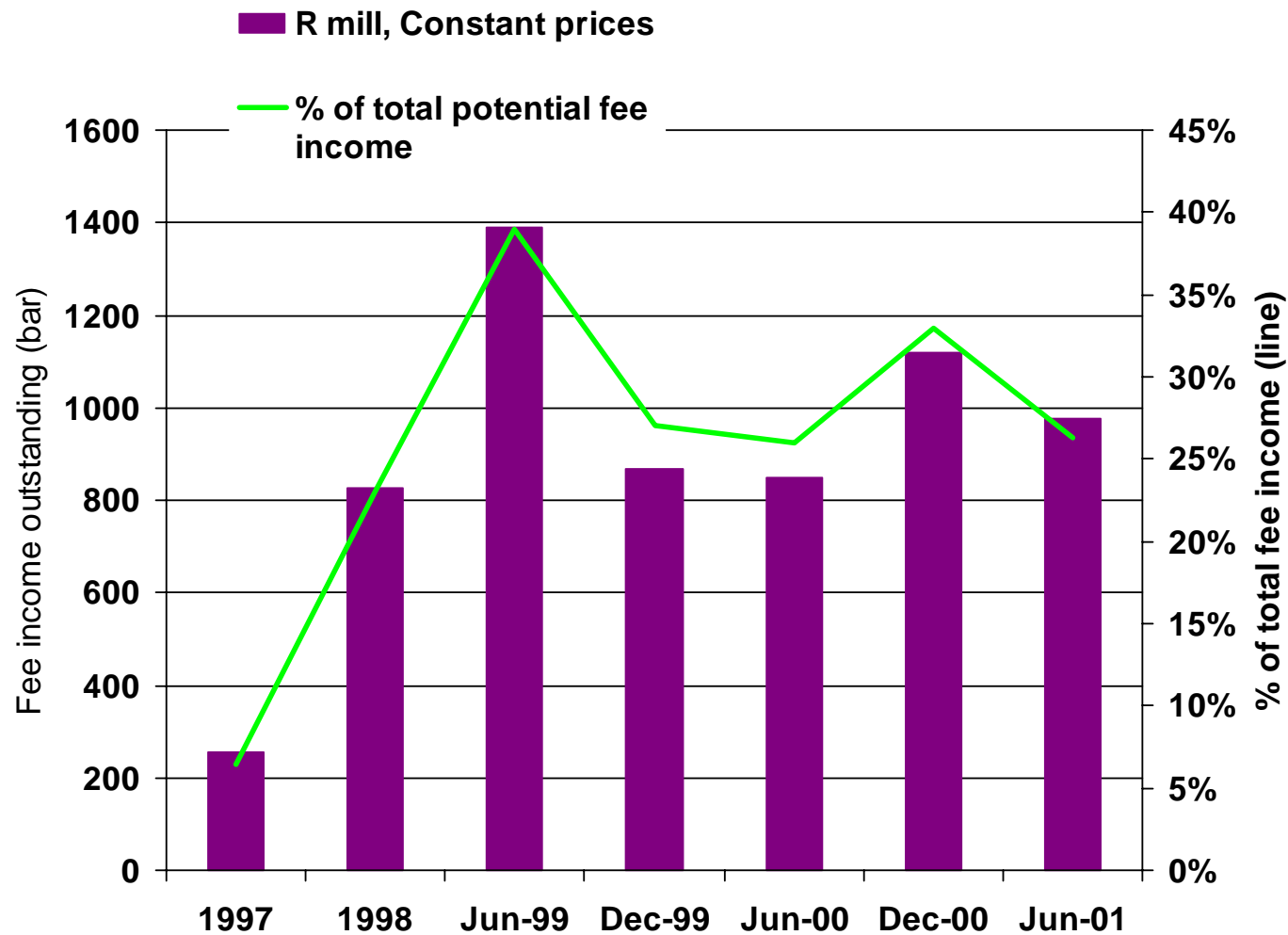


# Total fee income outstanding



# Comparison of total fees outstanding

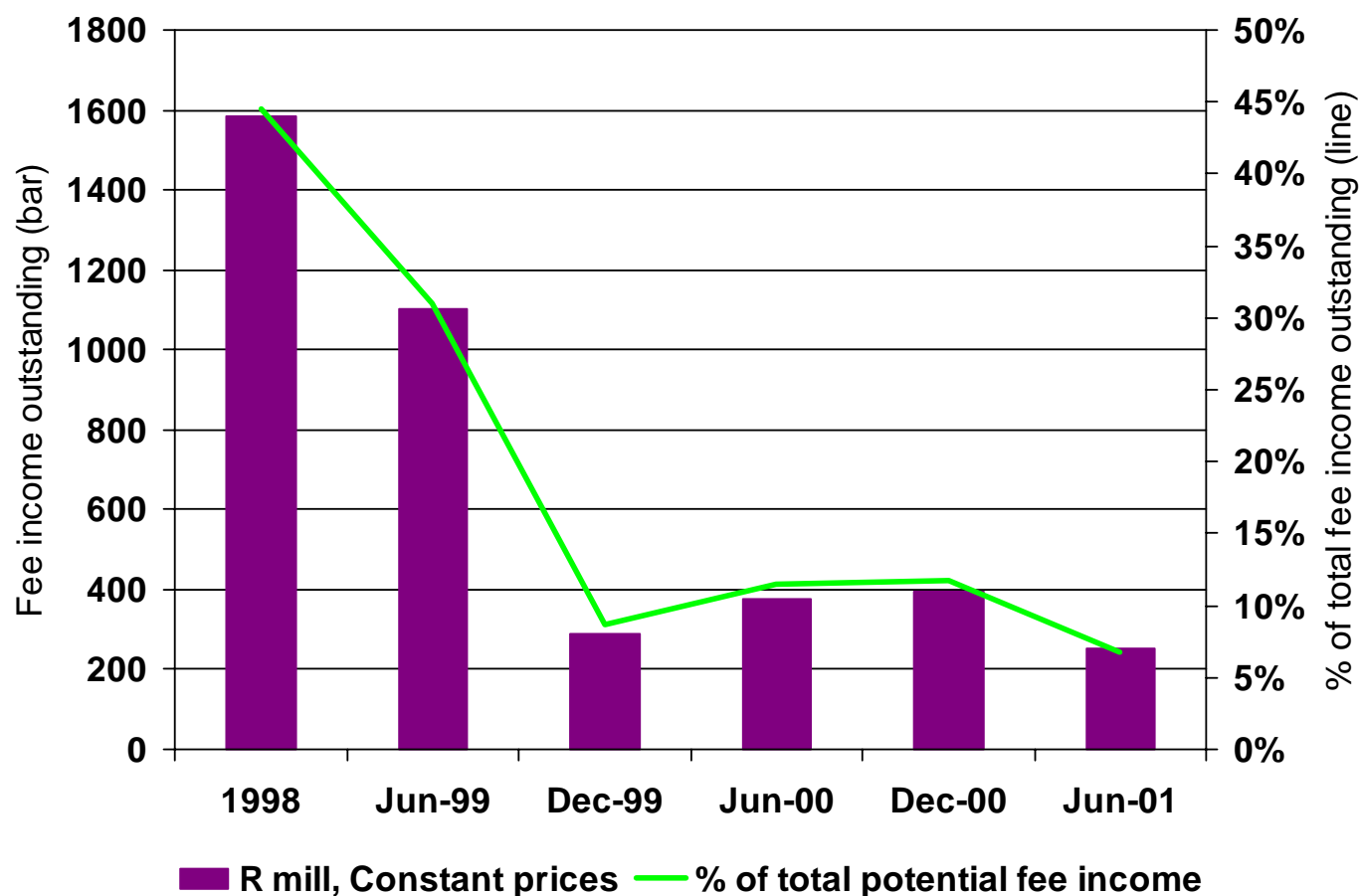
## Constant 2000 prices



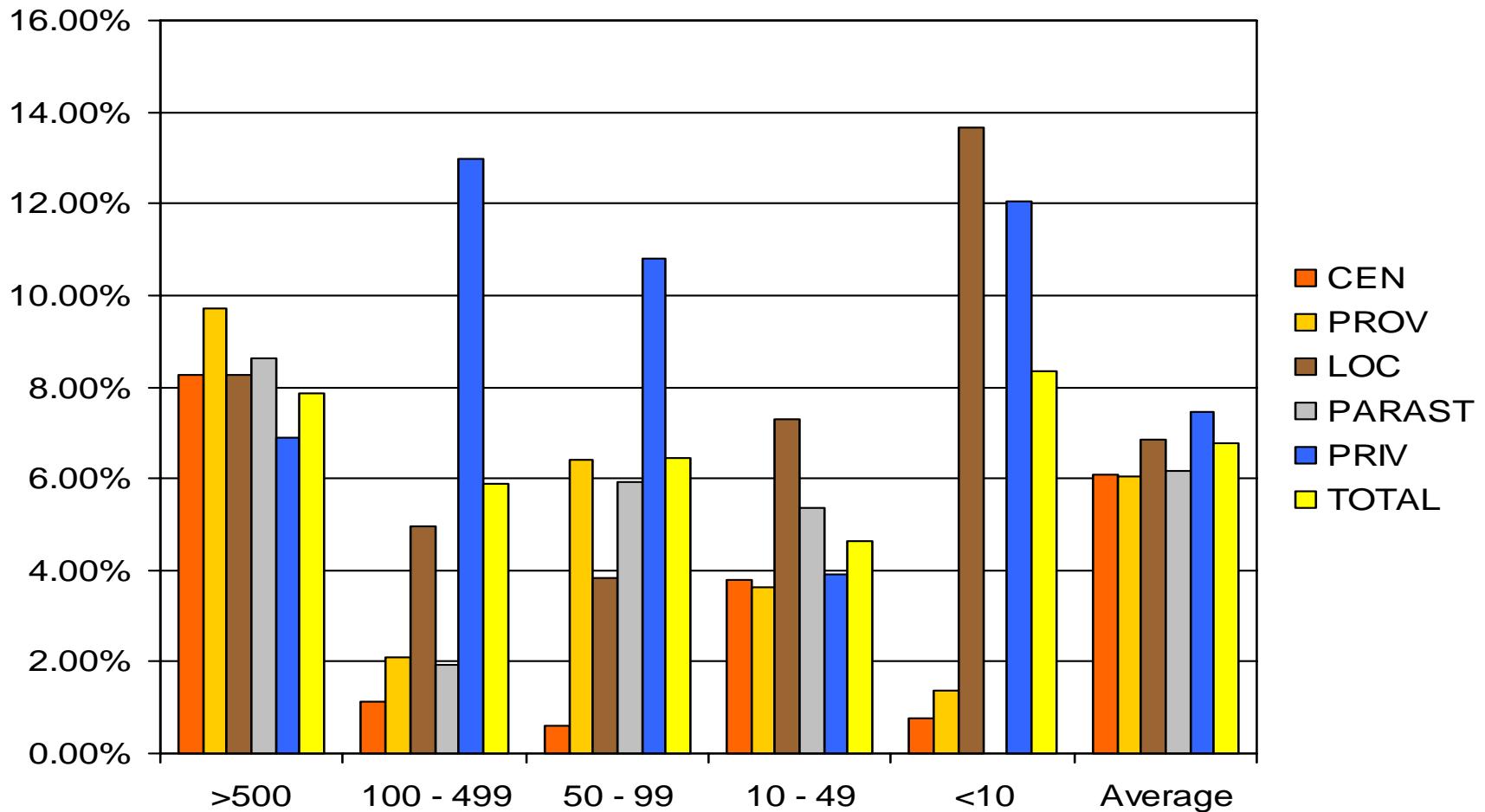
# Comparison of total fees outstanding

## 90 Days or more

As percentage of total potential fee income



# Comparison of total fees outstanding 90 Days or more, by type of client As percentage of total potential fee income



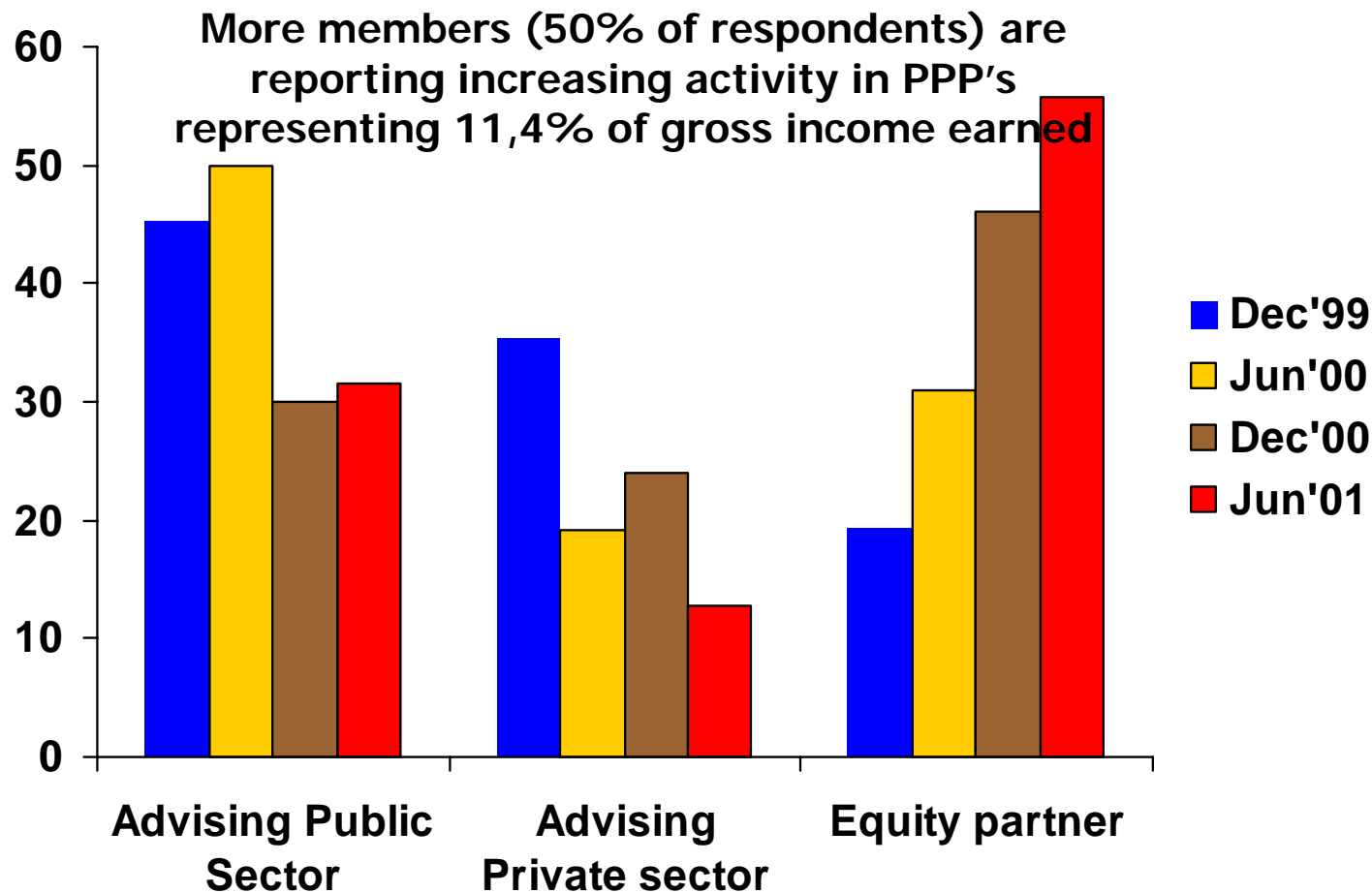
**Payments outstanding for longer than 90 days  
as % of gross fee income,  
by type of client  
January – June 2001**



CATEGORY	Total	CLIENT				
		CEN	PROV	LOC	PARAS	PRIV
> 500	7.86	8.28	<b>9.73</b>	8.26	8.62	6.91
Between 100 and 499	5.90	1.11	2.08	4.97	1.95	<b>12.98</b>
Between 50 and 99	6.45	0.60	6.40	3.84	5.92	<b>10.80</b>
Between 10 and 49	4.65	3.77	3.62	<b>7.31</b>	5.35	3.92
Less than 10	8.34	0.76	6.05	<b>13.67</b>	0	<b>12.07</b>
Average	6.77	6.07	6.05	6.84	6.18	7.44

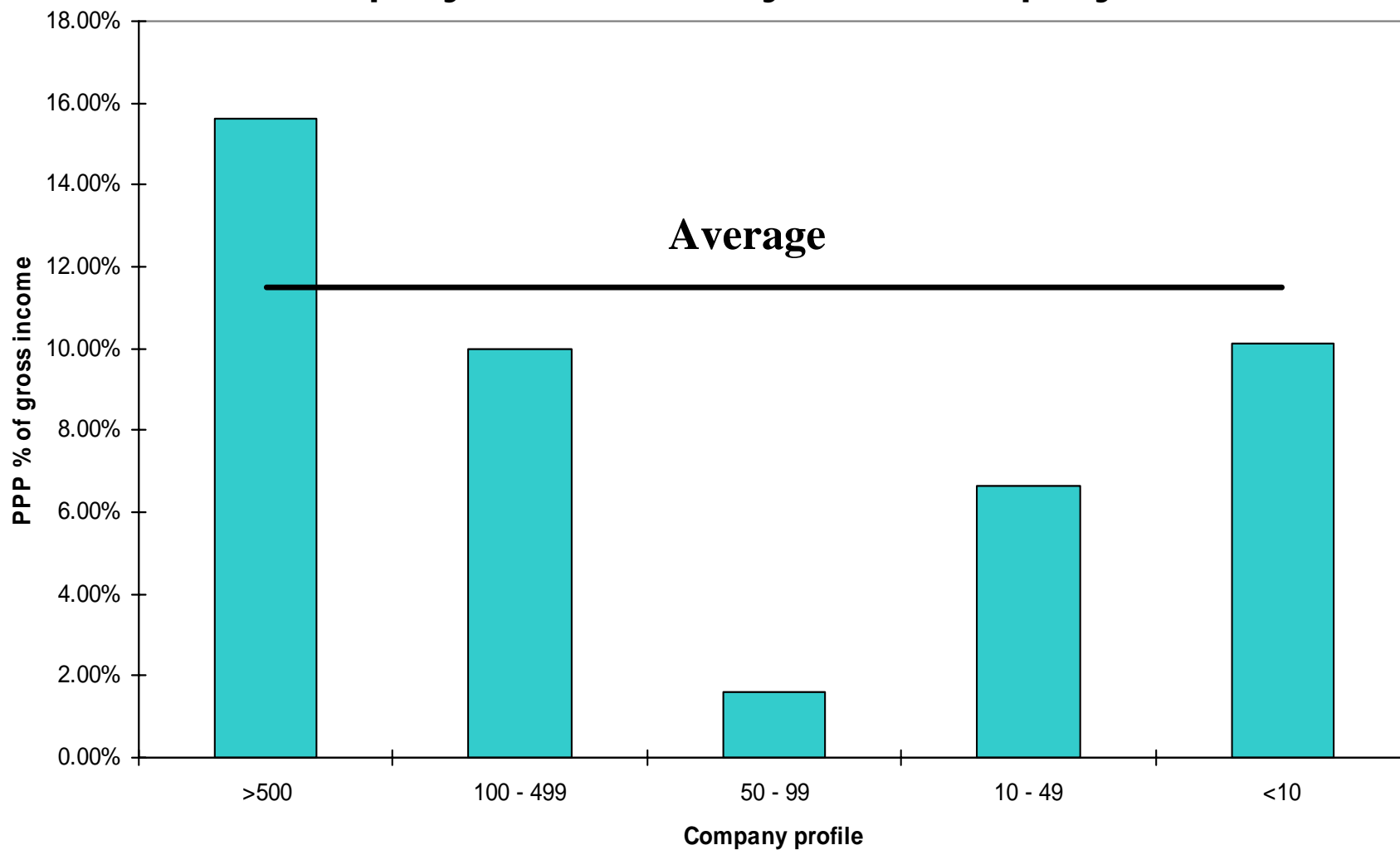


# Public Private Partnerships (PPP's)



# PUBLIC PRIVATE PARTNERSHIPS

## Company involvement by size of company

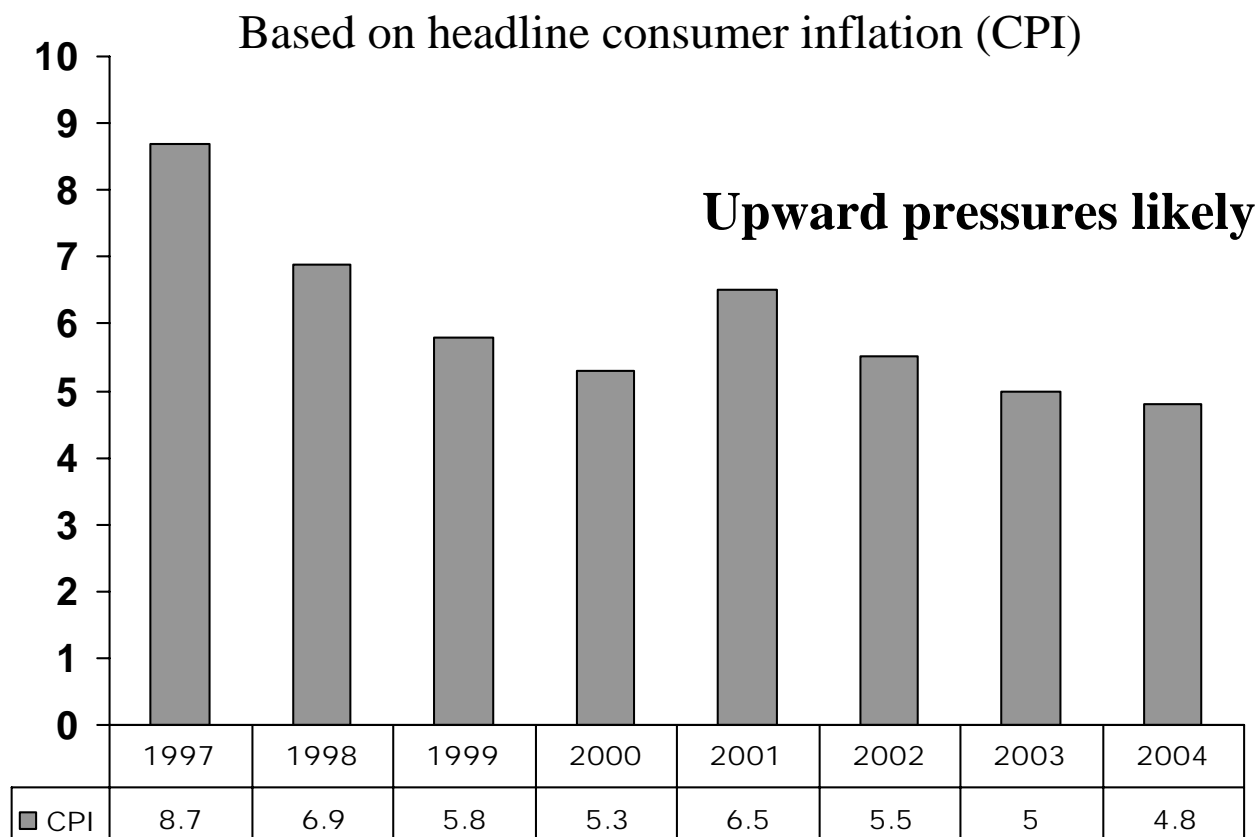






# Escalation trends

Year-on-Year % Change

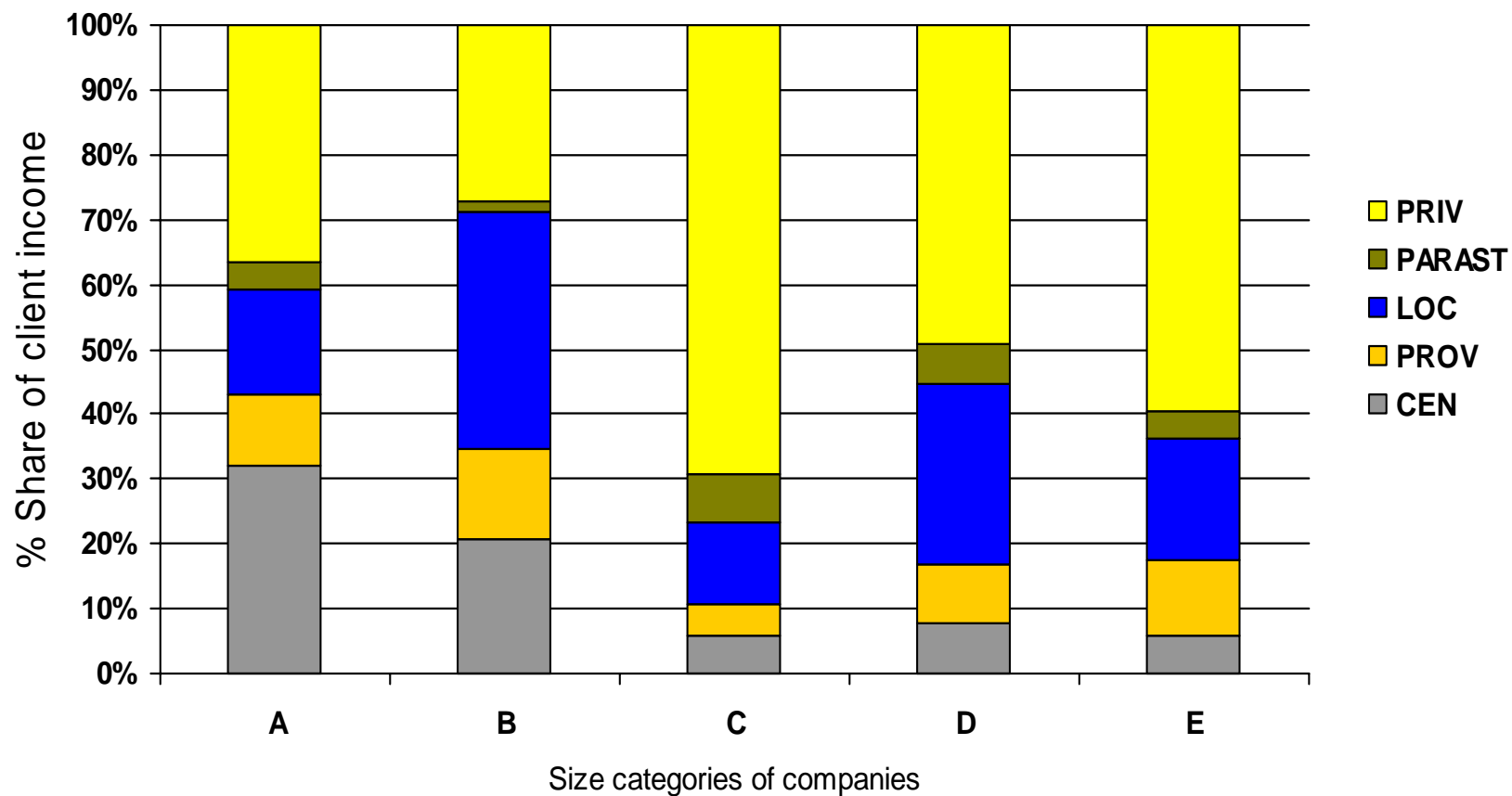


## Client distribution by size of company

Category	Size according to employment
> 500	More than 500 people
Between 100 and 499	Between 100 and 499
Between 50 and 99	Between 50 – 99
Between 10 and 49	Between 10 and 49
Less than 10	Less than 10 people



## Client distribution by size of company January – June 2000





## Client distribution by size of company January – June 2000

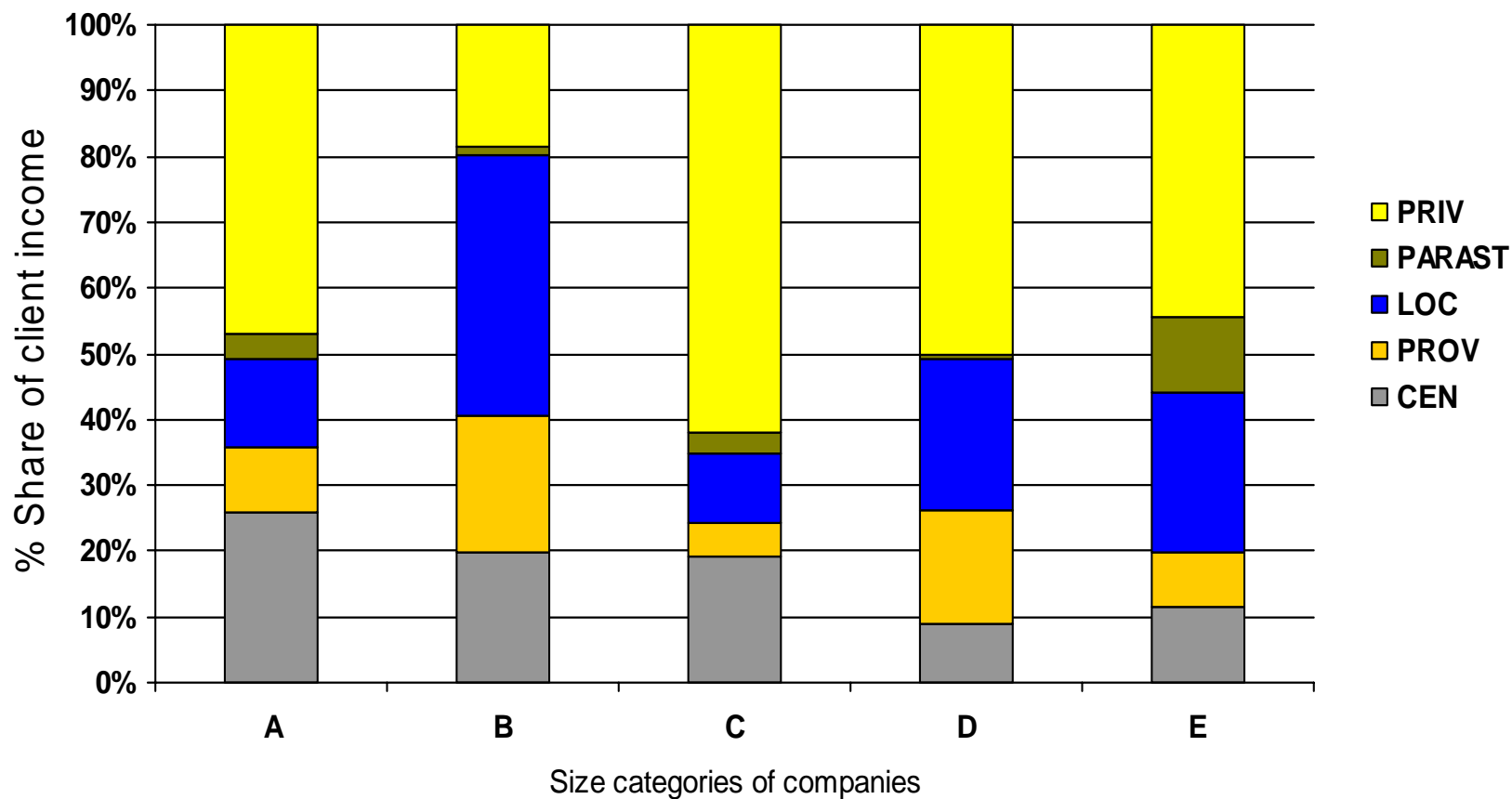
CATEGORY	CLIENT				
	CEN	PROV	LOC	PARAS	PRIV
A	32.09	10.88	16.4	4.2	36.43
B	20.68	14.02	36.5	1.65	27.15
C	5.94	4.83	12.57	7.45	69.21
D	7.82	9.15	27.79	6.01	49.23
E	5.75	11.82	18.72	4.27	59.43



## Client distribution by size of company July – December 2000

CATEGORY	CLIENT				
	CEN	PROV	LOC	PARAS	PRIV
A	25.8	9.91	13.39	3.78	47.12
B	19.84	20.66	39.76	1.19	18.56
C	19.26	5.03	10.54	3.19	61.98
D	8.95	17.36	22.88	0.69	50.13
E	11.44	8.34	24.20	11.52	44.50

## Client distribution by size of company July – December 2000





## Client distribution by size of company January – June 2001

CATEGORY	CLIENT				
	CEN	PROV	LOC	PARAS	PRIV
A	25.27	12.17	16.57	3.08	42.90
B	23.74	24.36	28.37	1.07	22.47
C	18.25	10.44	32.50	0.25	38.56
D	9.26	10.73	21.38	4.46	54.18
E	17.44	17.49	15.19	3.75	46.12



## Client distribution by size of company January – June 2001

