

MEDIUM & LARGE ESTABLISHMENTS SURVEY
eTHEKWINI MUNICIPAL AREA - 2013/2014
MODULE 1 (To be completed by MD/CEO)

1.1 Establishment Name: _____

1.2a. Physical (street) address: _____

1.2b. Postal Code: _____

1.3a Respondent Name: _____

1.3b Respondent Position: _____

1.4 Telephone: Dialling Code _____ **Number** _____

1.5 E-mail address: _____

PART 1: GENERAL ISSUES

NATURE & POSITION OF THE ESTABLISHMENT

1.6(a) Indicate the status of the establishment: **(Circle (O) one option)**

Head office/holding company	1
Branch	2
Subsidiary	3
Independent unit	4
Other, specify: _____	5

6Other 7

1.6(b) Does the establishment have a parent company?

1 Yes	2 No
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If NO go to question 1.7

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1.6(c) If YES, where is the parent company?

	Circle (O)
In KZN	1
Elsewhere in SA	2
Outside SA	3

Country if outside SA: _____

9 10Country

1.7 In what year did production start at this location? _____ (Year)

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1.8 When did the present owner(s) of this establishment take over in this capacity?

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_____ (Year)

1.9 How many full-time employees does this establishment have? _____

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1.10 Describe the legal status of this establishment:

	Circle (O) One	Listed on the JSE (circle)	
		Yes	No
Sole proprietor	1		
Closed corporation	2		
PTY Limited – Private company	3		
Personal Liability Company	4		
Public Company (Ltd)	5	1	2
State-owned Company	6	1	2
Subsidiary/division of larger enterprise	7	1	2
Other, Specify: _____	8	1	2

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1.11 Describe the ownership structure of this establishment:

	Ownership structure	% of ownership at present
Private ownership	Domestic	
	Individual resident(s) of South Africa	17
	Domestic company	18
	Local bank/institutional investor	19
	Foreign	
	Non-resident(s)	20
	Foreign company	21
	Foreign bank/institutional investor	22
Government ownership	Central government - IDC	23
	Central government - Other	24
	Other, specify: _____	25

1.12 Do 'previously / historically disadvantaged individuals' (PDI / HDIs) or companies controlled by PDIs / HDIs (African, Asian, Indian, Coloured) own a part of this establishment?

☐ 1 Yes ☐ 2 No **IF NO, GO TO QUESTION 1.14**

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If YES to question 1.12:

1.13(a) What percentage of the total does the PDI / HDI own? _____%

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If YES to question 1.12:

1.13(b) When did the PDI / HDI become owner/part-owner of this establishment?:

_____ (Year)

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1.14 What type of products does this establishment produce? (List the **main product** – e.g. spices, garden chair)

_____ 29

1.15 Categorise the following in terms of their significance for changes in establishment strategy since 2008 / OR since establishment started operating if set up after 2008? (Circle (O) the relevant answer for each focus area listed in the table.)

Focus area	Major change	Moderate change	No - Not undertaken/not applicable	Reduced focus area
Bypassed intermediaries for the sales of products	1	2	3	4
Developed new/more remote markets	1	2	3	4
Bypassed intermediaries in sourcing inputs	1	2	3	4
Took control of logistics/tightened control of logistics costs	1	2	3	4
Took steps to control/reduce energy costs	1	2	3	4
Engaged in equipment investment	1	2	3	4
Accelerated skills and training development	1	2	3	4
Made investments in marketing	1	2	3	4
Engaged in internal reorganisation processes (process upgrading)	1	2	3	4
Other, specify: _____	1	2	3	4
Other, specify: _____	1	2	3	4

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39 Other

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41 Other

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CONTEXT CHANGE

1.16(a) What major elements in the **global** arena have been influencing the establishment's ability to expand since 2008/OR since establishment started operating if set up after 2008?

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2. _____ 44

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3. _____ 45

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4. _____ 46

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1.16(b) What major elements within the **national** arena have been influencing the establishment's ability to expand since 2008/OR since establishment started operating if set up after 2008?

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4. _____ 50

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1.16(c) What major elements within the **provincial** arena have been influencing the establishment's ability to expand since 2008/OR since establishment started operating if set up after 2008?

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2. _____ 53

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1.16(d) What major elements within the **local** arena have been influencing the establishment's ability to expand since 2008/OR since establishment started operating if set up after 2008?

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3. _____ 56

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4. _____ 57

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ECONOMIC POLICY ENVIRONMENT

1.17(a) Rate each of the potential obstacles to an expansion of your activities on a scale ranging from 1 = major problem to 3 = not a problem. **(Circle the relevant answer.)**

Potential obstacle	Major problem	Moderate problem	Not a problem	Not applicable
Regulations for expanding current business and/or starting a new business	1	2	3	4
Export regulations/procedures	1	2	3	4
Import regulations/procedures	1	2	3	4
Availability of technical/vocational labour skills	1	2	3	
Labour regulations & relations (LRA, BCEA, EEA, Skills Act)	1	2	3	
Compliance with competition rules & procedures	1	2	3	
Administrative charges (e.g. cost of preparing documents, applying for licences)	1	2	3	
Changes in government policies (inconsistency in policy)	1	2	3	
Environmental regulations	1	2	3	
HIV/AIDS	1	2	3	
Crime and theft	1	2	3	
Transport infrastructure provision & quality	1	2	3	
Cost of transport	1	2	3	
Telecommunication & ICT infrastructure provision and quality	1	2	3	
Cost of telecommunication & ICT	1	2	3	
Energy provision & quality	1	2	3	
Cost of energy	1	2	3	
Water provision & quality	1	2	3	
Cost of water	1	2	3	
Cost of capital/credit	1	2	3	
Depreciation or weakening of Rand/Dollar exchange rate (more Rand per US\$) directly or indirectly	1	2	3	
Markets are dominated by established firms	1	2	3	
Mergers and acquisitions procedures	1	2	3	
Low rates of economic growth in South Africa	1	2	3	
Corruption in government**	1*	2	3	
Private sector corruption*	1*	2	3	
Inefficiencies in national government	1	2	3	
Inefficiencies in provincial government	1	2	3	
Inefficiencies in local government	1	2	3	
Other, Specify: _____	1	2		

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1.17(b) Additional comments on any of the obstacle mentioned above (If major or moderate problem chosen above)?

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1.17(c). * If you have ranked **private corruption** as a major problem, explain briefly how this has affected your establishment?:

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1.17(d). ** If you have ranked **corruption in government** as a major problem, explain briefly how this has affected your establishment?:

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1.18 What is the BEE level of this establishment? (Circle N.A. (Not applicable) if not registered for BEE).

BEE Level (insert number): **99 = N.A.** IF N.A. SKIP TO QUESTION 1.21

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1.19 Has the Broad Based Black Economic Empowerment (BBBEE) Act had any effect on your establishment?

1 Yes **2 No** IF NO SKIP TO QUESTION 1.21

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1.20 If YES to Question 1.19 above, has the following occurred in this establishment? (Circle the relevant answer for each question and comment.)

Question	Yes	No	Comment	
Re/Structure to meet BBBEEE requirements	1	2		99
BBBEE has imposed costs on your establishment	1	2		100
Benefitted from the BBBEE Act	1	2		101

GOVERNMENT'S ROLE IN INVESTMENT PROMOTION AND LOCAL ECONOMIC DEVELOPMENT

1.21(a) In terms of enhancing the performance of your establishment, to what extent is further progress still required by the Municipality in the various areas listed in the table below?

(Circle (O) from the list below and add under other if required. Specify other areas not listed in the table as appropriate to your establishment.)

Area for further progress	Extremely important	Moderately important	Not important
New Infrastructure	1	2	3
Maintenance of the existing infrastructure (e.g. road maintenance/ development, electricity, water)	1	2	3
Investment support and facilitation	1	2	3
Sector-specific support	1	2	3
Other, Specify:	1	2	
Other, Specify:	1	2	

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1.21(b) What comments would you make about the manner in which eThekwin Municipality deals with your business queries?

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1.21(c) Are local property rates a problem for your establishment?

1 Yes	2 No	3 Not applicable
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1.21(d) If YES, in what ways?

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1.22 From your experience, which are the most important areas where progress is still required by central government? (Circle (O) the appropriate response for each area listed in the table and suggest additional areas as appropriate.)

Area for further progress	Extremely important	Moderately important	Not important
New infrastructure	1	2	3
Maintenance of the existing infrastructure (e.g. National roads, ports and power stations)	1	2	3
Address high cost of utilities such as electricity	1	2	3
Provide timely, accurate and relevant information for growth of local businesses	1	2	3
Provide adequate sectoral support mechanisms & measures	1	2	3
Promote competition	1	2	3
Support small firms to set-up and expand	1	2	3
Support new firms to set up and expand	1	2	3
Promote efficient skills development systems	1	2	3
Promote access to government tenders	1	2	3
Other, Specify: _____	1	2	3
Other, Specify: _____	1	2	3

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- 1.23(a) Evaluate the incentive programmes available to medium and large producers listed below:
(Circle relevant numbers and specify years over which a particular programme has been used.)

		If you are aware of the programme -											
		Are you aware of this programme me?		Is it used by your establishment?		If it is used by your establishment							
						If used: how many years has it been used for?		Importance for your establishment			Administrative and other costs (including delays in obtaining benefits) for your establishment to use this facility		
Yes	No	Yes	No	No of years used	Unsure	Essential	Useful	Not useful	Prohibitive costs not worth using again	Costs are high	Reasonable costs		
Grants for R&D projects	129	1	2	1	2		4	1	2	3	1	2	3
R&D tax incentives (S11D of the Income Tax Act)	130	1	2	1	2		4	1	2	3	1	2	3
Grant for feasibility studies (CPFP)	131	1	2	1	2		4	1	2	3	1	2	3
Export marketing & investment assistance scheme (EMIA)	132	1	2	1	2		4	1	2	3	1	2	3
Capital expenditure incentive (S12I of the Income Tax Act)	133	1	2	1	2		4	1	2	3	1	2	3
Enterprise investment programme (EIP)/Manufacturing investment programme (MIP)	134	1	2	1	2		4	1	2	3	1	2	3
APDP – Automotive production development programme	135	1	2	1	2		4	1	2	3	1	2	3
Foreign investment grant (FIG)	136	1	2	1	2		4	1	2	3	1	2	3
Manufacturing competitiveness enhancement programme (MCEP)	137	1	2	1	2		4	1	2	3	1	2	3
Clothing & textile competitiveness improvement programme (CTCIP including leather and footwear)	138	1	2	1	2		4	1	2	3	1	2	3
Other, Specify:	139	1		1	2		4	1	2	3	1	2	3

- 1.23(b) Are there any additional comments you would like to add on incentive programmes available to firms in your sector?

1. _____

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2. _____

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CORPORATE FINANCE1.24(a) Is your investment capital **fully** funded from internal sources?

1 Yes	2 No
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IF YES, GO TO QUESTION 1.24(c)
142 1.24(b) **IF NO TO QUESTION 1.24(a)**, list the percentage of the establishment's current financing from each of the following source for your investment capital:

Source	Percentage (%)
Internal sources	
Loan from a local South African bank	
Loan from a foreign bank	
Loan from partner establishment or parent establishment	
Shares issued on the stock exchange	
Share issue not listed on the stock exchange	
Loan from another investor/other investors or another company/other companies	
Loan from the IDC*	
Other, Specify: _____	
Total=	100

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1.24(c) Is your working capital **fully** funded from internal sources?

1 Yes	2 No
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IF YES, GO TO QUESTION 1.24(e)
153 1.24 (d) **IF NO TO QUESTION 1.24(c)**, list the percentage of establishment's current financing from each of the following source for your working capital:

Source	Percentage (%)
Internal sources	
Loan from a local South African bank	
Loan from a foreign bank	
Loan from partner establishment or parent establishment	
Shares issued on the stock exchange	
Issued shares not listed on the stock exchange	
Loan from another investor/other investors or another company/other companies	
Loan from the IDC*	
Other, Specify: _____	
Total=	100

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1.24(e) * **IF NO LOAN FROM THE IDC AT PRESENT**: Has this establishment ever applied for a loan from the IDC?

1 Yes	2 No
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IF NO, GO TO QUESTION 1.24(h)
164 1.24(f) **IF YES TO QUESTION 1.24(e)**: when was the last that such an application was made?

_____ (Year)

165 1.24(g) **IF YES TO QUESTION 1.24(e)**, Was the application successful?

1 Yes	2 No	3 Don't yet know
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1.24(h) What comments would you make about the role of the IDC for your establishment/for establishments in your sector?

1. _____ 167 2. _____ 168 3. _____ 169

- 1.25 Has your establishment expanded its operations (output) since 2008?/OR since the establishment started operating if set up after 2008?

1 Yes 2 No IF NO, GO TO QUESTION 1.27

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- 1.26(a) IF YES TO QUESTION 1.25, what expansion strategies were undertaken?

Type of expansion	Circle (O) all relevant
Expansion through acquisition/merger	1
Expansion through starting / adding a new production facility	2
Expansion through increasing employment in current production facility	3
Expansion through investment in plant and machinery	4
Other, specify: _____	5

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- 1.26(b) IF YES TO QUESTION 1.25, how was the expansion pursued?

Type of expansion	Circle (O) all relevant
Expansion in existing markets	1
Expansion in new markets	2
Expansion within South Africa	3
Expansion through exports in Africa	4
Expansion through exports outside Africa	5
Other, specify: _____	6

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- 1.27 IF NO TO QUESTION 1.25, what is the main reason why not?

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EXPECTATIONS

- 1.28 What are your expectations for the following indicators over the next two years relative to 2012? (Circle (O) the relevant answer for each indicator.)

Indicator	Markedly worsening/very poor	Worsening /poor	No change	Good/ improved	Do not know
The annual sales of the establishment	1	2	3	4	5
The establishment's average margin	1	2	3	4	5
South Africa's GDP growth	1	2	3	4	5

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1.29 What would it take to expand to a scale of operation which would enable you to increase your workforce by at least 10 percent? **(Circle ALL that apply and comment.)**

	Circle (O)	Comments
Sustained increase in the market demand for my products/services	1	
Interest rates must fall in real terms	2	
Wages must decline in real terms	3	
Have to export more	4	
Need cheaper imports	5	
Labour regulations must be more flexible for large businesses	6	
Need a greater supply of skilled workers	7	
Competition from foreign firms must decline	8	
Nothing would work/not possible	9	
Other, Specify: _____	10	
Other, Specify: _____	11	

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1.30 What would it take for your establishment to make an additional capital investment of at least 10 percent next year? **(Circle ALL that apply and comment.)**

	Circle (O)	Comments
Sustained increase in the market demand for my products/services	1	
Interest rates must fall in real terms	2	
The exchange rate must stabilize	3	
Have to export more	4	
Need to feel more confident about the future of the South African economy	5	
Crime and violence must decrease to make investments less risky	6	
Labour relations must be more flexible and real wages must fall	7	
Need a greater supply of skilled workers	8	
The investment climate (rate of return/risk) in South Africa in relation to foreign economies must improve significantly	9	
There is nothing that allows such option	10	
Other, Specify: _____	11	
Other, Specify: _____	12	

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2130th		214

1.31 What competitive advantages does your establishment enjoy as a result of being located in South Africa?

1. _____ 215

2. _____ 216

3. _____ 217

PART 2: PRODUCTION RELATED ISSUES

PRODUCTS MANUFACTURED

1.32(a) List the main products manufactured by this establishment in order of importance and indicate for how long each has been manufactured for (in years):

	List a maximum of THREE products manufactured or assembled at this plant?	Approximate % of total turnover	Main raw material/inputs used to produce each product	Purpose/use/application of final product	Number of years manufactured
	1. Sheet metal products	70 %	Steel	Components for buildings	15
	2. Furniture	30 %	Metal	Garden furniture	8
1	1.				4
2					5
3					
6	2.				9
7					10
8					
11	3.				14
12					15
13					
16	TOTAL				

1.32(b) Has the list of main products manufactured or assembled at the plant changed since 2008/OR since the establishment has started its operations if less than 5 years old?

1 Yes	2 No
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IF NO GO TO QUESTION 1.33(a)

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1.32(c) How has the list of products manufactured or assembled changed since 2008/ OR since the establishment has started its operations if less than 5 years old?:

_____ 18

1.32(d) Explain briefly why these changes have been made/occurred:

_____ 19

1.33(a) Does this establishment provide services (i.e. repairs, design, installation, maintenance) to other customers and / or firms (manufacturing and others)?

1 Yes	2 No
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IF NO GO TO QUESTION 1.34

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1.33(b) How has this pattern of service provision changed since 2008?

_____ 21

1.34 What kind of product development changes have taken place at the establishment since 2008/OR since the establishment started operating if set up after 2008? **(Circle (O) the relevant answer for each focus area and specify market focus.)**

Focus Area	Major Change	Moderate Change	No - Not undertaken / not applicable	Reduced focus area	Market focus	
					Domestic	Foreign
Introduction of completely new products to the market	1	2	3	4	1	2
Focus shifting onto less complex / more basic products	1	2	3	4	1	2
Adaptation of existing product(s)/introduction of new product(s) to improve environmental or sustainability performance of the enterprise	1	2	3	4	1	2
Significant improvements of the quality or technical specifications of your products	1	2	3	4	1	2
Focus on offering new <u>services</u> (e.g. professional services) to other firms in same sector	1	2	3	4	1	2
Focus on offering new <u>services</u> (e.g. professional services) to firms in other sectors	1	2	3	4	1	2
Shift of activities significantly away from production and toward services	1	2	3	4	1	2
Other, specify: _____	1	2	3	4	1	2

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24				25a 25b
26				27a 27b
28				29a 29b
30				31a 31b
32				33a 33b
34				35a 35b
36				37a 37b

PRODUCTION CHALLENGES

1.35 Please indicate the main production challenges experienced by the establishment.
(Circle (O) the relevant answer for each focus area.)

Focus Area	A Problem Area	Not a Problem Area	Comments	
Insufficient skills of existing workforce	1	2		38
Low labour productivity	1	2		39
High absenteeism	1	2		40
High staff turnover	1	2		41
Difficulty to adapt to new technology brought into the establishment for production purposes	1	2		42
Quality control issues (for own production)	1	2		43
Difficulty in dealing with fluctuations in order size	1	2		44
Problems in the maintenance of equipment	1	2		45
Issues in quality of product from suppliers required as inputs	1	2		46
Other, specify: _____	1	2		47

CHOICE OF LOCATION1.36(a) Please list the **main advantages** of your present location:

1. _____
2. _____
3. _____
4. _____

48 49 50 51 1.36(b) Please list the **main disadvantages** of your present location:

1. _____
2. _____
3. _____

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1.37(a) If you should decide to expand your existing production capacity, where would the expansion/new plant be located?

Choice of location	Circle (O) one
Same premises	1
Within the same industrial area as at present	2
Different industrial area in Durban	3
Elsewhere in KZN	4
Elsewhere in South Africa Specify province: _____	5
Outside South Africa Specify country: _____	6
Not applicable	7

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1.37(b) If ANSWER IS ELSEWHERE (e.g. code 3, 4, 5, and 6 in the table above), state the main reasons for the choice of that location.

1. _____
2. _____

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CAPACITY

1.38(a) What kind of labour shift did production employees in this establishment predominantly follow in 2011 and in 2012? (Circle (O) kind of shift for each year and indicate the length of each shift in hours.)

Kind of shift	In 2011	What was the length of each shift in hours?	In 2012	What was the length of each shift in hours?
Single shift	1		1	
Double shift	2		2	
Triple shift	3		3	
Other, specify: _____	4		4	

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1.38(b) What workweek do production employees in this establishment follow? (Circle (O) one option.)

1. Less than 5 days	2. 5 days	3. 6 days	4. 7 days
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OUTSOURCING/SUBCONTRACTING

1.39(a) Does this establishment subcontract/outsourcing some of its activities?

1 Yes	2 No
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IF NO GO TO QUESTION 1.42(a)72 1.39(b) Does this establishment subcontract/outsourcing some of its **production activities**?

1 Yes	2 No
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IF NO GO TO QUESTION 1.4173 1.40 Rate the reason(s) why this establishment **OUTSOURCES/SUBCONTRACTS** part of its **PRODUCTION** process. (Circle (O) the appropriate response for each reason put forward and suggest additional reasons as appropriate).

Reason	Extremely important	Moderately important	Not important
Gives the establishment flexibility to respond to temporary surges in workload	1	2	3
Allows for a reduction in production costs	1	2	3
Allows the establishment to respond to any temporary need for specific skills not available internally	1	2	3
Minimizes labour discipline problems	1	2	3
The establishment subcontracts when its own equipment breaks down or is being serviced	1	2	3
Subcontractors produce quality products	1	2	3
It strategically allows access to competitive capabilities not available at the firm (e.g. access to alternative technologies, helps secure new markets, etc.)	1	2	3
Other, specify: _____	1	2	3

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81 Other

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1.41 Do you give preference to firms owned by previously / historically disadvantaged individuals (PDI / HDI) when you outsource/subcontract?

1 Yes	2 No
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83 **ENERGY/RESOURCE EFFICIENCY**

1.42(a) Has the establishment introduced electricity efficiency measures or invested in new technologies to help reduce electricity consumption at the establishment in 2011 or in 2012?

1 Yes	2 No
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IF NO GO TO QUESTION 1.43(a)84

1.42(b) What were the interventions/measures put into place OR what type of investments have been made specifically in this regard?

Measure/interventions	Circle (O) all relevant
New technologies/motors/machinery	1
New metering systems and sub-metering	2
Changes to factory floor arrangement	3
Change in operating time/production shifts have been altered	4
Changes to the building / retrofitting of existing building(s)	5
On-site electricity generation from alternative sources of energy (e.g. cogeneration, etc.)	6
Other, Specify: _____	7

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91 Other

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1.43(a) Has the establishment introduced water saving measures or made investment in new technologies to help reduce the water consumption in the establishment **in 2011 or in 2012?**

1 Yes **2 No** **IF NO GO TO QUESTION 1.44(a)**

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1.43(b) What were the interventions/measures put into place OR what type of investments were made specifically in this regard?

Measure/interventions	Circle (O) all relevant
New technologies/motors/machinery	1
New metering systems and sub-metering	2
Changes to factory floor arrangement	3
Change in operating time/production shifts have been altered	4
Changes to the building / retrofitting of existing building(s)	5
Other, specify: _____	6

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1.44(a) Are you aware of the green energy efficiency fund (or GEEF)?

1 Yes **2 No** **IF NO GO TO QUESTION 1.44(c)**

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1.44(b) Has the establishment made an application to the green energy efficiency fund (or GEEF)?

1 Yes **2 No**

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1.44(c) Has your establishment used any other funding programme for energy efficiency or cleaner production since 2008/OR since the establishment started production?

1 Yes **2 No** **IF NO GO TO QUESTION 1.45**

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1.44(d) **IF YES TO QUESTION 1.44(c)** Which other funding programme has been used?

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1.45 How do you view the following as barriers to further investment in resource saving technologies?

Potential obstacle	Major problem	Moderate problem	Not a problem	Do not know
Access to information	1	2	3	4
Cost of technologies	1	2	3	4
Long pay-off period of resource efficient/saving technologies	1	2	3	4
Quality of service providers	1	2	3	4
Quality of available technologies	1	2	3	4
Other, Specify: _____	1	2		

1110th

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<input type="text"/>	107
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<input type="text"/>	109
<input type="text"/>	110
<input type="text"/>	112

PART 3: PURCHASES RELATED ISSUES**BUSINESS RELATIONS**

1.46(a) Indicate this establishment's relationship with other tiers of industry for the purchases listed in the table. **(Circle (O) all relevant answers.)**

Purchase pattern	In-house or firms within the same group	Other large firms in South Africa	Small (incl informal) firms in South Africa	Foreign firms (Small or large)	Not applicable	Comments, if any
Purchase of raw materials mostly from ¹	1	2	3	4	5	
Purchase of semi-processed inputs mostly from ²	1	2	3	4	5	
Purchase of components mostly from ³	1	2	3	4	5	

1.46(b) Does this establishment import goods and services?

1 Yes	2 No
--------------	-------------

IF NO GO TO QUESTION 1.47
4

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1.46(c) Did this establishment import finished goods to be sold (directly or indirectly) in 2012?

1 Yes	2 No
--------------	-------------

IF NO GO TO QUESTION 1.47
5

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1.46(d) When did imports of finished goods begin? _____ (Year)

6

--

1.46(e) Explain briefly what has motivated imports of finished goods?

7

--

INPUT PURCHASES

1.47 Approximately what percentage of this establishment's TOTAL inputs (excluding production machinery and equipment) was imported in 2011 and in 2012? **(Write 'O' if no input was imported.)**

Year	% imported
2011	
2012	

	8
	9

1.48 What factors influence your choice of foreign as opposed to national (including local) input suppliers?

1.
2.
3.

	10
	11
	12

EXCHANGE RATES

According to the South African Reserve Bank, in the 11 years between 2002 and 2012, the Rand exchange rate to the US Dollar averaged R7.65 to \$1 USD.

(Information: At its weakest (in 2002) it averaged, for that year R10.50 to \$1 USD. At its strongest it averaged R6.36 to \$1 USD for the year 2005. For the purposes of the following two questions a strong Rand-US Dollar exchange rate is understood to be a rate of around R8 to \$1 USD or better (i.e. anything at R8.00 or below, e.g. R7.50), and a weak Rand-US Dollar exchange rate is understood to be a rate above R10 to \$1 USD (for example a rate of R10.50). The exchange rate on 31 October 2013 was R9.96 to \$1 USD (tending towards a weakening of exchange rates.)

1.49 What happens to your imports (if applicable) and to your production when the Rand strengthens (e.g. against the \$USD - the Rand is strong when it is at around R8=\$1 USD)?

(Comment on Imports and on Production if applicable – i.e. when the establishment imports or is affected by other firms importing competing products even if it does not import.)

Imports: _____
 _____ 13

Production: _____
 _____ 14

1.50 What happens to your imports (if applicable) and to your production when the Rand weakens (e.g. against the \$ USD - the Rand is weak when it is at around R10=\$1 USD)?

(Comment on Imports and on Production if applicable – i.e. when the establishment imports or is affected by other firms importing competing products even if it does not import.)

Imports: _____
 _____ 15

Production: _____
 _____ 16

1.51 Where does the establishment buy its **three most important inputs**?

If any of these inputs is imported, what is the percentage (%) that is imported from the main foreign countries?

Area		Origin of inputs		
In the Durban municipal area	17	1		
Elsewhere in KZN	18	2		
If elsewhere in South Africa, list province(s) in this next column	19	3	% Input imported* In 2011	% Input imported* In 2012
		4		
		5		
If outside of South Africa, list country(ies) and % of the input value imported in 2011 and in 2012 from each input	20	6		
		7		
		8		
		9		

*Note: * excluding production machinery and equipment*

1.52(a) What approximate share of total material input costs was with various material inputs listed in the table below in 2011 and in 2012?

	2011	2012
Raw Materials	%	%
Semi-processed inputs	%	%
Built up components	%	%
TOTAL	100%	100%

21			25
22			26
23			27
24			28

1.52(b) What have been the trends, since 2008, about the various types of inputs used at the establishment, that is, in terms of the relative share of raw materials, semi-processed inputs and components?

 29

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PART 4: SALES/MARKETING RELATED ISSUES

BUSINESS RELATIONS

1.53(a) Indicate which of the categories of the sales market you sell to and who do you compete with?
(Circle (O) ALL the relevant answers.)

Tier of business	Sale of products to	Competition in products' markets with -
In house and other firms under the same ownership as this firm:		
- that manufacture	1	
- that are involved with wholesaling or retailing (including direct sales)	2	
Other large/medium-sized firms in SA		
- In the same industry	3	1
- In other manufacturing sectors	4	2
- that act as Wholesalers, retailers & other intermediaries	5	3
Small and informal firms in SA		
- that are involved with manufacturing	6	4
- that act as wholesalers/retailers or as intermediaries	7	5
Foreign firms		
- that manufacture	8	6
- that act as wholesalers, retailers or as intermediaries	9	7

1	<input type="text"/>
2	<input type="text"/>

3	<input type="text"/>	<input type="text"/>	10
4	<input type="text"/>	<input type="text"/>	11
5	<input type="text"/>	<input type="text"/>	12

6	<input type="text"/>	<input type="text"/>	13
7	<input type="text"/>	<input type="text"/>	14

8	<input type="text"/>	<input type="text"/>	15
9	<input type="text"/>	<input type="text"/>	16

1.53(b) What have been the main changes affecting your channels of sales since 2008/OR since the establishment has been set up if less than 5 years old? (Please explain briefly.)

17

1.54 Where does the establishment sell its three most important products?

Area	Destination
Greater Durban	1
Elsewhere in KZN	2
Elsewhere in South Africa, list province(s) in this next column	3
	4
	5
Outside South Africa	6

	<input type="text"/>	18
	<input type="text"/>	19
20Prov	<input type="text"/>	21
22Prov	<input type="text"/>	23
24Count	<input type="text"/>	25
	<input type="text"/>	26

MEMBERSHIP IN BUSINESS ASSOCIATIONS

1.55 Is this establishment a member of any business or trade association or professional body?

1 Yes	2 No
--------------	-------------

IF NO, GO TO QUESTION 1.58

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 27

1.56 If YES, list the three most important business or trade associations or professional body:

(a) _____

--

 28

(b) _____

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 29

(c) _____

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1.57 Does any of the associations of which this establishment is a member perform any of the following functions?:

(Circle (O) ALL that applies.)

Helps members acquire important inputs	1
Helps members get technical information	2
Accredits members to suppliers or customers	3
Helps members enter export markets	4
Helps members get market information	5
Accredits suppliers or customers to members	6
Disseminates tender information	7
Lobbies politicians/government on behalf of members	8
Other, Specify: _____	9
Other, Specify: _____	10

GO TO QUESTION 1.59(a)

1.58 If this establishment does not belong to any business association/body, specify the reasons why not

(Circle (O) one or more option from the list below.)

There is no association of relevance to our line of business	1
Existing associations provide no tangible benefits to their member	2
Membership of existing associations is too expensive	3
Other, Specify: _____	4
Other, Specify: _____	5

EXPORTS

1.59(a) Does the establishment export goods or services?

1 Yes	2 No
--------------	-------------

IF NO, GO TO QUESTION 1.63

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 50

1.59(b) When did the establishment start exporting? _____ (year)

51

--

1.60(a) Approximately what percentage of annual production and of annual sales was exported in 2010, in 2011 and in 2012?:

	% of annual Production	% of annual Sales
2010		
2011		
2012		

1.60(b) What major factors influence the level of exports as a share of total sales?

1. _____

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 58

2. _____

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 59

3. _____

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 60

1.60(c) What factors influence the choice of market regions?

1. _____ 61
2. _____ 62
3. _____ 63

1.61 Provide information on the percentage distribution of direct and indirect exports by destination for 2011 and 2012:

Regions of export	% of annual exports		List the 3 countries receiving most of your exports
	2011	2012	
SADC* 64			1 _____ 2 _____ 3 _____
Rest of Africa 65			1 _____ 2 _____ 3 _____
Western / Central / Eastern Europe 66			1 _____ 2 _____ 3 _____
Asia 67			1 _____ 2 _____ 3 _____
Australasia 68			1 _____ 2 _____ 3 _____
North America 69			1 _____ 2 _____ 3 _____
Rest of the Americas 70			1 _____ 2 _____ 3 _____
Middle East 71			1 _____
			2 _____
			3 _____
Total	100%	100%	

* SADC is the Southern African Development Community. The following countries are currently members of SADC besides South Africa: Angola, Botswana, the Democratic Republic of Congo, Lesotho, Malawi, Mauritius, Mozambique, Namibia, the Seychelles, Swaziland, Tanzania, Zambia and Zimbabwe.

1.62 Evaluate the special facilities for exports listed below:

	Are you aware of this programme?		If you are aware of the programme -									
			Is it used by your establishment?		If it is used by your establishment							
					If used: how many years has it been used for?		Importance for your establishment			Administrative and other costs (including delays in obtaining benefits) for your establishment to use this facility		
	Yes	No	Yes	No	No of years used	Unsure	Essential	Useful	Not useful	Prohibitive costs not worth using again	Costs are high	Reasonable costs
Export credit facility –pre-shipment 72	1	2	1	2		4	1	2	3	1	2	3
Export credit facility - post shipment 73	1	2	1	2		4	1	2	3	1	2	3
Export credit guarantee 74	1	2	1	2		4	1	2	3	1	2	3
Forward forex cover 75	1	2	1	2		4	1	2	3	1	2	3
Other, specify: 76	1		1	2		4	1	2	3	1	2	3

SKIP TO QUESTION 1.65(a)

QUESTIONS FOR NON EXPORTERS

1.63 Did the establishment export in the past?

1 Yes	2 No
-------	------

IF NO, GO TO QUESTION 1.65(a)

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 77

1.64 If this establishment exported in the past but no longer exports, what factors have caused this change?

(a) _____

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 78

(b) _____

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 79

(c) _____

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 80

TRANSPORT

1.65(a) How do your goods reach the following markets?

(Circle (O) the relevant answers for each main region but select the not applicable option in the last column if not exporting to the region mentioned in the first column.)

(Also circle (O) what is your preferred logistic strategy option, even if currently not used or not available).

	Logistics option				
	Road	Rail	Sea freight	Air freight	Not Applicable
National	1	2	3	4	5
Africa	1	2	3	4	5
Europe			3	4	5
Rest of the world			3	4	5
Preferred	1	2	3	4	

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1.65(b) Please comment on your preferred logistics option:

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1.65(c) If you USE SEA FREIGHT, to what extent are the freight rates a factor limiting export access/growth by your establishment? **(Circle (O) the relevant answers.)**

1 = A significant growth/access constraint	2 = A minor growth/access constraint	3 = No significant influence on export market access	4 = N.A.
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87

1.65(d) If you USE AIR FREIGHT, is air freight a growing or stable element of the establishment logistics' strategies? **(Circle (O) the relevant answer.)**

1 Yes	2 No	3 N.A.	IF NO or N.A., GO TO QUESTION 1.66(a)
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88

1.65(e) Which airport do you use for the goods?

1 King Shaka	2 O R Tambo	3 Don't know	4 Other
---------------------	--------------------	---------------------	----------------

89

1.65(f) What factors influence your choice of airport?

1. _____

90

2. _____

91

GOVERNMENT CONTRACTS

1.66(a) How many government/parastatal tenders did your establishment submit / bid for in 2011 and in 2012?

Tenders	Number	
	2011	2012
Total submitted		
- Awarded		
- Not awarded		

92 9593 9794 97

1.66(b) What percentage of the sales of this establishment was to government or to state-owned enterprises in 2011 and in 2012?

Year	% sale to government / SOEs
2011	
2012	

98 99

PART 5: ADMINISTRATIVE/LEGAL RELATED ISSUES

STATUTORY REPORTING

1.67(a) Do you find that statutory reporting (Examples of required reporting are WSP (Work place skills plan) to the DHET (Department of Higher education and Training), Employment Equity to the DoL (Department of Labour), or reporting to SARB (the South African Reserve Bank) for dividend remittances, etc.) places an unreasonable burden in terms of regulatory compliance on your establishment?

1 Yes	2 No
--------------	-------------

IF NO, GO TO QUESTION 1.68(a)

1

1.67(b) Of the statutory reporting requirements, which are the most burdensome? (Examples of required reporting are WSP (Work place skills plan) to the DoHET (Department of Higher Education and Training), employment equity to the DoL (Department of Labour), reporting to SARB (the South African Reserve Bank) for dividend remittances, etc.)
(Please specify the requirement as well as the Department or Agency involved.)

1. _____
2. _____
3. _____
4. _____

3Agency

5Agency

7Agency

9Agency

1.67(c) What do you find are the main problems associated with reporting?

1. _____
2. _____

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CRIMINAL ACTIVITIES

1.68(a) Has this establishment been the victim of any criminal activities in 2011 and in 2012?

	Yes	No
2011	1	2
2012	1	2

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**IF NO for both 2011 and 2012, STOP SURVEY
 THANK YOU FOR YOUR INVALUABLE INPUT, SEE PAGE 1.24.**

1.68(b) Were the following problem areas in 2011 and in 2012? (Circle all the problem areas experienced in the table below).

If more than one option is selected, rank the three most important areas of criminal and fraudulent activities affecting your activities in 2011 and in 2012 (Use **1=most important, 2=second most important and, if applicable, 3=third most important**).

Problem area	Problem experienced	Rank
Break-ins and property theft	1	
Vandalism	2	
Stock shrinkage	3	
Equipment lost due to theft	4	
Lack of compliance with rules/regulations by other businesses which affects the overall competitive environment (e.g. competitors sell counterfeit goods, breach of intellectual properties/trademark rules, etc.)	5	
Breach of rules and regulations by government officials that affects the competitive environment	6	
Bylaw transgressions	7	
Mis-interpretation of rules and regulations by government officials (e.g. customs) that affects the competitive environment	8	
Other, specify: _____	9	

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22Oth & 23

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 32

Notes for Researcher:

- Please collect business card, and
- Please proceed to the next modules or schedule appointments for Module two and three

THANK YOU FOR YOUR TIME

PLEASE SCAN AND E-MAIL THIS DOCUMENT TO: firmsurvey@ukzn.ac.za

ALTERNATIVELY PLEASE FAX TO 031 260 2359 ATTENTION M. VELIA

**IF YOU REQUIRE FURTHER INFORMATION PLEASE CONTACT OUR CALL CENTRE ON
031 260 1197 BETWEEN 08H00-16H00 WEEKDAYS**

FOR FIELDWORKER ONLY

Date completed: _____

Interviewer 1: Name: _____ Tel no: _____

Interviewer 2: Name: _____ Tel no: _____

Internal Triangulated Questionnaire

Triangulation Date: _____

YES	NO
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OFFICE - FOR TRIANGULATED MODULE OR FOR MODULE DIRECTLY RETURNED BY ESTABLISHMENT

Filled in directly by Respondent

YES	NO
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Scanned 1

Date of scan 1: _____ Scanned by: _____

YES	NO
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Scanned 2

Date of scan 2: _____ Scanned by: _____

YES	NO
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Scanned 3

Date of scan 3: _____ Scanned by: _____

YES	NO
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Scanned of completed triangulated questionnaire

Date of scan 4: _____ Scanned by: _____

YES	NO
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Internal Verification

Date of Internal Verification: _____

YES	NO
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Verified by: _____

Comments:

Qualitative Data Capture completed

YES	NO
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Date of QC check 1: _____ QC by: _____

Date of QC check 2: _____ QC by: _____

Date of QC check 3: _____ QC by: _____

Date of QC check 4: _____ QC by: _____

Complete

YES	NO
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Date of Completed Data Capture: _____ Data captured by: _____

MEDIUM & LARGE ESTABLISHMENTS SURVEY
eTHEKWINI MUNICIPAL AREA - 2013/2014
MODULE 2 (To be completed by Financial Manager)

2.1 Establishment Name: _____

2.2. Physical (street) address: _____

2.3a Respondent Name: _____

2.3b Respondent Position: _____

2.4a Telephone: Dialling Code _____ **Number** _____

2.4b E-mail address: _____

GENERAL

2.5(a) Did your establishment make a net profit/net loss or breakeven in the following years/ OR since the establishment started operating if set up after 2008?

(Circle (O) the applicable answer for each year listed in the table.)

Year	Net Profit	Net Loss	Breakeven	Not applicable (if firm not operating in year)
2008	1	2	3	4
2009	1	2	3	4
2010	1	2	3	4
2011	1	2	3	4
2012	1	2	3	4

	1
	2
	3
	4
	5

2.5(b) How did the net profit/net loss of this establishment in 2012 compare to the situation in 2011?

(Circle (O) the applicable response in the first and / or the second table.)

Net profit		Net loss	
Increased	Decreased	Increased	Decreased
1. By less than 10 %	5. By less than 10 %	9. By less than 10 %	13. By less than 10 %
2. By between 10 % and 20 %	6. By between 10 % and 20 %	10. By between 10 % and 20 %	14. By between 10 % and 20 %
3. By between 20 % & 50 %	7. By between 20 % & 50 %	11. By between 20 % & 50 %	15. By between 20 % & 50 %
4. By more than 50 %	8. By more than 50 %	12. By more than 50 %	16. By more than 50 %

Other situations	Net profit / Net profit to net loss	Net loss / Net loss to net profit
	17. Net profit stayed roughly the same	19. Net loss stayed roughly the same
	18. Net profit turned into a loss	20. Net loss turned into a profit

- 2.5(c) How did the net profit/net loss of this establishment in 2012 compare to the situation in 2008?
(Circle (O) the applicable response in the first and / or the second table.)

Net profit		Net loss	
Increased	Decreased	Increased	Decreased
1. By less than 10 %	5. By less than 10 %	9. By less than 10 %	16. By less than 10 %
2. By between 10 % and 20 %	6. By between 10 % and 20 %	10. By between 10 % and 20 %	15. By between 10 % and 20 %
3. By between 20 % & 50 %	7. By between 20 % & 50 %	11. By between 20 % & 50 %	14. By between 20 % & 50 %
4. By more than 50 %	8. By more than 50 %	12. By more than 50 %	13. By more than 50 %

Other situations	Profit / Profit to loss	Loss / Loss to profit
	17. Profit stayed roughly the same	19. Loss stayed roughly the same
	18. Profit turned into a loss	20. Loss turned into a profit

8

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 9

CAPITAL ASSETS

- 2.6 How much would it have cost this establishment to **replace** all its machinery and equipment (including vehicles) with NEW items at the end of 2012?

R _____ 10

(If value specified in units other than Rand, specify the unit, e.g. million of Rand, etc.)

- 2.7 How much did this establishment spend on NEW machinery, equipment, vehicles, land and buildings (capital investment) in 2011 and in 2012?

(Please insert "0" in the table if the answer is none.)

	2011	2012	
	In Rand	In Rand	
New domestic machinery and equipment			11
New imported machinery and equipment			12
Land and buildings and physical facilities (e.g. roads, drainage, etc.)			13
New vehicles			14
Other capital investment, specify: _____			15
TOTAL			16

(If values specified in units other than Rand, specify the unit, e.g. 000 of Rand, etc.)

SALES & EXPENSES

2.8 Please provide the following information on sales and expenses:

(Please insert “0” in the table if the answer is none.)

(If values specified in units other than Rand, specify the unit, e.g. 000 of Rand, etc. next to the figures in the table above).

Sales and expenses	Value in Rand		
	2011	2012	
Total sales (in Rand)			17
Purchases of material inputs into production, excluding utilities (in Rand)			18
Expenditure on utilities (in Rand), i.e. electricity, water, etc.			19
Labour costs (in Rand), i.e. wages and salaries, allowances, bonuses and other benefits			20
Goods transport costs (excluding rent/lease of vehicles) (in Rand)			21
Rent/lease of vehicles (in Rand)			22
Rent for machinery and equipment (in Rand)			23
Rent for land or buildings (in Rand)			24
Telecommunication & postal services (in Rand)			25
Royalty or license fees (in Rand)			26
Interest charges and other financial fees (in Rand)			27
Net profit /Net loss* (in Rand)			28

*** Delete either the term ‘net profit’ or the term ‘net loss’ in the first column to indicate which is correct.**

2.9 What was the total wage bill for production employees in 2011 and in 2012? **(Answer in Rand.)**

Year	Rand	
2011	R	29
2012	R	30

2.10 How much did this establishment spend on security (e.g. guards employed directly or supplied through an outside contractor, alarm systems, etc.) in 2011 and in 2012? **(Answer in Rand.)**

Year	Rand	
2011		31
2012		32

2.11 How much did this establishment spend on training in 2012? **(Answer in Rand.)**

	Rand	
In-house training		33
Outside training*		34

*** Outside training is training involving external trainers (with training taking place either at the establishment or outside the establishment).**

REACHING TARGETS

2.12 Has the establishment achieved its targets in 2011 and in 2012 with regard to the items listed in the table?
(Circle (O) the relevant answer for 2011 and for 2012 and comment.)

Item	2011		2012		Comments	
	Yes	No	Yes	No		
Revenue	1	2	1	2		35
Production volumes	1	2	1	2		36
Operating expenses	1	2	1	2		37
Profit	1	2	1	2		38

THANK YOU FOR YOUR TIME

PLEASE SCAN AND E-MAIL THIS DOCUMENT TO: firmsurvey@ukzn.ac.za

ALTERNATIVELY PLEASE FAX TO 031 260 2359 ATTENTION M. VELIA

IF YOU REQUIRE FURTHER INFORMATION PLEASE CONTACT OUR CALL CENTRE ON

TEL: 031 260 1197

BETWEEN 08H00-16H00 WEEKDAYS

FOR FIELDWORKER ONLY

Date completed: _____

Interviewer 1: Name: _____ Tel no: _____

Interviewer 2: Name: _____ Tel no: _____

OR: Filled in directly by Respondent

YES	NO
-----	----

Internal Triangulated Questionnaire

YES	NO
-----	----

Triangulation Date: _____

OFFICE - FOR TRIANGULATED MODULE ONLY

Scanned 1

YES	NO
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Date of scan 1: _____ Scanned by: _____

Scanned 2

YES	NO
-----	----

Date of scan 2: _____ Scanned by: _____

Scanned 3

YES	NO
-----	----

Date of scan 3: _____ Scanned by: _____

Scanned of completed triangulated questionnaire

YES	NO
-----	----

Date of scan 4: _____ Scanned by: _____

Internal Verification

YES	NO
-----	----

Date of Internal Verification: _____

Verified by: _____

Comments:

Qualitative Data Capture completed

YES	NO
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Date of QC check 1: _____ QC by: _____

Date of QC check 2: _____ QC by: _____

Date of QC check 3: _____ QC by: _____

Date of QC check 4: _____ QC by: _____

Complete

YES	NO
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Date of Completed Data Capture: _____ Data captured by: _____

MEDIUM & LARGE ESTABLISHMENTS SURVEY
eTHEKWINI MUNICIPAL AREA - 2013
MODULE 3 (To be completed by the HR Manager/CEO)

3.1 Establishment Name: _____

3.2a. Physical (street) address: _____

3.2b. Postal Code: _____

3.3a Respondent Name: _____

3.3b Respondent Position: _____

3.4a Telephone: Dialling Code _____ **Number** _____

3.4b E-mail address: _____

EMPLOYMENT

3.5 Please provide information about the level of difficulty you experience in recruiting new entrants and in filling vacancies in the table below:

(Circle (O) the appropriate response for each employee category)

Employee category	How difficult is it to find employees? (Circle (O) one option per employee category)			
	Extremely hard	Moderately hard	Not hard at all	Not applicable
Managers (e.g. CEO, finance manager)	1	2	3	4
Professionals (e.g. health & safety engineers, clothing designer, HR officer)	1	2	3	4
Technicians and associated professionals (e.g. fuel cell technician, clothing manufacturing technician, miller, controller, sales consultant)	1	2	3	4
Clerical support workers (e.g. secretary, receptionist, salary clerk, dispatcher)	1	2	3	4
Service employees (e.g. watchman, shop and market sales representatives)	1	2	3	4
Craft and related employees (e.g. moulder, cutter, fitter, mechanics)	1	2	3	4
Plant and machine operators and assemblers (e.g. metallurgical plant operator, sewing machinist, seed bagger)	1	2	3	4
Labourers and related occupations (e.g. meat packer, clothing factory worker)	1	2	3	4

	1
	2
	3
	4
	5
	6
	7
	8

Recruitment Category	Recruitment preference
A. Age group (Circle one option)	
▪ 16-24	1
▪ 25-45	2
▪ 46 and above	3
▪ No age preference	4
B. Gender (Circle one option)	
▪ Men	1
▪ Women	2
▪ No gender preference	3
C. Qualifications and experience (Circle one option or specify an option)	
▪ Relevant work experience only	1
▪ Primary education only	2
▪ Secondary education only	3
▪ Vocational education only	4
▪ Tertiary education only	5
▪ Both work experience and primary education	6
▪ Both work experience and secondary education	7
▪ Both work experience and vocational education	8
▪ Both work experience and tertiary education	9
▪ Other, specify:	10

9

10

110th			12
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1 Yes	2 No	IF NO, GO TO QUESTION 3.11
--------------	-------------	-----------------------------------

13

Reasons	Most important	Moderately important	Not important
To lower the fixed non-wage cost per staff member	1	2	3
To respond to temporary market fluctuations	1	2	3
To complete particular or exceptional tasks (e.g. maintenance shutdown)	1	2	3
To lower the cost of administrative compliance	1	2	3
Other, specify: _____	1	2	3

Channel	Yes	No
Direct (e.g. direct individual hiring/contract)	1	2
Indirect: via an employment agency/bureau	1	2
Through intern or trainee programme intakes	1	2
Other, Specify:		
1. _____	1	
2. _____	1	

			20
			21
			22
23	Oh		24
25	Oh		26

- 3.10 Please identify the skill category most applicable to your temporary employees in 2011 and in 2012?
(Circle (O) the relevant answer for each year.)

	Highly skilled	Semi-skilled	Low levels of skills
2011	1	2	3
2012	1	2	3

	27
	28

- 3.11 Does this establishment subcontract/outsources some of its activities?

1	Yes
2	No

 IF NO, GO TO QUESTION 3.13

	29
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- 3.12 If YES to question 3.11, specify the task(s) that are outsourced/subcontracted by the establishment.

Circle (O)

one or more

Administrative (e.g. HR, financial, accounting, legal, bookkeeping)	1
Maintenance of plant and machinery	2
Transport	3
Marketing	4
General services such as cleaning, security, etc.	5
Production	6
Training	7
Other, Specify: _____	8

	30
	31
	32
	33
	34
	35
	36
	37
	38

- 3.13 How many employees did the establishment have in the past 5 years?

(Enter the numbers of full, part-time and temporary / casual employees but circle the 'not applicable' option if the establishment was not operating in any of the years specified in the table. Provide estimates for temporary/casual employees if appropriate/ _

Year	Full-time	Part-time	Temporary/ casual	Not applicable
2012				
2011				1
2010				1
2009				1
2008				1

- 3.14 In which work areas are 'previously disadvantaged individuals' or PDIs employed at management level in this establishment? (Circle (O) ALL that apply). What is the gender of these PDIs? (Circle (O) the relevant answer(s)). Please specify their race in the last column of the table.

	Circle (O) all relevant	Gender (circle)	Race (specify)
General manager	1	1 = Male 2 = Female	
Production	2	1 = Male 2 = Female	
Human resources	3	1 = Male 2 = Female	
Finance	4	1 = Male 2 = Female	
Marketing	5	1 = Male 2 = Female	
On the board	6	1 = Male 2 = Female	
Other, specify: _____	7	1 = Male 2 = Female	

3.15 How many employees did this establishment have in 2012 for each of the following occupational categories in terms of race and gender? (*NOTE: A foreign national is someone who does not have permanent residence status in South Africa.*)

Occupational levels	SOUTH AFRICAN MALE				SOUTH AFRICAN FEMALE				FOREIGN NATIONALS		Total
	Africans/ Blacks	Coloured	Indians/ Asians	White	Africans/ Blacks	Coloured	Indians/ Asians	White	Males	Females	
Top management											51
Senior management											52
Professionally qualified and experienced specialists and mid-management											53
Skilled technical & academically qualified workers, junior management, supervisors, foremen & superintendents											54
Semi-skilled											55
Unskilled											56
TOTAL											57
TOTAL PERMANENT											58
TOTAL TEMPORARY											59

3.16 What are the costs related to the appointment of new entrants that fall in the category of 'labourers and related occupations'?

NB: Hourly wage & non-wage rates = $\frac{\text{Annual wage costs}}{\text{1920 (i.e. number of hours per annum)}}$ (Rounded off to the nearest Rand)		Labourers and related occupations
Provide the average hourly wage rate to ENTRY level employees in your establishment that fall under the category of labourers & related occupations / low level of skills category (in RAND per hour)		60
List the average hourly non-wage rate applicable to ENTRY level employees that fall under the category of labourers & related occupations / low level of skills category in your establishment (in RAND per hour)		61
What is the hiring cost of an ENTRY level worker in the specified category? (in RAND)		62

- **Wage costs** = salary related labour costs (excluding overtime).
- **Hiring costs** are defined as the costs of advertising, screening, recruiting and training of an entry level worker.
- **Non-wage costs** = all types of benefits including overtime payments, government sponsored unemployment insurance, pensions, medical insurance, contribution to private social security, housing and other fringe benefits, transport allowance, etc.

3.17 How many employees (across all employee categories) were retrenched in 2012: _____ (number) ⁶³
IF ANSWER TO QUESTION 3.17 IS 'ZERO', GO TO QUESTION 3.19

3.18 In which categories were the employees retrenched in 2012? (Circle all relevant categories).

	Category
Highly skilled employees	1
Semi-skilled employees	2
Employees at low level of skills	3

	64
	65
	66

LABOUR RELATIONS3.19 What is the main labour relation challenge at this establishment? **(Circle (O) one option).**

Establishment level collective dispute	Individual dispute	Industry-wide dispute	No Challenge
1	2	3	4

67

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3.20 Which of the following labour relations instruments or agreements apply to this establishment?
(Circle (O) one or more option(s)).

No agreement	1
Establishment/ company/plant level collective agreement	2
Sector/industry level collective agreement (bargaining council)	3
Sector determination (as per ministerial prerogative)	4

68

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IF ANY ANSWER TO QUESTION 3.20 = 2 AND/OR = 3, GO TO QUESTION 3.21.**OTHERWISE GO TO QUESTION 3.22.**

3.21 What proportion of your workforce is unionised? _____% 72

3.22 What do you see as the 3 main problems and 3 main advantages associated with collective bargaining?

Problems	Advantages
1. _____ _____	1. _____ _____
2. _____ _____	2. _____ _____
3. _____ _____	3. _____ _____

73Pb

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 76Adv74Pb

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 77Adv75Pb

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 78Adv

3.23(a) Does the establishment have particular schemes or arrangements in place to motivate employees to enhance productivity?

1 Yes	2 No
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IF ANSWER TO QUESTION 3.23(a) IS 'NO,' GO TO QUESTION 3.24.79

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3.23(b) What are those schemes?

1. _____

80

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2. _____

81

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3.24 How many strikes, lockouts and stay-aways did this establishment experience in 2012?

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IF ANSWER TO QUESTION 3.24 IS 'NIL' GO TO QUESTION 3.26.82

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3.25 How did these events (e.g. strikes, stay-aways, etc.) disrupt production in 2012?

Severely	Moderately	No impact
1	2	3

83

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3.26 Has your establishment been affected by industrial disputes in other sectors in 2012?

1 Yes	2 No
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84

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IF ANSWER TO QUESTION 3.26 IS 'NO,' GO TO QUESTION 3.28.

3.27 How did these events (e.g. industrial disputes in other sectors) disrupt production in 2012?

Severely	Moderately
1	2

85

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LABOUR MARKET REGULATIONS

- 3.28 As a result of South Africa's labour laws and regulations, does this establishment ... **(please read the list of effects below, circle (O) the one answer for each effect listed and comment.)**
 (Note that the labour laws and regulations are as defined in the Labour Relations Act, the Basic Conditions of Employment Act, and the Employment Equity Act.)

Effect	Yes	No	Please Comment
Hire fewer employees	1	2	
Use more machinery instead of hiring more labour to expand production	1	2	
Hire employees on a temporary rather than permanent basis	1	2	
Rely (more) on sub-contracting	1	2	
Assist to improve labour relations	1	2	
Increase labour productivity	1	2	
Other, specify: _____	1		

86			87Com
88			89Com
90			91Com
92			93Com
94			95Com
96			97Com
98			99Comt

TRAINING

- 3.29(a) Does the establishment have interns?
(NOTE: An intern is someone gaining work experience not specifically linked to a qualification.)

1 Yes	2 No
-------	------

100

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- 3.29(b) Does the establishment have learners (as in learnerships)?
(NOTE: A learner is someone who has to get experience as part of their qualification.)

1 Yes	2 No
-------	------

101

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IF NO TO BOTH ABOVE, GO TO QUESTION 3.31

- 3.30 **If YES to QUESTION 3.29(a) AND/OR YES to QUESTION 3.29(b),** how many interns and/or how many learners were in the establishment in 2011 and in 2012?

Number of interns		Number of learners	
In 2011	In 2012	In 2011	In 2012

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102
104

103
105

Id.:

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Id.:

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Id.:

--	--	--

Id.:

--	--	--

Id.:

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Id.:

--	--	--

Id.:

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Id.:

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Id.:

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Id.:

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Id.:

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Id.:

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Id.:

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Id.:

--	--	--

Id.:

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Id.:

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- 3.35 In selecting individuals for training, what criteria is used for selection and how important do you consider these criteria to be? (Circle (O) one option for each factor listed in the table.)

Factor	Extremely important	Moderately Important	Not Important
The line manager/supervisor indicates that the person requires training in a particular area	1	2	3
The line manager/supervisor indicates that the person has been working well and deserves to go on this training	1	2	3
There is a rotating system to ensure that everyone ultimately accesses training	1	2	3
The training is linked to the employment equity plan of the company	1	2	3
The training is linked to the establishment's skills development plan	1	2	3
The individual expresses an interest in attending the training	1	2	3
Each individual has a personal development plan and this determines what training the person attends	1	2	3
Other, please specify: _____	1	2	3

	128
	129
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- 3.36 Which SETA is the establishment registered with?

136

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- 3.37 What do you see as the 4 main benefits and as the 4 main disadvantages of the SETA training system in the training commitments made by the establishment?

Benefits	Disadvantages
1. _____ _____	1. _____ _____
2. _____ _____	2. _____ _____
3. _____ _____	3. _____ _____
4. _____ _____	4. _____ _____

137Ben		141Dis
138Ben		142Dis
139Ben		143Dis
140Ben		144Dis

- 3.38 Do you find the resignation of recently trained employees a problem?

1 Yes	2 No
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145

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3.39(a) What is/are the reason(s) for not training workers over and above those who were trained in 2012? (as reported in the 2012 table for question 3.31).

Reason	Circle (O) one or more option(s)
Firm has sufficiently trained workers who do not require further training	1
Formally trained workers get trained and leave	2
Formal training programmes are expensive	3
Further formal training is not relevant because of the nature of work	4
Present demand for products does not justify any further investment in training	5
Many of the existing/new workers do not have the basic qualifications to be properly trained	6
Training programmes provided by the SETAs do not meet our needs*	7
Other, specify: _____	8

146			
147			
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150			
151			
152			
153	Oth		154

3.39(b) * **If training programmes provided by the SETAs do not meet the needs of the establishment reported in the table above, please explain:**

1. _____

155

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2. _____

156

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ABSENTEEISM

3.40 What was the rate of absenteeism of the workforce in 2012? _____% 157

3.41 What are the main reasons for absenteeism (outside leave arrangements) at the establishment?

1. _____

158

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2. _____

159

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3.42 What was the impact of absenteeism on production in 2012?

Severe	Moderate	No impact
1	2	3

160

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3.43 What measures has your establishment recently implemented to control absenteeism?

1. _____

161

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2. _____

162

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3. _____

163

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- 3.44 How has the rate of absenteeism of the workforce changed at the establishment since 2008? **(Circle (O) one answer).**

Increased markedly	Increased	No change	Decreased	Decreased markedly	Don't know
1	2	3	4	5	6

164

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HIV/AIDS

- 3.45 Have employees at the establishment died or retired due to ill-health as a result of HIV/AIDS in the last 2 years? **(Circle (O) one answer).**

1 Yes	2 No	3 Don't know
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IF NO OR DON'T KNOW, GO TO QUESTION 3.47(a)

165

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- 3.46 How many employees died and/or retired due to ill-health as a result of HIV/AIDS in the last 2 years?
In 2011:

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¹⁶⁶ In 2012:

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¹⁶⁷

- 3.47(a) What would you consider the impact of HIV/AIDS to currently be on the establishment's operations? **(Circle (O) one answer.)**

Severe	Moderate	No impact	Don't know
1	2	3	4

168

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- 3.47(b) What would you consider the impact of diseases other than HIV/AIDS to currently be on the establishment's operations? **(Circle (O) one answer).**

Severe	Moderate	No impact	Don't know
1	2	3	4

169

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- 3.48 As a result of HIV/AIDS, has your company done any of the following? **(Circle (O) one answer for each effect.)**

Effect	Yes	No	Don't know	Comments (optional)
Hired fewer employees	1	2	3	
Used more machinery instead of hiring more labour to expand production	1	2	3	
Hired employees on a temporary rather than permanent basis	1	2	3	
Relied (more) on sub-contracting	1	2	3	
Made a conscious effort to hire what was perceived to be 'less at risk' labour	1	2	3	
Reduced company benefits	1	2	3	
Other, specify: _____	1			

176 Other

- 3.49 What are the policies and programmes that the establishment has put in place to deal with the HIV/AIDS epidemic?

1. _____

178

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2. _____

179

--

3. _____

180

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THANK YOU FOR YOUR TIME

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FOR FIELDWORKER ONLY

Date completed: _____

Interviewer 1: Name: _____ Tel no: _____

Interviewer 2: Name: _____ Tel no: _____

Internal Triangulated Questionnaire
Triangulation Date: _____

YES	NO
-----	----

OFFICE - FOR TRIANGULATED MODULE OR FOR MODULE DIRECTLY RETURNED BY ESTABLISHMENT

Filled in directly by Respondent

YES	NO
-----	----

Scanned 1

YES	NO
-----	----

Date of scan 1: _____ Scanned by: _____

Scanned 2

YES	NO
-----	----

Date of scan 2: _____ Scanned by: _____

Scanned 3

YES	NO
-----	----

Date of scan 3: _____ Scanned by: _____

Scanned of completed triangulated questionnaire

YES	NO
-----	----

Date of scan 4: _____ Scanned by: _____

Internal Verification

YES	NO
-----	----

Date of Internal Verification: _____

Verified by: _____

Comments:

Qualitative Data Capture completed

YES	NO
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Date of QC check 4: _____ QC by: _____

Complete

YES	NO
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