

Eswatini Annual Construction Industry Performance Report 2025/26

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ACRONYMS - Definition of the different works and trades

Building Works

BF	:	Foreign Building Works
BSa	:	Plumbing and drainage Works
BSb	:	Waterproofing Works
BSd	:	Interior & Exterior Decoration Works
BSe	:	Structural steel fabrication, Fixing and Erection Works
BSH	:	Shop fittings, Timber and Carpentry Works
BSi	:	Scaffolding, Cladding, and Insulation Works
BSj	:	Fencing Works
BSr	:	Landscaping, Irrigation & Gardening
BSq-F	:	Foreign Sign Craft Installation Works

Civil Works

CF	:	Foreign Civil Works
CSc-F	:	Foreign Landscaping, Irrigation and Gardening Works
CSe	:	Drilling Works
CSi	:	Wall Retaining Works
Csm	:	Water Treatment and Sanitation Plant Works
CSc	:	Landscaping, Irrigation & Gardening
CSl	:	Tree Felling Works

Electrical Works

ESb	:	ICT and Electronics System Installations Works
ESc-F	:	Renewable Energy Efficiency Technologies Works
ESf	:	High Voltage Installations Works
ESf-F	:	Foreign High Voltage Installation Works

ESh-F : Foreign Industrial Electronic System Works

Manufacturers and Suppliers

M/S : Local Manufacturer & Supplier

FM/S : Foreign Manufacturer & Supplier

Individual Artisans

li : Bricklaying Works

lj : Electrical Works

Joint Ventures Works

JVB : Joint Venture Building

JVC : Joint Venture Civil

Mechanical Specialist Works

MF : Foreign Mechanical Works

MSa : Air-conditioning, Refrigeration and Ventilation Systems Works

MSb : Fire Prevention and Protection Systems Works

MSd : Specialized Plant and Petro-Chemicals Works

MSd-F : Foreign Specialised Plant and Petro-Chemicals Works

MSg : Refractory Works

MSj : Specialised Mechanical Systems Works

MSk : Sand, Shot, Grit Abrasive Blasting Works

MSk-F : Foreign Sand, Shot, Grit Abrasive Blasting Works

MSI-F : Foreign Industrial Instrumentation, Automation & Process
Control Systems Works

ABBREVIATIONS

AGOA	:	African Growth and Opportunity Act
ASCENT	:	Accelerating Sustainable and Clean Energy Access Transformation
CBE	:	Central Bank of Eswatini
CIC	:	Construction Industry Council
CSO	:	Central Statistics Office
EIPA	:	Eswatini Investment and Trade Promotion Authority
EEC	:	Eswatini Electricity Company
ERIIP	:	Eswatini Road Infrastructure Improvement Programme
ESE	:	Eswatini Stock Exchange
EHB	:	Eswatini Housing Board
EWADE	:	Eswatini Water and Agricultural
GDP	:	Gross Domestic Product
FDI	:	Foreign Direct Investment
IPP	:	Independent Power Producer
MNWAP	:	Mkhondvo-Ngwavuma Water Augmentation Programme
NDP	:	National Development Plan
PPP	:	Public-Private Partnerships
PSPF	:	Public Service Pension Fund
PV	:	Photovoltaic
RDF	:	Regional Development Fund
SACU	:	Southern African Customs Union
SADC	:	Southern African Development Community
SARB	:	South African Reserve Bank
SEZ	:	Special Economic Zones
SOEs	:	State-Owned Enterprises

USL : Ubombo Sugar Limited
YoY : Year on Year

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1. Introduction

The CIC, established under the Construction Industry Council Act No. 14 of 2013¹, continued to play a central role in regulating, promoting, and developing Eswatini's construction industry during the 2025/26 financial year. As the statutory body mandated to oversee the sector, the Council remains focused on strengthening compliance, enhancing industry standards, and supporting the development of local contractors and professionals. Through these efforts, the CIC contributes to national development objectives, including infrastructure delivery, economic growth, and employment creation².

The 2025/26 financial year represents the second phase of implementation of the Council's Strategic Plan (2024-2027)³, with continued emphasis on its three strategic priorities: strengthening stakeholder collaboration, improving institutional efficiency, and delivering measurable impact across the construction industry. During the year, the Council intensified its engagement with key stakeholders across both the public and private sectors to address persistent industry constraints, while also advancing internal reforms aimed at improving service delivery and regulatory effectiveness.

Data collection, monitoring, and research remained core to the Council's mandate. In line with its statutory authority, the CIC continued to collect and analyse industry data, including project performance, contractor compliance, and sector activity trends. This information has been critical in tracking developments within the construction industry, identifying emerging risks, and informing evidence-

¹ Construction Industry Council Act No. 14 of 2013

² Ministry of Public Works and Transport Eswatini (2023), *National Development Plan 2023-2028*.

³ Construction Industry Council Eswatini (2024), *Strategic Plan 2024-2027*.

based recommendations to the Minister responsible for public works and infrastructure. The Council has also made progress in strengthening its data systems to improve the accuracy, timeliness, and relevance of industry information.

During the period under review, the construction sector operated within a moderately improving economic environment; however, structural challenges persisted. The level of construction activity continued to have direct implications for employment creation, enterprise sustainability, and skills development within the industry⁴. While ongoing infrastructure projects supported a degree of sector stability, constraints such as limited private sector participation, contractor capacity gaps, and operational inefficiencies remained evident. These dynamics underscore the importance of targeted interventions to build a resilient and competitive construction industry.

Building on the foundation established in previous reporting periods, the Council has continued to promote transparency and accountability within the sector. The Annual Construction Industry Performance Report for 2025/26 provides a comprehensive account of the Council's activities, achievements, and challenges during the year, building on insights from earlier industry publications⁵. It also highlights key industry developments and assesses progress against strategic objectives.

Furthermore, the Council has advanced its commitment to improving the frequency and quality of industry reporting. The introduction of quarterly updates on the state of the construction industry is intended to provide stakeholders with timely and relevant information to support planning, policy formulation, and investment

⁴ International Labour Organization (2022), *Skills and Employment in the Construction Sector - Developing Economies*.

⁵ Construction Industry Council Eswatini (2023), *Annual Review on the State of the Construction Industry*.

decision-making. Through these initiatives, the CIC aims to enhance sector coordination and contribute to the sustainable growth and development of Eswatini's construction industry.

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2.Executive Summary

Eswatini's construction sector has entered a period of strong cyclical expansion, emerging as a key driver of economic growth through the second half of 2025⁶. This acceleration reflects a decisive shift from a previously slow pipeline environment toward active project implementation, with several large-scale infrastructure developments moving into construction simultaneously. As a result, the sector has contributed materially to the country's GDP performance, with growth underpinned by a concentrated but high-value investment pipeline⁷.

At the centre of this upswing is a cluster of major infrastructure projects spanning water, transport, energy and public sector development. The Mpakeni Dam, forming part of the

broader national water infrastructure programme, stood out as a key anchor project, driving sustained demand for civil works, bulk infrastructure development and construction materials⁸. Its scale and duration ensured the continued support of sector activity over the medium term. Alongside this, pipeline upgrades to strategic transport corridors, including the MR14 Road Upgrade and MR21 Road Upgrade, will reinforce construction demand while improving regional connectivity and trade efficiency⁹. More recently, the award of the D92 road project in early 2026 signals that the government's road infrastructure programme continues to feed a steady pipeline of work into the market, particularly for mid-tier contractors¹⁰.

⁶ Central Bank of Eswatini, 2025; International Monetary Fund, 2025

⁷ World Bank, 2025

⁸ Ministry of Public Works and Transport, 2025

⁹ Construction Industry Council of Eswatini, 2026

¹⁰

Beyond roads and water, the sector is also being shaped by developments in energy and industrial infrastructure. Investment in the Strategic Oil Reserve Project and a growing pipeline of renewable energy projects, particularly in solar and biomass, reflects a gradual shift toward more economically productive infrastructure. These projects are increasingly supported by private sector participation, which is becoming a more visible feature of the construction landscape. In parallel, government has indicated further industrial development initiatives, including factory shells and supporting infrastructure, aimed at strengthening manufacturing capacity and employment creation. While details remain limited, these initiatives point to a broader diversification of construction demand beyond traditional public sector projects.

Looking ahead, one of the most significant potential catalysts for the

sector is the Eswatini Rail Link (Swazi link), a large-scale cross-border freight rail project valued at approximately E24 billion. Albeit full construction, progress in financing and resettlement during 2026 suggests that it remains a critical component of the future pipeline. Once implemented, the project would represent a substantial step-change in civil construction activity and further integrate Eswatini into regional logistics networks.

Importantly, while large-scale projects dominate the value of construction activity, there is growing evidence that the market is beginning to broaden at the base. A steady flow of public sector tenders across infrastructure, transport and public works, combined with smaller project awards, is supporting more consistent activity levels across the contractor spectrum. This is helping to reduce reliance on a handful of mega-projects and is contributing to improved sector resilience in the short term.

The impact of this construction upswing is also being felt across the wider economy. Increased demand for aggregates, cement inputs and related materials is supporting the quarrying and manufacturing sectors, while higher volumes of construction-related logistics are boosting transport activity. Financial services are also benefiting through project financing and contractor support. These linkages reinforce the role of construction as a high-multiplier sector, helping to explain the strong GDP performance observed during 2025.

Despite this positive momentum, growth remains largely execution-led, with limited evidence of new project initiation, signalling a constrained pipeline. Early 2026 has not yet delivered a significant wave of new large-scale project announcements, with activity instead being sustained by the rollout of projects already in the pipeline. This distinction is

important, as it suggests that the sector is currently operating at or near the peak of its existing investment cycle.

In the near term, construction activity is expected to remain elevated through 2026, supported by ongoing infrastructure delivery, continued progress in energy and industrial projects, and a stable flow of smaller public sector work. However, growth is likely to moderate from the exceptionally strong levels recorded in 2025, as base effects begin to normalise, and some projects move beyond their most construction-intensive phases.

Over the medium term, the sustainability of the sector's performance will depend on the depth and continuity of the project pipeline. The progression of strategic developments such as the Eswatini Rail Link into full construction, together with the announcement of new large-

scale infrastructure or industrial projects, will be critical in maintaining momentum. At the same time, the sector remains exposed to a few risks, including its reliance on public sector funding, potential delays in project execution, and broader fiscal pressures linked to revenue volatility. Overall, Eswatini's construction sector is currently benefiting from a strong but concentrated investment cycle, with activity firmly supported by infrastructure delivery and increasing private sector participation. While the outlook remains positive in the short term, the sector's longer-term trajectory will depend on its ability to transition from the current execution phase into a renewed pipeline expansion, ensuring that the momentum generated in 2025 can be sustained beyond the current cycle.

3. General Economic Overview

In the 2025/26 financial year, Eswatini's economy demonstrated a stronger growth trajectory compared to the previous period, with gross domestic product (GDP) estimated to have expanded by 5.7 percent, supported by improved agricultural output, continued public sector investment, and relatively stable regional economic conditions¹¹. This performance reflects a cyclical recovery rather than a structural shift, with growth remaining uneven across sectors. While the construction industry continued to contribute to economic activity through ongoing infrastructure projects, its overall impact remained constrained by implementation inefficiencies and limited private sector participation¹².

Inflation remained broadly stable during the period, averaging within the 3 to 6 percent target range, supported by easing food price pressures and improved domestic supply conditions¹³. However, underlying

“Structural constraints—including fiscal limitations—continued to limit the sector’s growth potential.”

vulnerabilities persist, particularly due to Eswatini's continued exposure to imported inflation, given its heavy reliance on goods and services from South Africa¹⁴. As a result, inflation stability remains contingent on external price movements rather than strong domestic control mechanism.

On the fiscal front, government revenues experienced moderate improvement, supported in part by SACU receipts and incremental gains in domestic revenue

¹¹ International Monetary Fund (2025), *Kingdom of Eswatini: 2025 Article IV Consultation - Staff Report and Press Release*.

¹² International Monetary Fund (2025), *Staff Mission Statement for the 2025 Article IV Consultation*.

¹³ International Monetary Fund (2025), *World Economic Outlook Database*.

¹⁴ International Monetary Fund (2025), *Article IV Consultation Report*, external sector assessment.

mobilisation¹⁵. Nonetheless, fiscal space remained constrained due to sustained high recurrent expenditure, particularly the public sector wage bill, which continues to crowd out capital investment¹⁶. The fiscal deficit is estimated to have remained relatively contained at approximately 1.5 to 2.0 percent of GDP, while public debt levels remained elevated, limiting the government's capacity to significantly scale up infrastructure spending without increasing fiscal risk¹⁷.

Labour market conditions showed minimal improvement during the year. Although some employment opportunities were generated through ongoing infrastructure and development projects, overall unemployment remained structurally high, with youth unemployment continuing to pose a significant socioeconomic challenge¹⁸. This reflects the broader issue of jobless growth, where economic expansion is not sufficiently translating into widespread employment creation.

Eswatini's external sector remained largely unchanged, with trade continuing to be heavily concentrated with South Africa¹⁹. While preferential trade agreements under SACU, SADC, and AGOA continued to provide market access, the narrow export base and limited industrial diversification constrained the country's ability to fully leverage these opportunities²⁰. The services sector remained the dominant contributor to GDP, accounting for over half of total output, while the construction industry maintained a relatively smaller share²¹.

¹⁵ Ministry of Finance Eswatini (2025), *Budget Speech and Fiscal Framework Statement 2025/26*.

¹⁶ International Monetary Fund (2025), *Article IV Consultation Report*, fiscal sector analysis.

¹⁷ International Monetary Fund (2025), *Debt Sustainability Analysis - Eswatini*.

¹⁸ International Monetary Fund (2025), *Article IV Consultation Report*, labour market indicators.

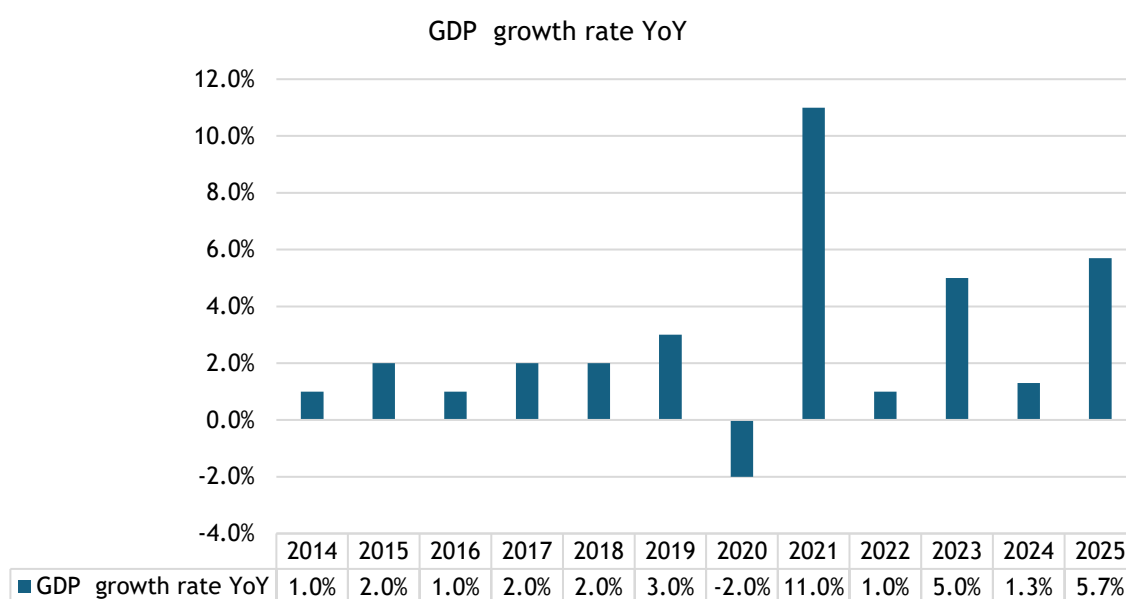
¹⁹ International Monetary Fund (2025), *External Sector Assessment*.

²⁰ World Bank (2024), *Eswatini Economic Update*.

²¹ Central Statistical Office Eswatini (2025), *National Accounts Statistics*.

Overall, the 2025/26 economic environment provided a moderately supportive backdrop for the construction industry; however, structural constraints—including fiscal limitations, dependence on public sector investment, and weak private sector demand—continued to limit the sector’s growth potential. Sustained economic expansion will depend on the effective implementation of structural reforms, improved efficiency in public investment, and enhanced participation of the private sector in productive activities²².

Figure 1: Gross Domestic Product: YoY Percentage Change (Constant)



Source: Central Statistics Office

3.1 Key Economic Developments During 2025

In 2025, Eswatini’s construction industry was anchored by a few large-scale public infrastructure projects, primarily concentrated in the transport, water, and energy sectors. A key flagship initiative was the Eswatini Road Infrastructure Improvement

²² International Monetary Fund (2025), *Article IV Consultation - Policy Recommendations*.

Programme (ERIIP) - Phase I, which commenced implementation during the year. This programme focuses on the upgrading and rehabilitation of strategic road corridors, including the Siphofaneni-Sithobela-Maloma-Nsoko (MR14) and Maloma-Siphambanweni (MR21) routes, with the objective of improving national and regional connectivity, reducing transport costs, and enhancing trade efficiency²³.

In the water infrastructure segment, the Mpakeni Dam project under the Mkhondvo-Ngwavuma Water Augmentation Programme (MNWAP) remained one of the most significant ongoing construction projects in 2025. The project, valued at E2.6 billion, is designed to enhance irrigation capacity, support agricultural production, and improve water security in the lowveld region²⁴. Its continued implementation reflects government prioritisation of long-term resource infrastructure, although its economic impact remains largely future-oriented rather than immediately stimulative to the broader construction sector.

Complementing this were urban and regional water supply projects, including the development of a new water treatment plant in Matsapha, construction of reservoirs, and expansion of bulk water distribution networks in Manzini and surrounding areas. These projects are aimed at improving service delivery and supporting urban growth, particularly in high-demand corridors²⁵.

In the energy sector, 2025 saw continued progress on strategic projects such as the Edwaleni Solar Power Station (100MW) and the rollout of the ASCENT Eswatini electrification programme, which targets expanded grid and off-grid electricity

²³ GPN- Eswatini Road Infrastructure Improvement Programme - ERIIP Phase 1

²⁴ [GDP 2024 Medium-Term Projections Final.pdf](#)

²⁵ [Projects - Eswatini Water Services Corporation \(EWSC\) -](#)

access to tens of thousands of households²⁶. These projects are critical for addressing energy security constraints and enabling industrial development, although most remain in phased implementation rather than completion stages.

Additionally, a broad base of decentralised infrastructure projects was implemented through government programmes such as the Regional Development Fund (RDF) and Microprojects initiatives. These included the construction of schools, clinics, bridges, and rural infrastructure across multiple tinkhundla, contributing to widespread but small-scale construction activity across the country²⁷.

Other notable developments included ongoing digital infrastructure expansion, particularly fibre-optic network rollout and 5G-related infrastructure, as well as the establishment of a strategic oil reserve, aimed at strengthening energy security²⁸.

²⁶ [GOVT HARD AT WORK: ESWATINI'S 2025 DEVELOPMENT PROGRESS SO FAR - Eswatini Positive News](#)

²⁷ <https://eswatinipositivenews.online/govt-hard-at-work-eswatinis-2025-development-progress-so-far/?utm>

²⁸ <https://eswatinipositivenews.online/development-you-can-see-eswatinis-2025-achievements/?utm>

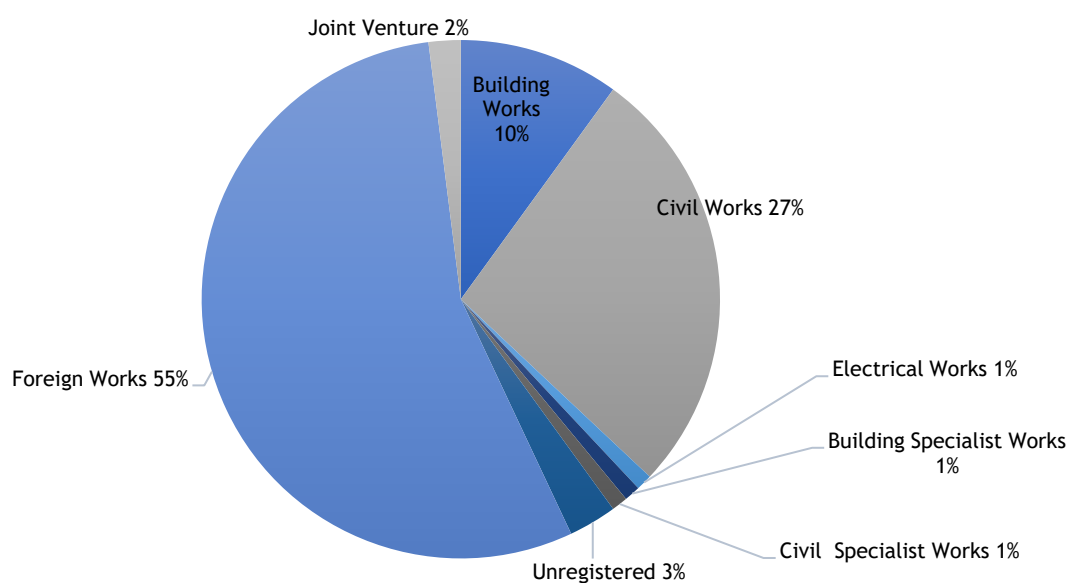
4. Construction Industry Performance

Quarters referenced in this section use the financial-year convention where Q1 = Apr-Jun (2025), Q2 = Jul-Sep (2025), Q3 = Oct-Dec (2025) and Q4 = Jan-Mar (2026), unless otherwise stated.

4.1 Construction Industry Economic Performance

4.1.1 Distribution of CIC Registered Projects by Value/Category

Figure 2: Distribution of Projects by Value for 2025/26 Financial Year



Source: CIC Project Register 2025/26²⁹

²⁹General Mechanical works, Electrical Specialist, Mechanical Specialist, Individual Artisan, and Manufacturer and Supplier categories are not reflected in figure 2 above due to their relatively small shares. When rounded their values equate to zero percent.

Table 1: Distribution of projects by value (2024/25 vs 2025/26 financial year)

CATEGORY	2024/25	2025/26	YOY %	% SHARE 2025/26
FOREIGN WORKS	16,918,044	6,127,849,659	+36,120.0%	54.5%
GENERAL BUILDING WORKS	799,214,015	1,155,351,956	+44.6%	10.3%
GENERAL CIVIL WORKS	1,826,634,059	2,981,332,113	+63.2%	26.5%
GENERAL ELECTRICAL WORKS	33,983,261	103,938,497	+205.9%	0.9%
GENERAL MECHANICAL WORKS	44,148,337	23,827,758	-46.0%	0.2%
CIVIL/STRUCTURAL ENGINEERING	281,308	0	-	<0.1%
BUILDING SPECIALIST WORKS	15,252,534	103,982,508	+581.7%	0.9%
CIVIL SPECIALIST WORKS	11,821,623	67,997,300	+475.2%	0.6%
ELECTRICAL SPECIALIST WORKS	10,706,835	18,245,887	+70.4%	0.2%
MECHANICAL SPECIALIST WORKS	10,991,170	53,070,280	+382.8%	0.5%
MANUFACTURER/SUPPLIER	0	1,059,215	-	<0.1%
LOCAL JOINT VENTURE	13,852,361	215,129,829	+1,453.0%	1.9%
INDIVIDUAL ARTISANS	1,903,803	1,195,912	-37.2%	<0.1%
UNREGISTERED CONTRACTORS	47,438,516	382,728,646	+706.8%	3.4%
GRAND TOTAL	2,833,145,865	11,235,709,560	+296.6%	100.0%

Source: CIC Project Register 2025/26

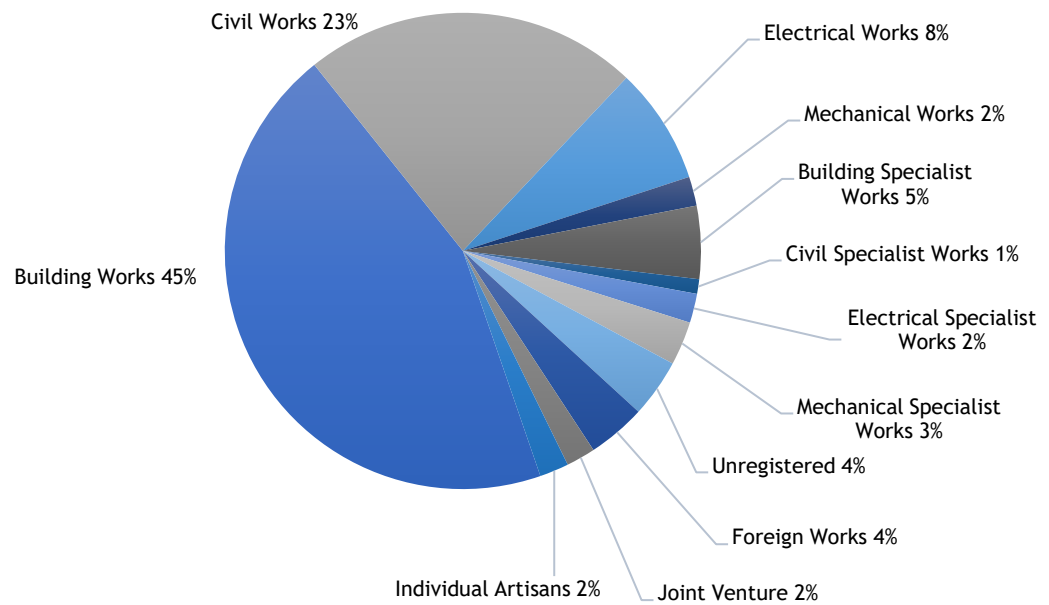
The 2025/26 financial year recorded a substantial increase in construction activity, with total project value rising by 296.6 percent to E11.24 billion. This growth was largely driven by Foreign Works, which accounted for 54.5 percent of total value, indicating a significant concentration of high-value projects undertaken by foreign contractors.

General Civil Works remained a key contributor at 26.5 percent, reflecting continued investment in infrastructure, while General Building Works accounted for 10.3 percent, underscoring the relatively lower value of building projects compared to large-scale civil works. The increase in local joint venture projects also points to growing collaboration in the delivery of complex developments.

However, the rise in Unregistered Contractor Works to 3.4 percent of total value highlights emerging compliance challenges that require strengthened regulatory oversight. Overall, the sector's performance reflects rapid expansion, driven by high-value projects, alongside the need to enhance local participation and ensure effective enforcement of registration requirements.

4.1.2 Distribution of CIC Registered Projects by Number Per Category

Figure 3: Distribution of Projects by Number for 2025/26 Financial Year



Source: CIC Project Register 2025/26

Table 2: Distribution of projects by number (2024/25 vs 2025/26 financial year)

CATEGORY	% SHARE OF NUMBER OF PROJECTS IN 2024/25	NUMBER OF PROJECTS IN 2024/25	NUMBER OF PROJECTS IN 2025/26	% SHARE OF NUMBER OF PROJECTS 2025/26
FOREIGN WORKS	2,6%	8	25	4,5%
GENERAL BUILDING WORKS	50,0%	155	251	45,1%
GENERAL CIVIL WORKS	13,9%	43	126	22,6%
GENERAL ELECTRICAL WORKS	7,7%	24	44	7,9%
GENERAL MECHANICAL WORKS	1,3%	4	9	1,6%
BUILDING SPECIALIST WORKS	7,4%	23	28	5,0%
CIVIL SPECIALIST WORKS	0,6%	2	7	1,3%
ELECTRICAL SPECIALIST WORKS	0,0%	0	9	1,6%
MECHANICAL SPECIALIST WORKS	3,5%	11	18	3,2%
MANUFACTURER AND SUPPLIERS	0,0%	0	1	0,2%

LOCAL JOINT VENTURE WORKS	1,3%	4	10	1,8%
INDIVIDUAL ARTISANS	2,9%	9	9	1,6%
UNREGISTERED CONTRACTORS WORKS	8,4%	26	21	3,8%

Source: CIC Project Register 2025/26

The comparative analysis of project distribution between 2024/25 and 2025/26 reveals a significant contraction in overall construction activity, with total projects declining by approximately 45 percent, alongside a noticeable shift in market structure. General Building Works decreased its dominance from 50 percent to 45.1 percent despite an increase in absolute numbers. Other sectors, particularly General Civil Works, increased from 13.9 percent (43 projects) to 22.6 percent (126 projects), likely reflecting an expansion in infrastructure investment.

Specialist categories showed measurable improvement rather than deterioration, indicating some strengthening in specialized construction capacity and service provision. Increases across specialist works categories suggest growing participation and possibly improved demand for specialized services within the sector.

The number of unregistered contractors declined from 26 to 21 during the reporting period. While this reduction is encouraging, it remains a concern that project owners continue to engage contractors operating outside the regulatory framework of the Construction Industry Council (CIC). Projects valued at E382,728,646 were undertaken by unregistered contractors, indicating the continued presence of informal market activity within the construction sector. This highlights the need for

increased stakeholder awareness, stronger procurement due diligence, and continued efforts to promote the use of registered contractors. Nevertheless, the decline in the number of unregistered contractors suggests gradual progress toward greater formalization of the industry and improved adherence to established registration requirements.

4.1.3 Distribution of CIC Registered Projects by Ownership Classification

Table 3: Value of Registered Projects, by Ownership Classification

CLASSIFICATION	2024/25	2025/26	YOY%	% SHARE 2024/25	% SHARE 2025/26
PARASTATAL	1 159 408 955	³⁰ 6 715 296 994	+479%	40.9%	59.8%
GOVERNMENT	276 801 662	2 293 688 714	+729%	9.8%	20.4%
PRIVATE	1 336 119 095	2 149 824 454	+61%	47.2%	19.1%
COMMERCIAL					
PRIVATE	48 586 096	23 151 010	-52%	1.7%	0.2%
RESIDENTIAL					
NGO	12 230 057	53 748 389	+339%	0.4%	0.5%
GRAND TOTAL	2 833 145 865	11 235 709 561	+297%	100%	100%

Source: CIC Project Register 2025/26

The 2025/26 financial year recorded significant growth in registered project value, increasing by 294 percent from E2.83 billion to E11.24 billion. This expansion was primarily driven by public sector investment, with parastatal and government projects jointly contributing 80.2 percent of total project value, up from 50.7 percent in 2024/25.

Parastatal projects remained the dominant category, increasing their share from 40.9 percent to 59.8 percent, while government projects grew from 9.8 percent to 20.4 percent. Although private commercial projects increased in value, their share

³⁰ The total for parastatals excluding the Strategic Oil Reserve amounted to E1 624 721 353. YoY comparison indicates a 44 percent increase from the previous year.

declined sharply from 47.2 percent to 19.1 percent, reflecting the faster pace of public sector growth.

Private residential projects contracted significantly, falling by 52 percent and contributing only 0.2 percent of total value, indicating weakened housing sector activity. Overall, the sector in 2025/26 was increasingly driven by state-led infrastructure development, with reduced relative participation from private sector segments.

4.1.4 Construction Works Executed by Specialised Contractors

Table 4: Distribution of Specialised Works by Value (2024/25 vs 2025/26)

CATEGORY	VALUE 2024/25 (E)	VALUE 2025/26 (E)	YOY %	SHARE OF VALUE 2024/25	SHARE OF VALUE 2025/26
BUILDING SPECIALIST WORKS	15,252,534	103,982,508	+581.7%	31%	42.7%
CIVIL SPECIALIST WORKS	11, 821,632	67,997,300	+475.2%	24%	27.9%
ELECTRICAL SPECIALIST WORKS	10, 706,835	18,245,887	+70.4%	22%	7.5%
MECHANICAL SPECIALIST WORKS	10,991,170	53,070,280	+382.8%	23%	21.8%

TOTAL	48,772,162	243,295,975	+398.8%	100%	100%
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Source: CIC Project Register 2025/26

The value profile of specialised works indicates a sharp expansion in capital intensity and a structural shift in market composition between 2024/25 and 2025/26. Total value increased by 398.8 percent, confirming that growth in this segment is being driven by large-scale, high-value projects rather than incremental activity.

Building Specialist Works remains the largest contributor; its share increased significantly from 31 percent to 42.7 percent, despite strong absolute growth. The most notable shift is in Civil Specialist Works, which increased from 24 percent to 27.9 percent, effectively emerging as a major value driver. This reflects a surge in infrastructure-related specialised activities, suggesting increased demand for engineering-intensive inputs within large projects.

Mechanical Specialist Works also recorded strong growth (+382.8 percent), but its share declined from 23 percent to 21.8 percent, indicating that it is expanding at a slower rate relative to civil works. Meanwhile, Electrical Specialist Works, which recorded 22 percent value in 2024/25, contributed 7.5 percent of total value in 2025/26, marking a rapid decline of electrical specialisation within the industry.

Table 5: Distribution of Specialised Works by Number of Projects (2024/25 vs 2025/26)

CATEGORY	NO. OF PROJECTS 2024/25	NO. OF PROJECTS 2025/26	CHANGE (%)	SHARE OF NUMBER 2024/25	SHARE OF NUMBER 2025/26
BUILDING SPECIALIST WORKS	24	28	+21.7%	63.9%	45.2%
CIVIL SPECIALIST WORKS	7	7	+250.0%	5.6%	11.3%
ELECTRICAL SPECIALIST WORKS	9	9	-	0.0%	14.5%
MECHANICAL SPECIALIST WORKS	12	18	+63.6%	30.6%	29.0%
TOTAL	52	62	+72.2%	100%	100%

Source: CIC Project Register 2025/26

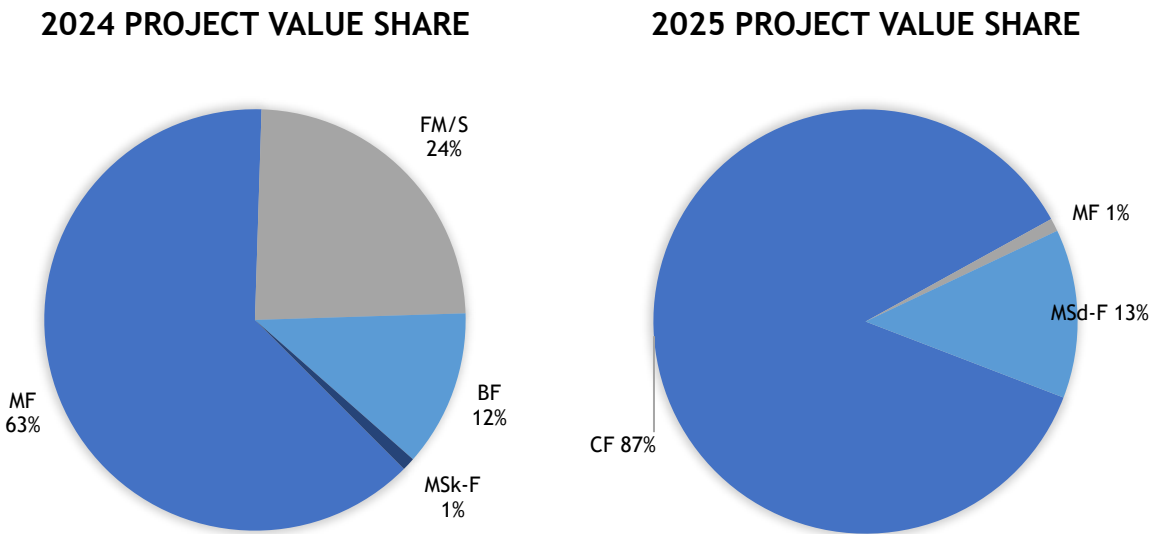
The distribution of specialised works by the number of projects shows a moderate expansion in activity levels, with total projects increasing by 72.2 percent from 52 to 62. However, compared to the much higher growth in value, this confirms that the sector is experiencing increased project scale rather than widespread creation of projects.

Building Specialist Works continues to dominate in terms of project count or construction works, accounting for 45.2 percent of total projects in 2025/26, although this represents a decline from 63.9 percent in 2024/25. This indicates a reduction in concentration, with other specialised categories gaining participation. Mechanical Specialist Works remains relatively stable, maintaining a consistent share of around 29.0 percent, suggesting steady demand for mechanical inputs across projects.

A key development is the growth in Civil Specialist Works, where the number of projects increased from 2 to 7, raising its share from 5.6 percent to 11.3 percent. This aligns with the value trends and reinforces the conclusion that civil specialisation is becoming increasingly important within the sector. More notably, Electrical Specialist Works recorded no projects in 2024/25 but increased to 9 projects in 2025/26, accounting for 14.5 percent of total project count. This represents a significant expansion in participation, signalling growing demand for electrical expertise in construction projects.

4.1.5 Construction Works Executed by Foreign Contractors

Figure 4: Distribution of Foreign Works Projects by Value 2024/2025 vs 2025/2026



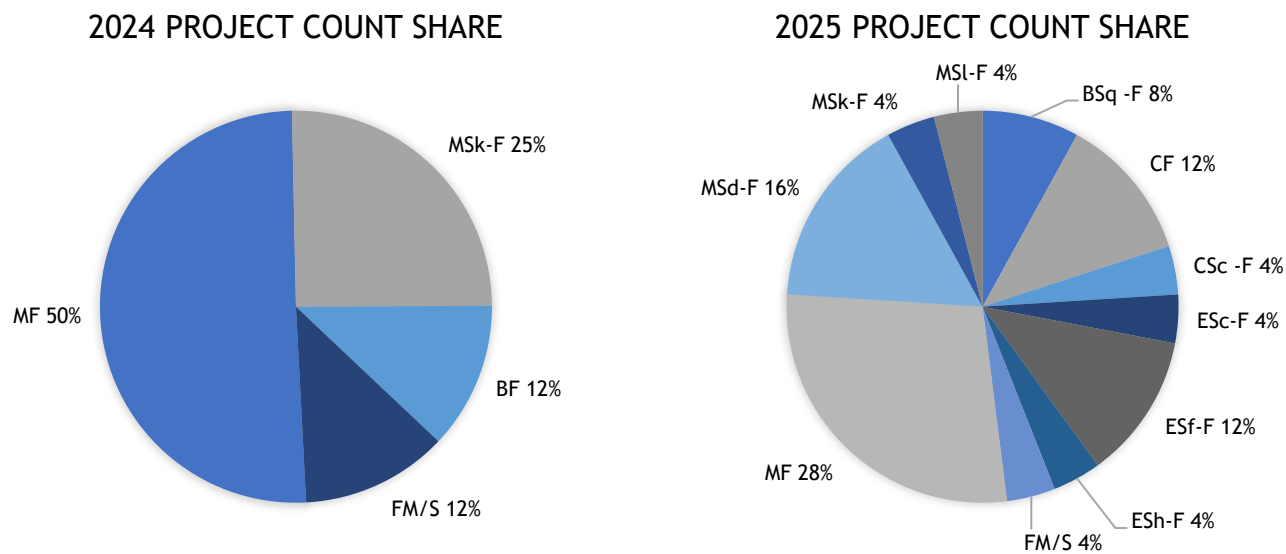
Source: CIC Project Register 2025/26

Table 6: Project Value by Category (2024 vs 2025)

CATEGORY	2024 VALUE (E)	% SHARE 2024	2025 VALUE (E)	% SHARE 2025
BF	2,087,828	12%	0	0%
BS-F	0	0%	64,070	0%
CF	0	0%	5,313,803,136	87%
CSc-F	0	0%	0	0%
ESc-F	0	0%	92,440	0%
ESf-F	0	0%	424,746	0%
ESh-F	0	0%	161,979	0%
MF	10,562,359	62%	44,288,869	1%
MSd-F	0	0%	767,802,505	13%
MSk-F	198,980	2%	685,280	0%
MSI-F	0	0%	526,634	0%
FM/S	4,068,877	24%	0	0%
TOTAL	16,918,044	100%	6,127,849,659	100%

Source: CIC Project Register 2025/26

Figure 5: Distribution of Foreign Works Projects by Number 2024/2025 vs 2025/2026



Source: CIC Project Registration database, 2025/26

Table 7: Project Count by Category (2024 vs 2025)

CATEGORY	COUNT 2024	% SHARE 2024	COUNT 2025	% SHARE 2025
BF	1	12%	0	0%
BSq-F	0	0%	2	8%
CF	0	0%	3	12%
CSc-F	0	0%	1	4%
ESc-F	0	0%	1	4%
ESf-F	0	0%	3	12%
ESh-F	0	0%	1	4%
MF	4	50%	7	28%
MSd-F	0	0%	4	16%
MSk-F	2	25%	1	4%
MSI-F	0	0%	1	4%
FM/S	1	12%	1	4%
TOTAL	8	100%	25	100%

Source: CIC Project Register 2025/26

The graphical analysis of project value distribution reveals a significant structural shift between 2024 and 2025. In 2024, the portfolio was relatively more balanced, with Foreign Mechanical Works (MF) 50 percent of total project value, followed by Foreign Manufacturer and Supplier (FM/S) at 12 percent and Foreign Building Works (BF) at 12 percent, while other categories made negligible contributions. This indicates that although MF was dominant, there was still a degree of diversification across multiple categories supporting overall performance.

In contrast, the 2025 distribution shows a highly concentrated portfolio, with Foreign Mechanical Works (MF) accounting for 28 percent of total project value. The

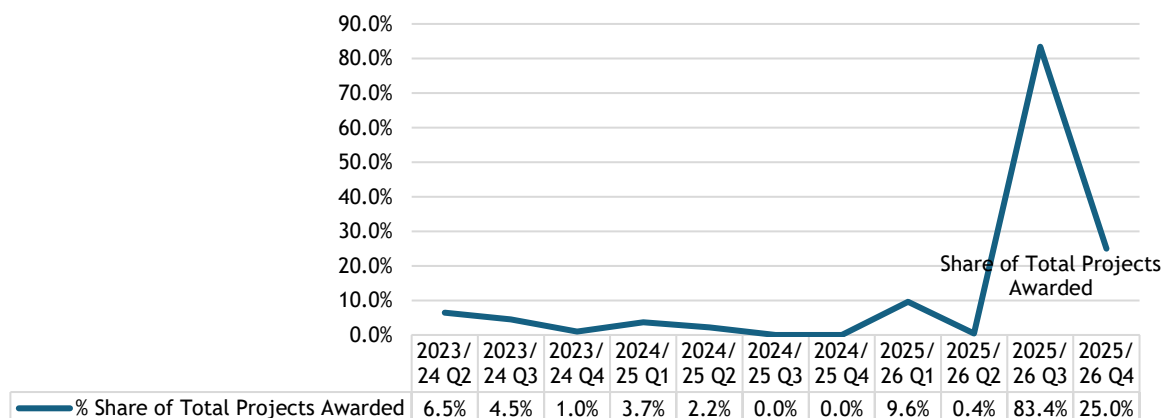
remaining categories contributed marginally, with Civil Foreign Works (CF) at 12 percent, Foreign Mechanical Specialist Works (Plant and Petro-Chemicals - MSd-F) at 16 percent, Foreign Electrical Specialist Works (High Voltage Installation Works - ESf-F) accounted for 12 percent while all other remaining categories were at 4 percent.

The comparison of project counts further reinforces this imbalance. In 2024, project activity was limited, with only 8 projects recorded, primarily concentrated in MF (50 percent), MSk-F (25 percent), and smaller contributions from FM/S and BF (12 percent each). This reflects a low volume but relatively focused project base.

In 2025, total project count increased significantly to 25 projects, indicating improved activity levels and pipeline expansion. However, this increase is not proportionally aligned with value contribution. While MF accounts for the largest share of projects (28 percent), its contribution to total value is only 1 percent, suggesting a concentration of smaller-scale projects within this category. Conversely, MSd-F contributes 13 percent of total value with only 16 percent of the project count, indicating that a few high-value projects dominate financial performance. In contrast CF and ESf-F both represents 12 percent of project count yet contributes 87 percent and less than 0.1 percent of total value respectively, indicating the presence of high value investments.

Additionally, several categories such as CSc-F, Esc-F, Esh-F, MSk-F, MSI-F and FM/S each accounted for 4 percent of project count in 2025 yet contribute negligibly to total value. This reflects a pattern where project volume growth is driven by lower-value activities, which may enhance operational visibility but does not significantly strengthen revenue performance.

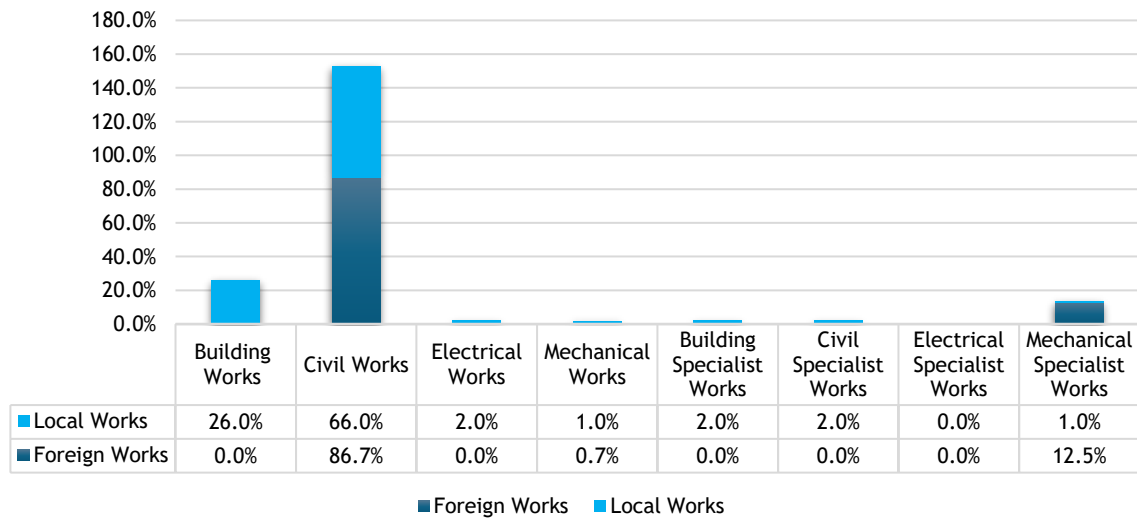
Figure 6: Quarterly Foreign Contractor Participation by Projects Awarded From 2023/24 Q4 to 2025/26 Q4 Financial Years



Source: CIC Project Register 2025/26

Foreign contractor participation in the construction industry increased significantly between the 2024/25 and 2025/26 financial years. In 2024/25, foreign contractors accounted for less than 1 percent of the total project value awarded, with quarterly participation remaining minimal and reaching 0 percent in the third and fourth quarters. However, participation increased markedly in 2025/26, rising from 9.6 percent in the first quarter to a peak of 83.4 percent in the third quarter before declining to 25.0 percent in the fourth quarter. Overall, foreign contractors accounted for approximately 55 percent of the total project value in 2025/26, equivalent to E6,127 million out of E11,285 million. The sharp increase observed during the 2025/26 financial year suggests a greater involvement of foreign contractors in high-value infrastructure and construction projects.

Figure 7: Foreign vs Local Works for the Year 2025/2026



Source: CIC Project Register 2025/26

Table 8: Total Number and Funds for Foreign vs Local Works for the Year 2025/2026

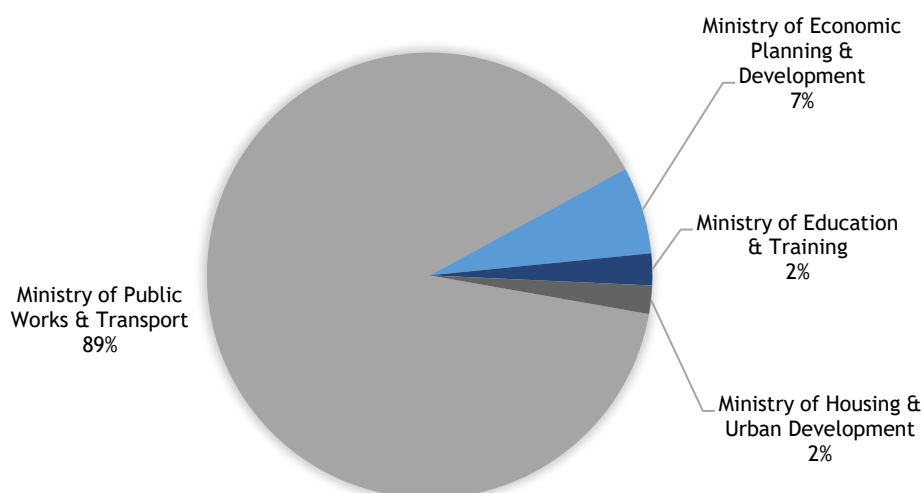
Category	Count 2025	% Share 2025	Total Funds (E) 2025	% Share of Total Funds Disbursed 2025
Local Works	533	96%	5 107 859 901	45%
Foreign Works	25	4%	6 127 849 659	55%
Total	558	100%	11 235 709 560	100%

Source: CIC Project Register 2025/26

During the 2025/26 financial year, local contractors continued to account for the majority of registered projects, demonstrating their strong participation across the construction industry. While foreign contractors undertook a smaller proportion of projects, these were generally associated with larger-scale, higher-value works. This highlights the importance of continued initiatives to strengthen the capacity, competitiveness and participation of local contractors in major construction opportunities.

4.1.6 Project Registered by Ownership (Classification: 2025/26 (Top 5))

Figure 8: Government Project Ownership Share 2025/26



Source: CIC Project Register 2025/26

Table 9: Government Project Ownership Share 2025/26

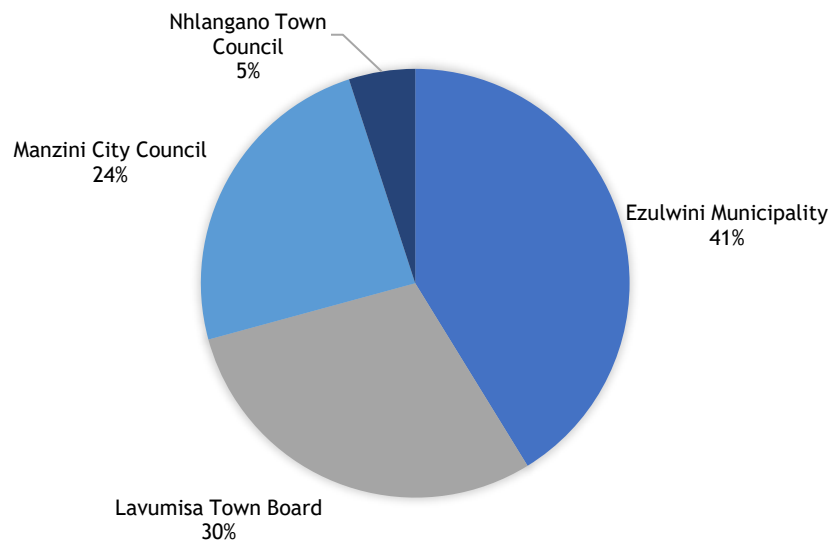
PROJECT OWNER	TOTAL
MINISTRY OF PUBLIC WORKS & TRANSPORT	2 037 198 587
MINISTRY OF ECONOMIC PLANNING & DEVELOPMENT	144 473 431
MINISTRY OF EDUCATION & TRAINING	52 597 064
MINISTRY OF HOUSING & URBAN DEVELOPMENT	46 852 442
GRAND TOTAL	2 281 112 524

Source: CIC Project Registration database, 2025/26

For the top five Government project ownership for the 2025/26 financial year is highly concentrated within the Ministry of Public Works and Transport, which accounts for approximately 89 percent of the total project value. In contrast, the

Ministry of Economic Planning and Development, Ministry of Education and Training, and Ministry of Housing and Urban Development collectively contribute just 11 percent. This distribution highlights a strong bias toward infrastructure-related projects, with relatively limited investment in social and urban development sectors, indicating low diversification in the government project portfolio.

Figure 9: Municipal Project Ownership Share 2025/26



Source: CIC Project Register 2025/26

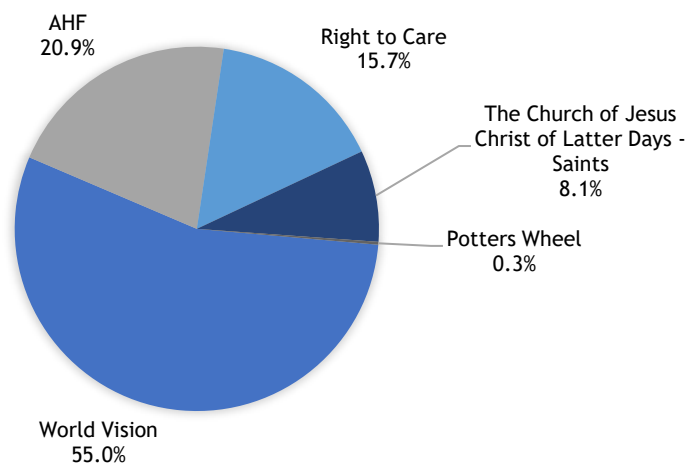
Table 10: Municipal Project Ownership Share 2025/26

PROJECT OWNER	TOTAL (E)
EZULWINI MUNICIPALITY	5 180 394
LAVUMISA TOWN BOARD	3 713 057
MANZINI CITY COUNCIL	3 045 051
NHLANGANO TOWN COUNCIL	628 686
GRAND TOTAL	12 567 188

Source: CIC Project Registration database, 2025/26

Municipal project ownership in the 2025/26 financial year reflects a moderately distributed structure, with Ezulwini Municipality accounting for the largest share at approximately 41 percent of total project value. Lavumisa Town Board and Manzini City Council follow with 30 percent and 24 percent, respectively, indicating notable participation across multiple urban centres. In contrast, Nhlangano Town Council contributes only 5.0 percent, highlighting relatively low project activity.

Figure 10: NGO Project Ownership Share 2025/26



Source: CIC Project Registration database, 2025/26

Table 11: NGO Project Ownership Share 2025/26

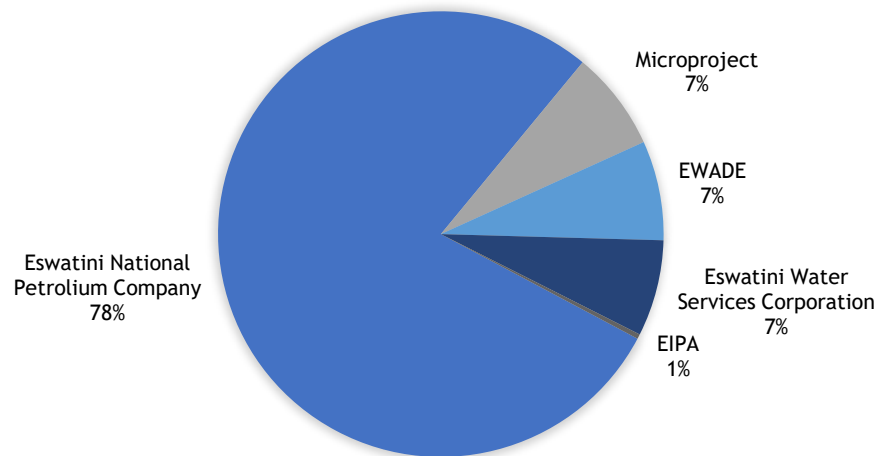
PROJECT OWNER	TOTAL (E)
WORLD VISION ESWATINI	29 580 415
AFH	11 256 542
RIGHT TO CARE NPC	8 412 586
THE CHURCH OF JESUS CHRIST OF LATTER-DAY SAINTS	4 362 906
POTTERS WHEEL CHURCH	135 938
SUB-TOTAL	53 748 387

Source: CIC Project Registration database, 2025/26

The NGO project distribution for 2025/26 is highly concentrated and structurally uneven, with a clear dominance by a single implementing partner. World Vision Eswatini accounts for E29,580,415, representing approximately 55 percent of the total NGO project value (E53,748,387). This level of concentration indicates that more than half of all NGO-related construction activity is reliant on one organisation,

creating a significant dependency risk for programme continuity, delivery stability, and institutional resilience within the sector.

Figure 11: Parastatal Project Ownership Share 2025/26



Source: CIC Project Registration database, 2025/26

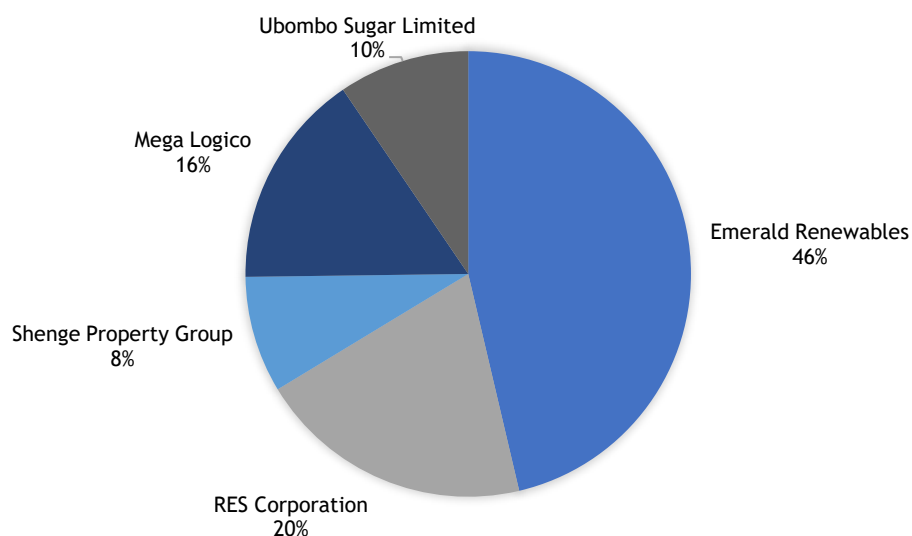
Table 12: Parastatal Project Ownership Share 2025/26

PROJECT OWNER	TOTAL (E)
ESWATINI NATIONAL PETROLEUM COMPANY	5 226 000 000
MICROPROJECT	483 453 419
EWADE	482 652 884
ESWATINI WATER SERVICES CORPORATION	467 343 422
EIPA	22 838 029
GRAND TOTAL	6 682 287 754

Source: CIC Project Registration database, 2025/26

Project value distribution among parastatals is highly concentrated, with the Eswatini National Petroleum Company accounting for over three-quarters of total registered project value. This indicates that overall industry performance is being driven by a single large-scale investment rather than broad-based sector activity. While this boosts short-term growth figures, it raises concerns about sustainability, as any slowdown in this project pipeline could significantly impact the construction sector. The relatively low contribution from other parastatals highlights the need for more diversified and consistent infrastructure investment to stabilize industry performance.

Figure 12: Private Commercial Project Ownership Share 2025/26



Source: CIC Project Registration database, 2025/26

Table 13: Private Commercial Project Value Distribution 2025/26

PROJECT OWNER	TOTAL (E)
EMERALD RENEWABLES	762 840 832
RES CORPORATION	329 484 228
MEGA LOGICO	258 617 544
UBOMBO SUGAR LIMITED	156 502 920
SHENGE PROPERTY GROUP	139 323 883
GRAND TOTAL	1 646 769 407

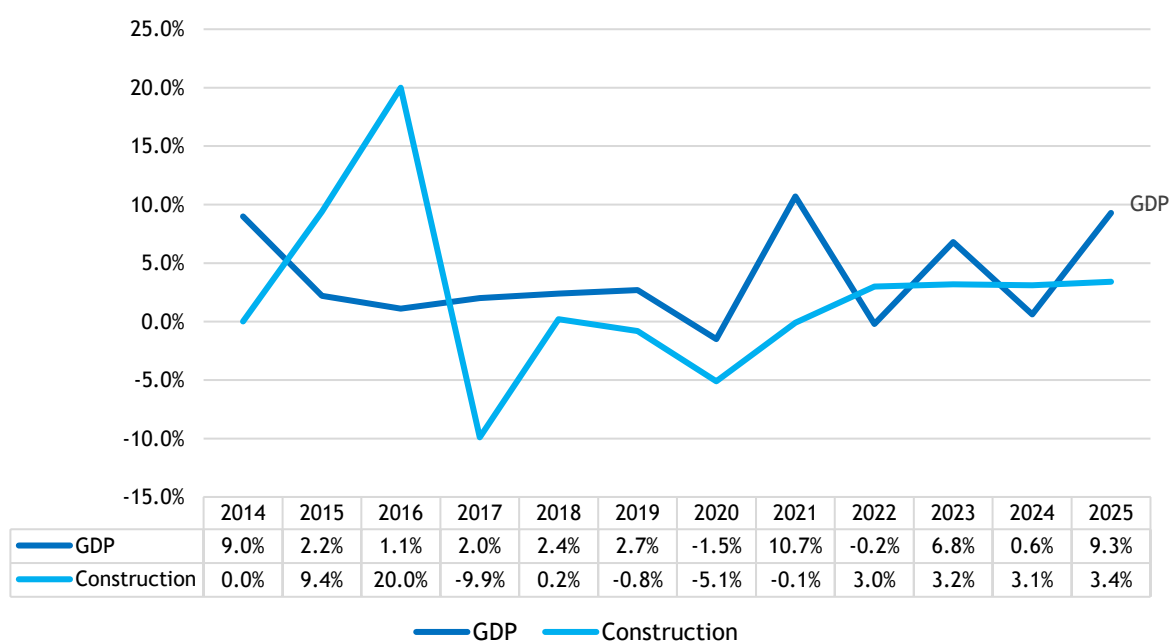
Source: CIC Project Registration database, 2025/26

The distribution of project value within the private commercial sector indicates a moderately concentrated but relatively diversified investment landscape. While Emerald Renewables accounts for the largest share at approximately 46 percent, the

remaining project value is distributed across several active investors, each contributing between 8 percent and 20 percent. This contrasts with the highly concentrated public sector and suggests stronger competitive participation within the private market. However, the dominance of the top two investors highlights continued reliance on a limited number of large-scale projects, posing potential risks to investment stability should these entities reduce their activity.

4.2 Contribution of Construction Activities to GDP

Figure 13: GDP vs Construction: YoY Percentage



Source: Central Statistics Office, National Account Unit, quarterly gross domestic product report 2025 quarter

In 2014, GDP expanded by 9.0 percent, while the construction sector recorded no growth, indicating a clear disconnect between overall economic performance and sectoral activity. This was followed by a sharp upswing during 2015 and 2016, with

construction growth accelerating to 9.4 percent and 20.0 percent, respectively—levels that strongly point to large-scale, public sector-driven infrastructure investment. However, this surge proved unsustainable. In 2017, the sector contracted sharply by -9.9 percent, despite GDP maintaining moderate growth of 2.0 percent. This pattern reflects a classic boom-bust cycle in construction activity, where growth is heavily dependent on a limited number of major projects. The subsequent contraction suggests the completion of key infrastructure projects without a sufficiently developed pipeline to sustain activity, highlighting structural weaknesses in investment planning and project continuity within the sector.

Between 2018 and 2020, the construction sector remained in a state of sustained decline, contracting by 0.8 percent in 2019 and 5.1 percent in 2020. While this coincided with a weakening national economy, the severity of the contraction—particularly in 2020—reflects the pronounced impact of the COVID-19 shock on project execution, supply chains, and investment flows.

Although the broader economy rebounded strongly in 2021, with GDP growth reaching 10.7 percent, the construction sector failed to recover, recording a marginal contraction of 0.1 percent. This disconnect indicates that the sector did not simply lag the economic cycle but was constrained by deeper structural factors, including delayed project restarts, limited fiscal space for infrastructure spending, and weak investment momentum.

This pattern of underperformance persisted into 2022 and 2023, with construction growth remaining near stagnant at 0.3 percent and 0.2 percent, respectively, despite GDP expanding by 0.5 percent and 4.8 percent. The sustained divergence underscores a structural weakness in the sector, where economic recovery has not

translated into renewed construction activity, pointing to deficiencies in project pipeline development, investment coordination, and overall sector responsiveness.

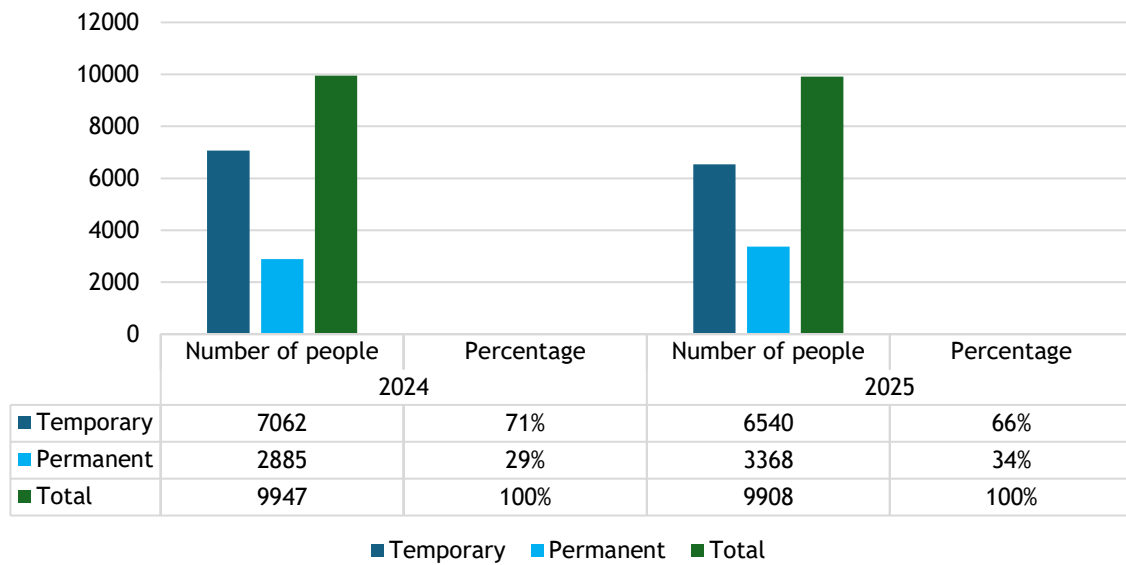
By 2024 and 2025, both GDP and construction recorded improved performance, with GDP growth rising from 0.6 percent to 9.3 percent, while construction expanded by 3.1 percent and 3.4 percent, respectively. While this marks a recovery from the prolonged stagnation observed in earlier years, the pace of construction growth remains relatively modest and does not yet signal a full sectoral rebound. The observed improvement likely reflects a partial revival in infrastructure activity, particularly in segments such as roads, water, housing, and renewable energy. However, given the sector's historical dependence on project-based investment cycles, this uptick may reflect isolated project activity rather than a broad-based and sustained recovery. As such, the extent to which increased involvement from parastatals and the private sector can support long-term growth remains uncertain.

4.3 Labour Structure and Employment in the Construction Industry in Eswatini

For the financial year ending March 31st, 2026, the construction industry employed a total of 9,908 workers. Unemployment for the year ended December 2025 was 32.4 percent, predominantly among the youth. The workforce in this sector is categorized by the following factors: gender (male and female), age (18 to 35 years; youth, and above 35 years (adult)), nationality (Swazi and Foreign), and employment type (permanent and temporary).

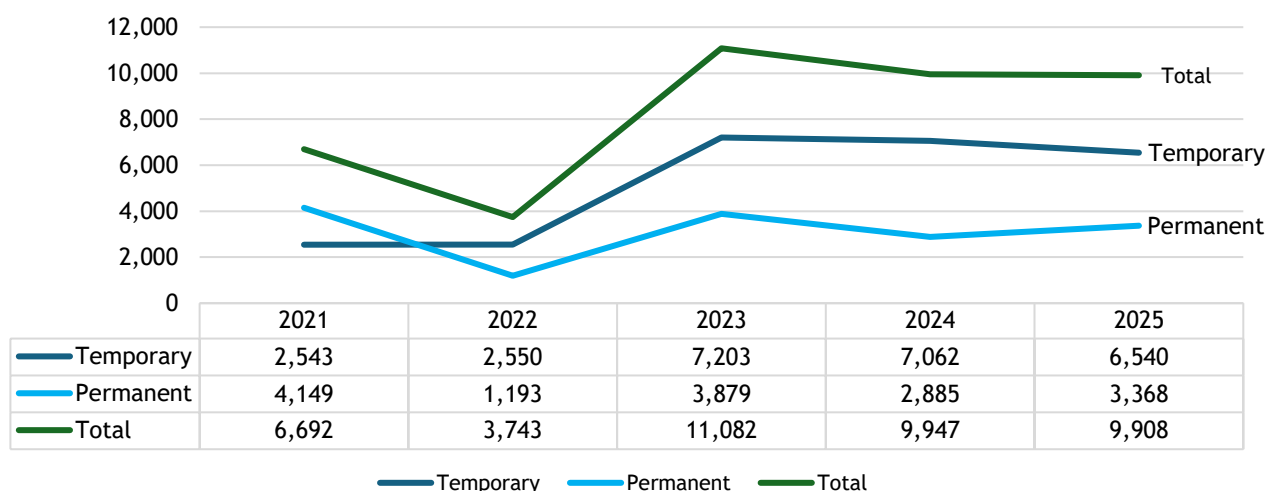
4.3.1 Construction Industry Employment in the Construction Industry

Figure 14: Construction Industry Employment by Type 2024/25 vs 2025/26



Source: CIC Project Registration database, 2025/26

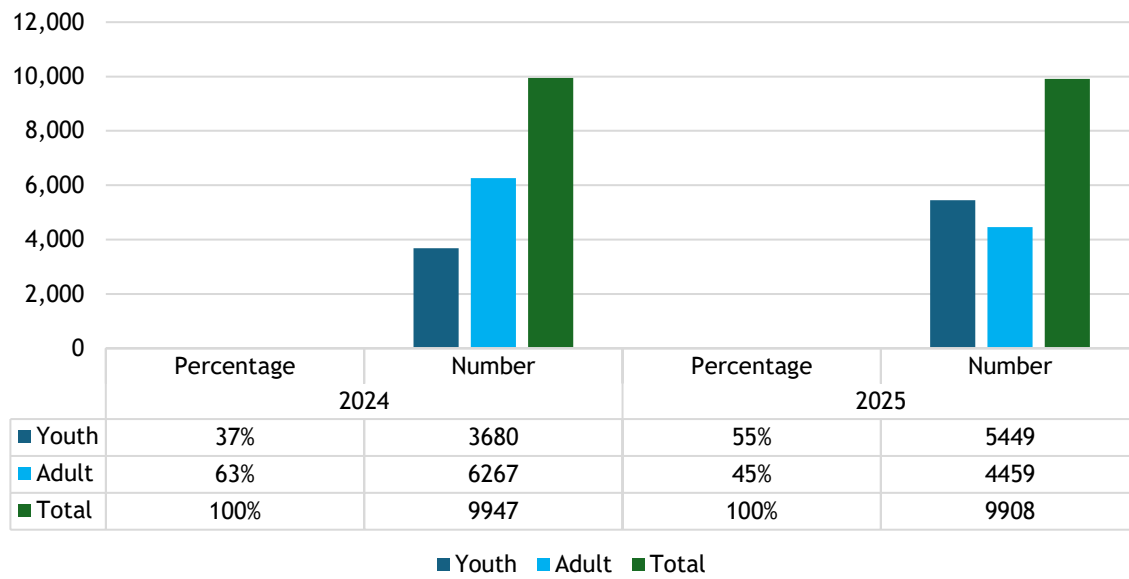
Figure 15: Construction Industry Employment by Type for the last 5 years



Source: CIC Project Registration database, 2025/26

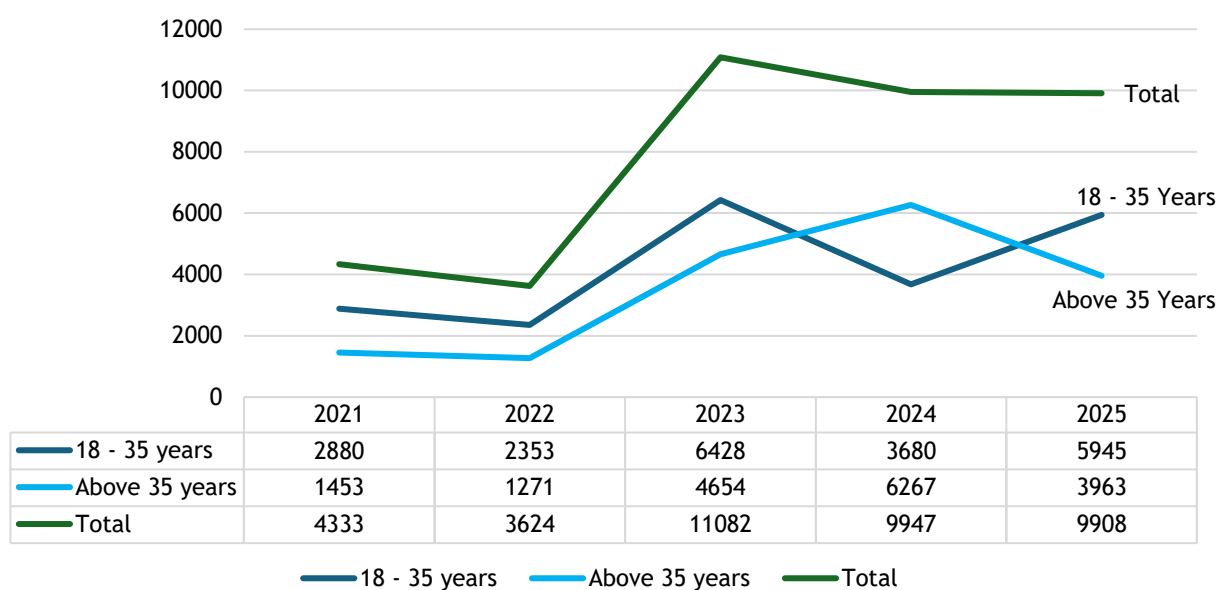
The employment structure within the construction industry remains heavily skewed towards temporary and lower-skilled roles, with minimal progression observed over the past five years. While overall employment levels have shown moderate growth, this has largely been driven by short-term project-based engagements rather than the expansion of permanent, skilled positions. This trend suggests that the sector's growth is not translating into sustainable job creation or meaningful skills development. Without targeted interventions to formalize employment and strengthen technical capacity, the industry risks remaining trapped in a low-productivity, labour-intensive cycle.

Figure 16: Construction Industry Employment by Age 2024/25 vs 2025/26



Source: CIC Project Registration database, 2025/26

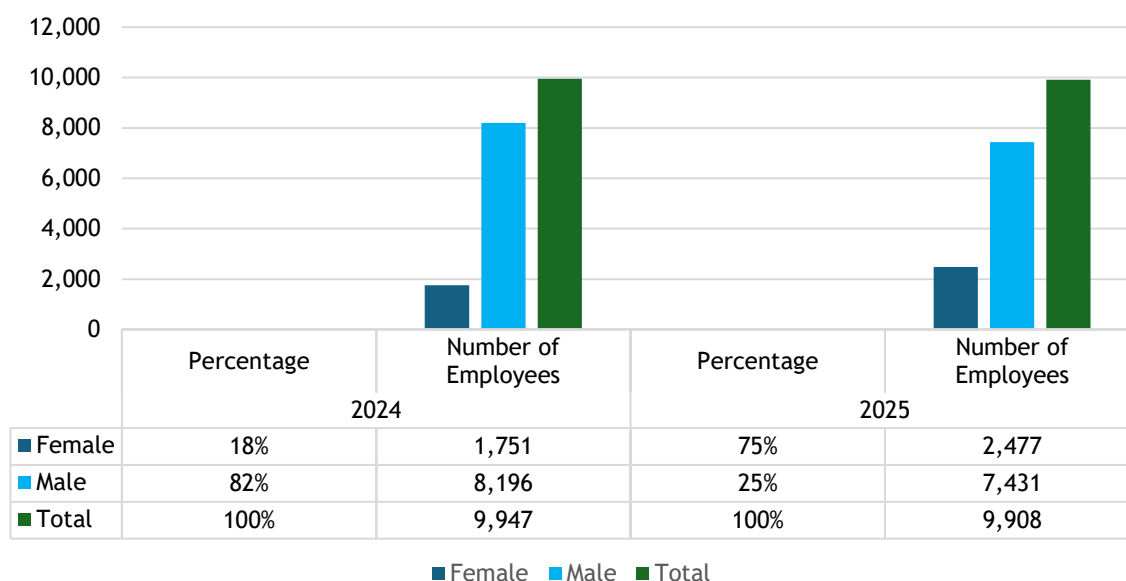
Figure 17: Construction Industry Employment Trend by Age for the last 5 years



Source: CIC Project Registration database, 2025/26

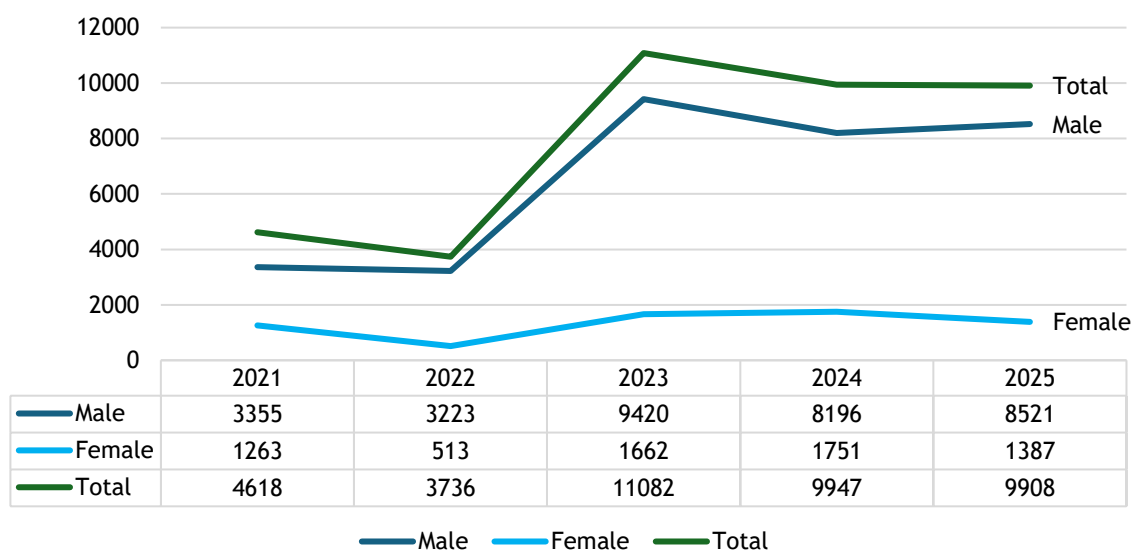
The age distribution of the construction workforce indicates a concentration within the younger age brackets, suggesting strong entry into the sector. However, trend analysis reveals limited progression into mid-career roles, pointing to potential retention challenges. This pattern implies that while the industry is effective in attracting new entrants, it may not be providing sustainable career pathways to retain and develop talent over time. Without targeted interventions to strengthen skills development and career progression, the sector risks perpetuating a cycle of low-experience labour, undermining productivity and long-term capacity

Figure 18: Construction Industry Employment by Gender 2024/25 vs 2025/26



Source: CIC Project Registration database, 2025/26

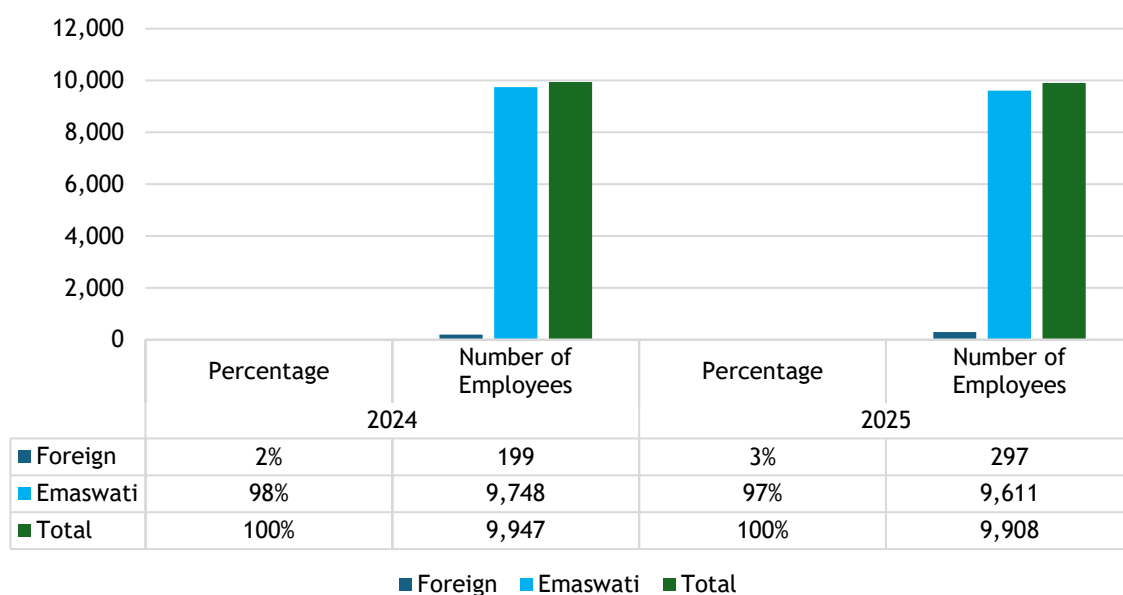
Figure 19: Construction Industry Employment Trend by Gender for the last 5 years



Source: CIC Project Registration database, 2025/26

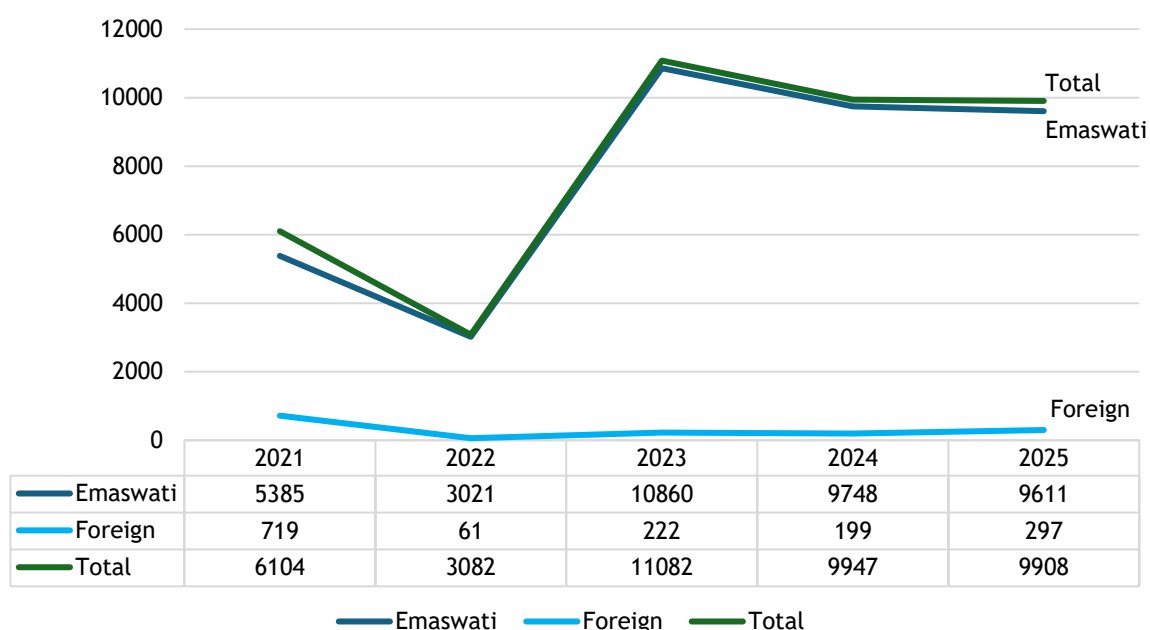
The construction industry continues to exhibit a significant gender imbalance, with male workers accounting for most of the employment. Although there has been a gradual increase in female participation over recent years, this growth remains marginal and largely concentrated in non-technical roles. Trend analysis indicates that the pace of change is insufficient to meaningfully close the gender gap, suggesting that structural barriers – including limited access to technical training and workplace constraints – persist. Without deliberate and targeted interventions, the sector is likely to remain male-dominated, limiting both inclusivity and the broader talent pool available for industry growth.

Figure 20: Construction Industry Employment by Nationality 2024/25 vs 2025/26



Source: CIC Project Registration database, 2025/26

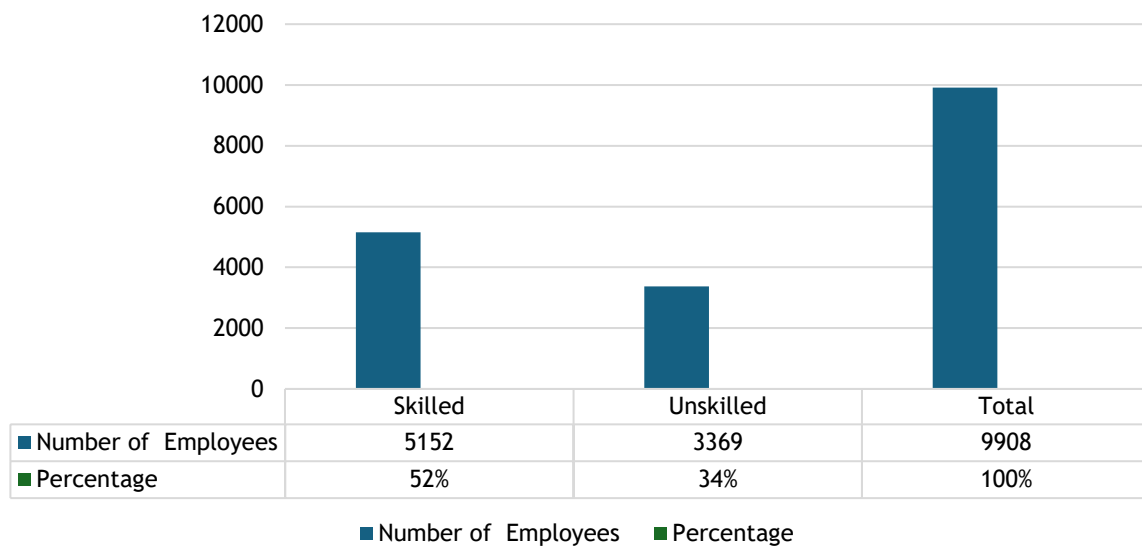
Figure 21: Construction Industry Employment Trend by Nationality for the last 5 years



Source: CIC Project Registration database, 2025/26

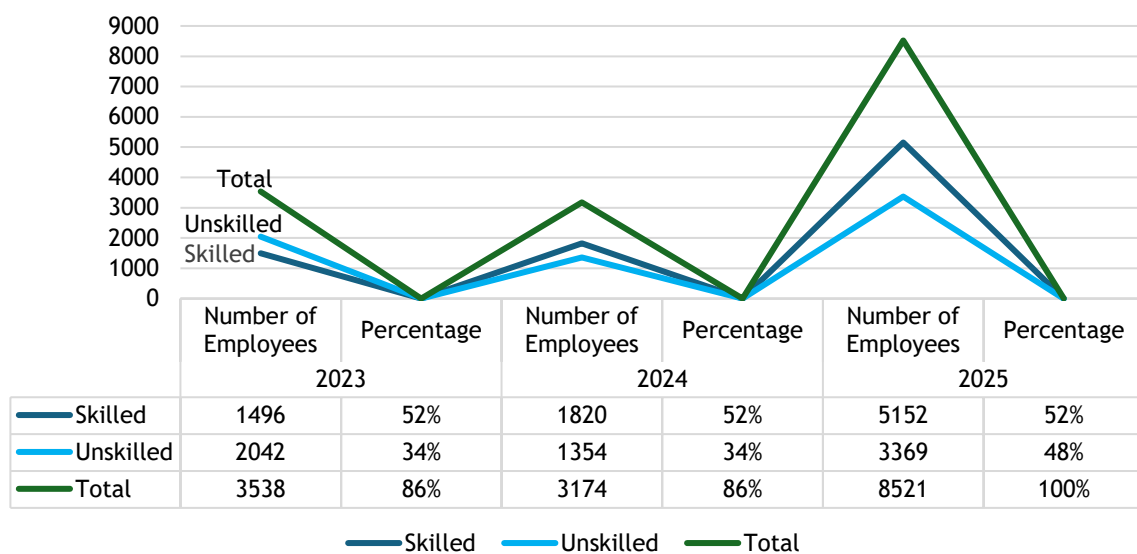
The construction industry remains predominantly locally staffed; however, trend analysis indicates a gradual increase in foreign national employment, particularly in skilled roles. This suggests persistent domestic skills gaps despite overall employment growth. While local participation appears strong in absolute terms, the concentration in lower-skilled categories raises concerns about the depth of capacity development within the sector. Without targeted skills development and stricter labour market alignment, the industry risks increasing structural dependence on foreign expertise, undermining long-term sustainability.

Figure 22: Construction Industry Employment by Skills



Source: CIC Project Registration database, 2025/26

Figure 23: Construction Industry Employment Trend by Skills

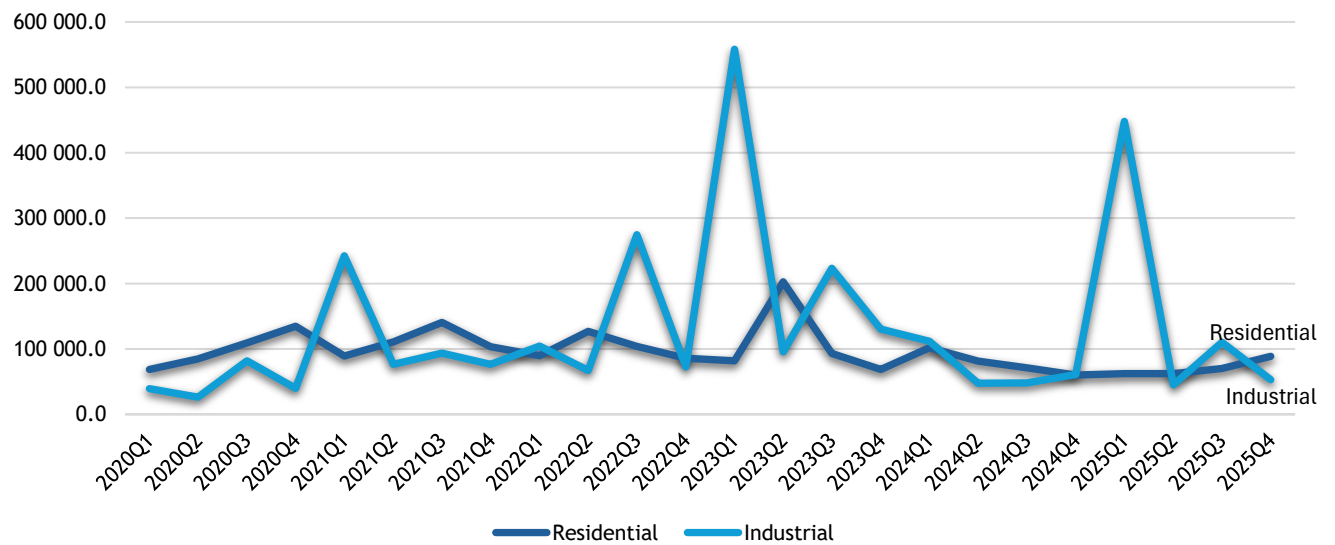


Source: CIC Project Registration database, 2025/26

The employment structure of the construction industry remains predominantly concentrated in semi-skilled and unskilled labour categories, reflecting the labour-intensive nature of project execution. While this supports broad-based employment creation, it also indicates limited penetration of high-level technical skills required for improved productivity and quality outcomes. Trend analysis further shows that growth in employment has largely been driven by lower-skilled categories, with minimal expansion in skilled labour. This pattern suggests that, although the sector is expanding in scale, it is not undergoing a corresponding transition toward higher technical capacity. Without targeted investment in skills development and professional training, this imbalance may constrain the industry's ability to deliver complex infrastructure projects efficiently and sustainably.

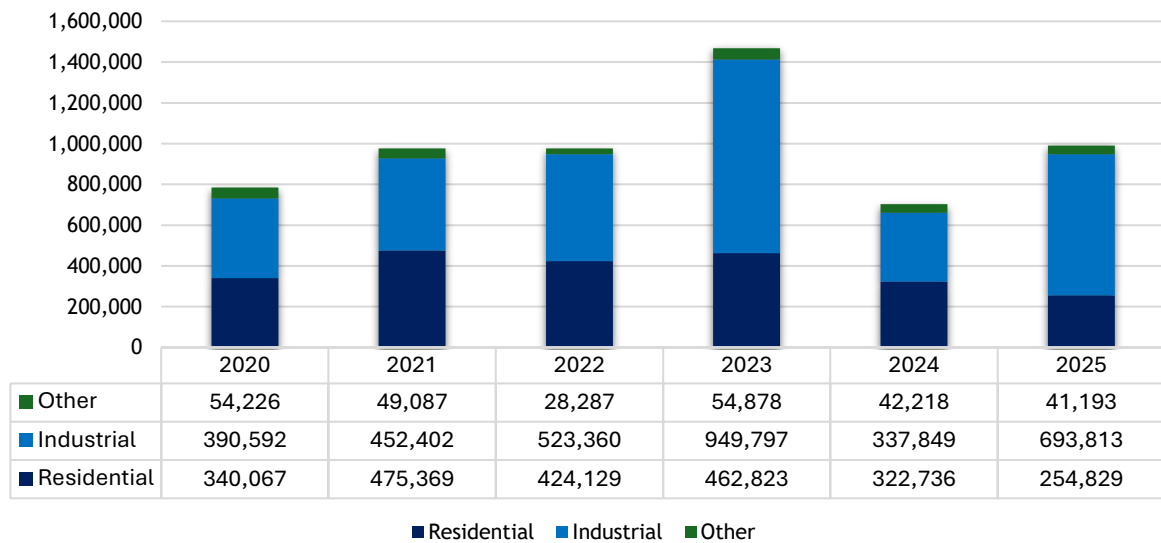
4.4 Building Sector Performance

Figure 24: Building Approvals: Residential vs Industrial (E'000 Constant 2025 Prices)



Source: Central Bank of Eswatini, Building Statistics 2026Q1

Figure 25: Eswatini Building Approvals



Source: Central Bank of Eswatini, Building Statistics 2026Q1

The above graph illustrates the trend in building plans approved by sector between 2020 and 2025, highlighting the contributions of the residential, industrial, and other sectors. Overall, the value of approved building plans increased steadily from 2020 to 2023 before declining sharply in 2024 and recovering again in 2025. Throughout the period, the industrial sector consistently accounted for the largest share of approved building plans, making it the main driver of changes in the construction industry.

Between 2020 and 2021, the total value of approved building plans increased from approximately E780,000 to E970,000, representing an estimated growth of 24.4 percent. This increase suggests improved confidence in the construction sector and rising investment activity. Both the residential and industrial sectors recorded growth during this period, indicating increased housing demand as well as expansion

in industrial and commercial developments. The growth likely contributed positively to employment creation and demand for construction materials and related services.

From 2021 to 2022, the total value of approved building plans remained relatively stable at around E970,000, reflecting almost no growth. This stability indicates that construction activity was maintained despite possible economic uncertainties. The industrial sector continued to dominate approvals, suggesting sustained investment in productive infrastructure and business development. Although growth slowed during this period, the sector maintained its contribution to economic activity and employment.

A significant increase was recorded between 2022 and 2023, when the total value of approved building plans rose from approximately E970,000 to E1,460,000, representing an estimated increase of 50.5 percent. This was the highest growth recorded over the entire period and was driven mainly by a substantial rise in industrial approvals. The sharp increase may reflect increased infrastructure investment, expansion in industrial development, and improved investor confidence. The growth likely had positive economic impacts through increased employment opportunities, higher demand for construction materials, and expansion of economic activity within the construction industry.

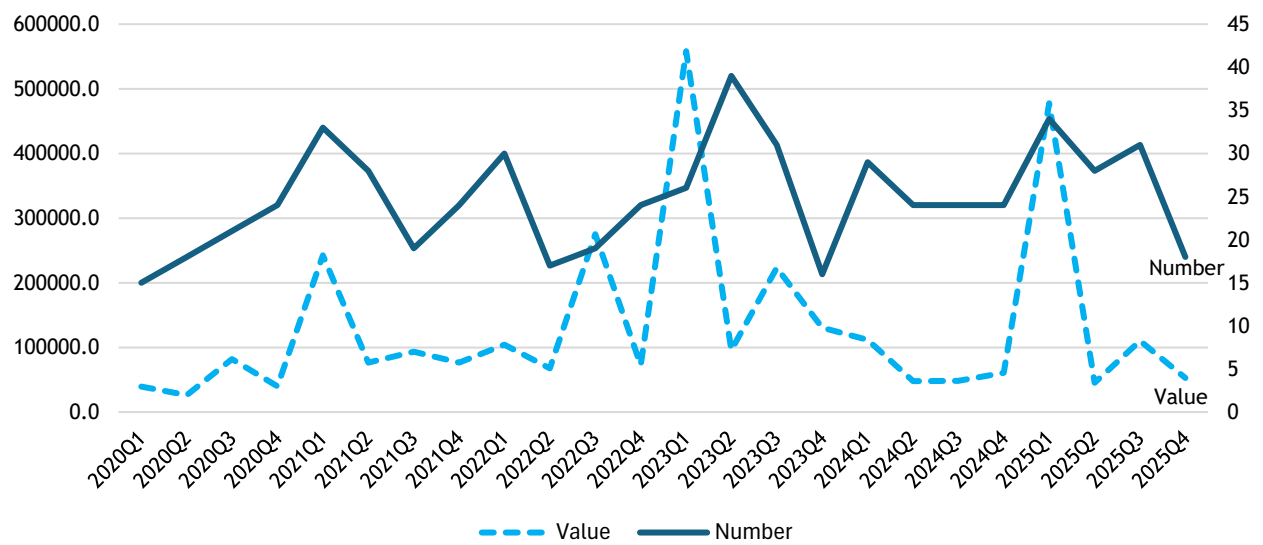
However, between 2023 and 2024, the total value of approved building plans declined sharply from approximately E1,460,000 to E700,000, representing a decrease of about 52.1 percent. This significant contraction suggests a major slowdown in construction activity, largely due to the decline in industrial building approvals. The decrease may have resulted from reduced investment spending, economic uncertainty, tighter financing conditions, or delays in major projects. The

decline likely had negative impacts on the construction sector, including reduced employment opportunities, lower demand for building materials, and slower economic growth.

The sector showed signs of recovery between 2024 and 2025, as the total value of approved building plans increased from approximately E700,000 to E990,000, representing an estimated growth of 41.4 percent. This recovery indicates renewed investment and improving confidence within the construction industry. Industrial approvals once again contributed significantly to the increase, suggesting that industrial development remains a key driver of construction activity. The rebound is likely to support employment creation, stimulate demand for construction-related services, and contribute positively to overall economic growth.

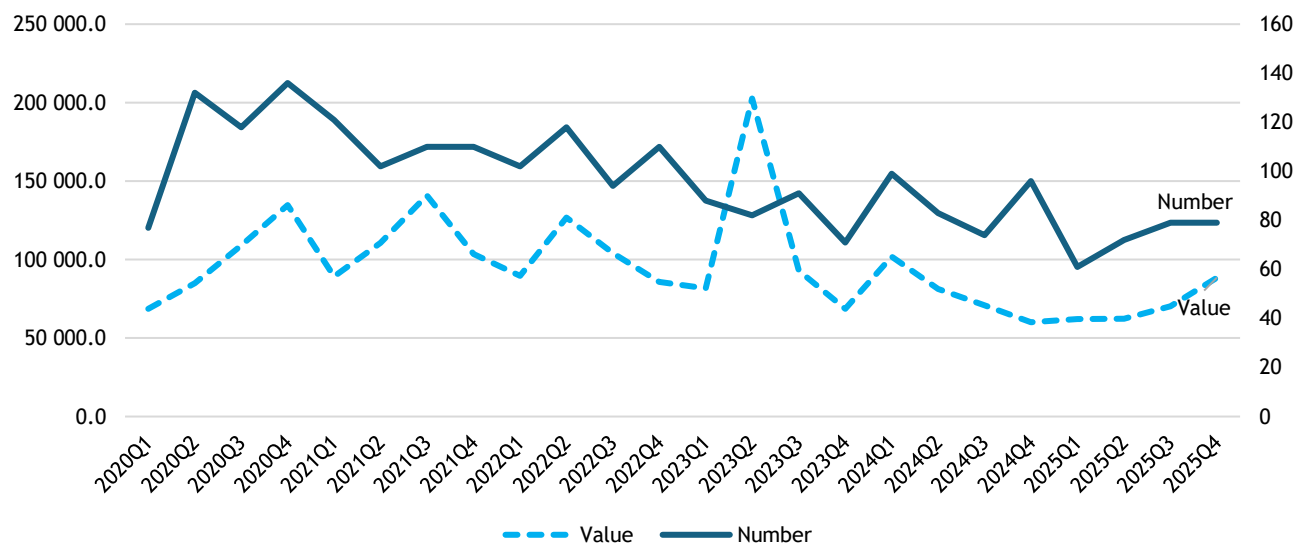
Overall, the graph demonstrates that the construction sector experienced periods of both strong growth and sharp decline between 2020 and 2025. The industrial sector remained the dominant contributor to approved building plans and played a major role in influencing overall trends in the industry. Meanwhile, the residential sector remained relatively stable throughout the period, reflecting consistent housing demand, while the other sector contributed only a small share of total approvals.

Figure 26: Building Approvals: Industrial Number vs Value



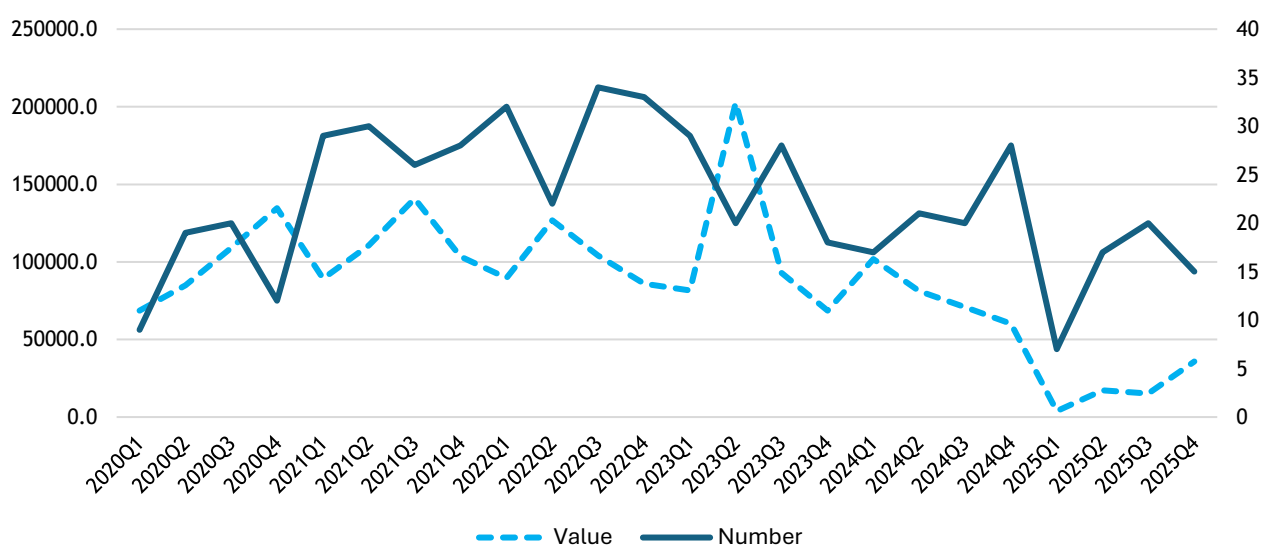
Source: Central Bank of Eswatini, Building Statistics 2026Q1

Figure 27: Building Approvals: Residential Number vs Value



Source: Central Bank of Eswatini, Building Statistics 2026Q1

Figure 28: Building Approvals: Other Number vs Value



Source: Central Bank of Eswatini, Building Statistics 2026Q1

4.5 Analysis of Stakeholder Performance

4.5.1 Overview

The performance of the construction industry is determined by the interaction of multiple stakeholders across the value chain, including individual artisans, contractors, consultants, manufacturers and suppliers, and project owners. An integrated assessment of these groups reveals a sector that possesses pockets of technical strength but is constrained by systemic inefficiencies, weak coordination, and uneven capacity distribution. While each stakeholder group contributes to overall project outcomes, the misalignment between them continues to limit productivity, increase project risk, and weaken the translation of investment into tangible infrastructure delivery.

4.5.2 Analysis of Project Owner Performance

Table 14: Respondent profile

CATEGORY	DETAIL	SHARE
REGIONAL DISTRIBUTION	Hhohho	58%
	Lubombo	19%
	Manzini	19%
	Shiselweni	4%
ORGANISATION TYPE	Parastatal	38%
	Private sector	23%
	Local government	23%
	Public sector	12%
	Financial institutions	4%
PROJECT TYPE	Mixed (multiple categories)	54%
	Building projects	23%
	Civil & infrastructure	12% each
PROJECT VALUE	Large (above E10 million)	50%
	Medium (E2 - E10 million)	28%
	Small (below E2 million)	23%

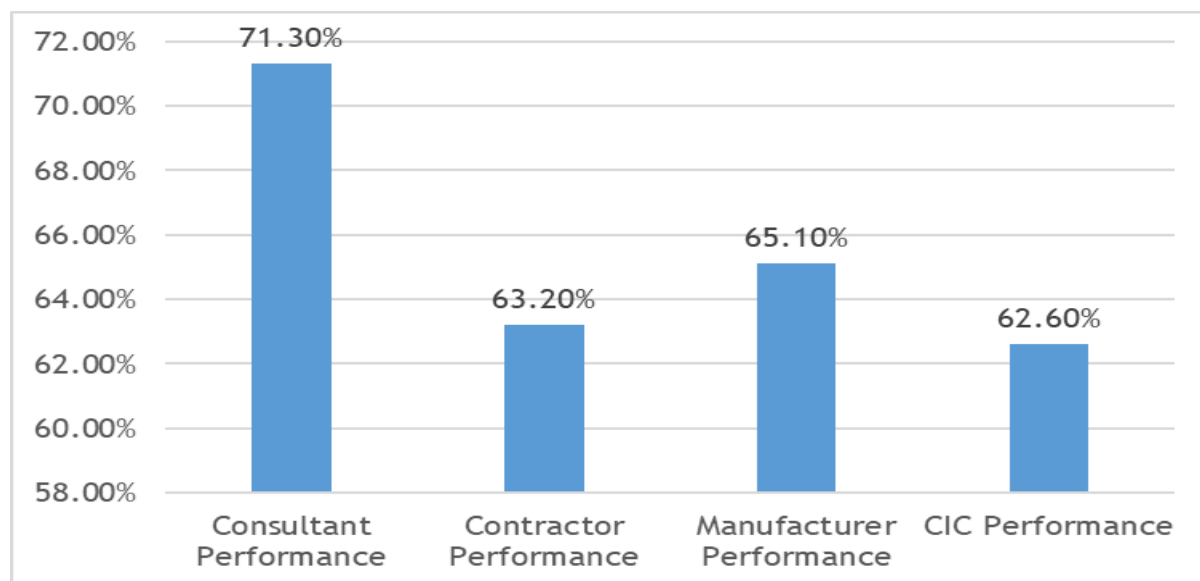
The survey assessed project owner performance across nine categories. Scores range from 62.6 percent (CIC Performance) to 79.3 percent (Planning & Procurement), with an overall sector average of approximately 72.4 percent. While no category reached the Excellent threshold, none fell into a critically poor range – the sector operates in a broad moderate-to-good band with clear variation across domains.

Table 15: Stakeholder Performance Assessments

CATEGORY	SCORE	BAND	STRONGEST INDICATOR	WEAKEST INDICATOR
----------	-------	------	---------------------	-------------------

PLANNING & PROCUREMENT	79.3%	Good	Procurement compliance (4.3)	Feasibility studies / bid evaluation (3.8)
FINANCIAL MANAGEMENT	74.8%	Good	Payment certification accuracy (3.92)	Financing adequacy (3.60)
CONTRACT ADMINISTRATION	74.5%	Good	Approvals timeliness (3.91)	Written instructions (3.45)
STAKEHOLDER ENGAGEMENT	74.5%	Good	Consultant selection (3.99)	Scope creep control (3.42)
OVERALL PROJECT OUTCOMES	71.7%	Moderate	Willingness to adopt improvements (3.74)	Achievement of objectives (3.42)
SUPPLIER PERFORMANCE	65.1%	Fair	Material quality (3.50)	Delivery reliability / pricing (3.09)
RISK & DISPUTE MANAGEMENT	65.8%	Fair	Risk mitigation (3.45)	Dispute avoidance (3.08)
CONTRACTOR PERFORMANCE	63.2%	Fair	Specification adherence (3.48)	Meeting project deadlines (2.76)
CIC PERFORMANCE	62.6%	Fair	Complaint handling (3.21)	Monitoring & inspection (2.88)

Figure 29: Overall Performance Summary assessed by Project Owners



Source: CIC Survey, 2025/26

4.5.3 Qualitative Insights and Recurring Themes

Beyond the structured ratings, respondents provided rich qualitative feedback on recurring challenges and coordination failures. Five themes emerged consistently across multiple respondents.

4.5.3.1 Payment delays – primary systemic failure

Payment delays were the single most consistently cited challenge across all project owner categories. Public sector and parastatal respondents pointed to government payment system constraints, multiple approval layers, and budget unavailability as structural causes. Private sector respondents highlighted contractor cash flow crises flowing from delayed payments (due to the unavailability of funds mainly for public projects and late submission of payment certificates on private projects), leading to stalled projects, workforce disputes, and quality compromises.

4.5.3.2 Scope definition and BOQ accuracy gaps

Inadequate Bills of Quantities, omitted items, and vague scope descriptions were identified as root causes of variations, cost overruns, and disputes. Respondents specifically cited consultants omitting BOQ items as leading to excessive variations. Under-quoting by contractors also creates subsequent financial pressure. This points to a systemic need for improved pre-contract quantity surveying and scope validation.

4.5.3.3 Contractor capacity and competency gaps

Concerns were raised about contractor capacity, lack of skilled labour, personnel on tender submissions not matching those deployed on site, underfunded contractors who cannot advance works, and contractors winning tenders based on lowest price but lacking delivery capacity. Project owners noted the importance of not overloading smaller contractors with large projects they cannot financially sustain.

4.5.3.4 Risk management absent or purely reactive

No respondent described a proactive, structured risk management framework. Risks cited – inclement weather, stakeholder engagement failures, language barriers with foreign contractors, material supply delays – are largely predictable and manageable, yet they repeatedly caused project disruption. This confirms that risk registers and mitigation plans are either absent or not enforced on most projects.

4.5.3.5 Communication and coordination deficits

Coordination among consultants, contractors, and suppliers was described as operating in fragments, with conflicting instructions and no effective escalation mechanisms. Respondents noted that consultants work in silos leading to conflicting instructions, and that absence of follow-up processes from meetings means notices

are not timeously acted upon. These findings point to a need for integrated project management systems and formal communication protocols.

4.5.4 Analysis of Contractor Performance

Responses were heavily concentrated in Manzini (62 percent). A total of 42 contractors participated across a wide mix of trades, dominated by generalist General Building & Civil Works contractors (17 percent), with meaningful representation from Mechanical (14 percent) and Electrical (12 percent) specialists

Table 16: Regional Distribution

REGION	SHARE OF RESPONDENTS
MANZINI	62%
LUBOMBO	19%
HHOHHO	17%
SHISELWENI	2%

Source: CIC Survey, 2025/26

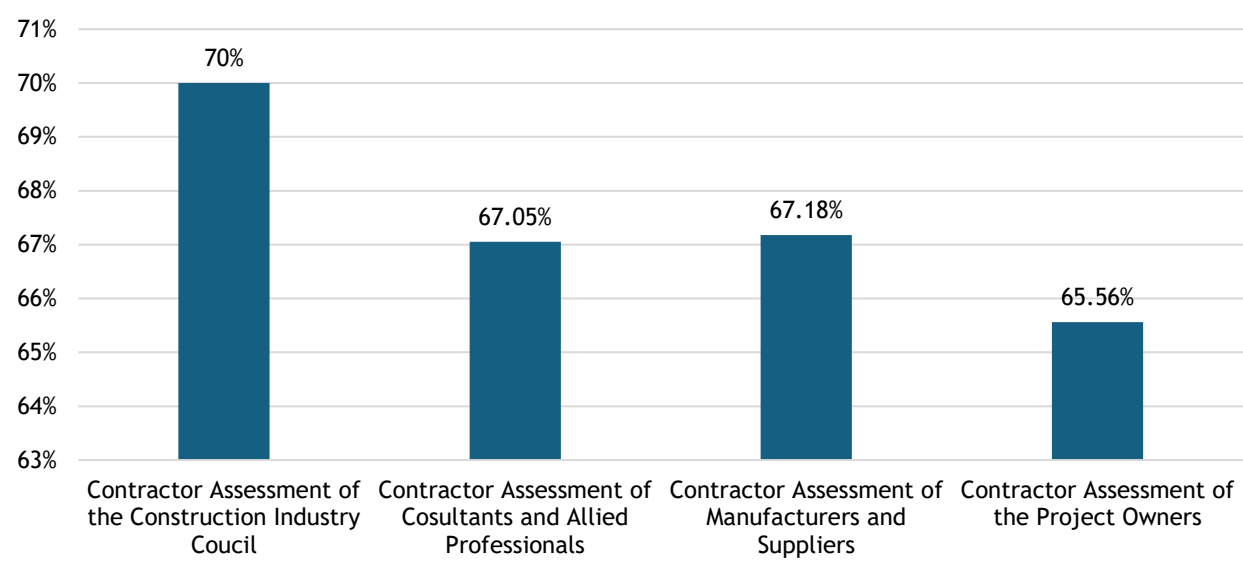
Table 17: Trade Profile Distribution

CATEGORY	SHARE
LARGE CONTRACTORS (GRADES 1-2)	18%
MEDIUM CONTRACTORS (GRADES 3-4)	60%
SMALL CONTRACTORS (GRADES 5-6)	20%
SUPPLIERS	2%

Source: CIC Survey, 2025/26

On the total of responses captured per group, the combined average performance score across all stakeholders is 67.4 percent, with scores ranging from 70 percent (CIC) to 65.6 percent (Project Owners) a narrow spread of 4.5 percentage points, indicating consistent but moderate performance across the sector.

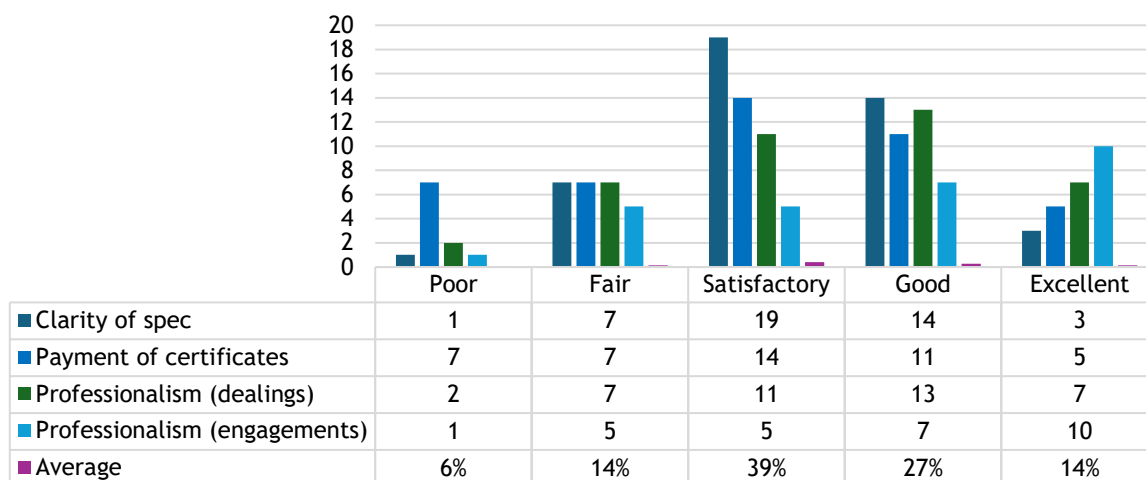
Figure 30: Overall Performance Summary assessed by Contractors



Source: CIC Survey, 2025/26

4.5.5 Performance Ratings Given by Contractors

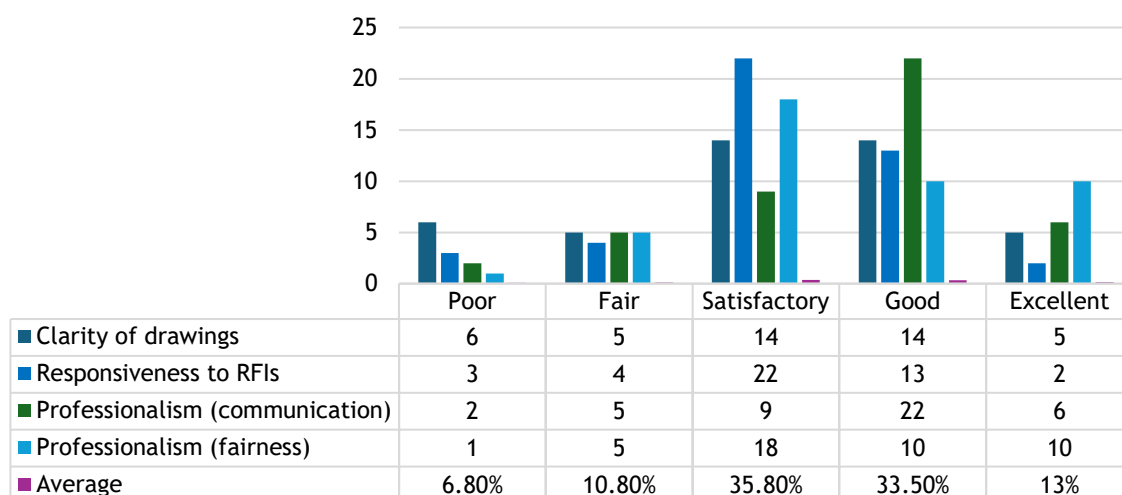
Figure 31: Project Owners' Performance Breakdown - 65.6 Percent



Source: CIC Survey, 2025/26

Project owners recorded the lowest score among all stakeholder groups. Payment of certificates attracted the highest number of Poor ratings (7), indicating delayed or disputed payments to remain a concern for contractors. Performance was strongest in professionalism during engagements, where Good and Excellent ratings were most concentrated.

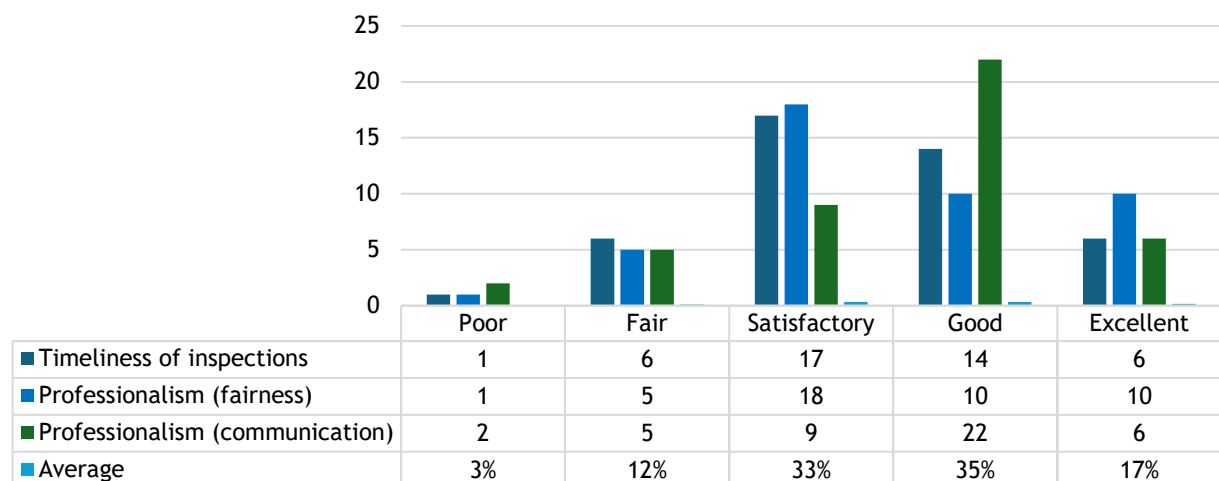
Figure 32: Consultants' Performance Breakdown - 67.1 Percent



Source: CIC Survey, 2025/26

Consultants performed near the overall average. Clarity of drawings attracted the Poorest ratings (6), suggesting design documentation quality needs attention. Professionalism and communication were the strongest criterion, with 22 Good ratings the highest single criterion count for this group.

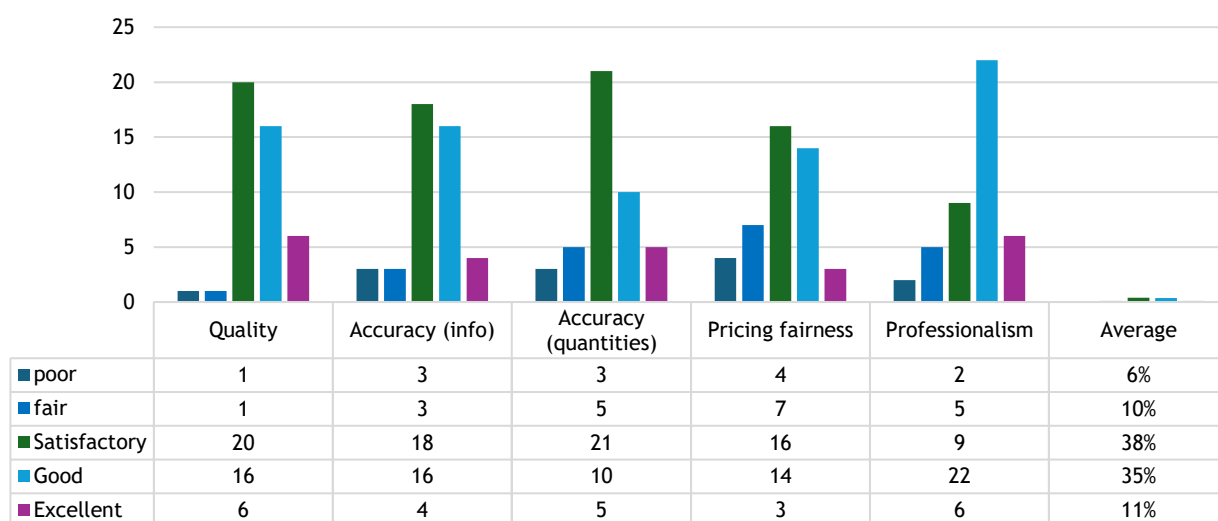
Figure 33: CIC Performance Breakdown - 70 Percent



Source: CIC Survey, 2025/26

The CIC achieved the highest overall score at 70 percent, driven by strong Good and Excellent ratings particularly in professionalism and communication (22 Good) and professionalism in engagements (10 Excellent). Timeliness of inspections and approval remains at a relatively weak point within the group.

Figure 34: Manufacturers & Suppliers Performance Breakdown - 67.18 Percent



Source: CIC Survey, 2025/26

The financial data collected from survey respondents has been analyzed using key financial ratios. Because the data is presented in monetary range of bands rather than exact figures, the midpoint of the modal band (the band with the most respondents) is used as the representative value for each metric. The ratios below reflect the typical contractor profile across the sector.

Table 18: Financial Profile of Respondents

MONETARY RANGE (E)	TOTAL DEBT	TOTAL EQUITY	CURRENT ASSETS	CURRENT LIABILITIES	SUPPLIER PURCHASES	PAYMENTS TO SUPPLIERS	CONSTRUCTION PROJECTS
ZERO / NONE	5	3	2	4	4	3	4
E1 - E100,000	5	1	2	4	4	6	1
E100,001 - E250,000	2	4	4	4	1	4	0
E250,001 - E500,000	5	3	1	7	4	2	1
E500,001 - E1,000,000	6	3	4	8	3	7	1
E1,000,001 - E2,000,000	8	6	7	5	5	5	11

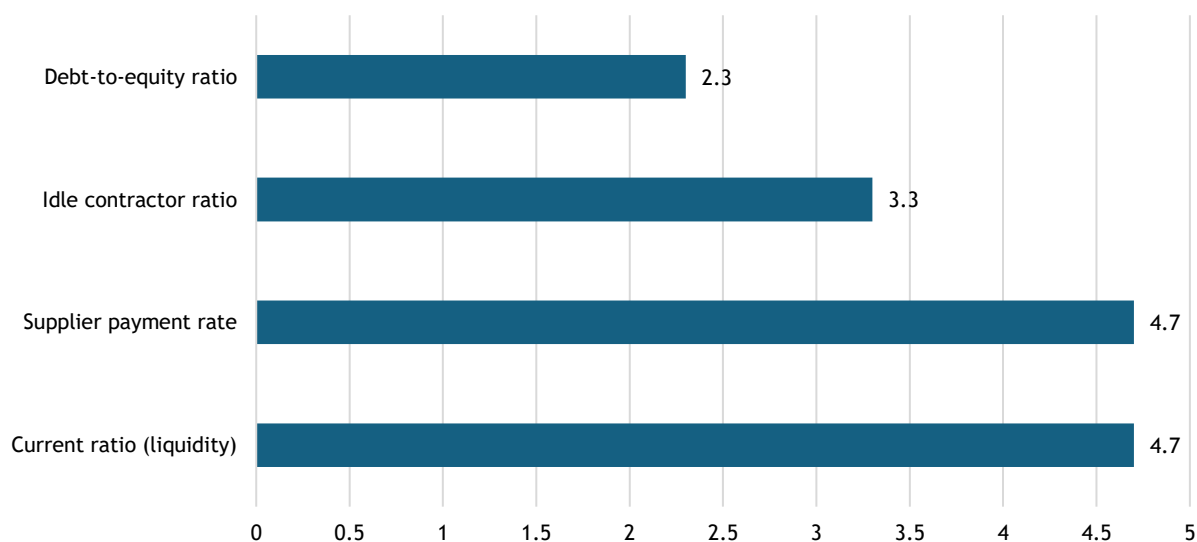
E2,000,001 -	5	8	9	2	10	4	11
E5,000,000							
E5,000,001 -	0	4	3	1	6	7	2
E10,000,000							
E10,000,001	0	1	4	0	1	0	4
-							
E100,000,000							
ABOVE	1	1	1	1	1	1	3
E100,000,000							

Source: CIC Survey, 2025/26

The financial data reveals a sector dominated by small to medium-sized contractors with stable but modest financial profiles. Most contractors operate within the E1 million to E5 million range across debt, equity, assets, and project values. No contractors reported projects in the E100,001-E250,000 bracket, and very few operate above E100 million.

The financial data collected from survey respondents has been analyzed using key financial ratios. Because the data is presented in monetary range of bands rather than exact figures, the midpoint of the modal band (the band with the most respondents) is used as the representative value for each metric. The ratios below reflect the typical contractor profile across the sector.

Figure 35: Contractor Financial Ratios



Source: CIC Survey, 2025/26

The debt-to-equity ratio of 2.3 indicates that contractors are moderately leveraged, with equity levels exceeding debt obligations and reflecting a relatively stable

financial position. The current ratio of 4.7 shows that contractors hold significantly more current assets than short-term liabilities, although ongoing cashflow pressures suggest that much of these assets are tied up in unpaid certificates and receivables. The supplier payment ratio of 4.7 highlights severe payment imbalances within the sector, with contractors purchasing substantially more materials than they are paying suppliers, confirming widespread payment delays across the supply chain. The idle contractor ratio of 3.3 further indicates that while most contractors remain operational, a considerable number of firms have no active projects, reflecting under-utilization within the industry.

Table 19: Top challenges affecting project delivery

RANK	CHALLENGE	KEY IMPACT
1	Late payments & cashflow constraints	Contractors cannot pay suppliers or retain labour; projects stall
2	Material shortages & supply chain delays	Reliance on imports causes long lead times; local materials unavailable
3	Lack of skilled labour	Poor workmanship, rework, safety issues, limited project capacity

Source: CIC Survey, 2025/26

Additional challenges noted include weather delays, foreign contractors taking local jobs, CIC fee concerns, poor project planning, incomplete drawings, communication breakdowns, and corruption.

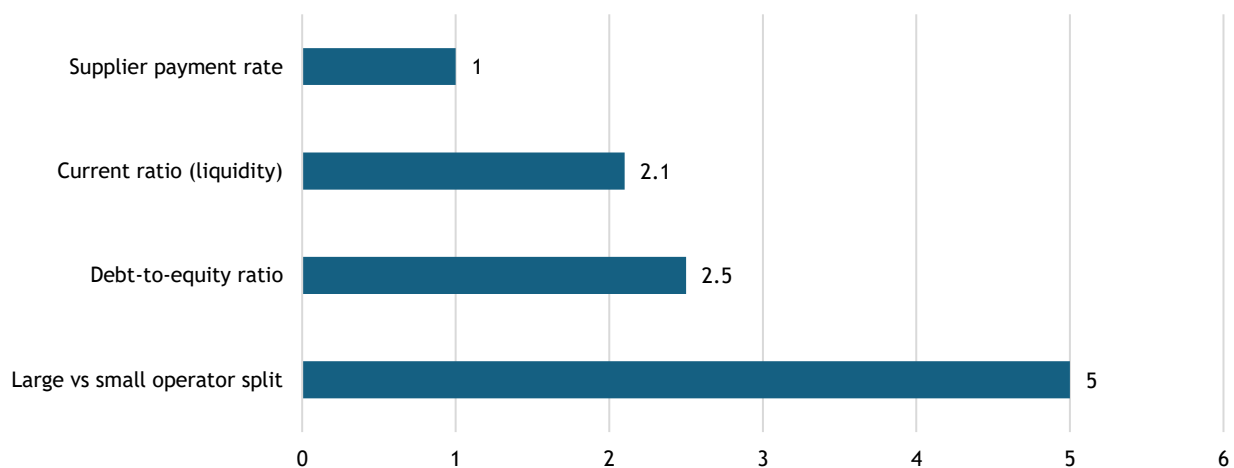
4.5.6 Analysis of Manufacturer & supplier performance

Manufacturers and suppliers achieved an overall performance score of 84.6 percent significantly higher than the 67.2 percent they received when rated by contractors

in the main contractor survey. This suggests that manufacturers and suppliers view their own client-facing processes more favorably than contractors do. The rating is based on ten criteria assessed across 12 respondents.

Figure 36: Manufacturer & Supplier Financial Ratio

Source: CIC Survey, 2025/26



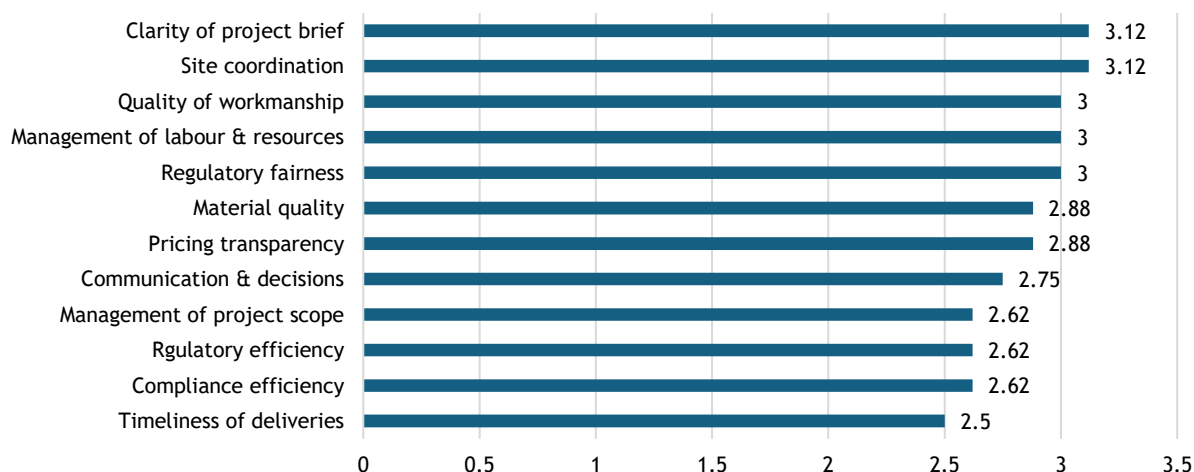
The debt-to-equity ratio of 2.5 indicates that manufacturers and suppliers operate with relatively low debt compared to their equity base, reflecting a financially stable and conservatively financed sector. The graph suggests that most firms are not heavily dependent on borrowing and are therefore less exposed to financial distress and interest rate pressures. The current ratio of 2.1 further demonstrates that manufacturers and suppliers maintain sufficient current assets to comfortably cover their short-term obligations, indicating a generally healthy liquidity position and stronger cashflow management compared to contractors.

The supplier payment ratio of 1.0 shows that purchases and payments to suppliers remain broadly balanced, meaning manufacturers and suppliers are generally paying

their own suppliers at the same rate they are purchasing materials. This reflects a more sustainable and stable payment cycle within the supplier tier of the industry. In contrast to contractors, where delayed payments create severe supply chain pressure, the graph suggests that payment challenges are less concentrated among manufacturers and suppliers. The large versus small operator split ratio of 5.0 indicates that the sector is heavily dominated by small operators, with far fewer large firms participating in the market. This suggests that the industry relies significantly on smaller local suppliers, making the sector vulnerable to disruptions should smaller firms experience financial or operational difficulties.

4.5.7 Performance Analysis of Consultants and Allied Professionals

Figure 37: Consultant & Allied Professional Performance



Source: CIC Survey, 2025/26

The performance assessment of consultants and allied professionals revealed mixed results across the evaluated criteria. Overall, seven out of the twelve performance indicators achieved scores within the “good” performance range, defined as scores of 2.75 and above. However, none of the assessed firms attained an “excellent” rating across any criterion, indicating room for improvement within the professional services segment of the construction industry.

The strongest-performing criterion was clarity of brief and site coordination, which achieved an average score of 3.12 out of 4. This suggests that most consultants and allied professionals demonstrated relatively strong communication, project understanding, and coordination capabilities during project implementation.

In contrast, delivery timeliness emerged as the weakest-performing criterion, recording an average score of 2.50 out of 4. Delays in the submission of deliverables

and completion of assigned tasks remain a notable challenge affecting overall project efficiency and execution.

Project schedule adherence was moderate, with 63 percent of firms completing assignments within planned timelines. Specifically, five out of eight assessed firms met their scheduled delivery periods, while the remaining firms exceeded planned completion durations. This indicates inconsistencies in project execution capacity across service providers.

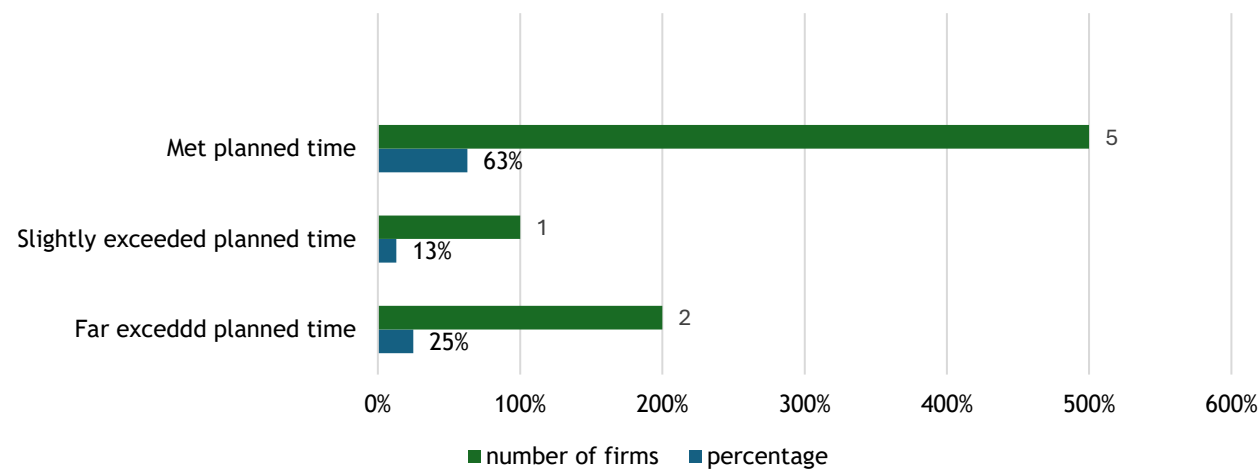
Cost estimation accuracy was identified as the most significant systemic weakness among consultants and allied professionals. Only one out of eight firms-maintained project cost deviations within the acceptable threshold of 5 percent, representing just 13 percent of compliance. The remaining 87 percent of firms exceeded the acceptable deviation margin, suggesting weaknesses in cost forecasting, budgeting precision, and financial planning during project implementation.

Overall, the findings suggest that while consultants and allied professionals demonstrate relatively adequate coordination and technical management capabilities, persistent weaknesses in delivery timelines and cost estimation accuracy continue to undermine efficient project delivery within the construction industry.

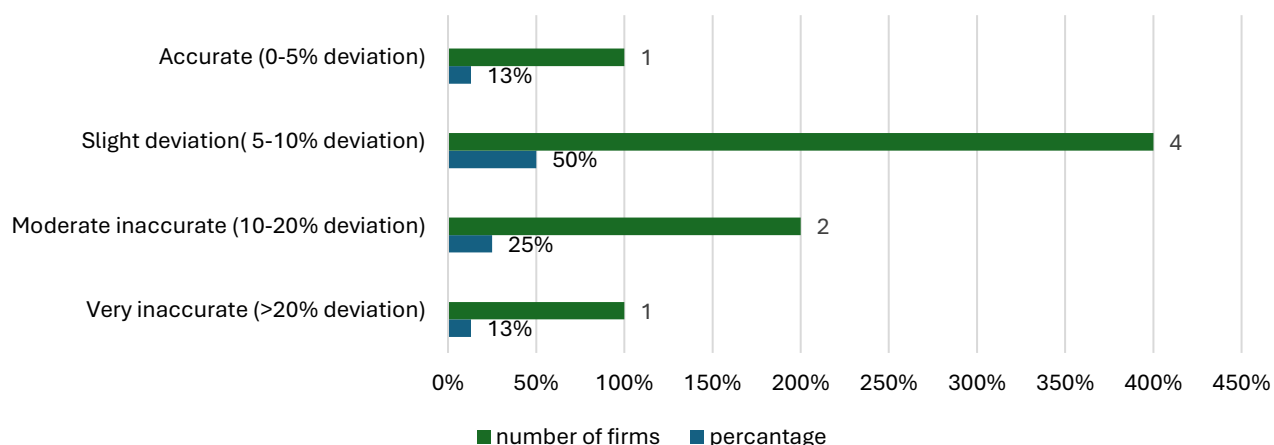
4.5.8 Project Delivery Performance

Schedule adherence was mixed – 63 percent of firms met planned timelines, but two firms far exceeded them. Cost estimation was the most systemic concern, with 87 percent of firms deviating beyond the 5 percent accuracy threshold.

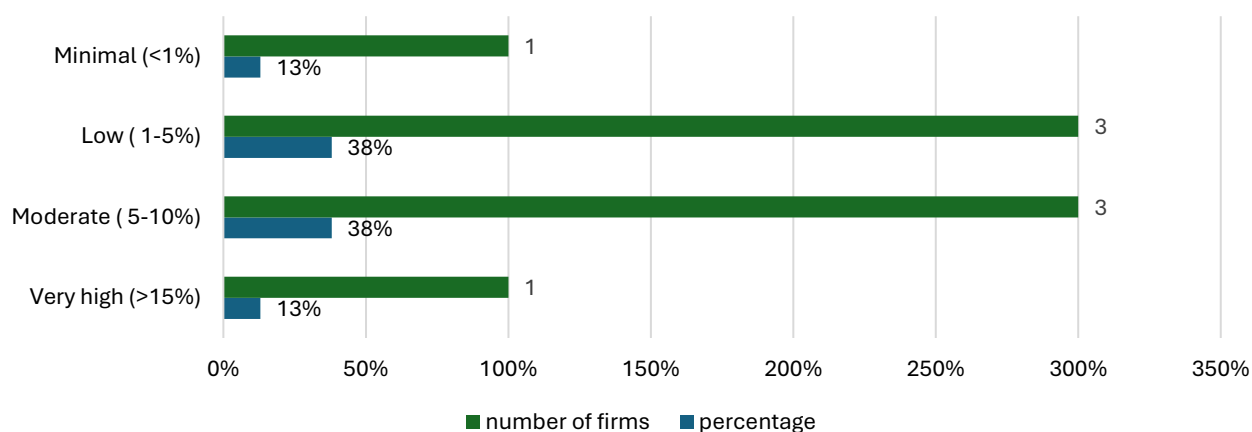
Figure 38: Schedule Adherence



Source: CIC Survey, 2025/26

Figure 39: Cost Estimation Accuracy

Source: CIC Survey, 2025/26

Figure 40: Contract Variation exposure

Source: CIC Survey, 2025/26

Most firms fell in the Low to Moderate variation range. One firm reported Very High exposure, indicating significant consultant-driven scope changes affecting the final contract sum.

4.5.9 Regulatory body performance

Fairness and consistency crossed the good threshold at 3.00. Regulatory efficiency and compliance support both scored 2.62, indicating the regulatory framework is not providing sufficient guidance or timely processing to adequately support the industry.

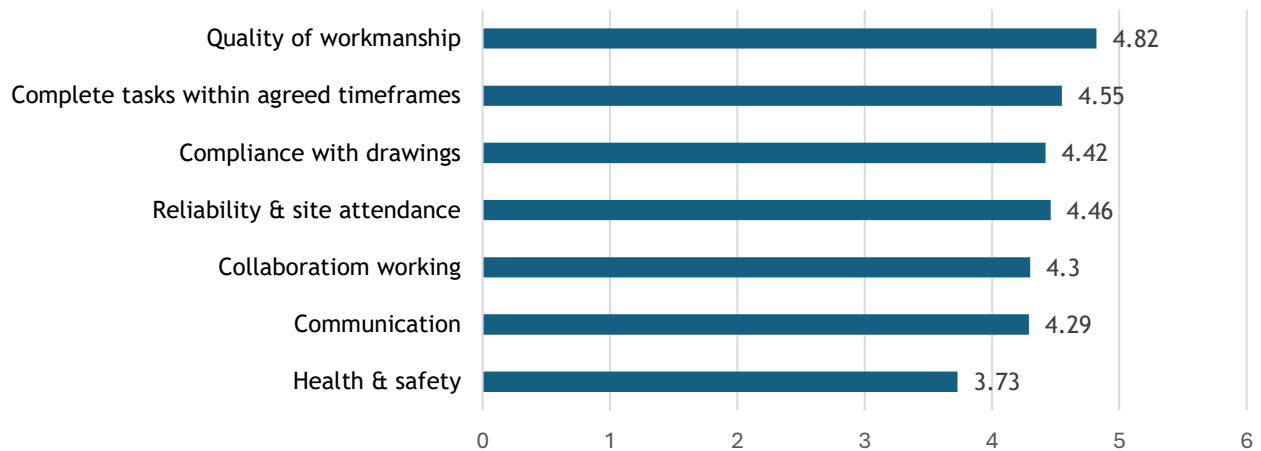
Table 20: Individual firm summary

FIRM	SCHEDULE	COST ACCURACY	VARIATION	PROFILE
1	Far exceeded	Very inaccurate	Very high	Mixed
2	Met planned	Slight deviation	Low	Mostly Good
3	Far exceeded	Moderately inaccurate	Low	Predominantly Excellent
4	Slight exceed	Accurate	Moderate	Good/Fair balance
5	Met planned	Slight deviation	Minimal	Mostly Fair
6	Met planned	Moderately inaccurate	Moderate	Good/Excellent
7	Met planned	Slight deviation	Low	Consistently Good
8	Met planned	Slight deviation	Moderate	Consistently Good

Source: CIC Survey, 2025/26

4.5.10 Analysis of Individual Artisans Performance

Figure 41: Performance Indicator Scores – average out of 5



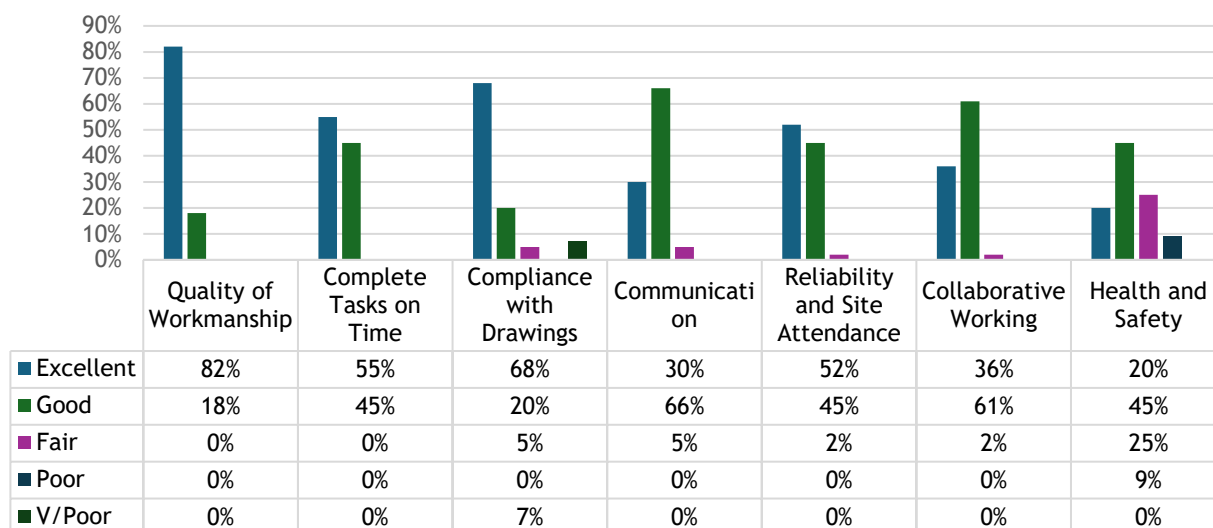
Source: CIC Survey, 2025/26

The survey of 44 artisans across all four regions of Eswatini recorded an overall performance score of 87 percent, indicating generally strong artisan performance. Workmanship was identified as the strongest-performing area, with consistently high ratings across respondents. However, one performance indicator scored below the good-performance threshold, revealing notable gaps in communication and business-related competencies.

The survey also highlighted a significant gender imbalance within the sector, with males accounting for 91 percent of respondents and females only 9 percent. Additionally, late payment and non-payment by clients were identified as the most significant challenges affecting artisans across all regions and trades. Overall, while technical performance among artisans remains strong, challenges relating to skills development, inclusivity, and financial sustainability persist within the sector.

Six of seven indicators scored above 4.0 (Good). Health & Safety understanding was the only exception at 3.73. The dashed orange line marks the good threshold (4.0) and the red dotted line the overall average (4.37).

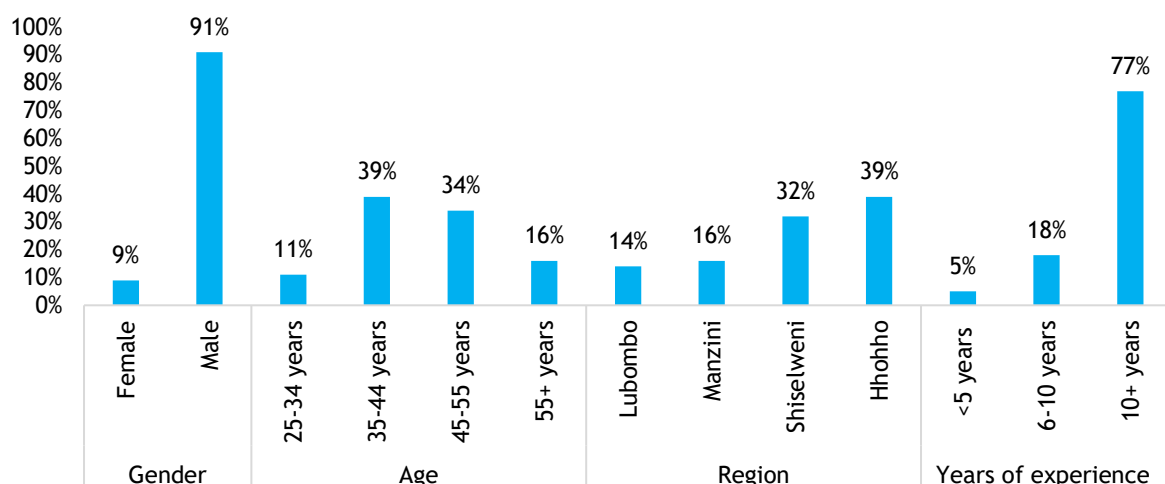
Figure 42: Rating Distribution of Individual Artisans by Indicator



Source: CIC Survey, 2025/26

The chart above shows the full spread of Excellent, Good, Fair, Poor, and Very Poor responses for each indicator. Workmanship and task completion are dominated by Excellent and Good. Health & Safety has the widest spread including Poor ratings.

Figure 43: Summary of Respondent Characteristic



Source: CIC Survey, 2025/26

Male respondents accounted for 91 percent of the total, with female respondents at only 9 percent. The limited female representation underscores the need for targeted programmes to encourage greater female participation in the construction trades. On top of that, the 35-44 bracket was the largest at 39 percent, followed by 45-54 at 34 percent, and 55+ at 16 percent. Only 11 percent were aged 25-34, raising concerns about workforce succession and skills renewal as the current artisan base ages out of the sector.

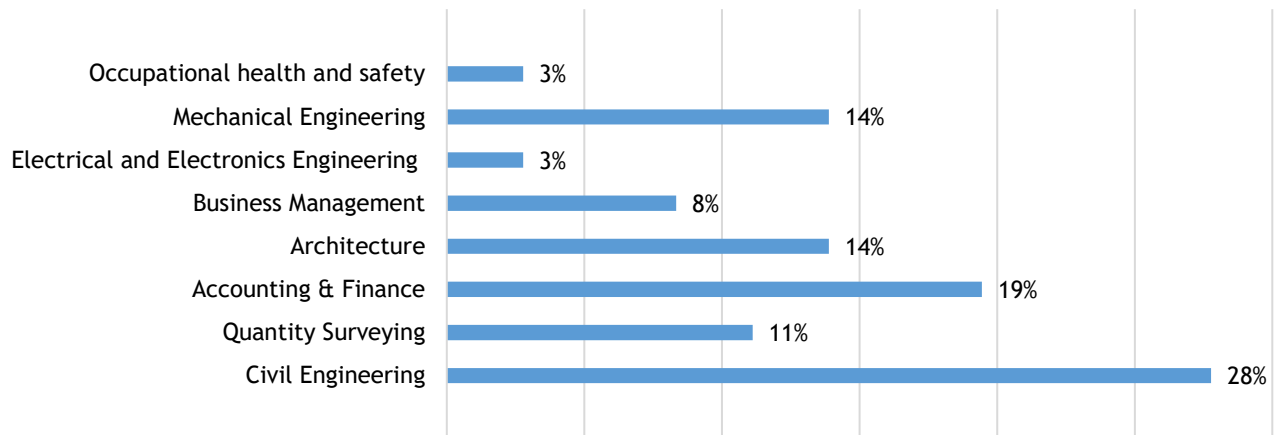
4.5.11 Workforce Development and Industry Alignment

The Construction Industry Council of Eswatini (CIC), in partnership with the Eswatini Youth Empowerment Programme (EYEP), implemented a six-month internship programme designed to equip young graduates with practical industry experience and bridge the gap between academic training and professional practice. A total of 57 interns participated in this programme.

To evaluate programme effectiveness, a structured feedback survey was administered at the conclusion of the internship period. Of the 57 interns, 36 completed and returned the survey. An additional 12 interns provided partial or contextual information outside the formal survey instrument, while 9 interns could not be contacted for feedback.

The overall findings indicate a highly successful programme. Interns reported strong satisfaction levels, with an average overall satisfaction score of 4.25 out of 5.00 (85 percent). The willingness-to-recommend score was exceptionally high at 4.81 out of 5.00 (96 percent), reflecting near-universal endorsement by participants. Thirteen interns (36 percent) secured employment within or shortly after the programme period.

Key areas requiring attention include the structured quality of mentorship, alignment of host company placements with interns' academic fields, and the need for more frequent programme check-ins.

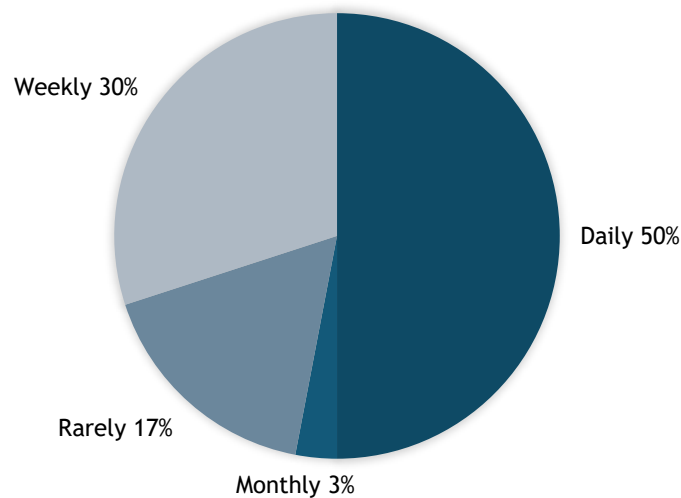
Figure 44: Interns Field of Study

Source: CIC Survey, 2025/26

Figure 45: Skills Gaps Identified by Interns

Source: CIC Survey, 2025/26

Figure 46: Supervision Frequency



Source: CIC Survey, 2025/26

The graph shows that 50 percent of interns rated supervision as daily, indicating that half of the interns received regular and consistent supervision. A further 30 percent reported weekly supervision, while 17 percent indicated that supervision was provided rarely. Only 3 percent reported monthly supervision. Overall, the results suggest that supervision was generally frequent, although there is room to improve consistency for interns who receive supervision rarely or only monthly.

4.5.12 Key findings on CIC-UNDP Internship Programme

- Overall satisfaction 4.25/5 and willingness-to-recommend 4.81/5 – near-universal endorsement from interns across all fields and placement types.
- 36 percent of interns secured employment during or shortly after the programme – a strong result for a six-month scheme in a competitive labour market.

- 80 percent of interns received daily or weekly supervision. Learning opportunities (4.44/5) and industry confidence (4.44/5) were among the top-rated indicators.
- Structured mentorship scored only 3.64/5 – the lowest rated indicator in the entire survey – indicating that formal mentorship planning was inconsistently applied across host companies.
- 81 percent of interns felt their academic training did not fully prepare them for the workplace, confirming a significant theory-to-practice gap in Eswatini's construction education pipeline.
- 17 percent of interns in site roles did not receive required PPE – a compliance failure that requires immediate host company vetting reform.
- Several interns left early due to poor treatment, disrespectful workplaces, or misaligned placements. Qualitative feedback includes reports of mental health impacts from unsupportive environments.

5. Monitoring & Assessment of Trainings

The Construction Industry Council (CIC) implemented a series of targeted training programmes during FY 2025/2026 as part of its broader contractor development and sector capacity-building strategy. These initiatives were designed to enhance technical competence, strengthen regulatory compliance, and improve safety and project delivery outcomes within the construction industry.

Overall, the programmes demonstrated strong participation levels and positive learning outcomes, with increasing evidence of skills transfer into workplace practice. However, gender disparities and technical depth in certain programmes remain key areas for improvement.

5.1 Health & Safety Training for RES Contractors

The Health & Safety training programme aimed to improve compliance with national safety regulations and strengthen risk management practices among emerging contractors.

5.1.1 Assessment

The training successfully achieved its intended objectives, particularly in addressing knowledge gaps related to hazard identification, risk mitigation, and compliance with construction safety requirements. The programme recorded encouraging progress in gender inclusion, with female participation slightly exceeding male participation (53 percent compared to 47 percent), demonstrating increased participation of women in safety-related roles within the construction sector. Participants indicated improved preparedness for site inspections and a stronger

understanding of occupational health and safety protocols, contributing towards improved safety awareness and risk management practices.

However, feedback from participants highlighted the importance of strengthening the sustainability of the programme outcomes through regular refresher training, increased use of practical demonstrations to reinforce theoretical concepts, and continuous post-training monitoring to assess compliance and ensure that safety practices are effectively implemented on construction sites.

5.2 Solar Energy Course

The Solar Energy training programme focused on equipping participants with skills in renewable energy systems, including installation, maintenance, and energy efficiency practices.

5.2.1 Assessment

The programme adopted a blended learning approach that integrated theoretical instruction with practical application to enhance participants' understanding and ability to apply renewable energy concepts within real-world construction environments. Participant evaluations reflected high levels of satisfaction across all assessment areas, highlighting the programme's relevance, quality of facilitation, and effectiveness in improving technical knowledge and practical confidence.

Despite the positive outcomes achieved, gender representation remains a significant area requiring attention. Male participants accounted for approximately 90 percent of the programme participants, while female participation remained limited. This disparity highlights ongoing barriers affecting women's participation in technical renewable energy disciplines and underscores the need for targeted inclusion

strategies, such as improved outreach, awareness initiatives, and support mechanisms to encourage greater female participation in future programmes.

5.2.2 Participant Evaluation Summary

Evaluation Criterion	Score
Overall Satisfaction	4.6 / 5
Facilitator Effectiveness	4.7 / 5
Confidence to Apply Learning	4.7 / 5
Course Relevance	5.0 / 5
Recommendation Rate	100%

5.2.3 Skills Transfer

The assessment of skills transfer following the programme indicates that participants demonstrated varying levels of application of the knowledge and skills acquired. Approximately 20 percent of participants reported immediate application of the skills gained, indicating that some participants were able to integrate the knowledge directly into their work environments. A further 60 percent indicated partial application, suggesting that while the training improved their technical understanding, additional workplace exposure, practical opportunities, or support may be required to fully implement the acquired skills. The remaining 20 percent reported delayed or no application, primarily due to limited opportunities, readiness constraints, or contextual factors affecting immediate implementation.

5.2.4 Areas of Improvement

Although the programme achieved positive outcomes, participants identified several areas where improvements could further enhance its effectiveness and practical impact. Key recommendations included extending the duration of hands-on practical sessions to provide deeper experiential learning, increasing exposure to industry standards and technical tools such as PVsyst, and introducing more flexible training schedules to accommodate working professionals. Additionally, participants recommended the inclusion of pre-course electrical fundamentals to ensure that individuals with limited technical backgrounds have the necessary foundation to fully benefit from the programme.

5.3 Contracts Management for Project Owners

The Contracts Management Training Programme was implemented to strengthen contract administration, governance, and project management capabilities among key project stakeholders, particularly within parastatal institutions involved in infrastructure delivery. The programme focused on improving participants' understanding of contractual obligations, risk management processes, and effective contract administration practices to enhance project performance and minimise contractual disputes.

5.3.1 Assessment

The training successfully enhanced participants' capacity in several critical areas, including a deeper understanding of standard construction contract frameworks such as JBCC and FIDIC, improved awareness of contractual risk allocation and compliance requirements, and strengthened knowledge of claims management and dispute avoidance mechanisms.

Participants demonstrated increased confidence in managing contractual risks, interpreting contract provisions, maintaining appropriate project documentation, and applying structured approaches to dispute prevention. These improved competencies are expected to contribute towards stronger project governance, improved decision-making, and more effective management of construction projects, ultimately supporting better delivery outcomes and reducing delays and disputes.

5.4 Internships: CIC-EYEP Programme (2nd Cohort)

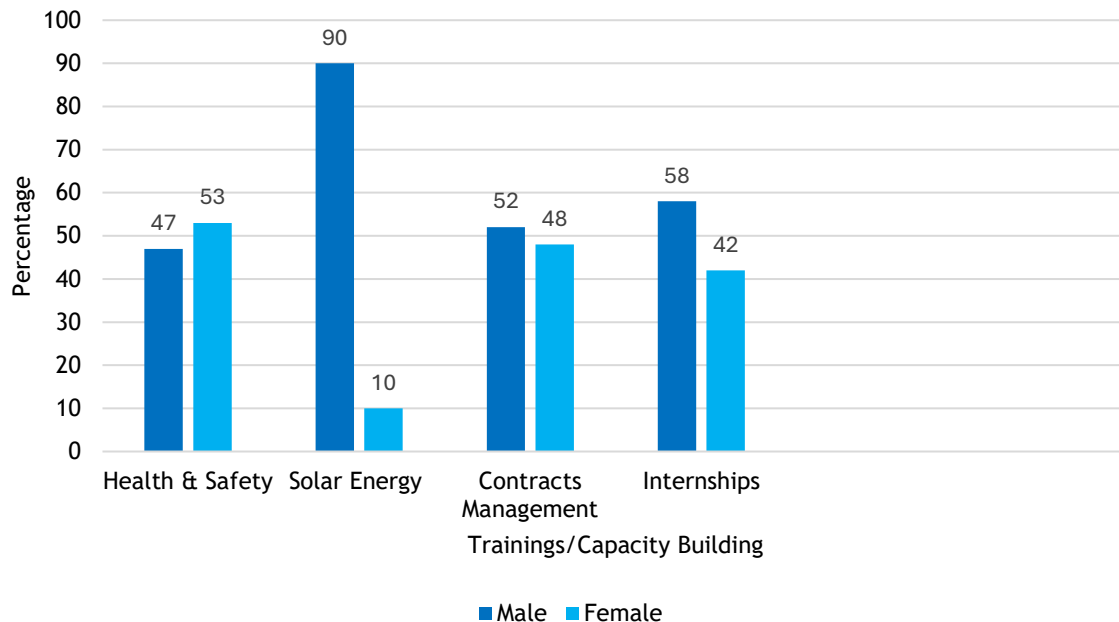
The CIC-EYEP Internship Programme continued to play a significant role in addressing youth unemployment and bridging the skills gap within the construction industry. During the reporting period, a total of 62 interns were placed under the programme, with female participants accounting for 42 percent and male participants representing 58 percent of the cohort. The programme provided graduates with practical workplace experience, enabling them to enhance both their technical and administrative competencies while gaining exposure to industry best practices.

Feedback received from participants indicated notable improvements in their professional skills, confidence, and readiness for employment. Host companies also benefited from the programme by strengthening their mentorship and training capabilities, thereby contributing to the development of future industry talent. Furthermore, the initiative fostered stronger collaboration between government and industry stakeholders, supporting national efforts to develop a sustainable pipeline of skilled professionals for the construction sector.

5.5 Gender Participation Analysis Across Programmes

The analysis reveals significant variation in gender participation across programmes.

Figure 47: Gender Participation Across Capacity Building Programmes



The gender distribution across the various training and development programmes revealed notable differences in participation levels. The Health and Safety Training programme achieved gender parity, with female participation slightly exceeding that of males, demonstrating strong inclusivity within this area. Similarly, the Contracts Management Training programme recorded near-equal representation between male and female participants, reflecting balanced access to professional development opportunities.

In contrast, the Solar Energy Training programme exhibited a significant gender imbalance, with male participants accounting for approximately 90 percent of enrolment. The CIC-EYEP Internship Programme also reflected a moderate disparity,

with males constituting 58 percent of participants compared to 42 percent for females. These variations suggest that gender disparities are not uniform across programmes but are influenced by the nature of the training and the broader industry context.

The observed patterns may be attributed to several factors, including prevailing perceptions of technical and engineering-related occupations, the accessibility of training opportunities and recruitment practices, as well as societal norms that continue to influence career choices among men and women. These findings highlight the need for targeted gender inclusion interventions aimed at increasing female participation in traditionally male-dominated fields, particularly within engineering, construction, and renewable energy disciplines. Strengthening outreach initiatives, mentorship programmes, and awareness campaigns will be critical in promoting greater gender diversity and ensuring equitable access to opportunities across the sector.

5.6 Host Company Distribution of Interns

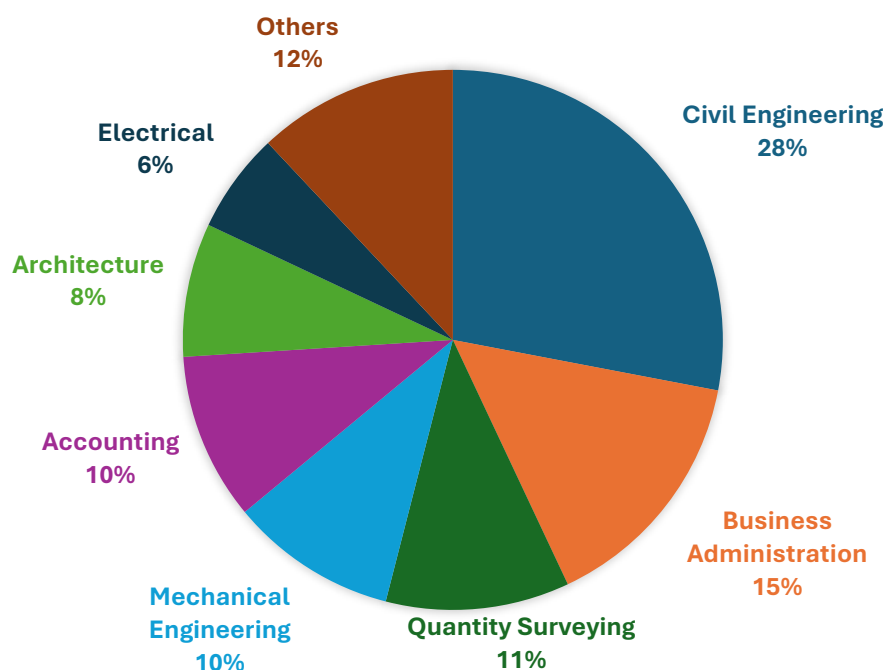
The placement of interns under the CIC-EYEP Programme was distributed across 15 host companies, reflecting broad industry participation in skills development initiatives. However, the distribution of interns was not evenly spread across participating firms. The three largest host companies collectively absorbed approximately 45 percent of all interns, demonstrating their significant capacity and commitment to workforce development. A second group of medium-sized contributors accommodated between 5 and 11 percent of interns each, while smaller firms supported between 2 and 4 percent of placements.

The distribution pattern indicates that internship training capacity remains concentrated among a relatively small number of companies. While the strong involvement of leading firms has been instrumental in the success of the programme, there is an opportunity to broaden participation across the industry. Encouraging greater involvement from small and medium-sized contractors would help diversify training opportunities, expand the number of available placements, and strengthen the industry's collective contribution to developing future construction professionals. Increased participation from a wider range of companies would also enhance exposure to different work environments and technical specialisations, thereby enriching the overall learning experience for interns.

5.7 Industry Skills Demand Analysis

The demand for skills is heavily concentrated in technical and engineering fields.

Figure 48: Industry Skills Demand Distribution



The analysis of internship demand by field of study revealed a strong preference for engineering and construction-related disciplines. Civil Engineering accounted for the largest share of demand at 28 percent, highlighting its critical role in supporting infrastructure and construction activities. This was followed by Business Administration at 15 percent and Quantity Surveying at 11 percent, indicating a substantial industry need for professionals with expertise in project management, contract administration, and cost control. Collectively, engineering-related disciplines represented more than 60 percent of total demand, underscoring the sector's continued reliance on technical and specialised skills.

In contrast, relatively lower demand was observed in support functions such as Human Resources, Marketing, and Supply Chain Management, each accounting for approximately 2 percent of demand, while Operations-related disciplines represented only 1 percent. Although these fields play an important role in organisational effectiveness, their lower representation suggests that current industry priorities remain focused on addressing technical skills requirements.

These findings have important implications for skills development planning and curriculum design. Training institutions and industry stakeholders should continue to prioritise engineering and construction-related programmes to align with labour market demand while ensuring that complementary managerial, administrative, and support skills are not overlooked. A balanced approach will be essential to developing a workforce capable of meeting both the technical and operational needs of the construction sector.

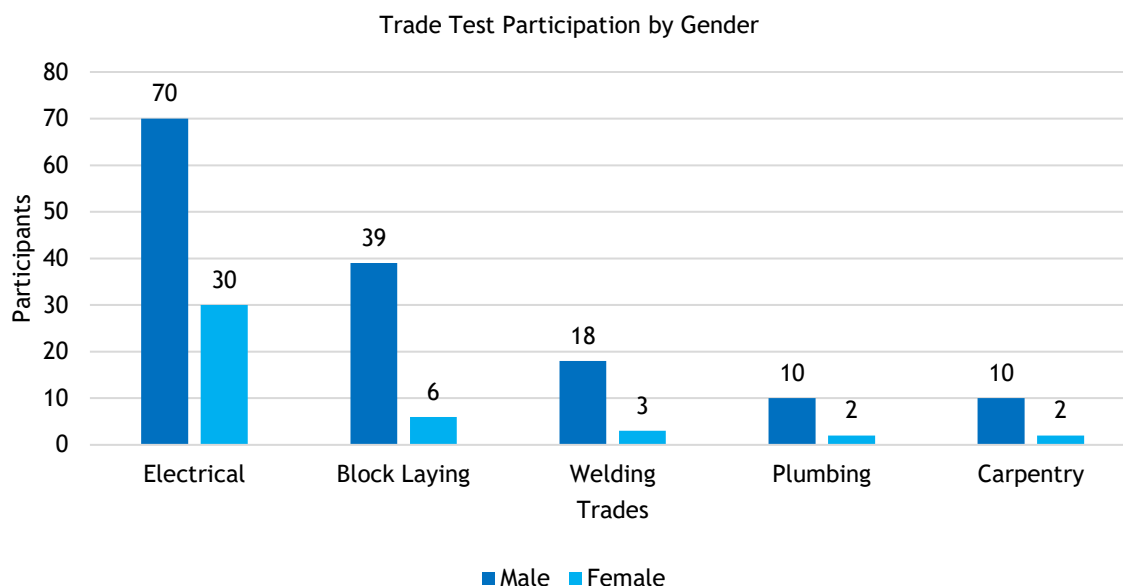
5.8 Trade Tests and Community Resilience Sensitisation

The Trade Testing and Community Resilience Sensitisation Programme was implemented to enhance the recognition and certification of artisanal skills within the construction sector while promoting sustainable livelihoods and improved employment opportunities. The programme provided artisans with an opportunity to have their competencies formally assessed and validated, thereby strengthening their credibility and competitiveness in the labour market. In addition, the sensitisation component focused on raising awareness of safe construction practices, community resilience, and industry standards, contributing to improved quality, safety, and professionalism across the sector. Through these interventions, the programme supported workforce development, skills formalisation, and the creation of safer and more resilient communities.

5.9 Grade 3 Trade Testing by Trade and Region

A total of 171 artisans participated across five trades.

Figure 49: Participation by Gender



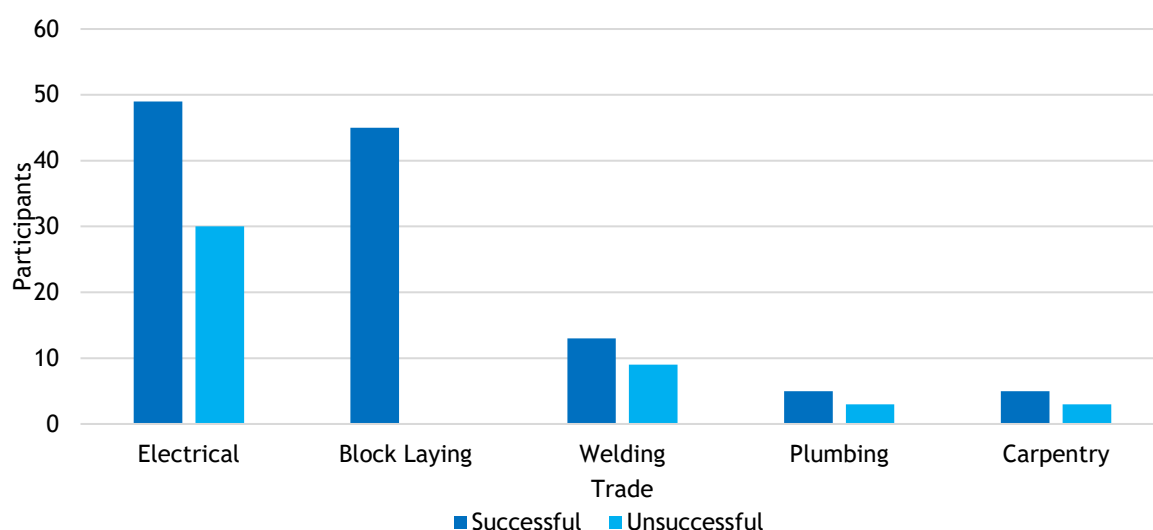
The analysis of trade test participation revealed a significant gender imbalance across all assessed trades, with male candidates overwhelmingly outnumbering their female counterparts. The disparity was most pronounced in the Electrical trade, where 70 male candidates participated compared to only 9 female candidates. Similar trends were observed across the remaining trades, with female participation consistently remaining below 15 percent of total candidates.

These findings suggest the existence of persistent structural and socio-cultural barriers that continue to limit the entry and participation of women in technical and trade-related occupations. Factors such as traditional perceptions of gender roles, limited exposure to technical career pathways, and challenges in accessing training opportunities may be contributing to the low levels of female representation.

Addressing these barriers will require targeted interventions aimed at encouraging greater participation of women in technical trades through awareness campaigns, mentorship programmes, skills development initiatives, and inclusive recruitment strategies.

5.10 Trade Test Performance

Figure 50: Trade Test Performance Outcomes



The trade test results revealed varying levels of performance across the different trades. Block-laying recorded the strongest outcome, achieving a 100 percent pass rate and demonstrating a high level of candidate preparedness and competency. The Electrical trade attracted the highest number of participants, reflecting strong demand for certification in this field; however, it also recorded a notable number of unsuccessful candidates, indicating challenges in meeting the required competency standards. Welding candidates demonstrated moderate performance, with results

suggesting a reasonable balance between participation and successful completion. In contrast, Plumbing and Carpentry recorded relatively low participation levels and weaker performance outcomes compared to the other trades.

The findings indicate that additional support mechanisms may be required to improve performance in the Electrical trade, particularly given its high enrolment levels and strategic importance to the construction sector. The success achieved in Block-laying provides an opportunity to identify and replicate effective training approaches, assessment preparation methods, and industry support mechanisms across other trades. Furthermore, the lower-performing trades, particularly Plumbing and Carpentry, would benefit from targeted capacity-building interventions, enhanced training programmes, and increased stakeholder engagement to improve both participation rates and candidate success outcomes.

5.11 Community Resilience Sensitisation

The programme also strengthened participants' understanding of hazard-resistant construction practices and the importance of resilience in the built environment. Through targeted sensitisation activities, artisans were exposed to key principles of flood and wind-resistant construction, structural safety requirements, and compliance with applicable building regulations and standards. This knowledge equipped participants with the skills necessary to incorporate resilience measures into their work, thereby improving the quality, safety, and durability of construction projects.

By integrating technical skills development with community resilience awareness, the programme ensured that artisans are not only competent in their respective trades but are also capable of contributing to disaster risk reduction and the

development of safer, more resilient communities. This approach supports national efforts to strengthen preparedness for natural hazards while promoting sustainable construction practices across the sector.

5.12 Areas of Improvement and Challenges

The assessment identified several challenges that continue to affect the effectiveness and inclusivity of skills development initiatives within the construction sector. Notable skills gaps were observed in key technical trades, particularly Electrical, Plumbing, and Carpentry, where performance outcomes indicated the need for enhanced training and competency development. These gaps have implications for both workforce quality and the industry's ability to meet growing demand for skilled artisans.

The assessment also highlighted the persistent underrepresentation of women across technical training programmes, pointing to the need for targeted interventions to improve female participation in traditionally male-dominated trades. In addition, findings revealed a need for more comprehensive pre-assessment preparation, including structured polish-up sessions to better equip candidates for trade testing and competency evaluations. Furthermore, there remains an ongoing requirement for mentorship programmes and refresher training to reinforce skills acquisition, support continuous professional development, and improve long-term performance outcomes among trainees and certified artisans.

5.13 Recommendations

To improve the effectiveness of future training and trade testing programmes, efforts should focus on increasing gender inclusion, particularly in technical and engineering-related fields, through targeted recruitment, mentorship, and

awareness initiatives. Training curricula should be regularly reviewed and strengthened to align with industry needs, with greater emphasis on practical learning and enhanced preparation for trade assessments, especially in trades with high failure rates.

Mentorship, refresher training, and continuous professional development opportunities should be expanded to support long-term skills development and improve workforce competency. Greater participation of small and medium-sized contractors in internship and workplace-based learning programmes should also be encouraged to broaden access to practical training opportunities. In addition, training programmes should be made more accessible and inclusive, supported by stronger monitoring and evaluation systems to track outcomes and inform improvements. Strengthened collaboration between industry, training institutions, and government will be essential to developing a skilled, inclusive, and competitive workforce that supports sustainable growth within the construction sector.

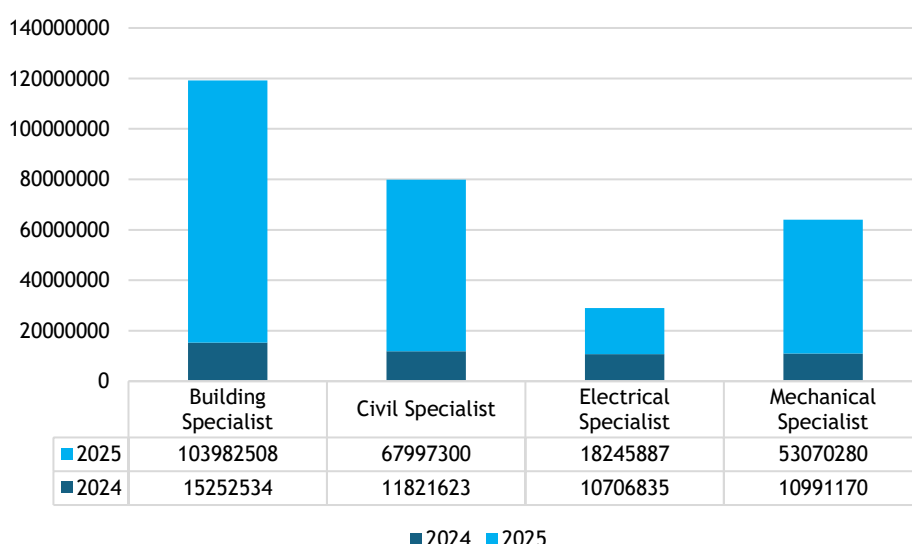
6. Construction Industry Challenges

6.1 Concentration of Growth in High-Value Projects

The sector is experiencing rapid growth in total project value, but this expansion is not matched by a similar increase in the number of projects. This indicates that growth is being driven by a small number of large-scale, capital-intensive projects, rather than widespread industry activity. While this boosts headline performance, it limits participation across the contractor base and reduces opportunities for smaller firms. As a result, industry growth is not inclusive, and capacity across many firms remains underutilised.

6.2 Limited Local Capacity in Specialised Technical Works

Figure 51: Limited Local Capacity in Specialised Technical Works in Construction Industry

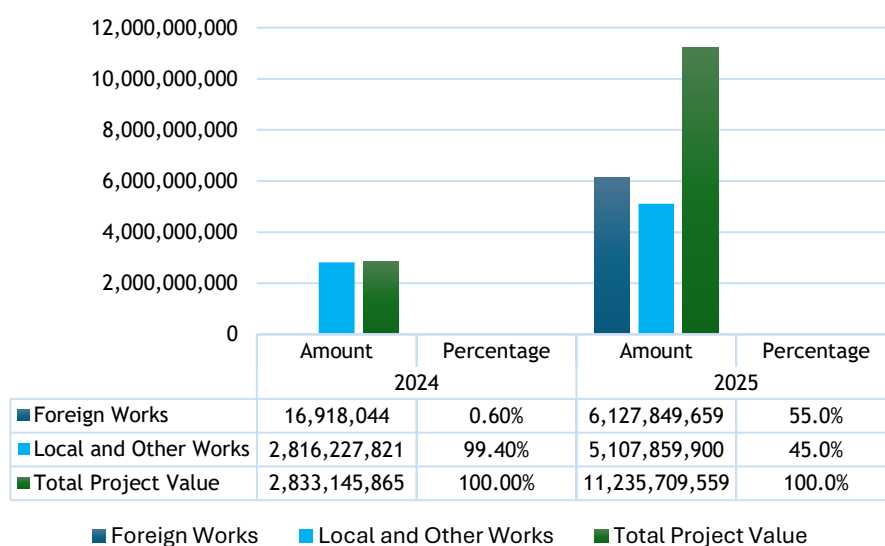


Source: CIC Project Register 2025/26

The sharp increase in civil, mechanical, and electrical specialised works reflects a shift toward more technically complex projects. However, the local industry has not developed sufficient depth in these specialised areas, particularly in engineering-intensive disciplines. This creates a mismatch between demand and capability, where local firms are unable to fully participate in high-value segments. Without targeted capacity development, this gap will continue to widen as the industry becomes more technically advanced.

6.3 Rising Dependence on Foreign Contractors

Figure 52: Foreign Works Share on Total Project Value in the Construction Industry



Source: CIC Project Register 2025/26

Foreign contractor participation has increased significantly, particularly in high-value and technically complex projects. In some cases, a single category of foreign-led work dominates total project value. This suggests that local firms are being bypassed in strategic projects, largely due to capacity constraints. While foreign involvement can improve delivery in the short term, it limits skills transfer, local

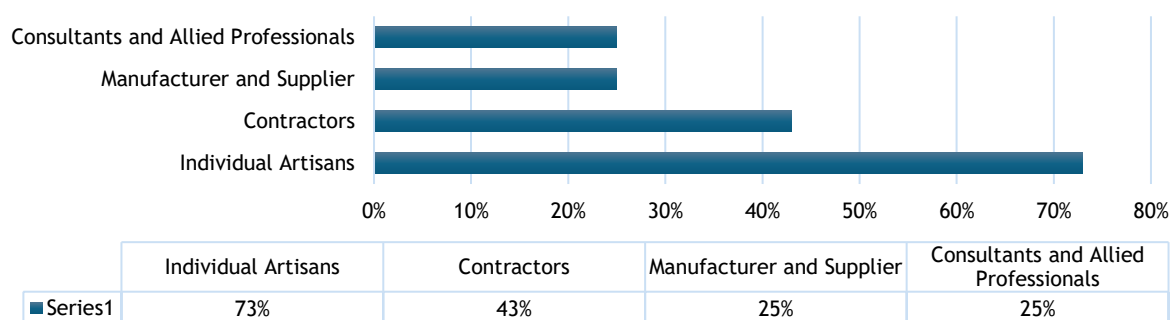
industry development, and retention of economic value, creating long-term dependency risks.

6.4 Extreme Concentration of Project Ownership

Project ownership is heavily concentrated among a small number of government entities and parastatals, with one institution accounting for most of the total project value. This means that the entire construction sector is highly dependent on a few decision-makers and funding streams. Any delays, policy shifts, or budget constraints within these entities can have a disproportionate impact on the entire industry, reducing stability and predictability.

6.5 Systemic Payment Delays and Cash Flow Constraints

Figure 53: Delayed Payments in the Construction Industry



Source: CIC Survey 2025/26

Late payment by project owners is the most critical operational challenge in the industry. Although contractors appear financially stable on paper, their liquidity is largely tied up in unpaid receivables. This creates severe cash flow constraints, preventing them from paying suppliers, sustaining operations, or investing in growth.

The result is a cascading financial strain across the value chain, making this a structural issue rather than an isolated problem. The delayed payment emanates from lack of sufficient funds for public projects and delayed submission of payment certificates on private projects.

6.6 Weak Contractor Base and Underutilised Capacity

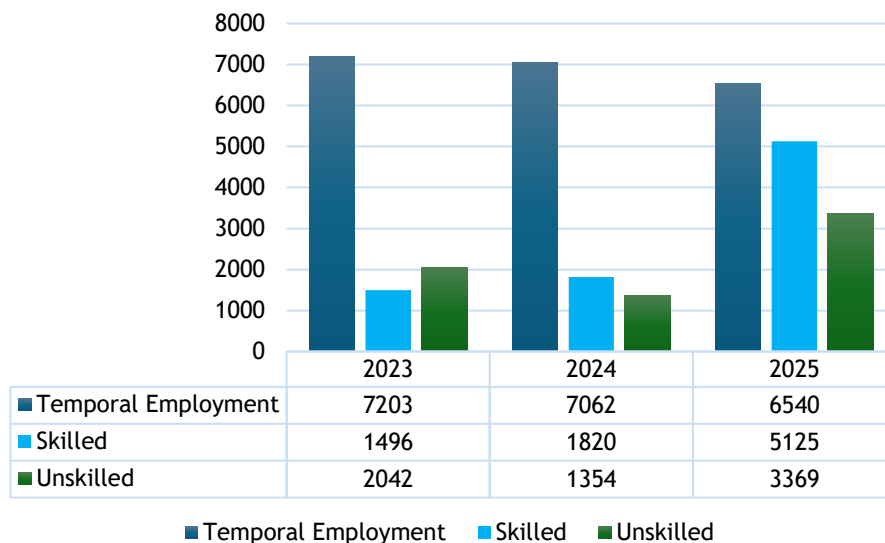
The contractor landscape is dominated by small to medium-sized firms with limited technical and financial capacity. Many contractors manage only a few projects at a time, while a significant proportion have no active projects at all. This indicates inefficient distribution of work and underutilisation of industry capacity. Over time, this weakens firms, reduces competitiveness, and limits the sector's ability to scale.

6.7 Skills Shortages and Low Workforce Progression

Although the industry employs many workers, there is a shortage of high-level technical and supervisory skills. At the same time, workforce data shows limited progression from entry-level to mid-career roles, suggesting weak career pathways and retention challenges. This results in a workforce that is broad but shallow, lacking the depth required for complex project delivery.

6.8 Dominance of Low-Skilled, Temporary Employment

Figure 54: Dominance of Low-Skilled, Temporary Employment



Source: CIC Survey 2025/26

Employment in the construction sector is largely temporary and concentrated in low-skilled roles. While this supports short-term job creation, it does not contribute to long-term skills development or productivity improvement. The lack of permanent, skilled positions indicates that the sector is not transitioning toward a more advanced and professionalised workforce.

6.9 Persistent Gender Imbalance in Technical Roles

The industry remains overwhelmingly male-dominated, particularly in technical and trade-related roles. Female participation, where it exists, is largely concentrated in non-technical areas. This reflects structural barriers to entry, including access to training and workplace conditions. The continued exclusion of women from technical roles represents both a social inequity and a loss of potential talent for the industry.

6.10 Weak Project Planning, Costing, and Execution Efficiency

Project delivery is consistently affected by poor planning, inaccurate cost estimation, and weak contract management. Consultants struggle with cost accuracy, while project owners often initiate projects without fully developed feasibility and budget frameworks. These weaknesses lead to cost overruns, delays, and disputes, reducing overall efficiency and increasing project risk.

6.11 Volatile, Project-Driven Growth Model

Historical trends show that construction growth in Eswatini is highly volatile, driven by a limited number of large projects rather than sustained investment. Periods of rapid expansion are often followed by sharp contractions once major projects are completed. This boom-bust pattern indicates weak pipeline planning and lack of long-term investment coordination, preventing the sector from achieving stable and predictable growth.

7. Construction Industry Performance: Key Findings and Medium-Term Outlook

7.1 Construction Industry Key Findings

The construction industry in Eswatini in 2025 is characterised by strong headline growth but weak structural depth, with performance driven by a narrow base of high-value investments rather than broad-based sector expansion.

A primary finding is that industry growth is highly concentrated in large-scale, capital-intensive projects. While total project values have increased significantly, the number of projects has grown at a much slower rate. This confirms that the sector is expanding in scale but not in participation. As a result, a substantial portion of contractors remain underutilised, and industry growth is not translating into inclusive development or widespread capacity strengthening.

The structure of demand is shifting rapidly toward infrastructure and engineering-intensive works, particularly civil, mechanical, and electrical specialisations. Civil works have emerged as a dominant driver of value, while electrical works have scaled rapidly from negligible levels. This indicates a transition toward more complex project types; however, this shift is not matched by corresponding growth in domestic technical capacity, creating a widening gap between industry demand and local capability.

Another critical finding is the increasing reliance on foreign contractors, particularly in high-value and technically complex projects. Foreign participation has grown significantly and is heavily concentrated in a small number of large projects. This reflects underlying capacity constraints within the local industry and suggests that strategic segments of the market are not being executed domestically. While this

supports short-term delivery, it limits long-term skills transfer and reduces local economic retention.

The industry is also marked by extreme concentration of project ownership, particularly within government and parastatal entities. A single ministry and a single parastatal account for most of the project value, indicating that overall sector performance is highly dependent on a few institutions. This creates systemic vulnerability, as any disruption in these entities' investment pipelines can significantly affect the entire industry.

Financially, the sector is constrained by persistent cash flow challenges driven by delayed payments. Contractors, despite appearing liquid, are heavily exposed to unpaid receivables, resulting in operational strain across the value chain. This payment bottleneck is the most critical structural inefficiency, affecting project delivery, contractor sustainability, and supplier stability.

Labour market analysis reveals that the industry remains labour-intensive but low in technical depth, with employment concentrated in temporary and low-skilled roles. While workforce participation is relatively high, there is limited progression into skilled and supervisory positions. At the same time, the gradual increase in foreign skilled labour highlights persistent domestic skills shortages.

Finally, the sector continues to exhibit a volatile, project-driven growth pattern, with historical evidence showing cycles of rapid expansion followed by contraction. Even during periods of broader economic recovery, construction activity has remained inconsistent, indicating weak pipeline development and limited long-term planning.

7.2 Medium-Term Outlook

The medium-term outlook for the construction industry is moderately positive but structurally uncertain, with growth expected to continue in the short term but facing sustainability risks.

In the near term, the sector is expected to benefit from ongoing and planned large-scale infrastructure investments, including energy, water, and transport projects. These investments are projected to significantly contribute to national economic growth, with construction acting as a key driver of GDP expansion. More broadly, economic growth in Eswatini strengthened to around 4-5 percent in 2025-2026, supported by public and private capital investment.

However, this growth is expected to moderate over the medium term, as the current pipeline of mega-projects is completed and not fully replaced. This reinforces the structural risk that the sector remains dependent on episodic, large-scale investments rather than a stable and diversified project pipeline. A key determinant of future performance will be the sector's ability to transition from project-driven growth to system-driven development. Without improvements in procurement efficiency, payment systems, and project planning, current inefficiencies will continue to constrain productivity and limit the impact of investment.

The outlook also depends heavily on capacity development within the local industry. If skills gap—particularly in specialised technical fields—are not addressed, reliance on foreign contractors is likely to increase further. This would limit domestic industry growth and reduce the long-term developmental impact of construction investment.

8. CONSTRUCTION MONITOR 2025/26

INDICATOR		Q1 (APR-JUN 2025)	Q2 (JUL-SEP 2025)	Q3 (OCT-DEC 2025)	Q4 (JAN-MAR 2026)
ECONOMIC PERFORMANCE OVERVIEW					
GDP GROWTH RATE		-0.2%↑	2.6%↑	2.1%↓	0.01
CONSTRUCTION CONTRIBUTION TO GDP		3.3% ↑	3.8% ↑	3.2% ↓	4.1%
INFLATION		4.0% ↓	3.1%↓	2.7% ↓	2.5% ↓
EXCHANGE RATE		E18.48US\$↓	E18.28/US\$↓	E17.62/US\$↓	E17.11/US\$↓
IMPORTS FROM RSA		82.2↓	77.3%↑	80.3%↑	82.4%↑
LEADING CONSTRUCTION MATERIAL	SOURCED RAW	Steel & Metal, Electrical and Cement	Steel, electrical and plumbing supplies	Steel & Metal, Electrical and Cement	Steel & Metal, Electrical and Cement
CONSTRUCTION & BUILDING ACTIVITY					
BUILDING PLANS APPROVED		102↑	117↑	130↑	112↓
VALUE OF BULIDINGS PLANS (E' 000)		543,818↑	121,588↓	195, 534	177, 352
BUILDINGS COMPLETED	PLANS	13↓	27↑	14	9

VALUE OF COMPLETED BUILDINGS (E' 000)	17,143↓	33,565↑	305, 464	21, 197
NEW BUILDINGS PLANS COMPLETED	8↓	25↑	11	9
VALUE OF NEW COMPLETED BUILDINGS PLANS (E' 000)	12,977↓	29,822↑	272, 959	21, 197
CONTRACTOR ACTIVITY & PROJECT DISTRIBUTION				
NOT REGISTERED WORKS	1.1% (E10.8M)	2.8% (E21.7M)	0.09% (E5.6M)	10.7% (344.6M)
LEADING REGION	Lubombo (46%)	Manzini (45%)	Lubombo(88%)	Shiselweni(43%)
CONTRACTORS REGISTERED	1219↑	461↓	212↓	1641↑
PROJECTS REGISTERED	212 ↑	135↓	134↓	77↓
LEADING WORKS BY CATEGORY				
LEADING LOCAL WORKS	General Building Works (with B1 @ 56%)	General Building Works (with B1 @ 64%)	General Works (with C1 @ 33%)	Civil Works (with C1 @ 58%)

LEADING SPECIALIST WORKS	Electrical Specialist (with ESf @ 100%)	Mechanical Specialist (with Msh @ 98%)	Civil Specialist (with CSc @ 81%)	Civil Specialist (with CSc @ 100%)
LEADING FOREIGN WORKS	Mechanical Foreign	Mechanical Foreign	Mechanical Foreign	Mechanical Foreign
TOTAL FUND VALUE OF FOREIGN CONTRACTORS/ ARTISANS AS A PERCENTAGE OF TOTAL FUND VALUE PROJECTS	9.6%	0.4%	83.4%	25.0%

Source: Construction Project & Contractor Database Analysis 2025/26.

ANNEXURE: SURVEY METHODOLOGY

1. INTRODUCTION

This section outlines the methodology employed by the Research, Training and Business Development (RTBD) Department in administering industry-wide stakeholder surveys within the construction sector. It details the research design, survey implementation process, response rates achieved, and the measures adopted to enhance participation and data completeness across all respondent groups.

A structured questionnaire-based survey approach was adopted. Survey instruments were developed in November 2025 and subjected to internal review and refinement by departmental personnel within the Council to ensure clarity, relevance, and alignment with sector performance indicators.

The finalised Contractor Performance Survey was disseminated on 22 January 2026 using the 2025 CIC contractor database as the primary sampling frame.

Survey Implementation Timeline

Date	Activity
Nov 2025	Development of questionnaires for all stakeholder surveys
Jan 2026	Finalisation and dissemination of Contractor Performance Survey
Jan-Mar 2026	Survey administration, follow-ups, and data collection

1.1 Overview of Survey Design

A total of four structured stakeholder surveys were administered:

- Contractor Performance Survey
- Individual Artisans Survey

- Consultants Survey
- Manufacturers and Suppliers Performance Survey

Each instrument was designed to capture stakeholder-specific performance indicators, operational experiences, and sector participation dynamics. A uniform data collection framework was applied, with adaptations based on respondent accessibility and engagement levels.

2. DATA COLLECTION METHODOLOGY

2.1 Mixed-Mode Data Collection Approach

A mixed-method data collection strategy was employed to improve coverage and response rates. This included:

- Email-based questionnaire distribution
- Telephone follow-ups (up to three contact attempts per respondent)
- Physical/on-site administration where necessary
- Assisted completion for respondents facing literacy or language barriers

The use of multiple channels was necessitated by variability in respondent accessibility, operational constraints, and differing levels of digital responsiveness within the construction industry.

2.2 Sampling Approach and Data Sources

The survey utilised existing institutional databases as sampling frames:

- CIC contractor registration database
- Council stakeholder records (consultants, manufacturers, suppliers)
- Supplementary listings from official institutional platforms

2.3 Data Quality Assurance Measures

To ensure data reliability and validity, the following measures were implemented:

- Verification of respondent contact details prior to distribution
- Cross-checking of duplicate or outdated contacts
- Follow-up validation calls to confirm receipt and eligibility
- Exclusion of incomplete or non-usable responses during data cleaning
- Clarification of ambiguous responses through direct follow-ups

2.4 Ethical Considerations

Participation in all surveys was voluntary. Respondents were informed of the purpose of the study, and all refusals were respected without further persuasion beyond standard follow-up procedures. Confidentiality of individual responses was maintained throughout the data handling process.

3. INDIVIDUAL ARTISANS SURVEY

3.1 Sampling Frame

The target population for the Individual Artisans Survey was derived from an existing contractor database, supplemented with additional records obtained from the council's website. A total of 79 individual artisans were identified and included in the sampling frame.

3.2 Data Collection Approach

A mixed-method approach was employed to administer the survey:

- **Email Distribution:** Surveys were initially distributed via email to artisans with email addresses.
- **Follow-up Calls:** Telephone follow-ups were conducted to confirm receipt of the survey and encourage participation.

During the follow-up process, it became evident that a significant proportion of artisans faced challenges with English proficiency and literacy. As a result, the data collection strategy was adapted to include:

- **Telephone Interviews:** These were conducted to accommodate respondents who were unable to complete the written survey or had no email addresses ensuring inclusivity and improved data coverage.

3.3 Response Rate

Out of the 79 artisans contacted, a total of 46 responses were obtained, representing a response rate of approximately 58 percent. A total of 10 artisans responded to the survey via email without any follow-up calls, indicating voluntary participation.

4. CONTRACTOR PERFORMANCE SURVEY

4.1 Data Collection Approach

The Contractor Performance Survey was administered primarily through email distribution to contractors listed in the database. To improve participation, a structured follow-up process was implemented:

- **Email Invitations:** Surveys were sent to all contractors with available email contacts.

- **Follow-up Calls:** Respondents were contacted via telephone up to three times to confirm receipt of the survey and encourage participation. During this process, it was discovered that some email addresses were no longer in use or that the original contact persons had changed; in such cases, updated contact details and the relevant contact persons were provided.
- **On-site Engagement:** In addition to remote methods, some contractors were approached physically at reception. Approximately 1 in 5 respondents were willing to complete the survey immediately on-site, while others preferred that the survey be sent to them via email.

4.2 Challenges Encountered

Despite these efforts, several constraints affected participation:

- **Mismatch of Respondents:** Individuals who received the emails were often administrative personnel who did not possess the detailed operational information required to complete the survey. The survey required input from multiple departments within organisations, which contributed to delays in response times and, in some cases, non-response.
- **Limited Access to Key Informants:** The relevant personnel (e.g., site-based staff) were typically engaged in fieldwork and were not readily available to respond.
- **Non-response After Requesting Email:** Some respondents who preferred email follow-up did not submit responses after the survey was sent.
- **Non-response and Refusals:** Some contractors declined to participate, and their decision was respected.

- **Low Engagement Despite Follow-ups:** Even after conducting up to three follow-up calls, overall participation remained low.

4.3 Response Rate

A total of 44 responses were obtained from contractors. Given the number of contractors contacted (over 1000) the response rate was considered **low** (approximately 4.4 percent) reflecting the operational and accessibility challenges noted above. Before follow ups were conducted we had 26 voluntary responses from contractors.

4. MANUFACTURERS AND SUPPLIERS PERFORMANCE SURVEY

4.1 Sampling Frame

A total of 112 manufacturers and suppliers were identified and included in the survey.

4.2 Data Collection Approach

The survey followed a similar methodology:

- Surveys were distributed via email to identified firms.
- Follow-up calls were conducted to encourage participation and provide clarification where needed.

4.3 Response Rate

A total of 12 responses were received, representing a response rate of approximately 10.7%, indicating low engagement despite multiple follow-up strategies.

Build it Mbabane was also approached at the reception area, they gave us an email to send through the survey and later a follow up call was made. However, no response was received.

5. CONSULTANTS SURVEY

5.1 Sampling Frame

The Consultants Survey targeted a total of 119 consultants identified from the Contractor database.

5.2 Data Collection Approach

The same data collection strategy was applied:

- Email distribution of survey instruments.
- Follow-up telephone calls (up to three attempts) to prompt responses and encourage completion.

5.3 Response Rate

The survey yielded 8 responses, corresponding to a response rate of approximately 6.7 percent, which is considered low.

6. MEASURES TO ENHANCE PARTICIPATION ACROSS SURVEYS

Across all stakeholder groups, several measures were implemented to improve response rates:

- **Repeated Follow-ups:** Respondents were contacted multiple times (up to three follow-up calls) to encourage participation.
- **Multi-Mode Data Collection:** A combination of email, telephone, and physical approaches were used to reach respondents.
- **Clarification of Purpose:** The purpose and importance of the survey were clearly communicated during follow-up interactions.
- **Flexible Engagement:** Alternative approaches, including assisted completion, were considered to accommodate respondents' availability and constraints.
- **Respect for Voluntary Participation:** Participation was voluntary, and all refusals were respected.