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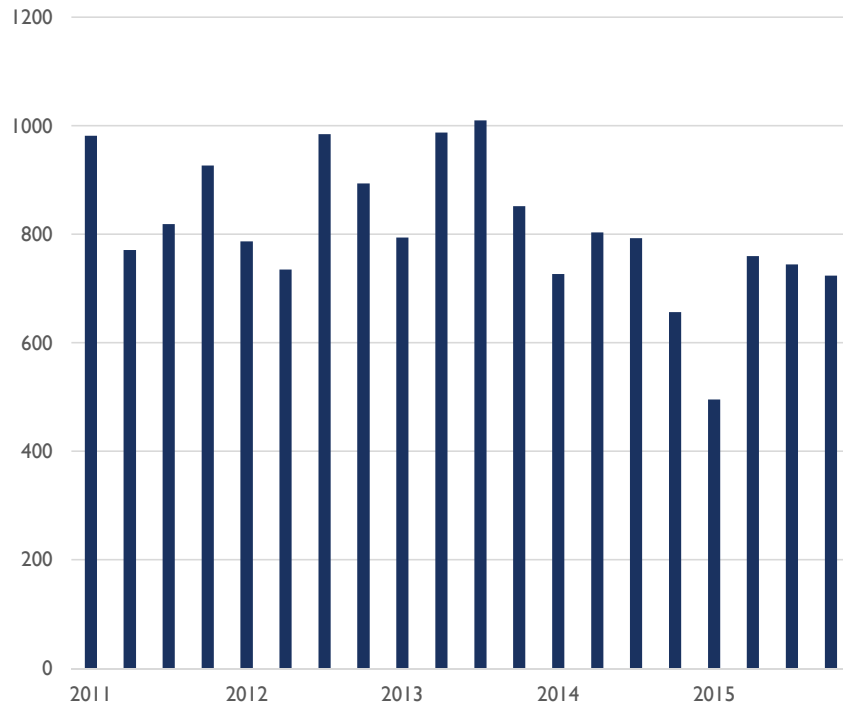
# SOUTH AFRICAN CIVIL CONSTRUCTION INDUSTRY



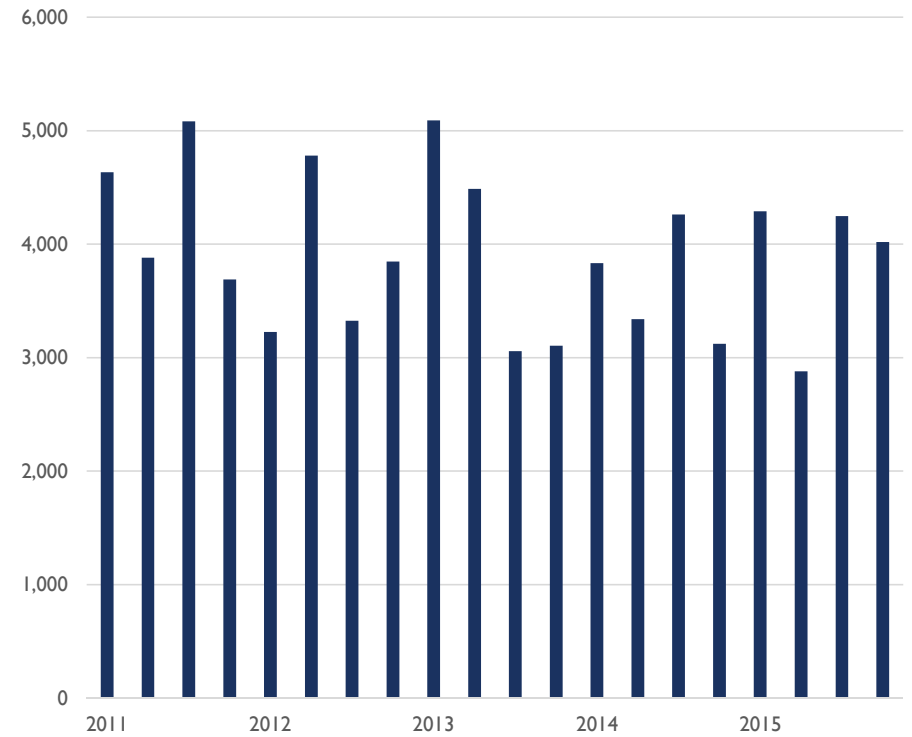
PROVINCIAL SYNOPSIS : 2015 Q4

# TENDERS AND AWARDS

Tender activity - Quarterly

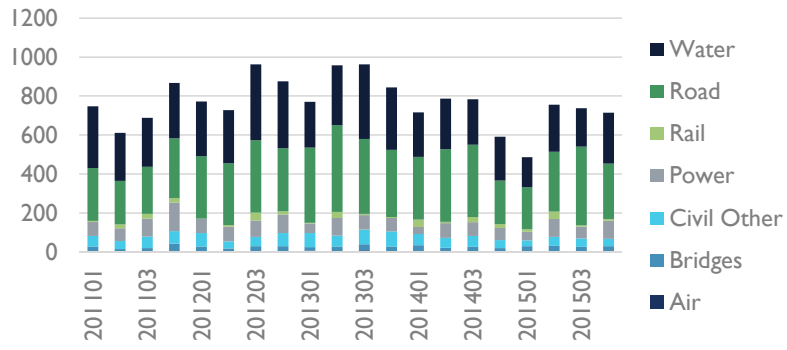


Value of awards - Quarterly

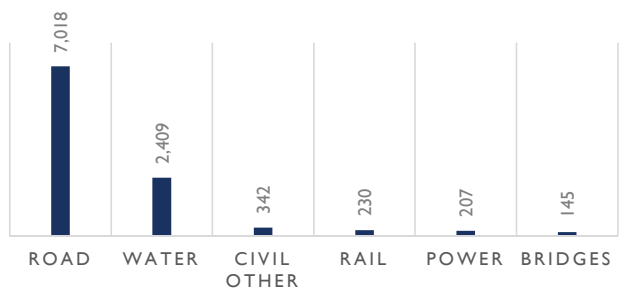


# NATIONAL SUMMARY

Tender activity by project type



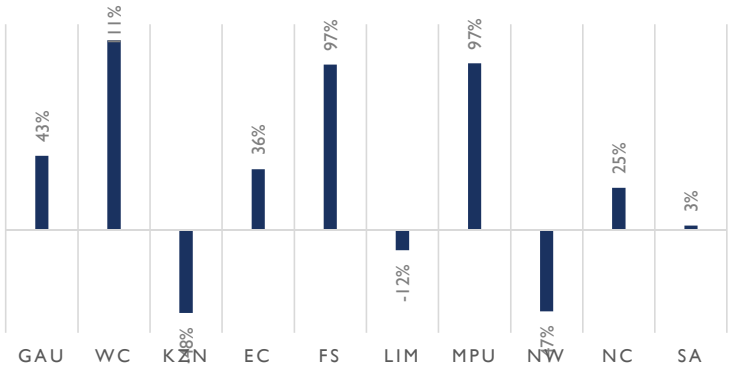
Value of projects awarded, current quarter



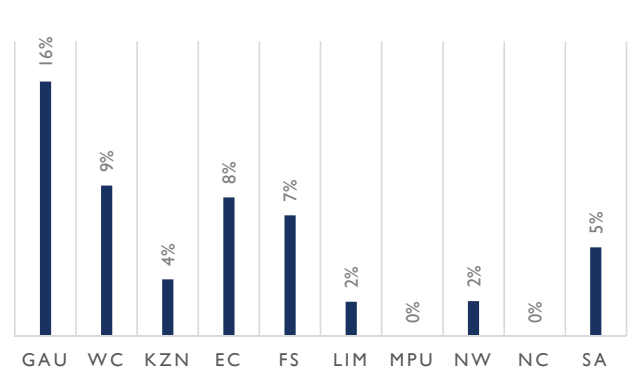
Awards Market share by project type, current quarter



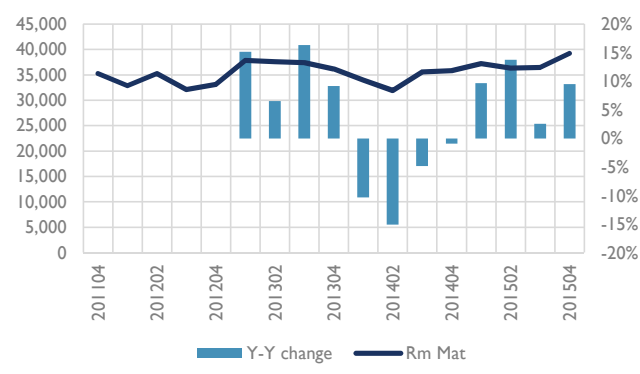
Y-Y percentage change by province



Postponement rate (% of tenders)



Awards, Rm vs Y-Y Per Change

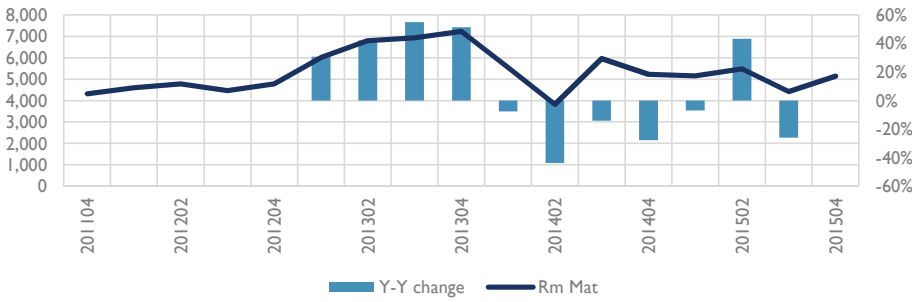


## CIVIL AWARDS, RM, CURRENT PRICES – CURRENT QUARTER

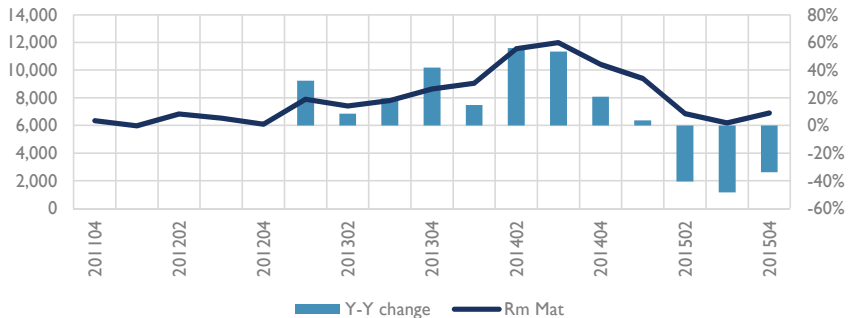
Province	Eastern Cape	Free State	Gauteng	Kwazulu Natal	Limpopo	Mpumalanga	North West Province	Northern Cape	Western Cape	Grand Total
Bridges				82	2			61		145
Civil Other	48		210	2	15		18	14	35	342
Power	32			45	7	4			120	207
Rail							230			230
Road	1,386	499	732	824	844	399	125	249	1,960	7,018
Water	301	61	267	961	429	15	100	56	218	2,409
Grand Total	1,767	560	1,209	1,914	1,297	418	473	381	2,333	10,351

# PROVINCIAL SUMMARY

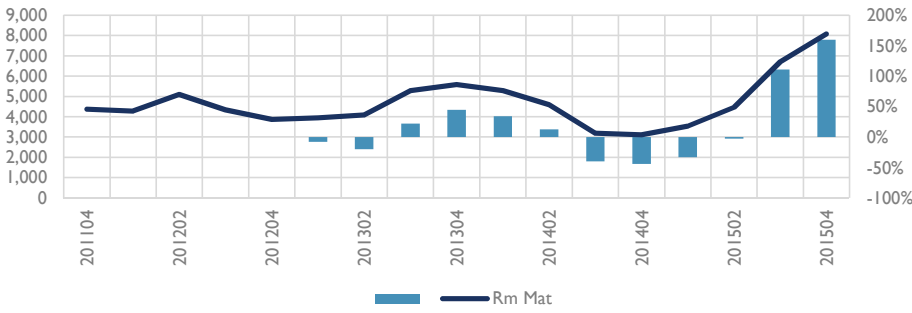
Gauteng Awards Rm



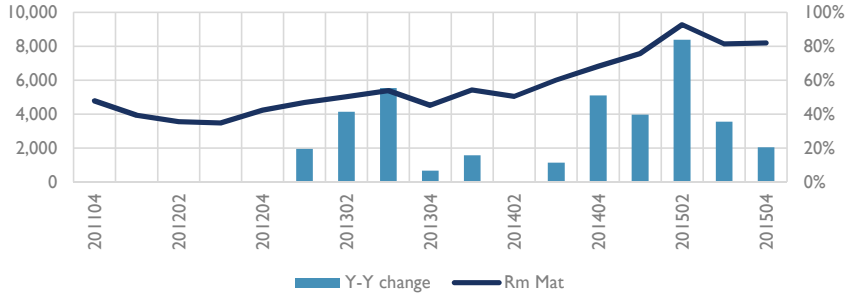
KZN Awards Rm



Western Cape Awards Rm

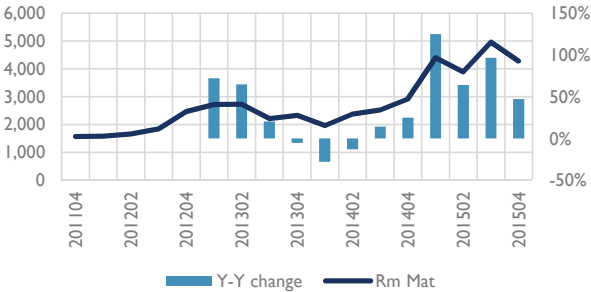


Eastern Cape Awards Rm

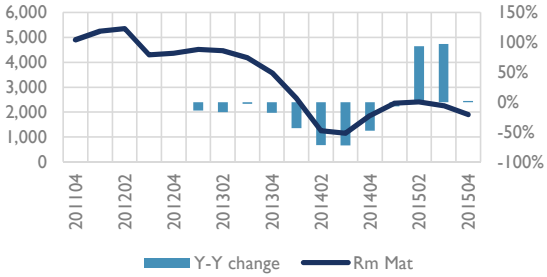


# PROVINCIAL SUMMARY /2

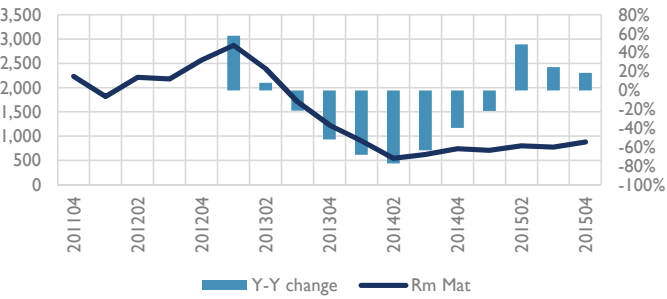
Free State Awards Rm



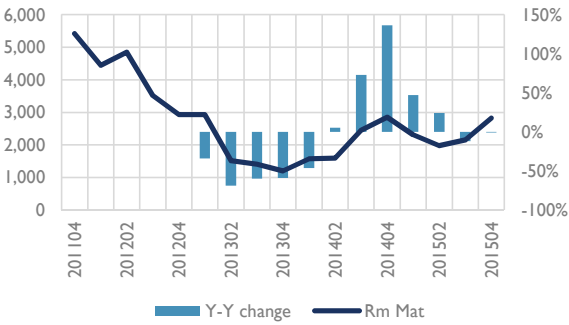
Mpumalanga Awards Rm



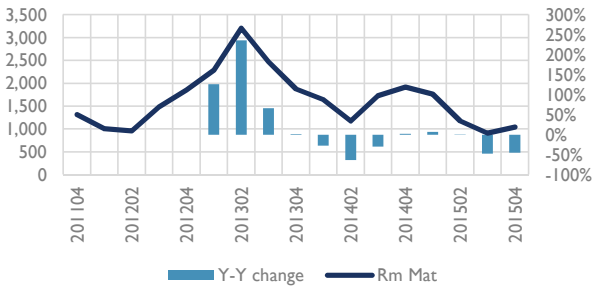
Northern Cape Awards Rm



Limpopo Awards Rm



North West Awards Rm



# GRADE 9 CIVIL TENDER ACTIVITY – CURRENT QUARTER

## Eastern Cape

Rehabilitation of National Routes N2 Section 15 and R63 from Alexandra Road to Bhisho

## Gauteng

Capacity Expansion at Panfontein Water Treatment Residue Disposal Site

## Limpopo

Revitalisation Programme - Bulk Water Pipeline from Nandoni to Nsami Water Treatment Plant

Construction of Tshififi to Dzingahe Access Road

## North West Province

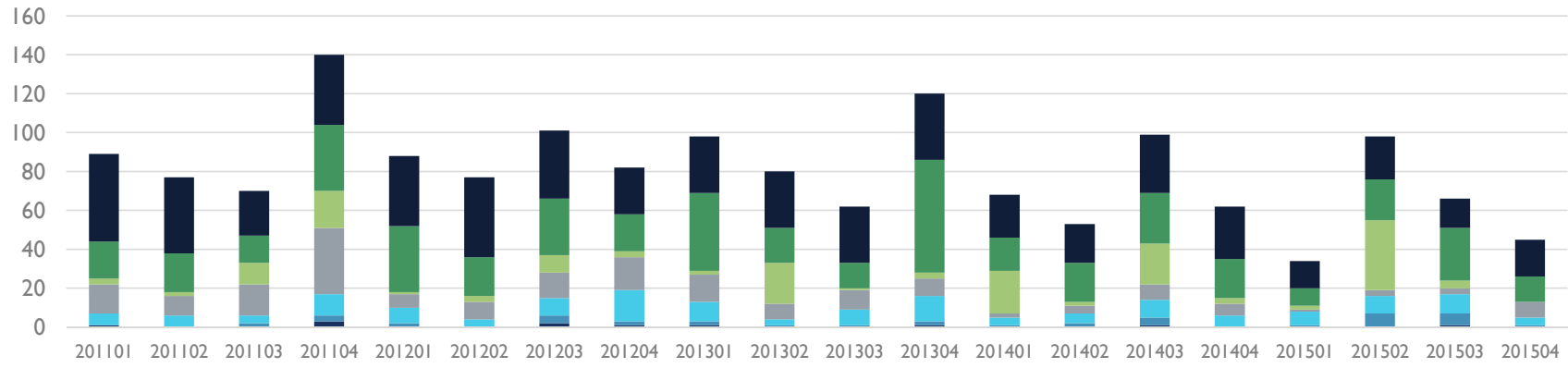
New Wastewater Treatment Works for the Greater Vryburg Area - Civil Works

New Wastewater Treatment Works for the Greater Vryburg Area - Civil Works

## Western Cape

Construction of a Reservoir near Contermanskloof

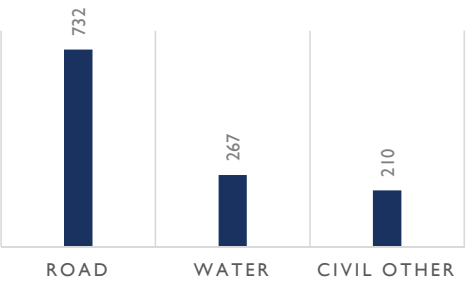
# GAUTENG



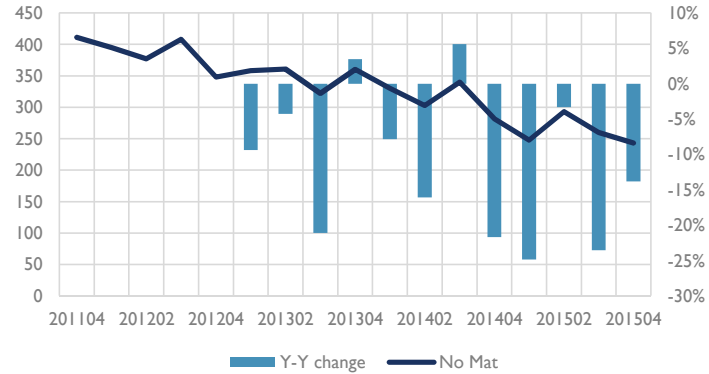
Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

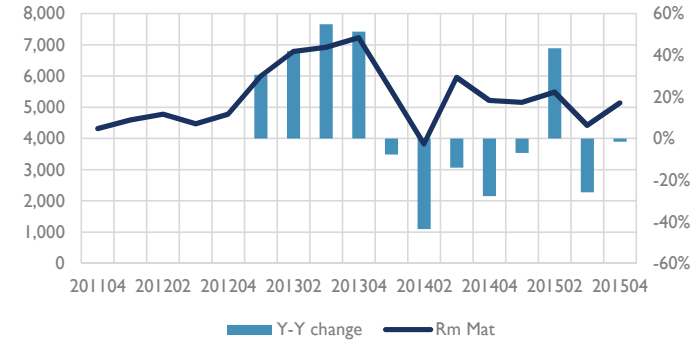
VALUE OF PROJECTS AWARDED RM



Tender (Number)

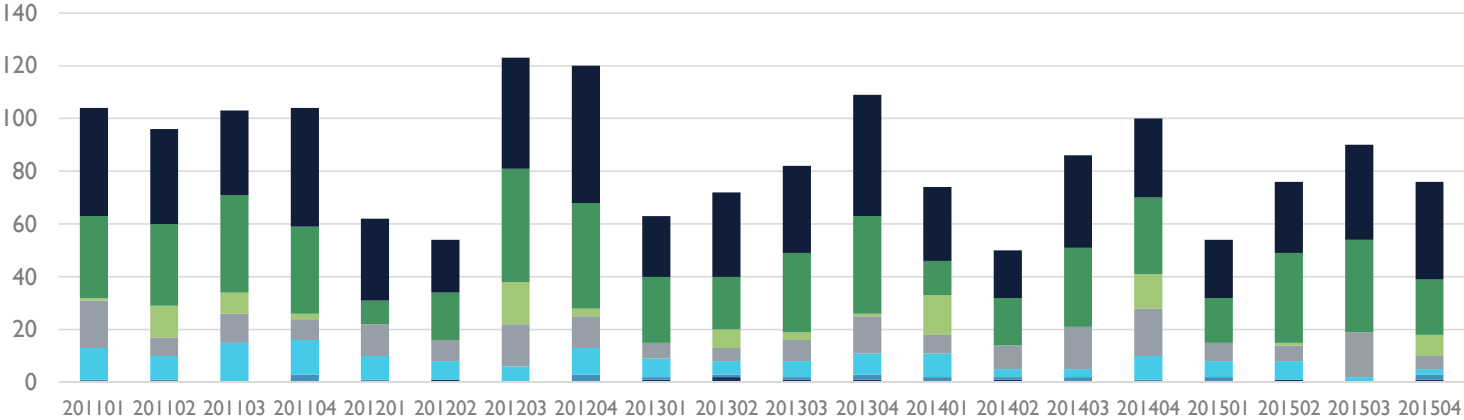


Awards Rm





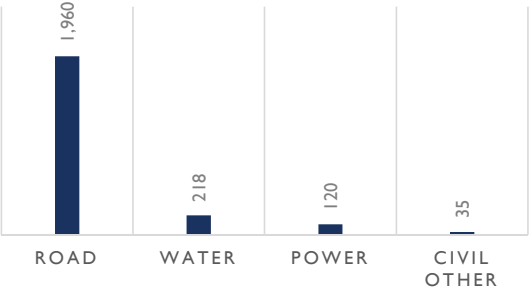
# WESTERN CAPE



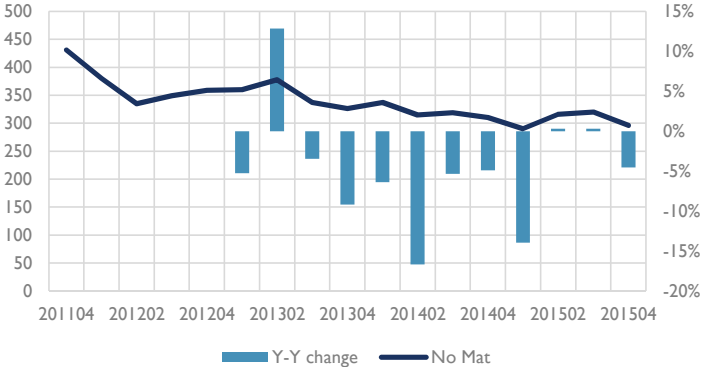
## Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

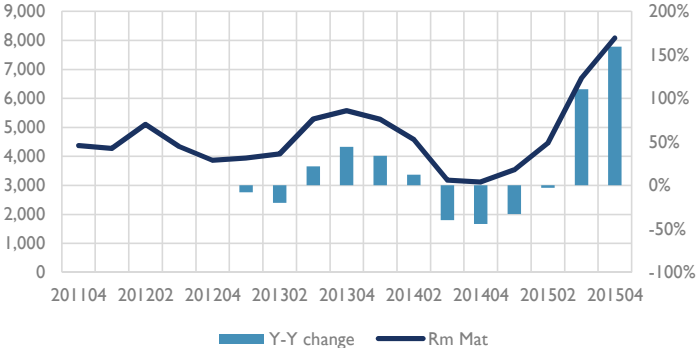
## VALUE OF PROJECTS AWARDED RM



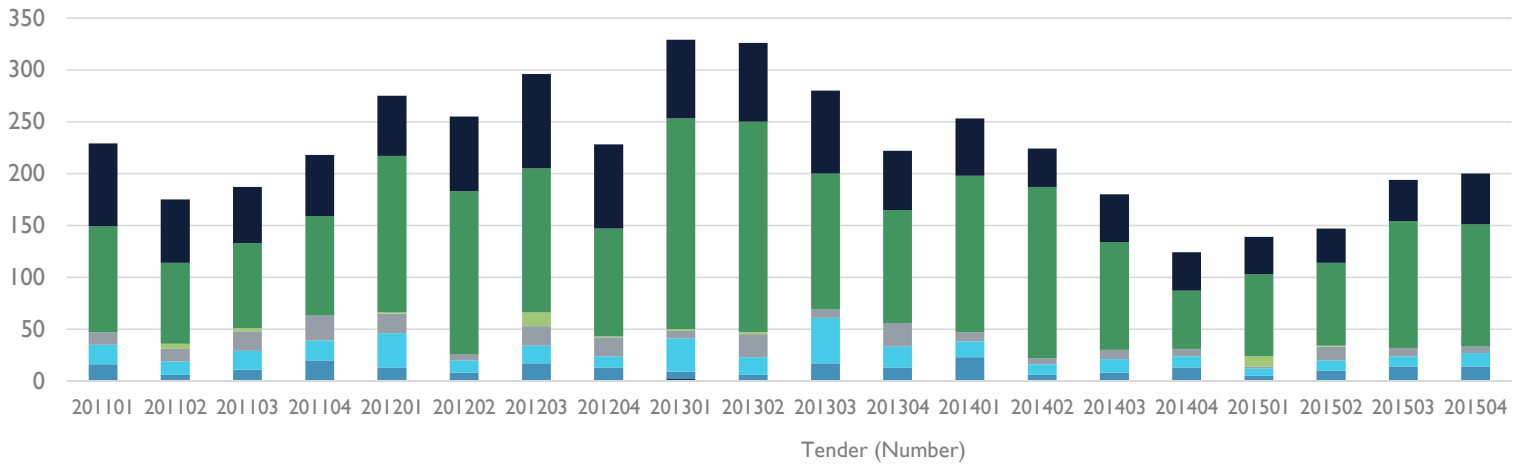
## Tender (Number)



## Awards Rm

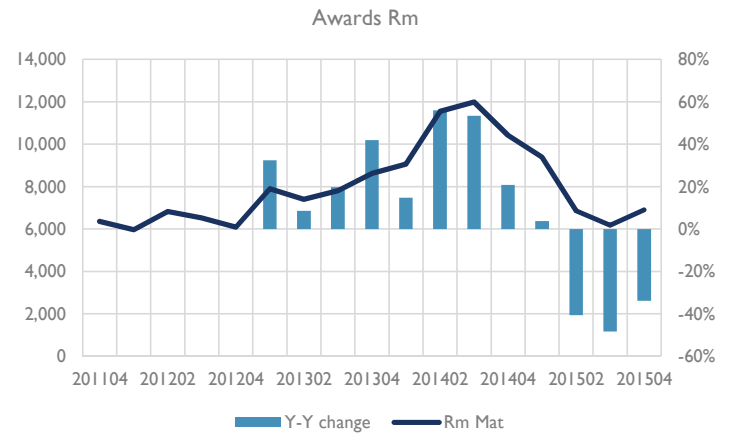
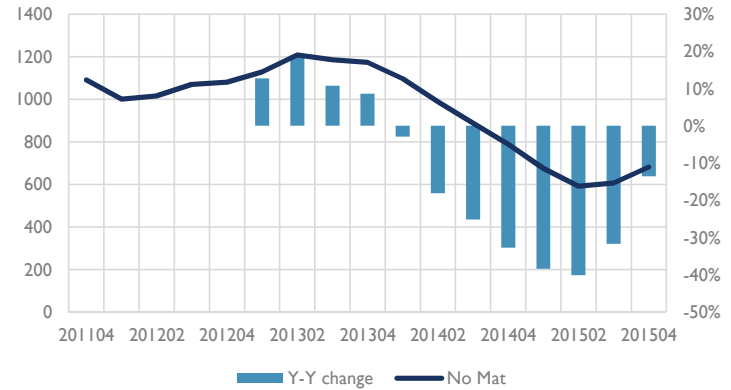
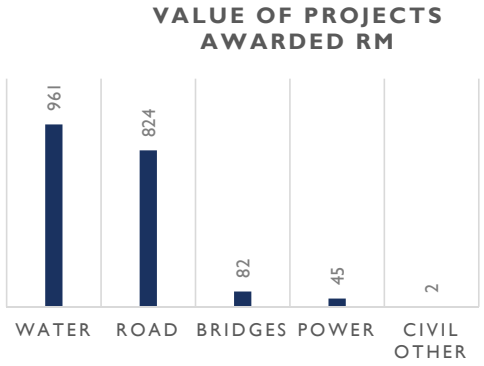


# KWAZULU NATAL

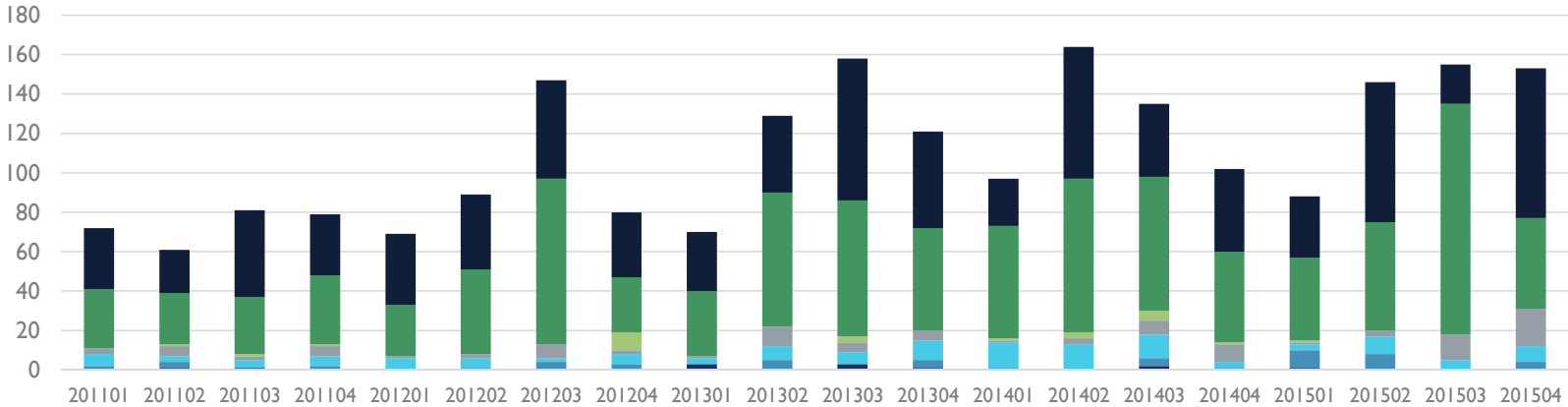


## Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

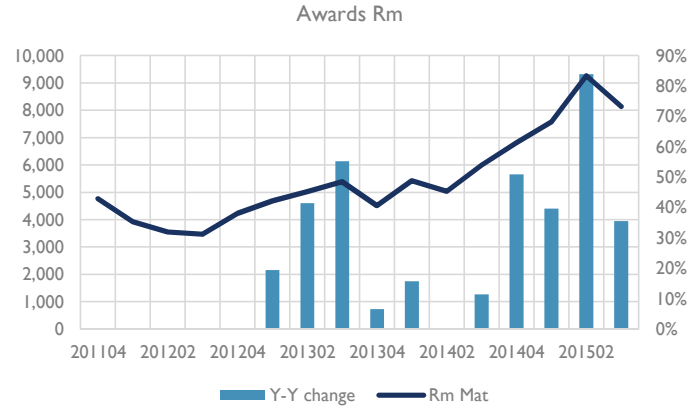
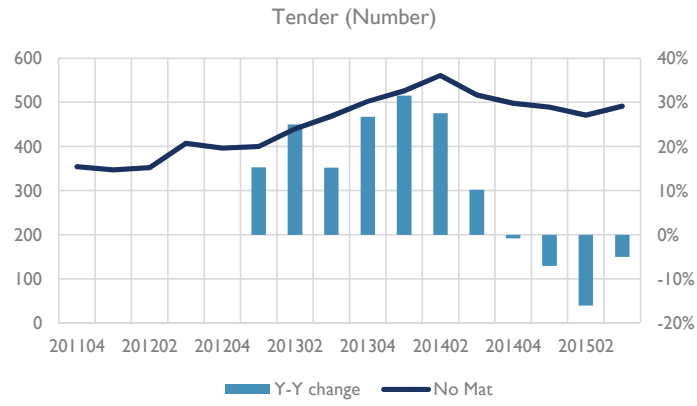
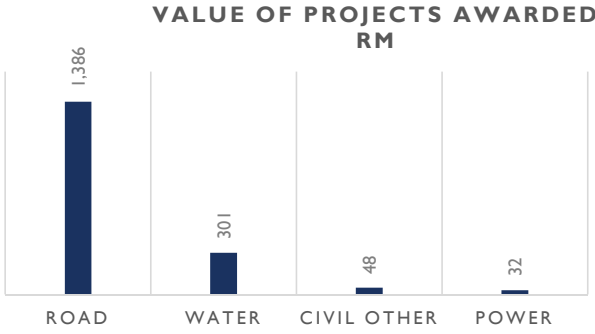


# EASTERN CAPE

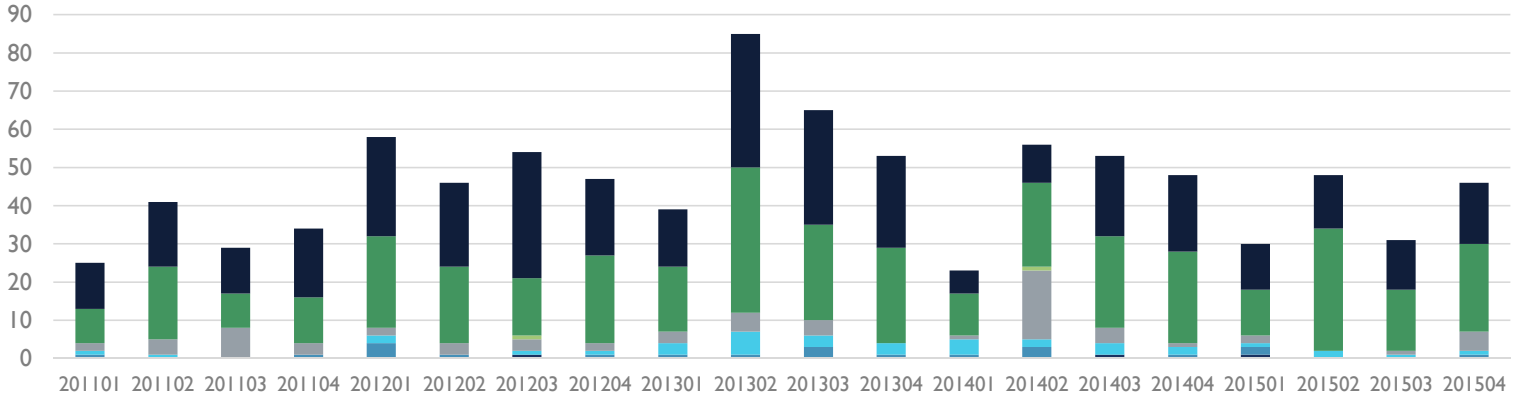


Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

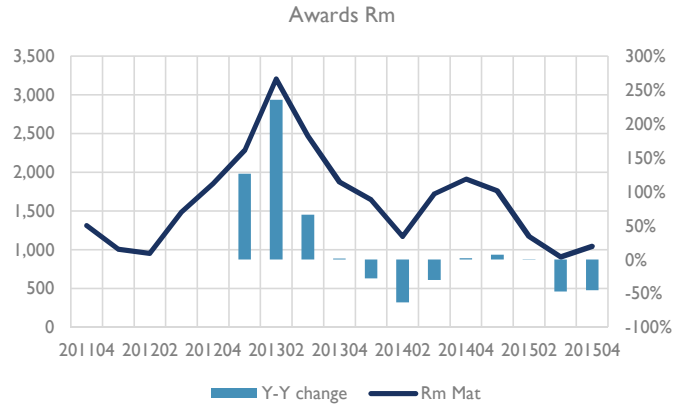
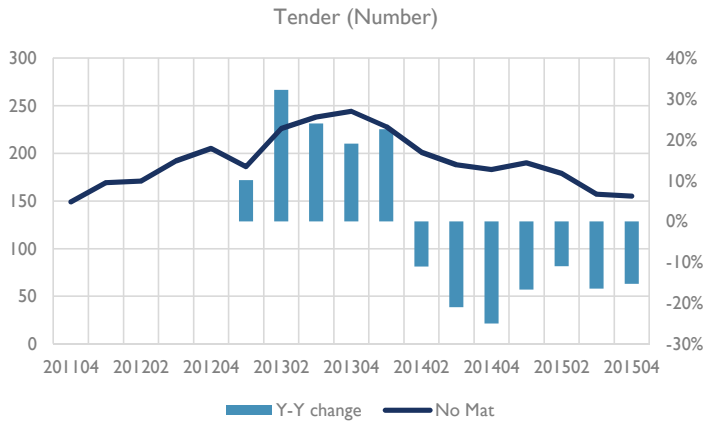
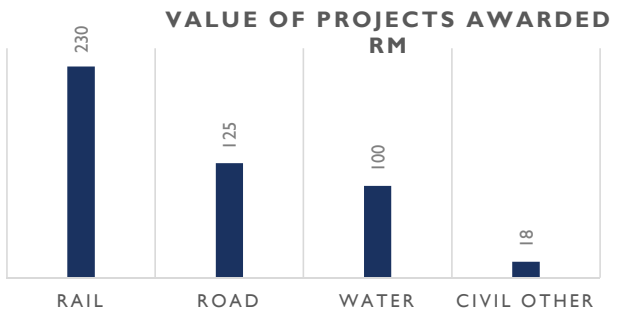


# NORTH WEST PROVINCE

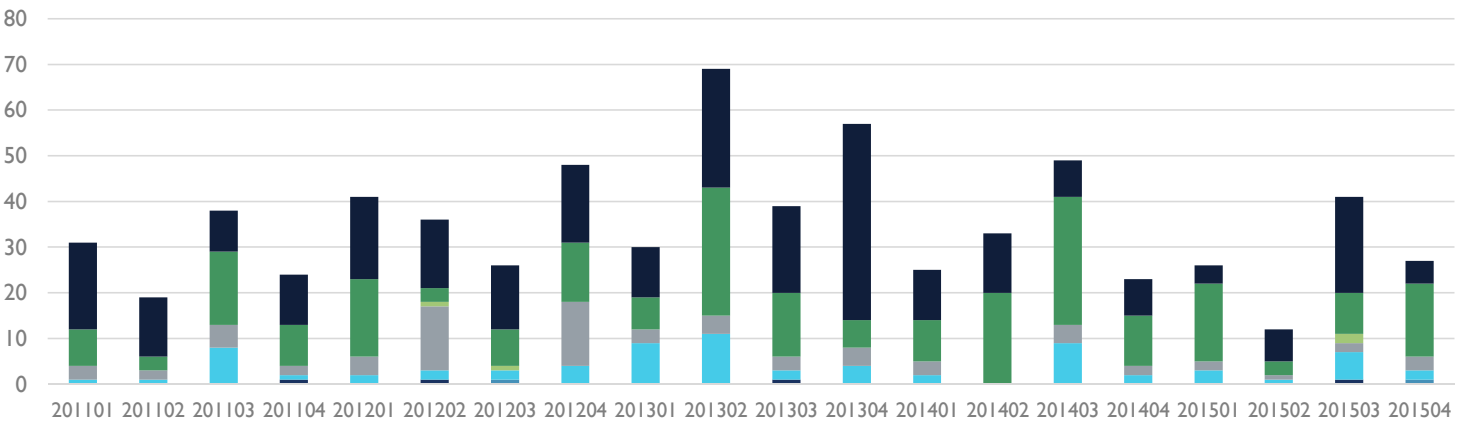


Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

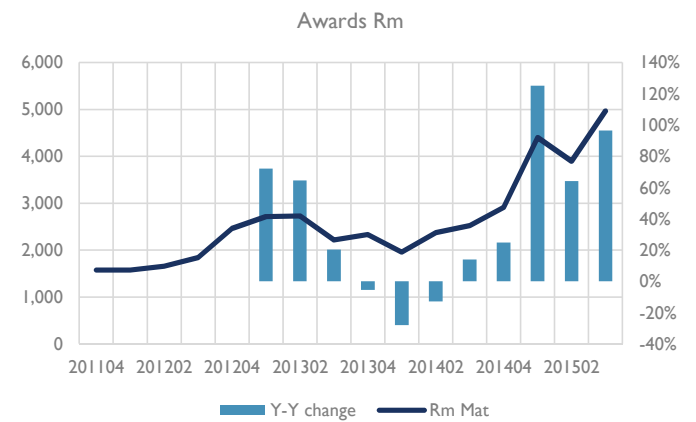
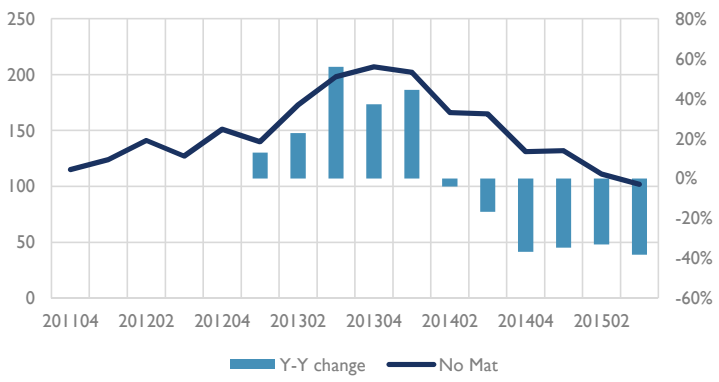
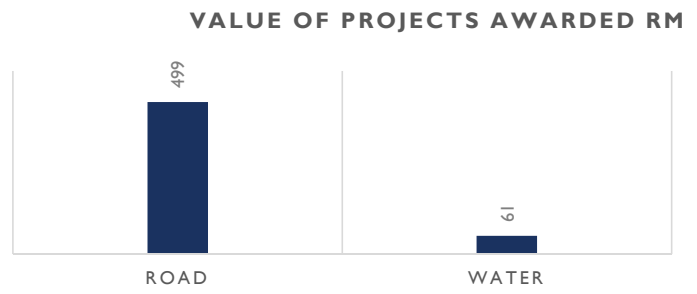


# FREE STATE

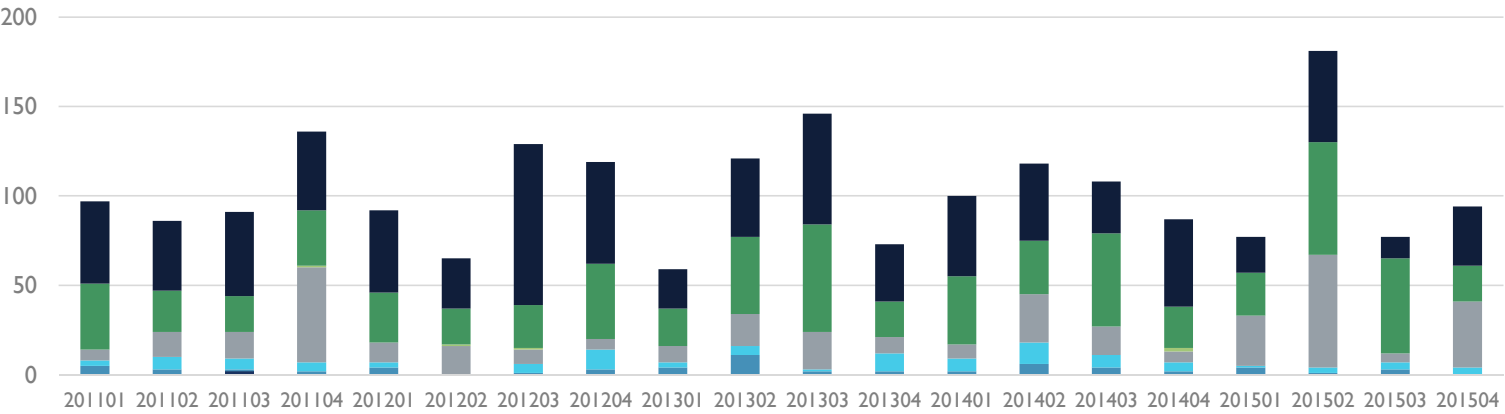


## Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air

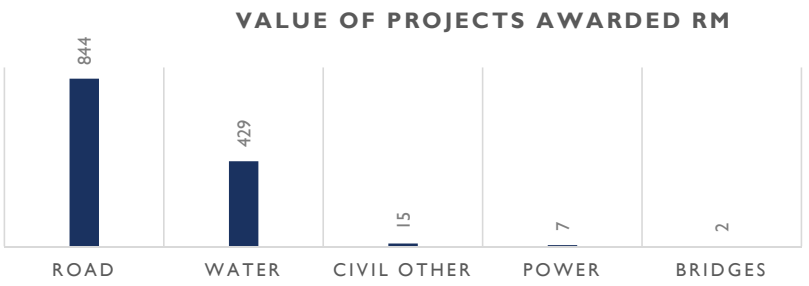


# LIMPOPO

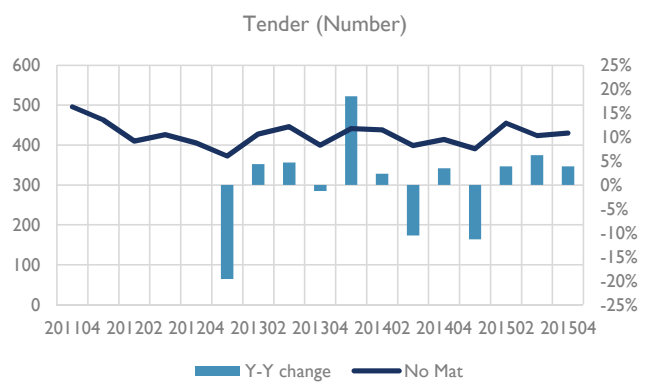


Tender activity

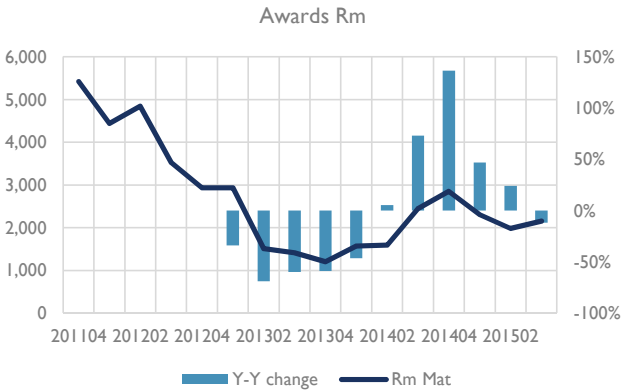
- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air



VALUE OF PROJECTS AWARDED RM

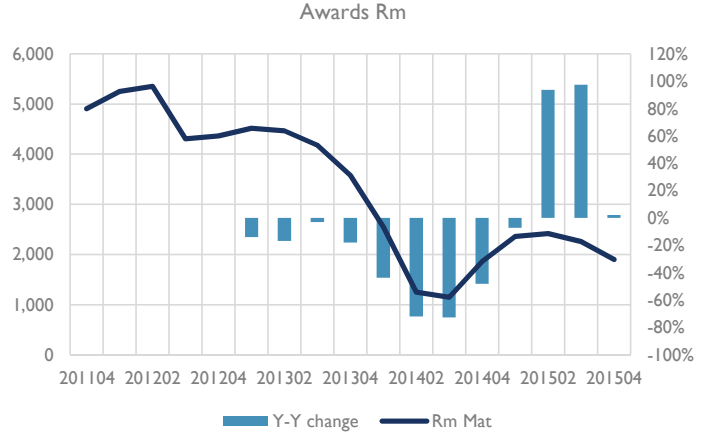
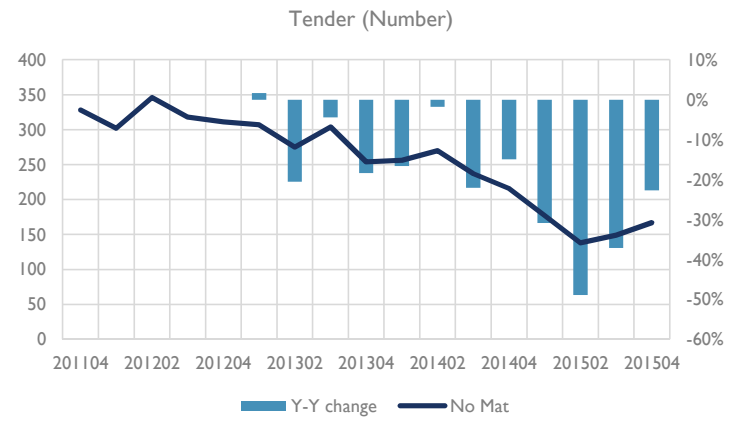
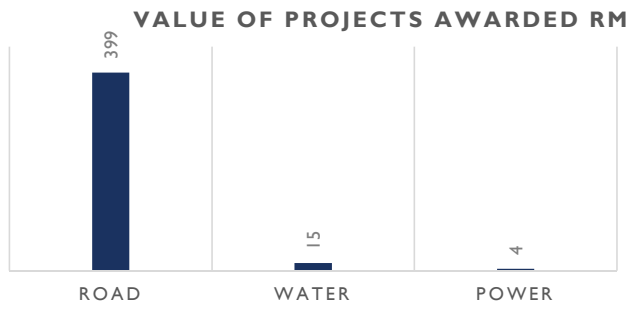
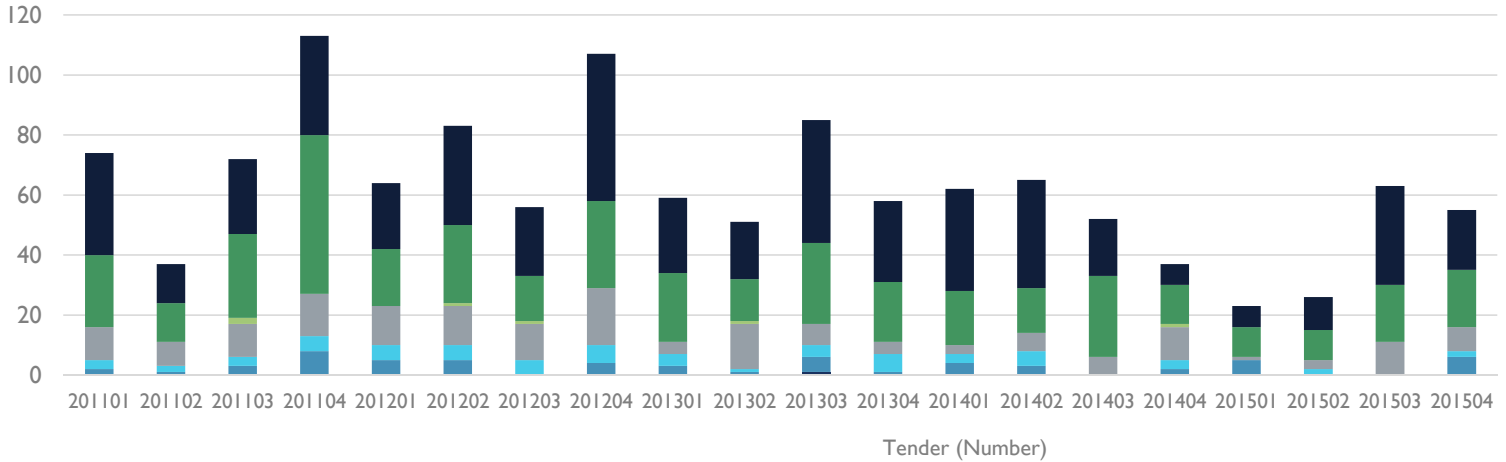


Tender (Number)

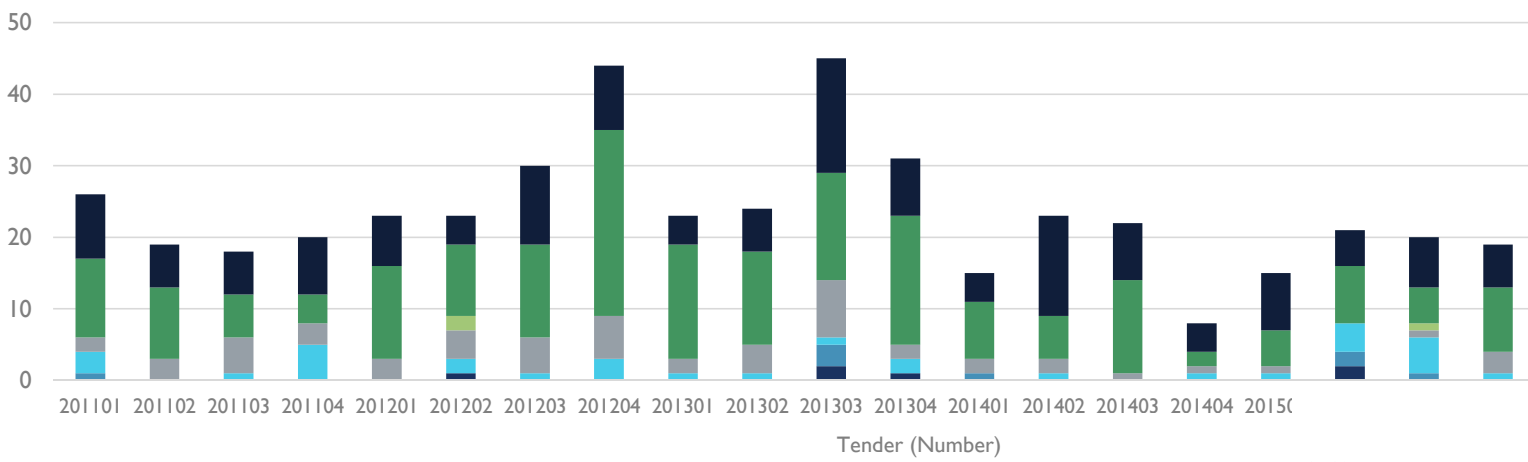


Awards Rm

# MPUMALANGA

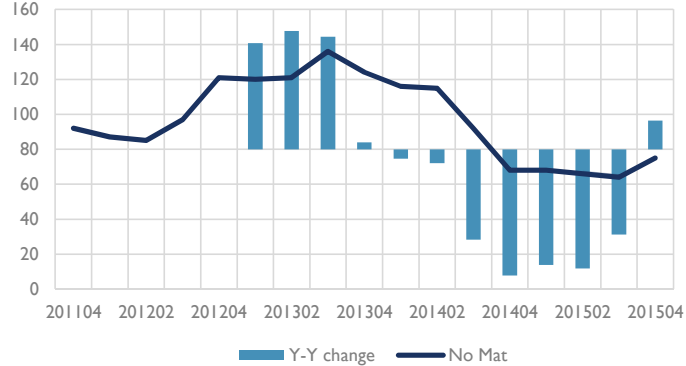
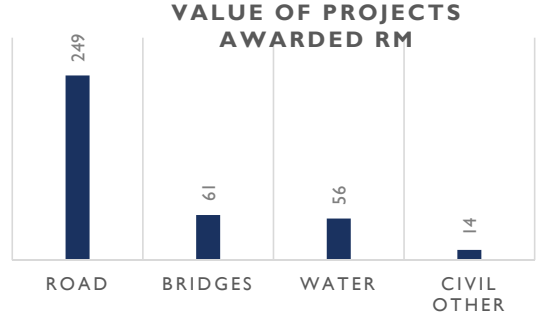


# NORTHERN CAPE

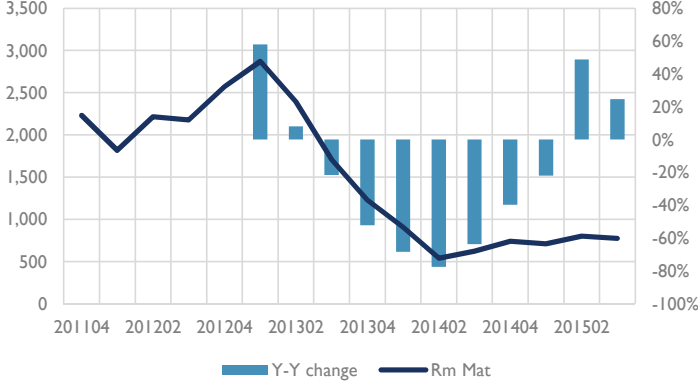


Tender activity

- Water
- Road
- Rail
- Power
- Civil Other
- Bridges
- Air



Awards Rm



■ Y-Y change — No Mat

■ Y-Y change — Rm Mat



# ESTIMATED VALUE OF TENDERS

CURRENT QUARTER: 2015Q4

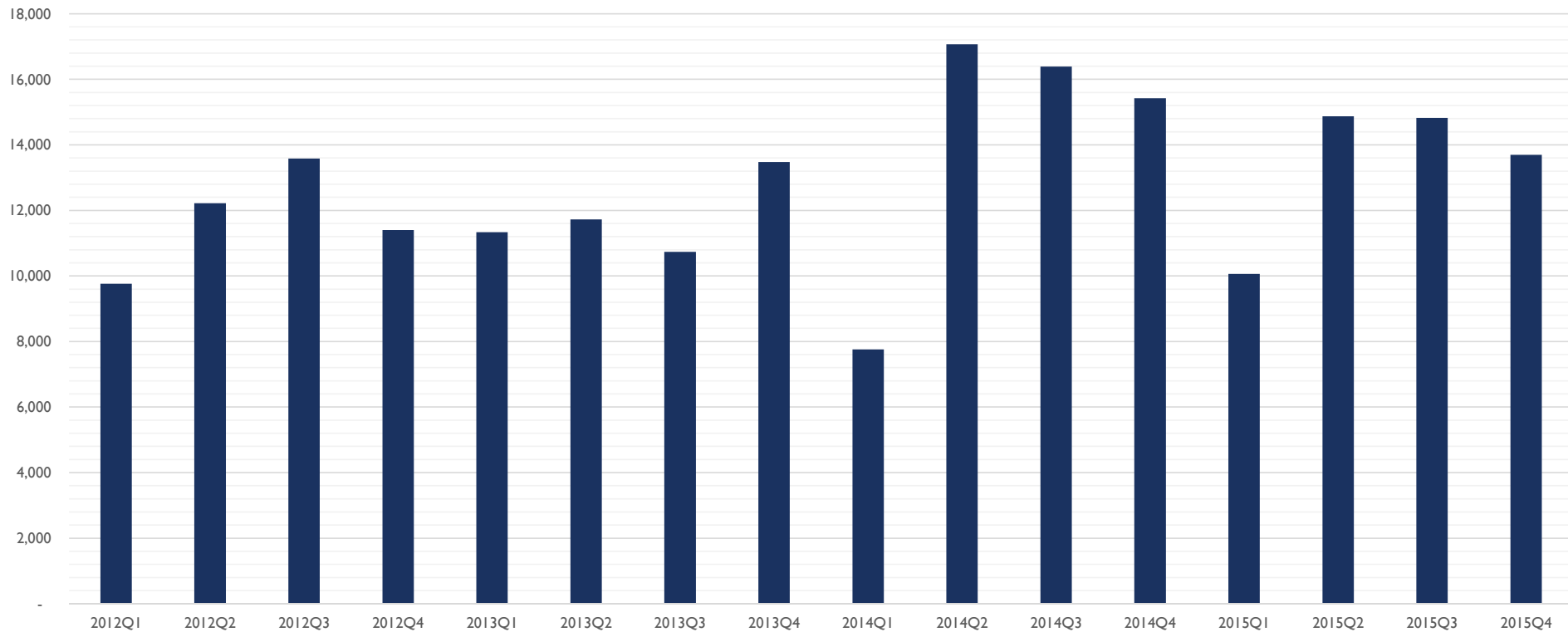
## ESTIMATED VALUE OF TENDERS (NATIONAL) CURRENT QUARTER, BY CIDB GRADE AND PROJECT TYPE (NATIONAL)

Rm current prices	3	4	5	6	7	8	9	Grand Total
Air	-	4	-	-	-	-	-	4
Bridges	11	19	26	38	61	336	-	492
Civil Other	25	31	40	77	192	-	-	365
Power	51	45	53	131	146	275	-	700
Rail	-	15	-	-	32	230	-	277
Road	111	192	216	510	1,202	2,361	654	5,245
Water	70	175	221	935	1,695	1,335	2,184	6,615
Total	268	481	555	1,690	3,329	4,537	2,838	13,697

## ESTIMATED TENDER VALUES, BY QUARTER

Rm, current prices	Air	Bridges	Civil Other	Power	Rail	Road	Water	Grand Total	Y-Y Change	YTD	YTD Per. Change
2012Q1	12	206	244	610	-	4,289	4,399	9,759		9,759	
2012Q2	-	87	549	404	16	4,919	6,247	12,223		21,982	
2012Q3	11	194	289	765	235	6,625	5,466	13,585		35,567	
2012Q4	-	197	498	778	13	6,392	3,527	11,404		46,971	
2013Q1	-	125	668	548	-	6,378	3,614	11,333	16.1%	11,333	
2013Q2	24	107	1,023	578	184	5,153	4,658	11,726	-4.1%	23,060	
2013Q3	18	102	205	334	0	5,676	4,403	10,738	-21.0%	33,798	
2013Q4	4	73	185	288	-	9,662	3,261	13,473	18.1%	47,271	
2014Q1	-	287	423	285	9	3,886	2,871	7,760	-31.5%	7,760	-31.5%
2014Q2	4	232	432	456	97	8,270	7,584	17,074	45.6%	24,834	7.7%
2014Q3	129	211	534	600	121	8,174	6,620	16,389	52.6%	41,222	22.0%
2014Q4	-	306	489	366	104	7,668	6,489	15,421	14.5%	56,643	19.8%
2015Q1	16	192	553	455	152	4,205	4,486	10,059	29.6%	10,059	29.6%
2015Q2	102	467	418	476	153	9,252	4,006	14,875	-12.9%	24,933	0.4%
2015Q3	128	380	388	765	108	8,924	4,129	14,822	-9.6%	39,755	-3.6%
2015Q4	4	492	365	700	277	5,245	6,615	13,697	-11.2%	53,453	-5.6%

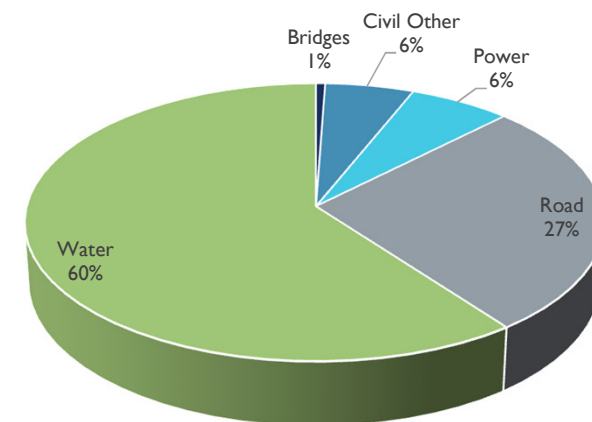
# ESTIMATED TENDER VALUES (NATIONAL), BY QUARTER RM CURRENT PRICES



# GAUTENG : ESTIMATED VALUE OF TENDERS

	3	4	5	6	7	8	9	Grand Total
Bridges	-	-	-	-	-	-	-	13
Civil Other	-	-	-	5	77	-	-	125
Power	-	-	-	20	33	160	-	144
Road	1	3	7	30	213	-	-	622
Water	4	123	32	31	159	157	619	1,367
Grand Total	5	126	39	87	481	317	619	2,271

Value of Civil Tenders  
Gauteng 2015Q4: R2.2bn

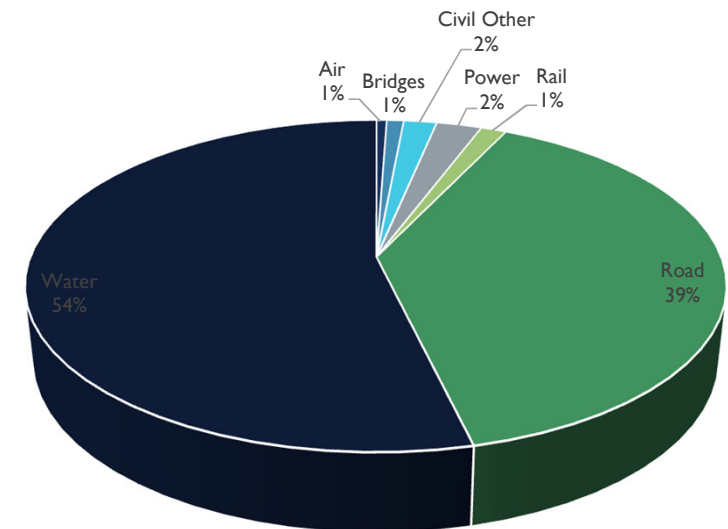


Details of other provinces available upon request

# WESTERN CAPE : ESTIMATED VALUE OF TENDERS

	3	4	5	6	7	8	9	Grand Total
Air	-	5	-	-	-	-	-	5
Bridges	-	-	8	-	-	-	-	8
Civil Other	-	8	-	8	-	-	-	16
Power	3	3	-	16	-	-	-	22
Rail	-	12	-	-	-	-	-	12
Road	8	22	15	-	146	160	-	351
Water	27	26	18	71	144	-	196	482
	38	77	41	95	291	160	196	898

Value of Civil Tenders  
Western Cape 2015Q4: R900m



Details of other provinces available upon request