

Questionnaire no: 1 

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Area: 4 

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Sector and size 8 

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**UNIVERSITY OF SOUTH AFRICA**

**BUREAU OF MARKET RESEARCH**

**SOUTH AFRICA ESTABLISHMENT SURVEY & ANALYSIS**

**MANUFACTURING SECTOR: LARGE**

**DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 1: GENERAL ISSUES (To be completed by MD/CEO)**

*Please complete this questionnaire by \_\_\_\_\_ 2002*

Completed by: \_\_\_\_\_

Position: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Name of interviewer: \_\_\_\_\_



**SOUTH AFRICA ESTABLISHMENT SURVEY AND ANALYSIS  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 1: GENERAL ISSUES (To be completed by MD/CEO)**

**IDENTIFICATION**

- 1.1 **Name:** \_\_\_\_\_
- 1.2 **Physical (street) address:**  
\_\_\_\_\_  
\_\_\_\_\_ **Code:** \_\_\_\_\_
- 1.3 **Postal address:**  
\_\_\_\_\_  
\_\_\_\_\_ **Code:** \_\_\_\_\_
- 1.4 **Telephone: Dialling Code** \_\_\_\_\_ **Number** \_\_\_\_\_
- 1.5 **Fax: Dialling Code** \_\_\_\_\_ **Number** \_\_\_\_\_ **E-mail address:** \_\_\_\_\_

**GENERAL BUSINESS INFORMATION**

- 1.6 **Indicate the status of the establishment:**

**Circle (O) one**

Head office/holding company	1
Branch	2
Subsidiary	3
Independent unit	4

- 1.7 When did this plant start production at this location? \_\_\_\_\_ (year)
- 1.8 When did the present owner(s) of this establishment take over in this capacity? \_\_\_\_\_ (year)
- 1.9 What type of products do this establishment produce?  
\_\_\_\_\_  
\_\_\_\_\_
- 1.10 How many full-time employees does this establishment have? \_\_\_\_\_

☐ 10

11   12

13   14

15   16

17     20



## 1.11 Describe the legal status of this establishment:

	Circle (O) one	Circle (O) if listed on -	
		JSE	Another stock exchange
Sole proprietorship	01	1	2
Partnership	02	1	2
Closed corporation	03	1	2
PTY Limited	04	1	2
Privately held corporation	05	1	2
Publicly traded corporation	06	1	2
Parastatal/government-owned corporation	07	1	2
Cooperative	08	1	2
Subsidiary/division of larger enterprise	09	1	2
Association	10	1	2
Other (Specify)		1	2

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## ECONOMIC POLICY ENVIRONMENT

## 1.12 Rate each of the potential obstacles on a scale ranging from 1 = major problem to 3 = not a problem

Potential obstacle	Major problem	Moderate problem	Not a problem	Not applicable
Regulations for expanding your current business and/or starting a new business	1	2	3	
Export and Import regulations/procedures	1	2	3	4
Availability of technical/vocational labour skills	1	2	3	
Recent labour regulations (LRA, BCEA, EEA, Skills Act)	1	2	3	
Tax regulations	1	2	3	
Tax rates	1	2	3	
Infrastructure provision and quality (roads, electricity, water etc)	1	2	3	
Change in government policies	1	2	3	
Cost of capital/credit	1	2	3	
Depreciation or weakening of Rand/Dollar exchange rate (more rand per US\$)	1	2	3	4
Environmental regulations	1	2	3	
HIV/AIDS	1	2	3	
Crime and theft	1	2	3	
Corruption in government	1	2	3	
Other (Specify)	1	2	3	

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# GOVERNMENT'S ROLE IN INVESTMENT PROMOTION AND LOCAL ECONOMIC DEVELOPMENT

- 1.13 Circle (O) the **three** most important contributions that **the Durban Metropolitan Unicity Council (DMUC)** can make towards promoting investment and local economic development, and rank them in order of importance.

Type of contribution	Circle (O)	Rank	Comments (optional)
Safety and security on streets	01		
Infrastructure (road maintenance, network development, electricity, water)	02		
Investment support and facilitation centres	03		
Improved attitude of local officials towards local residents	04		
Health policy (eg HIV/AIDS)	05		
Maintenance of high ethical standards by local government officials	06		
Targeted financial incentives	07		
Public transport	08		
Other (Specify)			

41			42
43			44
45			46

- 1.14 Circle (O) the **three** most important contributions that **central government authorities** can make towards promoting investment and local economic development in the DMUC area and rank them in order of importance.

Type of contribution	Circle (O)	Rank	Comments (optional)
Policy stability (stick to the policies announced)	01		
Safety and security	02		
Health policy (eg HIV/AIDS)	03		
Provide timely, accurate and relevant information for growth of local businesses	04		
Promote greater private sector participation in publicly-provided services and goods	05		
Speed up privatisation	06		
Promote efficient interest rate policy	07		
Promote efficient and flexible wage policy	08		
Promote efficient and flexible exchange rate policy	09		
Other (Specify)			

47			48
49			50
51			52

## CORPORATE GOVERNANCE AND OWNERSHIP STRUCTURE

### 1.15 Describe the ownership structure of this establishment:

Ownership structure	% of ownership at present
<b>Type of private ownership</b>	
<b>Domestic</b>	
Individual resident(s) of South Africa	
Domestic company	
Local bank/institutional investor	
<b>Foreign</b>	
Non-resident(s)	
Foreign company	
Foreign bank/institutional investor	
<b>Type of government ownership</b>	
Diffused -for publicly traded corporation	
Central government	
Province	
Municipality/local government	
Other (Specify)	

53			54
55			56
57			58

59			60
61			62
63			64

65			66
67			68
69			70
71			72
73			75

## PARENT COMPANY

### 1.16 Does the establishment have a parent company?

1 Yes	2 No
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If NO go to question 1.18

76 ☐

### 1.17 If YES, state area where the parent company is located

(a) If domestic, and:

(i) within Durban, list suburb \_\_\_\_\_

(ii) elsewhere in KZN, list city/town \_\_\_\_\_

(iii) elsewhere in South Africa, list province \_\_\_\_\_

(b) If foreign, list country \_\_\_\_\_

77					80
81					84
85					88
89					92

CORPORATE FINANCE

1.18 Does this establishment make its own **investment decisions** or does the parent company, if applicable, make all investment decisions?

Circle (O) one

This establishment makes all its investment decisions independently of its parent company	1
Parent company makes all investment decisions for this establishment	2
Decisions are made jointly	3

93

1.19 List the percentage of this establishment’s current financing that comes from each of the following sources: (Note: please put ‘0’ for sources from which the establishment does not receive financing).

Source	Percentage (%) of -	
	investment capital	working capital
Retained/internal earnings		
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		
Other (Specify)		
Total	100	100

94					97
98					101
102					105
106					109
110					113
114					118

[IF ANSWER TO QUESTION 1.19 IS 100 % ‘RETAINED/INTERNAL EARNINGS’ (1<sup>st</sup> OPTION ABOVE), SKIP QUESTION 1.20 TO 1.22 AND GO TO QUESTION 1.23]

1.20 In 2001, did your establishment consider expansion?

1 Yes	2 No
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[IF NO, GO TO QUESTION 1.23]

119

1.21 If YES to question 1.20, was the expansion undertaken?

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

[IF YES, GO TO QUESTION 1.23]

120

1.22 If NO to question 1.21, was it due to lack of funds?

1 Yes	2 No
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121



1.23 Over the past year (2001), did the establishment face problems in financing its actual levels of production?

1 Yes	2 No
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[IF NO, GO TO QUESTION 1.25]

122 ☐

1.24 If YES to question 1.23, circle (O) all the reasons that apply

Reason	
Operating or market conditions (input cost, market demand, global crisis effected exports)	1
Financial market conditions (high interest rates, unavailability of credit)	2
Other (Specify)	

123	<input type="checkbox"/>
124	<input type="checkbox"/>
125	<input type="checkbox"/>
	126

INTEREST RATES

1.25 Have the relatively high interest rates from 1996 to mid-1999 been a problem for **your** establishment?

1 Yes	2 No
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127 ☐

Explain briefly:

128 ☐ ☐ 129

1.26 In recent years interest rates have been fairly high. In particular, from June to August 1998, the Reserve Bank raised interest rates sharply. How did the interest rate hike in 1998 affect your establishment's financial structure?

Circle (O) one or more	
Changed term structure of borrowing and led to new liabilities (made it difficult for the establishment to raise more debt capital)	1
Reduced level of borrowing	2
Reduced planned plant expansion	3
Not at all	4
Not applicable	5
Other (Specify)	

130	<input type="checkbox"/>
131	<input type="checkbox"/>
132	<input type="checkbox"/>
133	<input type="checkbox"/>
134	<input type="checkbox"/>
135	<input type="checkbox"/>
	136

EXPORTS, IMPORTS AND EXCHANGE RATES

1.27 Does this establishment export goods and services?

1 Yes	2 No
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137 ☐

1.28 Does this establishment import goods and services?

1 Yes	2 No
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138 ☐

[SKIP QUESTIONS 1.29 TO 1.31 IF THIS ESTABLISHMENT DOES NOT EXPORT OR IMPORT]

1.29 In recent years the rand to dollar exchange rate (and indeed, all other related exchange rates) has tended to fluctuate. During September 2001 the exchange rate changed dramatically from around R8,00=US\$1 to around R10,00=US\$1. At all time low of more than R13 to the Dollar in December 2001 before it appreciated again to around R11,50=US\$1 in 2002.

Please explain how this frequent rise and fall in the Rand-Dollar exchange rate affects your establishment's business.

	Up to the beginning of September 2001 (R8,00=US\$1)					From about mid-September 2001 (R10,00=US\$1)				
	Very much	Mod-erately	Not at all	N/A	Don't recall	Very much	Mod-erately	Not at all	N/A	Don't recall
The establishment has reduced the use of imported inputs and shifted towards more domestic ones	1	2	3	4	5	1	2	3	4	5
When the rand recovers the establishment purchases more imported capital equipment	1	2	3	4	5	1	2	3	4	5
When the rand depreciates the establishment starts exporting more of its production	1	2	3	4	5	1	2	3	4	5
We are uncertain of the future direction of the exchange rate and will wait and see what happens to the exchange rate <b>before</b> we produce more for export.	1	2	3	4	5	1	2	3	4	5




1.30 In 2001, did you typically buy hedging/forward contracts on your foreign currency exposure?

1 Yes	2 No	IF NO, SKIP QUESTION 1.31 AND GO TO QUESTION 1.32	147	<input type="text"/>
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1.31 If YES to question 1.30, furnish the following:

(a) percentage of foreign currency exposure \_\_\_\_\_ % 148   149

(b) notional (forward contract) value in rands R \_\_\_\_\_ 150       155

## COMPANY TAX RATES

1.32 What was the effect of the reduction (from 35% to 30%) in the company tax rate on your after-tax profits?  
Circle (O) one

A significant difference	A moderate difference	No noticeable difference	Not applicable	156	<input type="text"/>
1	2	3	4		

1.33 Did the cut in company tax influence your future expansion plans?

1 Yes	2 No	157	<input type="text"/>
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## PDI PARTICIPATION

1.34 Does a 'previously disadvantaged individual' (PDI) or companies controlled by PDIs (African, Asian/Indian, Coloured) own a part of this establishment?

1 Yes	2 No	[IF NO, GO TO QUESTION 1.37]	158	<input type="text"/>
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1.35 If YES to question 1.34:

(a) what percentage of the total does the PDI own? \_\_\_\_\_ % 159   160

(b) when did the PDI become owner/part-owner of this establishment?  
\_\_\_\_\_ (year) 161   162

1.36 In which work areas are PDIs employed at management level in this establishment?  
Circle ALL that apply

	Circle (O)	
General manager	1	163 <input type="text"/>
Production	2	164 <input type="text"/>
Human Resources	3	165 <input type="text"/>
Finance	4	166 <input type="text"/>
Marketing	5	167 <input type="text"/>
Only ownership	6	168 <input type="text"/>
On the Board	7	169 <input type="text"/>
Other (Specify)		170 <input type="text"/> <input type="text"/> 171



## FUTURE EXPECTATIONS

- 1.37 Indicate your estimates for the listed variables at the end of 2002 and 2003. **Circle 1 if a variable is circle 2 if a variable is expected to fall/slow down/decrease/weaken, circle 3 if no change is expected** estimate indicate the percentage change or the level to which it is expected to change, as the case may be

**Comment:** Some coding errors – a code 5 entered for some of the questions.

	By end 2002											
	Change											
	Rise/grow/ increase/ improve	Fall/slow down/ decrease/ weaken	By what %	To what level	No change	Don't know	Rise/grow/ increase/ improve	Fall/slow down/ decrease/ weaken				
Relative to 2001, what is your expectation for annual sales? 172	1	2			3	4	1					
Relative to 2001, what is your expectation for the establishment's average product price? 178	1	2			3	4	1					
Relative to 2001, what is your expectation for the overall economy? 184	1	2			3	4	1					
Relative to the growth of 5,7 % in the consumer price index for 2001, what is your expectation for general prices? 190	1	2			3	4	1					
Relative to the prime interest rate of 14 % on 1 February 2002, what is your expectation for the average prime interest rate? 196	1	2			3	4	1					
Relative to the exchange rate of around \$1=R11,50 during January 2002, what is your expectation for the exchange rate of the rand to the US dollar? 202	1	2		\$1=R___	3	4	1					

**Comment:** Modified – coded 0



- 1.38 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

	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 business	6	
Need a greater supply of skilled workers	7	
Competition from foreign firms must decline	8	
Other (Specify)		

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- 1.39 What will it take to make an additional capital investment of at least 10 % next year?  
Circle ALL that apply

	Circle (O)	Comments
Sustained increase in the market demand for my products/services	01	
Interest rates must fall in real terms	02	
The exchange rate must stabilize	03	
Have to export more	04	
Need to feel more confident about the future of the SA economy	05	
Crime and violence must decrease to make investments less risky	06	
Labour relations must be more flexible and real wages must fall	07	
Need a greater supply of skilled workers	08	
The investment climate (rate of return/risk) in South Africa in relation to foreign economies must improve significantly	09	
Creation of more opportunities for manufacturers in South Africa as a result of globalisation	10	
Other (Specify)		

222			223
224			225
226			227
228			229
230			231
232			233
234			235
236			237
238			239
240			241
242			243

## MERGERS/ACQUISITIONS

- 1.40 Has the firm acquired new employees and capital stock due to a merger or acquisition in the past 5 years?

1 Yes	2 No
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244 ☐

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_ Tel no: \_\_\_\_\_





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**SOUTH AFRICA ESTABLISHMENT SURVEY & ANALYSIS  
MANUFACTURING SECTOR: LARGE  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 2: PRODUCTION RELATED ISSUES**  
(To be completed by Production Manager)

**IDENTIFICATION**

- 2.1 Name of establishment \_\_\_\_\_
- 2.2 Name of contact person \_\_\_\_\_
- 2.3 Telephone: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 2.4 Fax: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 2.5 E-mail address \_\_\_\_\_

**PRODUCTS MANUFACTURED**

- 2.6 List the main products manufactured by this establishment in order of importance and indicate for how long each is being manufactured:

	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
4	1.				13
14	2.				23
24	3.				33
	<b>Total</b>				

**CHOICE OF LOCATION**

- 2.7 Please list the 3 main advantages of your present location in order of importance:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_


- 2.8 Please list the 3 main disadvantages of your present location in order of importance:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_


## 2.2

2.9 If you should decided to expand your existing production capacity, where would the expansion/new plant be located and why?

Choice of location	Circle (0) one	State 3 main reasons for choice of location
Same premises	1	(i)
		(ii)
		(iii)
Within the same industrial area as at present	2	(i)
		(ii)
		(iii)
Different industrial area in Durban. Specify suburb:	3	(i)
		(ii)
		(iii)
Elsewhere in KZN Specify city/town:	4	(i)
		(ii)
		(iii)
Elsewhere in South Africa. Specify province:	5	(i)
		(ii)
		(iii)
Outside South Africa. Specify country:	6	(i)
		(ii)
		(iii)
Not applicable	7	

**FOR OFFICE USE:**

2.10 How would you rate the following variables with respect to the present location of your plant? Circle (o) the appropriate responses.

Variable	Excellent	Fair	Poor	Not applicable
<b>Variables related to proximity</b>				
Proximity to product markets	1	2	3	4
Proximity to SADC export markets	1	2	3	4
Proximity to corporate financial services (banks etc.)	1	2	3	4
Proximity to suppliers of spare parts, machinery etc.	1	2	3	4
Proximity to raw materials	1	2	3	4
Proximity to semi-processed inputs	1	2	3	4
Proximity of rail transport	1	2	3	4
Proximity to main road links	1	2	3	4
Proximity to international airport facilities	1	2	3	4
Proximity to national airport facilities	1	2	3	4
Proximity to seaport/harbour	1	2	3	4
<b>Variables related to cost and reliability</b>				
Low cost of water	1	2	3	4
Reliability of water supply	1	2	3	4
Low cost of electricity	1	2	3	4
Reliability of electric supply	1	2	3	4
Low cost of telecommunication services (domestic)	1	2	3	4
Low cost of telecommunication services (international)	1	2	3	4
Reliability of telecommunication services (domestic)	1	2	3	4
Reliability of telecommunication services (international)	1	2	3	4
Low cost of office spaces	1	2	3	4
Low local tax rates	1	2	3	4
Low crime rate affecting staff	1	2	3	4
Low crime rate affecting company property	1	2	3	4
Low cost of industrial land	1	2	3	4
<b>Variables related to availability</b>				
Availability of courier services	1	2	3	4
Availability of container services	1	2	3	4
Availability of trucking services	1	2	3	4
Availability of industrial waste facilities	1	2	3	4
Availability of industrial land	1	2	3	4

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## CAPACITY UTILIZATION

2.11 What kind of labour shift did production workers in this establishment predominantly follow? Circle (o) kind of shift and indicate the length of each shift.

Kind of shift	In 2000	What was the length of each shift in hours?	In 2001	What was the length of each shift in hours?
Single shift	1		2	
Double shift	1		2	
Triple shift	1		2	
Other (Specify)	1		2	

- 2.12(a) Indicate if this establishment stopped production for reasons other than annual and public holidays and for how long in EITHER days OR weeks OR months.

Year	YES	NO	Number of days	Number of weeks	Number of months
2000	1	2			
2001	1	2			

88					91
92					95

[IF THE ANSWER IS NO FOR BOTH 2000 AND 2001, GO TO QUESTION 2.14]

- (b) What workweek do production workers in this establishment follow?

5 days	6 days	7 days
--------	--------	--------

96

- 2.13 Indicate the reasons why production stopped in 2000 and/or 2001. Circle (o) ALL answers that apply:

Reason	2000	2001
	YES	YES
Routine maintenance	1	2
Retooling of production line	1	2
Lack of demand	1	2
Lack of supplies	1	2
Civil unrest	1	2
Strike	1	2
Other (Specify)	1	2

97				98
99				100
101				102
103				104
105				106
107				108
109				112

- 2.14 With no change in your installed machinery/equipment, if there was additional demand, how much MORE could you have produced? Give percentage(s) or circle.

Year	% more that could have been produced	No more could have been produced because of full capacity
2000		1
2001		2

113					116
117					120

## CAPITAL ASSETS

- 2.15 How much would it have cost this establishment to **replace** all its machinery and equipment (including vehicles) with NEW items at the end of 2001?

R\_\_\_\_\_ million

121     124

- 2.16 How much would this establishment have got if it had **sold** all its machinery, equipment (including vehicles) and business premises at the end of 2001?

R\_\_\_\_\_ million

125     128

## 2.5

- 2.17 How much did this establishment spend on NEW machinery, equipment, vehicles, land and buildings (capital investment) in 2000 and 2001?

	2000	2001
	Rands ('000)	Rands ('000)
New <b>domestic</b> machinery and equipment		
New <b>imported</b> machinery and equipment		
Land and buildings and physical facilities (roads, drainage, etc.)		
New vehicles		
Other capital investment (specify)		
<b>TOTAL</b>		

**FOR OFFICE USE:**

129											138
139											148
149											158
159											168
169											178

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_ Tel No: \_\_\_\_\_

**Comment:** The code for stayed the same is problematic

3.9 Provide the following information on sales and expenses:

Sales and expenses	Value in Rands ('000)	
	2000	2001
Total sales 20		
Purchases of material inputs into production, excluding utilities 34		
Expenditure on utilities (Rands), ie electricity, water, etc 48		
Labour costs (Rands), ie wages and salaries, allowances, bonuses and other benefits 60		
Goods transport costs (excluding rent/lease of vehicles) 72		
Rent/lease of vehicles 84		
Rent for machinery and equipment 96		
Rent for land or buildings 110		
Telecommunication & postal services 124		
Royalty or license fees 136		
Interest charges and other financial fees 146		
Net profit before tax/Net loss* 158		

\* Delete either 'net profit before tax' or 'net loss'

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_

Tel No: \_\_\_\_\_



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MANUFACTURING SECTOR: LARGE  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 4: PURCHASE RELATED ISSUES**  
(To be completed by the Purchasing Manager)

**IDENTIFICATION**

- 4.1 Name of establishment \_\_\_\_\_
- 4.2 Name of contact person \_\_\_\_\_
- 4.3 Telephone: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 4.4 Fax: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 4.5 E-mail address \_\_\_\_\_

**BUSINESS RELATIONS**

- 4.6 Indicate this establishment's relationship with other tiers of industry. **Circle (o)** all relevant answers.

Purchase pattern	In-house (own company)	Other large firms under same ownership as this firm	Other large firms	Small and informal firms	Foreign firms	Not applicable	Comments, if any
Purchase of raw materials mostly from	1	2	3	4	5	6	
Purchase of semi-processed inputs mostly from	1	2	3	4	5	6	
Purchase of financial services (credit, banking) mostly from	1	2	3	4	5	6	
Purchase of professional services (legal, accounting etc.) mostly from	1	2	3	4	5	6	
Purchase of marketing services mostly from	1	2	3	4	5	6	
Purchase of transport services mostly from	1	2	3	4	5	6	
Purchase of shipping services mostly from	1	2	3	4	5	6	
Purchase of cleaning/janitorial services mostly from	1	2	3	4	5	6	

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**PURCHASE OF RAW MATERIALS**

4.7 Where does the establishment buy its three most important inputs?

Area	Origin of inputs
If Greater Durban, list suburb(s)	1
	2
	3
If elsewhere in KZN, list city(ies)/town(s)	1
	2
	3
If elsewhere in South Africa, list province(s)	1
	2
	3
If rest of the world, list country(ies)	1
	2
	3

12					15
16					19
20					23
24					27
28					31
32					35
36					39
40					43
44					47
48					51
52					55
56					59

**[IF YOUR ESTABLISHMENT DOES NOT IMPORT ANY INPUTS, SKIP THE REMAINING QUESTIONS]****IMPORT DUTIES AND TARIFFS**4.8 Indicate the impact of lower import duties and tariffs/tax cuts since 1994 on your establishment.  
Circle (o) the appropriate responses and indicate the % reductions where applicable.

Areas affected	Impact on business				
	Significant	Moderate	Little	None	% reduction
Lower product sales prices through stiffer foreign competition	1	2	3	4	%
Lower raw material prices	1	2	3	4	%
Reduction in sales revenues					%

60					62
63					65
66					68

4.9 How else have the duty/tax cuts affected your establishment? Explain:

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69 

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 70**IMPORT OF RAW MATERIALS**

4.10 Approximately what percentage of this establishment's inputs (excluding machinery and equipment) was imported during 2000 and 2001? Write 'O' if no raw materials were imported.

Year	% imported
2000	
2001	

71					73
74					76

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_

Tel No: \_\_\_\_\_

**UNIVERSITY OF SOUTH AFRICA  
BUREAU OF MARKET RESEARCH**

**SOUTH AFRICA ESTABLISHMENTS SURVEY AND ANALYSIS  
MANUFACTURING SECTOR: LARGE  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 5: SALES/MARKETING RELATED ISSUES**  
(To be completed by Sales/Marketing Manager)

**IDENTIFICATION**

- 5.1 Name of establishment \_\_\_\_\_
- 5.2 Name of contact person \_\_\_\_\_
- 5.3 Telephone: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 5.4 Fax: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 5.5 E-mail address \_\_\_\_\_

**BUSINESS RELATIONS**

- 5.6 Indicate this establishment's relationship with other tiers of business.  
Circle (o) ALL the relevant answers

Tier of business	Sale of products to -	Competition in products markets with -
▪ In-house (own company)	01	11
▪ Other large/medium-sized firms under the same ownership as this firm:		
- Manufacturing	02	12
- Trade	03	13
▪ Other large/medium-sized firms		
- The same industry	04	14
- Other manufacturing	05	15
- Trade	06	16
▪ Small and informal firms		
- Manufacturing	07	17
- Trade	08	18
▪ Foreign firms		
- Manufacturing	09	19
- Trade	10	20

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9	<table border="1" style="width: 100%;"><tr><td></td><td></td><td></td><td></td></tr></table>					12
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33	<table border="1" style="width: 100%;"><tr><td></td><td></td><td></td><td></td></tr></table>					36
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41	<table border="1" style="width: 100%;"><tr><td></td><td></td><td></td><td></td></tr></table>					44

**MEMBERSHIP IN BUSINESS ASSOCIATIONS**

- 5.7 Is this establishment a member of a business or trade association?

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

[IF NO, GO TO QUESTION 5.10]

5.8 If YES, list the three most important business or trade associations:

- (a) \_\_\_\_\_
- (b) \_\_\_\_\_
- (c) \_\_\_\_\_

46				48
49				51
52				54

5.9 Does any of the associations of which this establishment is a member perform any of the following functions?: Circle (o) ALL that apply.

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)	

55				
56				
57				
58				
59				
60				
61				
62				
63				65

### GO TO QUESTION 5.11

5.10 If this establishment does not belong to any business association, explain the reason  
Circle (o) one or more

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)	

66				
67				
68				
69				70

### SOURCES OF INFORMATION

5.11 Indicate if the listed contacts, as sources of information, are important to the establishment or not:

Sources of information	Domestic/ foreign sources	Production process		Inputs		Customers/ markets	
		Yes	No	Yes	No	Yes	No
Private sources	domestic	1	2	1	2	1	2
	foreign	1	2	1	2	1	2
Business or trade associations	domestic	1	2	1	2	1	2
	foreign	1	2	1	2	1	2
Government agencies	domestic	1	2	1	2	1	2
	foreign	1	2	1	2	1	2
Other (Specify)	domestic	1	2	1	2	1	2
	foreign	1	2	1	2	1	2

71				73
74				76
77				79
80				82
83				85
86				88
89				92
93				96

**SALE OF PRODUCTS****5.12 Where does the establishment sell its three most important products?**

Area	Destination
If Greater Durban, list suburb(s)	1
	2
	3
If elsewhere in KZN, list city(ies)/town(s)	1
	2
	3
If elsewhere in South Africa, list province(s)	1
	2
	3
If rest of the world, list country(ies)	1
	2
	3

97					100
101					104
105					108
109					112
113					116
117					120
121					124
125					128
129					132
133					136
137					140
141					144

**5.13 What is the average length of time that a product is in stock/inventory?**

\_\_\_\_\_ days *or*  
 \_\_\_\_\_ weeks *or*  
 \_\_\_\_\_ months

145				147
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**EXPORTS****5.14 Does the establishment export?**

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

**[IF NO, GO TO QUESTION 5.23]**

148

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**5.15 Approximately what percentage of annual sales was exported during:**

Year	%
1999	
2000	
2001	

149			150
151			152
153			154

5.16 Provide information on the percentage distribution of direct and indirect exports by destination for the years 2000 and 2001:

Regions of export	% of annual exports		List the 3 countries receiving most of your exports	List the 3 countries against which you compete in your export destinations
	2000	2001		
SADC 5			1	1
			2	2
			3	3
Rest of Africa 33			1	1
			2	2
			3	3
Western Europe 61			1	1
			2	2
			3	3
Central/East Europe 89			1	1
			2	2
			3	3
Asia 117			1	1
			2	2
			3	3
Australasia 145			1	1
			2	2
			3	3
North America 173			1	1
			2	2
			3	3
Rest of the Americas 201			1	1
			2	2
			3	3
<b>Total</b>	<i>100%</i>	<i>100%</i>		

5.17 Evaluate the special facilities and incentives for exports listed below:

	Are you aware of this programme?		If you are aware of the programme -								
			Is it used by your establish-ment?		If it is used by your establishment						
					Number of years used since 1995	Importance for your exports			Administrative and other costs (including delays in obtaining benefits) for your establishment to use this facility		
Yes	No	Yes	No			Essen- tial	Use- ful	Not useful	Prohibitive costs not worth using	Reasonable costs	
Export marketing & Investment Assistance Scheme (EMIA): 19975	1	2	1	2		1	2	3	1	2	
Export credit and foreign investment reinsurance (ECRS): 199710	1	2	1	2		1	2	3	1	2	
World Player Scheme (IDC)15	1	2	1	2		1	2	3	1	2	
Life Scheme20	1	2	1	2		1	2	3	1	2	
Motor Industry Development Program25	1	2	1	2		1	2	3	1	2	
Export credit facility – pre-shipment30	1	2	1	2		1	2	3	1	2	
Export credit facility -- post shipment35	1	2	1	2		1	2	3	1	2	
Export credit guarantee40	1	2	1	2		1	2	3	1	2	
Forward forex cover45	1	2	1	2		1	2	3	1	2	
Transport subsidies50	1	2	1	2		1	2	3	1	2	
Tax exemptions including VAT and customs duty55	1	2	1	2		1	2	3	1	2	
Other (Specify)60	1		1	2		1	2	3	1	2	

5.18 Why are you not able to export more than you are **currently** despite or taking into account the depreciation in the value of the South Africa Rand over the last few years (Circle (O) all the relevant responses)

	Major problem	Moderate problem	No problem
Despite the depreciation of the South African Rand since 1998, our goods are still not competitive with other middle and low income countries that produce similar products	1	2	3
The type of markets we export to are niche markets where demand is rigid and not likely to increase too much even if the Rand falls too much	1	2	3
Tariff Barriers imposed by foreign countries on South African exports have played a negative role on our exports	1	2	3
Lack of production capacity within the firm to undertake any further production for exporting	1	2	3
Inability to make in-roads in our export markets due to the nature of business linkages in these export markets	1	2	3
Quality of our goods is not considered up to International standards in export markets	1	2	3
The currency movements have not necessarily been in our favour in my export destinations	1	2	3
Lack of knowledge/information on demand for our goods in export markets.	1	2	3
Licensing/Patent rights does not allow us to export our goods to certain countries	1	2	3
Lack of business confidence in South African firms as reliable suppliers to foreign firms	1	2	3
Lack of business confidence in the longevity of South African firms by foreign firms	1	2	3
The cost of imports has meant that the depreciation of the Rands has not worked in our favour with respect to intermediate inputs	1	2	3
Others (Specify)	1	2	3

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- 5.19 Does the establishment export by sea through the port of Durban?

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

80

**IF NO, GO TO QUESTION 5.23.**

- 5.20 For the relevant regions, indicate approximate freight rates, per TEU (standard freight container) for liner cargoes and/or per ton for bulk/breakbulk cargoes, attracted by typical shipments made by your establishment, if you export through the port of Durban.

Regions of export	Liner freight rate (US\$ per TEU)	Bulk/breakbulk freight rates (US\$ per ton)							
SADC			81						87
Rest of Africa			88						94
Western Europe & UK			95						101
Central/East Europe			102						108
Asia			109						115
Australasia			116						122
North America			123						129
Rest of Americas			130						136

- 5.21 In your experience are sea freight rates to/from South Africa higher than those for comparable lengths of haul in other parts of the world?

1	Don't know	2	Yes	3	No
---	------------	---	-----	---	----

137

- 5.22 To what extent do you perceive freight rates to be a factor limiting export access/growth by your establishment?

1 A significant growth/access constraint	2 A minor growth/access constrain	3 No significant influence on export market access	4 Don't know
---	--------------------------------------	---	-----------------

138

## BUSINESS OPERATIONS AND PROFITABILITY

- 5.23 What percentage of your output were you unable to sell?

Year	%
2000	
2001	

139


140

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- 5.24 Indicate the extent to which the following negatively impact your establishment's operations and profitability:

NOTE: Customs clearance refers to transaction costs (including bribes), not the level of import duties and taxes.

	Serious problem	Moderate problem	Reasonably efficient	N/A	Comments
Domestic dumping by foreign firms which adversely affects your profitability	1	2	3	4	
Foreign anti-dumping action affecting your exports to foreign markets	1	2	3	4	
Foreign import licensing and other non-tariff barriers (for example product labeling) affecting your exports to foreign markets	1	2	3	4	
Illegal customs control procedure (imports & exports)	1	2	3	4	

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**GOVERNMENT CONTRACTS**

5.25 Did you apply for a government contract in 2001?

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

**[IF NO, SKIP THE REST OF THE QUESTIONNAIRE]**

147

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5.26 How many government/parastatal tenders did your establishment submit during the past two years (2000-2001)?:

Tenders	Number	
	2000	2001
Awarded		
Not awarded		
Total submitted		

148


153

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5.27 On average, when (a) government/parastatal contract(s) was/were awarded, how much time did it take from tender submission to approval?:

\_\_\_\_\_ months

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Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_

Tel No: \_\_\_\_\_

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**SOUTH AFRICA ESTABLISHMENT SURVEY AND ANALYSIS  
MANUFACTURING SECTOR: LARGE  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 6: HUMAN RESOURCE RELATED ISSUES**  
(To be completed by the HR Manager)

**IDENTIFICATION**

- 6.1 Name of establishment \_\_\_\_\_
- 6.2 Name of contact person \_\_\_\_\_
- 6.3 Telephone: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 6.4 Fax: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_ (E-mail address: \_\_\_\_\_)

**RECRUITMENT**

- 6.5 Which channels of recruitment does this establishment use most frequently for each of the employment categories? Circle  
(o) ALL that apply

Channel of recruitment	Managerial, professional, technical and service workers	Craft, related tradesmen and plant operators	Unskilled labourers and related workers General services
Public advertisements	1	2	3
Employment bureaus	1	2	3
Employment service of Department of Labour	1	2	3
Direct applications	1	2	3
Educational institutions	1	2	3
Word of mouth	1	2	3
Recalling a recent lay-off	1	2	3
Asking current workers if they know job-seekers in same skill categories	1	2	3
In-house database	1	2	3
Other (specify)	1	2	3

5				7
8				10
11				13
14				16
17				19
20				22
23				25
26				28
29				31
32				36

- 6.6 Recruitment of new entrants and vacancies. (If a detailed breakdown is not available, FILL IN TOTALS)

Worker category	How difficult is it to find workers (Circle (o) one)				Number of unfilled vacancies		Main reason for vacancy(-ies)
					At this time	A year ago	
Senior officials and Managers 37	1	2	3	4			43
Professionals 44	1	2	3	4			50
Technicians and associated professionals 51	1	2	3	4			57
Clerks 58	1	2	3	4			64
Service workers, shop and market sales workers 65	1	2	3	4			71
Craft and related workers 72	1	2	3	4			78
Plant and machine operators and assemblers 79							85
Labourers and related occupations 86	1	2	3	4			92
TOTAL							

6.7 Does this establishment give priority to family and friends of current workers when hiring a new worker?

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

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6.8 For the LARGEST CATEGORY OF PRODUCTION WORKERS, indicate the establishment's recruitment preferences. Circle ONE in each of sections A, B and C.

Recruitment category	Recruitment preference
<b>A. Age group</b>	
▪ 16-24	1
▪ 25-45	2
▪ 46 and above	3
▪ No age preference	4
<b>B. Gender</b>	
▪ Men	1
▪ Women	2
▪ No gender preference	3
<b>C. Qualifications and experience</b>	
▪ Relevant work experience only	1
X Primary education only	2
X Secondary education only	3
X Vocational education only	4
X Tertiary education only	5
X Both work experience and primary education	6
X Both work experience and secondary education	7
X Both work experience and vocational education	8
X Both work experience and tertiary education	9

Circle (o)

94 95 96 

6.9 Does this establishment hire temporary workers?

1 Yes	2 No	IF NO, GO TO QUESTION 6.11
-------	------	----------------------------

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6.10 If YES to question 6.9, rate for each reason why this establishment hires TEMPORARY WORKERS. (Circle (o) appropriate response.)

Reason	Most important	Moderately important	Not important	N/A
Lowers the fixed non-wage cost (benefits) per worker of existing permanent workers	1	2	3	4
Provides flexibility. Able to respond to changes in demand for products without hiring more permanent workers	1	2	3	4
Able to <b>reduce</b> the existing workforce without replacing existing workers with permanent ones and affecting production.	1	2	3	4
Other (Specify)	1	2	3	4

98 99 100 101    103

6.11 Does this establishment subcontract/outsources some of its activities?

<b>1 Yes</b>	<b>2 No</b>	<b>IF NO, GO TO QUESTION 6.15</b>
--------------	-------------	-----------------------------------

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6.12 If YES to question 6.11, specify the task(s) that are out-sourced by the establishment.

**Circle (o)  
one or more**

Administrative (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)	

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112   113

**IF THE TASK 'PRODUCTION' IS NOT OUTSOURCED, GO TO QUESTION 6.14**

6.13 Rate the reason(s) why this establishment OUT-SOURCES/SUBCONTRACTS part of its production process. (Circle (o) the appropriate response(s)).

<b>Reason</b>	<b>Extremely important</b>	<b>Moderately important</b>	<b>Not important</b>
Gives the establishment flexibility to respond to temporary surges in workload	1	2	3
Subcontracting is cheaper than producing in-house	1	2	3
Allows the establishment to respond to any temporary need for specific skills	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 better quality products	1	2	3
Other (Specify)	1	2	3

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6.14 If you do out-source/subcontract, do you give preference to PDI individuals/ firms?

<b>1 Yes</b>	<b>2 No</b>
--------------	-------------

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**TRAINING**

6.15 Describe the establishment's training programs in 2001:

	Occupation - specific training								Joint
	Senior officials and managers	Professionals	Technicians and associated professionals	Clerks	Service workers, shop and market sales workers	Craft and related workers	Plant and machine operators and assemblers	Labourers and related occupations	Common training courses for several occupational categories
<b>A. IN-HOUSE TRAINING*</b>									
On-the-job training. Circle (o) ALL that apply 5	1	2	3	4	5	6	7	8	12
How many in-house training programs were offered in 2001? 13									30
How many workers were trained in these programs? 31									66
<b>B. OUTSIDE TRAINING*</b>									
How many outside training programs were offered in 2001? 67									84
How many workers were trained in these programs? 85									120
How many trainees left the establishment in 2001 after the training? 121									147

\* **In-house training:** Special training sessions, usually for groups of workers, presented by this establishment's own training personnel.

**On-the-job training:** Training, usually by the direct supervisor, of an individual worker while he/she is executing a specific task.

**Outside training:** Special training sessions, usually for groups of workers, undertaken by outside companies and irrespective of the venue where such training takes place.

6.16 What are the reason(s) for not training more workers than those reflected above?

Reason	Circle (o) one or more
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 nature of work	4
Present demand for products do 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
Other (specify)	

148  
149  
150  
151  
152  
153  
154 155

6.17 How much did this establishment spend on training in 2001:

	Rands	Don't know
In-house training		1
Outside training		2

156 160  
161 165

**IF NO OUTSIDE TRAINING IS UNDERTAKEN BY THE ESTABLISHMENT, SKIP QUESTION 6.18 AND GO TO QUESTION 6.19**

6.18 For 2001, rate each outside training source.

Source	Most important	Moderately important	Not important
Universities	1	2	3
Business partners (other firms)	1	2	3
Government institutions (schools etc.)	1	2	3
Vocational training (technikons, etc)	1	2	3
Industrial training boards	1	2	3
Private training schools	1	2	3
Other (Specify)	1	2	3

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6.19(a) Do you find the resignation of recently trained employees a problem?

1 Yes	2 No
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174

6.19(b) Do you believe that newly trained employees mainly leave the establishment for better paying jobs

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

175

## LABOUR RELATIONS

6.20 How many unions do you have to deal with \_\_\_\_\_ (number)

176

6.21 At what level, if any, is there a collective agreement:

**Circle (o) one  
or more**

No agreement	1
Establishment/plant level	2
Company/plant level	3
Sector/industry level (Bargaining Council)	4
Wage Determination Board	5

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6.22 Explain how the Bargaining Council system (including extension of Industrial Council agreements to the establishment even when it is not a party to it) affects the establishment's employment levels. (Circle (o) one)

<b>Levels increase</b>	<b>Levels decline</b>	<b>No effect</b>	<b>Not applicable</b>
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>

182

6.23 How many strikes, lockouts and stay-aways did this establishment experience in 2001?

183  184

**IF ANSWER TO QUESTION 6.23 IS 'NIL' GO TO QUESTION 6.27**

6.24 On average how many workers were involved each time?

185  187

6.25 On average how many work-days were lost each time?

188  190

6.26 How many disciplinary inquiries were held?

In 2000:

In 2001:

191  194**LABOUR MARKET REGULATIONS**

6.27 How did the following recent labour market laws affect the size of your workforce?

Labour acts	Effect on the size of the workforce (Circle one)					Specify 1 – 3 main elements of the Act that affect employment
	Increased it	Decreased it	No Effect	Not familiar with Act	N/A	
Labour Relations Act (LRA) of 1995	1	2	3	4		1 2 3
The Basic Conditions of Employment Act (BCEA) of 1997	1	2	3	4		1 2 3
Employment Equity Act of 1998	1	2	3	4		1 2 3
Skills Development Act of 1999	1	2	3	4		1 2 3
Other (Specify)	1	2				1 2 3

195  197  
 198  199  
 200  201  
 202  204  
 205  206  
 207  208  
 209  211  
 212  213  
 214  215  
 216  218  
 219  220  
 221  222  
 223  226  
 227  228  
 229  230

6.28 In 2001, as a result of recent labour laws and regulations, did this establishment experience any of the following? (Circle all that apply)

Effect	Yes	No	N/A	Don't know	Comments (optional)
Hired fewer workers	1	2	3	4	
Used more machinery instead of hiring more labour to expand production	1	2	3	4	
Hired workers on a temporary rather than permanent basis	1	2	3	4	
Relied on sub-contracting	1	2	3	4	
Improvement of labour relations	1	2	3	4	
Increased labour productivity	1	2	3	4	

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**EMPLOYMENT SIZE AND PATTERNS**

6.29 How many employees did the establishment have in the past:

Year	Full-time	Part-time	Don't recall (Circle)
2001			1
2000			1
1999			1
1998			1
1997			1

5										13
14										22
23										31
32										40
41										49

6.30 Approximately how many employees does this establishment have in each of the following occupational categories:

Worker category	Africans/ Blacks		Coloureds		Indians / Asians		Whites		Total	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Senior officials and Managers 50										73
Professionals 74										97
Technicians and associated professionals 98										121
Clerks 122										145
Service workers, shop and market sales workers 146										169
Craft and related Workers 170										193
Plant and machine operators and assemblers 194										217
Labourers and related occupations 218										241
Total										

6.31 How many new workers were appointed in 2001: \_\_\_\_\_ (number)

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 2441 

	4	

 3  
4

6.32 Costs related to the appointment of new entrants:

NB: Hourly wage & nonwage rates = <u>Annual wage</u> 1920 (ie number of hours pa) (Rounded off to the nearest Rand)	Senior officials and managers	Profes- sionals	Technicians and associated professionals	Clerks	Service workers, shop and market sales workers	Craft and related workers	Plant and machine operators and assemblers	Labourers and related occupations
List the average hourly <b>wage rate</b> applicable to ENTRY level workers in your establishment Rand 5								20
What is the <b>hiring cost</b> of an ENTRY- level worker? Rand 21								68
List the average hourly <b>non-wage rate</b> applicable to ENTRY level workers in your establishment Rand 69								84

- **Hiring costs** are defined as the costs of advertising, screening, recruiting and training an entry level worker
- **Wage costs:** salary related labour costs (excluding overtime).
- **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, transports allowance etc.



6.33 How many workers were retrenched in 2001: \_\_\_\_\_ (number)

85    87

**IF ANSWER TO QUESTION 6.33 IS 'NIL', GO TO QUESTION 6.36]**

6.34 How much time did it take to retrench a worker during 2001: \_\_\_\_\_ (months)

88   89

6.35 Dismissal (retrenchment) costs are defined as costs of any negotiation expenses, severance pay, court cases, CCMA, etc. Using this definition, provide the following information:

	Senior officials and managers	Professionals	Technicians and associated professionals	Clerks	Service workers, shop and market sales workers	Craft and related workers	Plant and machine operators and assemblers	Labourers and related occupations	
From which categories were the majority of the workers retrenched in 2001? Rank the 3 most important ones. 90									92
What is the retrenchment cost in Rands of firing an entry-level worker? 93	R	R	R	R	R	R	R		140

### EMPLOYEES' TRANSPORT INFRASTRUCTURE

6.36 What proportion of your employees use the following modes of transport to work?

Mode of transport	%
Buses	
Trains	
Taxis	
Own vehicle	
Bicycle	
Walk to work	
Other (Specify)	
<b>Total</b>	<b>100 %</b>

141   142  
 143   144  
 145   146  
 147   148  
 149   150  
 151   152  
 153   155

6.37 What proportion of your workforce, as a percentage of the total workforce in a particular occupational category, lives within 35 km of your plant? If breakdowns are not available, give approximations.

Worker category	Percentage (%) living		
	Within 35 km of the plant	Further away	Total
Senior officials and managers			100
Professionals			100
Technicians and associated professionals			100
Clerks			100
Service workers, shop and market sales workers			100
Craft and related workers			100
Plant and machine operators and assemblers			100
Labourers and related occupations			100

156   157  
 158   159  
 160   161  
 162   163  
 164   165  
 166   167  
 168   169  
 170   171

### LABOUR COST AND IMPACT OF HIV/AIDS

6.38 What was the total wage bill in 2000 and 2001?: R \_\_\_\_\_

Year	Total wage bill
2000	R
2001	R

172      177  
 178      183

6.39 What was the wage bill paid to production workers in 2000 and 2001?: R \_\_\_\_\_

Year	Total wage bill for production workers
2000	R
2001	R

184      189  
 190      195

6.40 Has your firm lost employees in the last 2 years because of reasons which can be attributed to HIV/AIDS?

1 Yes	2 No	3 Don't know
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**IF NO OR DON'T KNOW GO TO 6.42**

196

6.41 How many employees were lost in the last 2 years?

In 2000:

In 2001:

197     200

6.42 How has the HIV/AIDS epidemic affected your firm's operations?

Effect	Major problem	Moderate problem	No problem	Don't know	Not applicable
Higher turnover in the labour force as more workers die of the disease	1	2	3	4	5
Drop in labour productivity as infected workers get sick/weak and perform poorly	1	2	3	4	5
Drop in production/profits as infected workers take more frequent and longer periods of sick leave/absenteeism	1	2	3	4	5
Rise in operational costs as firm spends more time and resources in recruiting and retraining replacement workers	1	2	3	4	5
Rise in operational costs as health insurance and other medical benefits rise and the firm has to bear the additional costs	1	2	3	4	5
Other (Specify)	1	2			

201

202

203

204

205

206    208

6.43 Are you planning to shift current/future operations to other countries due to HIV/AIDS?

Name country (-ies) 1. \_\_\_\_\_

209     212

2. \_\_\_\_\_

213     216

6.44 How is your firm coping with the HIV/AIDS problem?

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217   218

6.45 What are the policies and programmes that your firm has put in place to deal with the epidemic?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

219   220

221   222

223   224

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_ Tel no: \_\_\_\_\_

**UNIVERSITY OF SOUTH AFRICA  
BUREAU OF MARKET RESEARCH**

**SOUTH AFRICA ESTABLISHMENT SURVEY AND ANALYSIS  
MANUFACTURING SECTOR: LARGE  
DURBAN METROPOLITAN UNICITY 2002**

**QUESTIONNAIRE 7: ADMINISTRATIVE/LEGAL RELATED ISSUES**  
(To be completed by the Administrative Manager)

**IDENTIFICATION**

- 7.1 Name of establishment \_\_\_\_\_
- 7.2 Name of contact person \_\_\_\_\_
- 7.3 Telephone: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_
- 7.4 Fax: Dialling Code \_\_\_\_\_ Number \_\_\_\_\_ (E-mail address: \_\_\_\_\_)

**LAW AND ORDER**

- 7.5 Has this establishment been the victim of any criminal activities in 2000 and 2001?

	Yes	No
2000	1	2
2001	1	2

4   
5

[IF NO for both 2000 and 2001, SKIP QUESTIONS 7.6 AND GO TO QUESTION 7.7]

- 7.6 If YES to question 7.5, specify type of criminal activity:

Criminal activity	Circle (o) one or more
Break-ins and property theft	1
Vandalism	2
Employee theft	3
Arson	4
Extortion	5
Other (Specify)	

6   
7   
8   
9   
10   
11  12

- 7.7 Were your employees subject to crime when arriving or leaving from work during 2000 and 2001?

	Yes	No
2000	1	2
2001	1	2

13   
14

- 7.8 How much did this establishment spend on security guards (either employed directly by this establishment or supplied by an outside contractor) in 2000 and 2001?

Year	Rand
2000	
2001	

15      19  
20      24

- 7.9 How much did this establishment spend on the installation and maintenance of security devices (alarm systems, etc) in?

Year	Rand
2000	
2001	

25					29
30					34

### START-UP LICENSES AND PERMITS

- 7.10 Consider the various licenses, permits and regulatory requirements that the establishment needs to **START-UP** operations and answer the following questions about them:

Licences, etc required	Establishments started before 1996			Establishments started in 1996 or later		
	Number	Excessive number	Reasonable number	Number	Excessive number	Reasonable number
How many licenses, permits or other authorisations were the establishment required to obtain before beginning operations? (Give number)						
If any was required, how do you regard the total number? (Circle one)		1	2		1	2

35			36
37			38

### IF 'NONE' GO TO QUESTION 7.14

- 7.11 How would you rate the cost of obtaining ALL licences/permits needed to START operations:

Costs	Very costly	Costs reasonable	Not costly	Not applicable
<b>Time costs</b> of preparing and obtaining ALL licenses & permits	1	2	3	4
<b>Monies</b> (application fees, etc) paid to obtain ALL licenses and permits	1	2	3	4
List any other costs that apply (bribes etc). 1.	1	2	3	4
2.	1	2	3	4

39			
40			
41			
44			

- 7.12 Which government departments/other authorities have the most cumbersome procedures and expected bribes?

Circle (o) one or more

Departments/authorities	Cumbersome procedure	Bribes
Department of Labour	1	2
Department of Trade and Industry	1	2
Department of Health	1	2
Department of Finance	1	2
DMU	1	2
Other (Specify) 1.	1	2
2.	1	2
3.	1	2

47			48
49			50
51			52
53			54
55			56
57			59
60			62
63			65

- 7.13 Did any of the following happen as a result of government licensing requirements?  
(Circle ALL that apply)

Circle appropriate options

Consequences	Yes	No
Delay in plant's opening	1	2
Changed the plant's production capacity (Increase/decrease/delay)	1	2
Lead to a change in plant or equipment	1	2
Changed the establishment's FULL-TIME workforce (Increase/decrease)	1	2
Changed the establishment's PART-TIME workforce (Increase/decrease)	1	2
Changed the establishment's location	1	2

66

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### LICENSING AND PERMITS REQUIRED TO CONTINUE OPERATIONS

- 7.14 Consider the various licenses, permits and regulatory requirements that this establishment needs to **CONTINUE OPERATIONS**, and answer the following questions about them.

Licences, etc required	Establishments started before 1996			Establishments started in 1996 or later		
	Number	Excessive number	Reasonable number	Number	Excessive number	Reasonable number
How many licenses, permits or other authorizations does the plant need to obtain each year to avoid fines and continue operations? (Give number)						
If any was required, how do you rate the total number? (Circle one)		1	2		1	2

72

74

73

75

### IF 'NONE' WAS NEEDED, GO TO QUESTION 7.17

- 7.15 Did the establishment find that officials associated with the permit and licensing procedures expect and/or demand bribes to issue these?

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

76

- 7.16 How would you rate the cost of obtaining ALL licences/permits needed to continue operations in 2001?

Costs	Very costly	Costs reasonable	Not costly	Not applicable
<b>Time costs</b> of preparing and obtaining ALL licenses & permits	1	2	3	4
<b>Monies</b> (application fees, etc) paid to obtain ALL licenses and permits	1	2	3	4
List any other costs that apply (bribes, etc)				
1.	1	2	3	4
2.	1	2	3	4
3.	1	2	3	4

77

78

79

82

85

81

84

87

- 7.17 If you compare the **time** costs of applying for a license with the **money** costs to obtain a license (**fees and bribes paid in rands**) which do you regard as the **WORST CONSTRAINT** to doing good business?

**Circle (o)  
one**

Time costs	1
Money (Rand) costs	2
Both are equally bad	3
Not applicable	4

88 ☐

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_ Tel no: \_\_\_\_\_

\* Fill in the appropriate cells only

## 8.2

## FOR OFFICE USE:

- 8.8 Which principal modes of transport does the establishment use in terms of volume of cargo flows?

Mode of transport used	Percentage of total volume -	
	exported	imported
Sea		
Air		
Road		
Rail		
Total	100 %	100 %

60					63
64					67
68					71
72					75

- 8.9 Over the next five years, how would you expect volumes of cargo handled by your establishment through the port of Durban to change?

Rise by more than 10 %	Rise by less than 10 %	Remain stable	Fall by less than 10 %	Fall by more than 10 %
1	2	3	4	5

76 

- 8.10 Do you anticipate that the facilities provided in the port of Durban will be capable of handling your future cargo needs?

1 Yes	2 No	3 Don't know
-------	------	--------------

77 

If No, specify a maximum of THREE main areas of concern:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

78				79
80				81
82				83

- 8.11 Which cargo-handling facilities in the port of Durban do you principally use to ship/land your products? Circle (o) ALL that apply and estimate which percentage of the total volume of **cargo flows** is handled by each type of facility.

Facilities	Circle	Percentage
Main container terminal (SAPO)	1	
Private leasehold container handling	2	
Combi-terminal	3	
Private bulk terminals (SAPO)	4	
Port authority bulk terminals	5	
Roll-on Roll-off facilities	6	
Private general cargo handling	7	
Port authority (SAPO) general cargo handling	8	
Other (Specify)		
1.		
2.		
Total		100 %

84					86
87					89
90					92
93					95
96					98
99					101
102					104
105					107
108					111
112					115



- 8.12 In what vessel types/sizes are your products typically carried? Indicate which percentage of the total volume of **cargo flows** is carried by each used and the level of satisfaction in each case.

Vessel types	Volume carried (%)	Level of satisfaction (Circle)	
		Yes - satisfied with existing vessel/parcel type	No - would ideally like to use larger vessels
Gearless cellular container vessels		1	2
Geared cellular container vessels		1	2
Multi-purpose vessels		1	2
Panamax bulk carriers (60-80,000 dwt)		1	2
Handy-sized bulk carriers (20-40,000 dwt)		1	2
Small bulk carriers (Less than 20,000 dwt)		1	2
Conventional <b>tweendeckers</b>		1	2
Tankers		1	2
Ro-ro & car carriers		1	2
Other (Specify)		1	2
Total	100 %		

116				118
119				121
122				124
125				127
128				130
131				133
134				136
137				139
140				142
143				145

- 8.13 To what extent and how do facilities or the marine infrastructure in the port of Durban constrain your choice of an optimal vessel size/type?

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146			147
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- 8.14 How would you rate the following variables with respect to your usage of the port of Durban? Circle the applicable response in each case.

Usage variables	Excellent	Fair	Poor	N/A
Variables related to marine infrastructure and services				
Port access by appropriate vessels	1	2	3	4
Water depth alongside relevant berths	1	2	3	4
Availability of marine services - pilotage, tugs etc. - on demand	1	2	3	4
Cost of marine services	1	2	3	4
Weather delays	1	2	3	4
Variables related to cargo-handling and port terminals				
Delays in access to container terminal	1	2	3	4
Delays in access to bulk terminals	1	2	3	4
Delays in access to general cargo terminals	1	2	3	4
Cargo-handling productivity in container terminal	1	2	3	4
Cargo-handling productivity in bulk terminals	1	2	3	4
Cargo-handling productivity in combi-terminals and general cargo berths	1	2	3	4
Delays in clearing cargo	1	2	3	4
Availability of appropriate equipment in container terminal	1	2	3	4
Availability of appropriate equipment in bulk terminals	1	2	3	4
Availability of appropriate equipment in combi-/general cargo terminals	1	2	3	4
General quality of private terminals	1	2	3	4
General quality of NPA/SAPO terminals	1	2	3	4
Private cargo-handling tariffs	1	2	3	4
SAPO cargo-handling tariffs	1	2	3	4
Ad Valorem Wharfage charges	1	2	3	4
Road access to port terminals	1	2	3	4
Rail access to port terminals	1	2	3	4

148	
149	
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169	

<b>Usage variables</b>	<b>Excellent</b>	<b>Fair</b>	<b>Poor</b>	<b>N/A</b>	
General quality of service variables					
Availability of qualified personnel in NPA/SAPO	1	2	3	4	170
Availability of qualified personnel in private terminals	1	2	3	4	171
Cargo security in container terminal	1	2	3	4	172
Cargo security in private facilities	1	2	3	4	173
Navigational safety	1	2	3	4	174
Availability of appropriate port-ancillary services - ships agents, chandlers etc. - in the Durban area	1	2	3	4	175
Sensitivity of service providers to changing needs of port users	1	2	3	4	176
Degree of involvement of port users in port planning processes	1	2	3	4	177
Variables related to shipping lines					
Frequency of liner shipping services	1	2	3	4	178
Level of sea freight rates: container	1	2	3	4	179
Level of sea freight rates: other	1	2	3	4	180

8.15(a) In the context of other ports with which you are familiar, how would you rate the port of Durban against other relevant ports in terms of the following characteristics?

Circle (o) the applicable response in each case.

<b>Characteristic</b>	<b>Generally better</b>	<b>Broadly comparable</b>	<b>Generally inferior</b>	<b>Don't know</b>	<b>N/A</b>	
Marine services	1	2	3	4	5	181
Marine infrastructure & port access	1	2	3	4	5	182
Congestion & vessel delays	1	2	3	4	5	183
Cargo-handling productivity: container	1	2	3	4	5	184
Cargo-handling productivity: bulk	1	2	3	4	5	185
Cargo-handling productivity: general	1	2	3	4	5	186
Port facilities & equipment: container	1	2	3	4	5	187
Port facilities & equipment: bulk	1	2	3	4	5	188
Port facilities & equipment: general	1	2	3	4	5	189
Articulation with land-side transport	1	2	3	4	5	190
Port authority tariffs	1	2	3	4	5	191
Private tariffs	1	2	3	4	5	192
Regulatory constraints	1	2	3	4	5	193

(b) Which ports did you use for the purposes of this comparative exercise?

1. \_\_\_\_\_ 194
2. \_\_\_\_\_ 195
3. \_\_\_\_\_ 196
4. \_\_\_\_\_ 197

8.16 If congestion problems in the port of Durban were to worsen in the future, what effect would this have? Circle (o) ALL relevant categories.

Potentially threaten your export sales & competitiveness	1	198
Induce a potential relocation of your activities	2	199
Future expansion of establishment will be outside the Durban area	3	200
Induce diversion of your cargo to Richards Bay	4	201
Induce diversion of your cargo to another SA port	5	202
Induce diversion of your cargo from sea to another mode	6	203

8.17 From the perspective of your establishment, what would you identify as the major strengths or competitive advantages of the port of Durban? (List a maximum of THREE)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

204 ☐ ☐ 205206 ☐ ☐ 207208 ☐ ☐ 209

8.18 From the perspective of your establishment, what would you identify as the major weaknesses or competitive disadvantages of the port of Durban? (List a maximum of THREE)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

210 ☐ ☐ 211212 ☐ ☐ 213214 ☐ ☐ 215

Date completed: \_\_\_\_\_

Interviewer: Name: \_\_\_\_\_ Tel No: \_\_\_\_\_