2026 Business Environment Survey:

From Constraints to Jobs: What Business Needs Fixed

Key findings with audience-specific annexures

Commissioned by the Cape Chamber | Design, analysis and reporting by Impact Economix | Survey implemented by the Bureau of Economic Research

Detailed online survey dashboard and results data: https://capechamber.co.za/2026-business-environment-survey-findings

Survey Fieldwork 20 July to 13 August 2026

August 2026

Cape Chamber
OF COMMERCE AND INDUSTRY

What this presentation covers

1 **The survey, and who responded**
What was asked, of whom, and how far the numbers can be pushed

2 **The headline findings**
Three slides carrying the whole result: what leads, who says it, and what sits behind it

3 **The four levels in detail**
The firm, the business precinct, the sector, and the province, in that order

4 **The picture across all four**
All 61 constraints ranked together, and whose problem each one is

5 **What happens next**
Six groups to convene, and two questions to add before 2027

6 **For your audience**
Target group specific slides: Council and members, sector bodies, municipalities and CIDs, government and SOEs, journalists, academia, and national leadership

The survey in one slide

Businesses were asked how seriously 61 named constraints limit their growth and investment, at four levels: their own firm, their business precinct, their sector, and the province.

61	4	369	308
constraints rated	levels asked about	businesses nationally	in the Western Cape
each on a three-point scale	firm, precinct, sector, province		of the 369 nationally

Fieldwork ran from 20 July to 13 August 2026. The survey was distributed through Chamber email campaigns, a paid social campaign, the Chamber newsletter and website, a CEO video, a QR code, regional chambers, and 29 industry bodies.

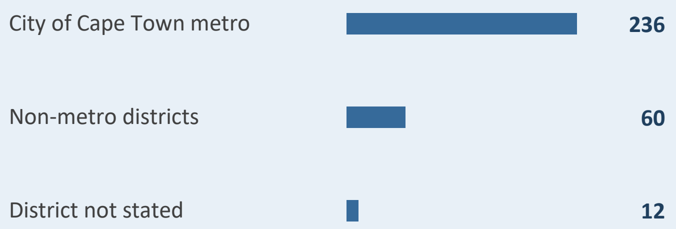
> These results are the direct testimony of the 369 businesses reached through chamber and industry networks. They are not estimates of what all businesses think. No margin of error applies, and no statement of the form "a given percentage of Western Cape businesses" can be drawn from them.

Base: every record answering at least one of the 61 rated constraints. All percentages in this deck are percentages of valid responses; answers of not applicable are excluded from the denominator, so the number of valid responses varies from one constraint to the next and is shown with every figure. Source: 2026 National Business Environment Survey.

Who responded

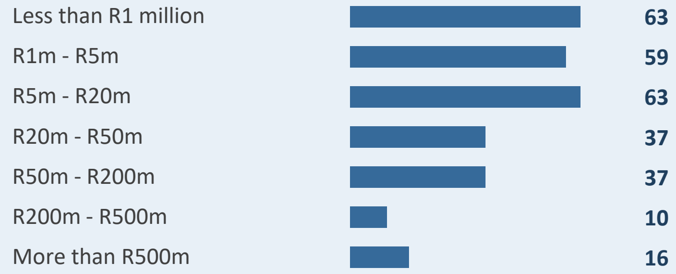
Every group shown here has 20 or more respondents, so each one is analysed in its own right through the rest of the deck.

Geography, within the Western Cape

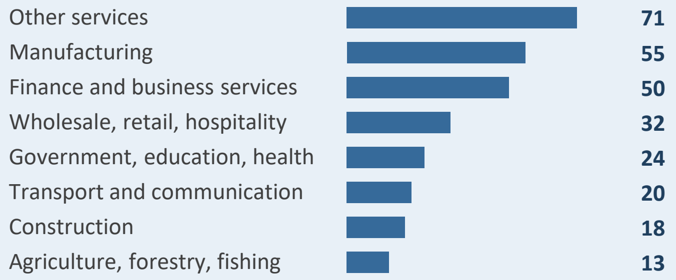


Employment size

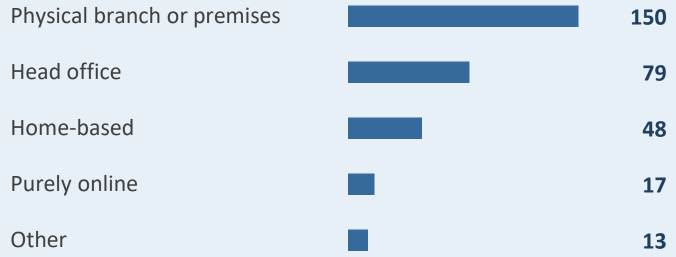
Annual turnover



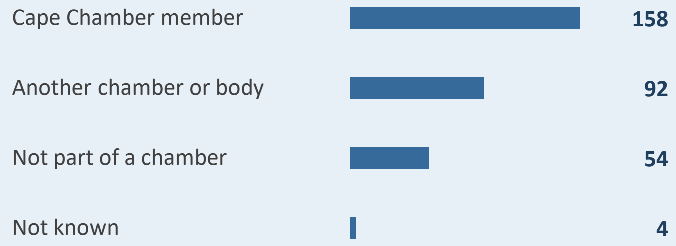
Broad sector



Type of business location



Chamber affiliation



Base: 308 Western Cape respondents. Counts are respondents. The bases shown under each percentage later in this deck are valid responses to that constraint, which are always fewer. Geography also covers 56 respondents outside the Western Cape, of whom 25 are in Gauteng. Source: 2026 National Business Environment Survey, analysis workbook sheets FIG_EMPLOYMENT, FIG_TURNOVER, FIG_SECTOR, FIG_LOCATION and FIG_CHAMBER.

CONSTRAINTS RATED AS SERIOUS BY MORE THAN HALF OF BUSINESSES NATIONALLY

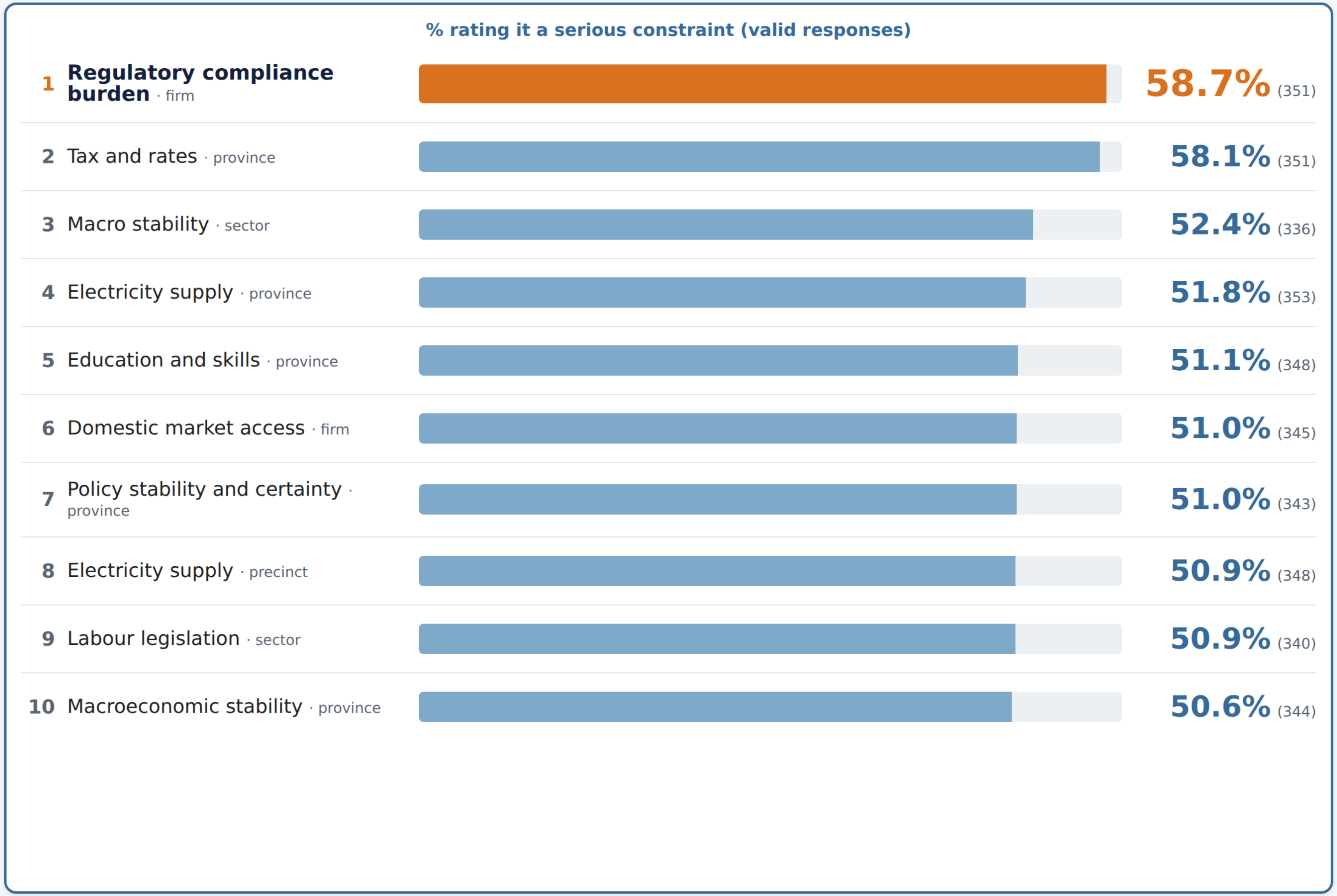
NO. 1 OF 61

Regulatory compliance burden

58.7%

of 351 businesses rate it a serious constraint

Western Cape: No. 1 too — **58.0%** (295)



Base: 369 businesses nationally answered at least one of the 61 rated constraints; valid responses per constraint in brackets (not-applicable answers excluded). Respondent testimony, not population estimates; no margin of error applies. Source: 2026 National Business Environment Survey — Cape Chamber of Commerce and Industry, Bureau for Economic Research (Stellenbosch University), Impact Economix.

Executive summary 2: Priorities differ by firm location, size, sector etc.

The ranking holds for the sample as a whole.
Underneath it, each group the Chamber serves has a different problem at the top of its own list.

City of Cape Town businesses

Traffic congestion

54.8%

of 230

against 24.1% of 54 outside the metro

Businesses outside the metro

Development approvals

55.6%

of 54

against 28.9% of 194 inside the metro

Medium and large employers

Labour legislation

78.3%

of 23 large

skilled worker hiring 71.4% of 21

Wholesale, retail and hospitality

Sector regulation and standards

75.9%

of 29

against 28.8% of 52 in manufacturing

Cape Chamber members

Regulatory compliance burden

53.2%

of 154

the member ranking mirrors the whole

Base: Western Cape respondents, valid responses in each case as shown. Large-firm figures rest on 21 to 23 valid responses and should be read for direction rather than for the exact size of the gap. Source: 2026 National Business Environment Survey, analysis workbook sheet 70_TARGET_GROUPS.

Executive summary 3: Three things behind the numbers

The ranking is the start of the analysis, not the end of it. Three important findings to take into consideration.

One label, several problems

The largest constraints each cover more than one problem, and the problems have different owners.

Regulatory compliance burden
empowerment and employment equity; tax administration; compliance costs for the smallest firms; sector-specific regulators; and an enforcement gap

Electricity supply
reliability; the cost of tariffs; and getting a connection to the grid

Firm size divides the sample, geography less so

Seven ways of dividing the Western Cape sample were tested against all 61 constraints.

Employment size divides 55 of the 61
and turnover follows on 43

Location divides only 14
metro and non-metro sit within ten percentage points of each other on 47 of the 61 constraints

Six groups to convene

Survey evidence identifies six constraints and groups of institutions to address specific constraints

Regulatory relief; development approvals outside the metro; metro congestion and mobility

Electricity; skills, hiring and labour rules; the Port of Cape Town and freight

Base: 308 Western Cape respondents. The seven dimensions are location, business area, employment size, turnover, broad sector, premises type and chamber affiliation. Source: 2026 National Business Environment Survey, analysis workbook sheets 72_RATINGS_TO_TEXT, 73_CONSENSUS and 74_CLUSTERS.

DIFFERENT BUSINESSES, DIFFERENT PROBLEMS

Group businesses together and the sharpest constraints disappear — the picture only comes into focus group by group

1. BY PLACE

Each side has a different No. 1

INSIDE THE METRO

Traffic congestion

54.8% (230)

outside the metro: 24.1%

OUTSIDE THE METRO

Development approvals

55.6% (54)

inside the metro: 28.9%

2. BY EMPLOYER SIZE

The bigger the employer, the more serious the constraint

Talent attraction and retention

medium **46.7%**

micro-small **32.5%** large **76.2%**

Education and skills

medium **54.4%**

micro-small **44.9%** large **72.7%**

Affordable housing

medium **37.0%**

micro-small **34.0%** large **71.4%**

% rating it a serious constraint. Group sizes: micro-small 156–176, medium 81–90, large 21–22 valid responses.

3. BY SECTOR

Sectors face sector-specific challenges

Labour legislation

Manufacturing 73.6% (53)

Finance & business services 28.6% (42)

Sector regulation and standards

Wholesale, retail, hospitality 75.9% (29)

Manufacturing 28.8% (52)

The sector most burdened by labour rules is the least burdened by sector regulation.

4. CHAMBER MEMBERS

158

of the 308 Western Cape respondents

MEMBERS' NO. 1

Regulatory compliance burden

53.2% (154)

Base: 308 Western Cape respondents; % rating it a serious constraint, valid responses in brackets (not-applicable answers excluded). Respondent testimony, not population estimates; no margin of error applies. Source: 2026 National Business Environment Survey — Cape Chamber of Commerce and Industry, Bureau for Economic Research (Stellenbosch University), Impact Economix.

BUSINESS CONSTRAINT THEMES

The leading constraints fall into three themes — national, % rating it a serious constraint (valid responses)

THE COST AND UNPREDICTABILITY OF RULES

Regulatory compliance burden · firm — **58.7%** (351)

WHAT BUSINESSES MEAN BY IT

Empowerment and employment equity requirements
raised most often, by a wide margin

Tax and revenue administration
how SARS processes work, more than the rates

The enforcement gap: compliant firms ask for enforcement against non-compliant competitors
the regulators, not less regulation

WEAK DEMAND

Macro stability · sector — **52.4%** (336)

WHAT BUSINESSES MEAN BY IT

Clients cutting budgets, decisions stalling, payment cycles stretching
the macro story arriving at the firm's door

Small firms excluded from procurement and supply chains
vendor registration and track-record requirements

SHARED SERVICES UNDER STRAIN

Electricity supply · province — **51.8%** (353)

WHAT BUSINESSES MEAN BY IT

Electricity's three problems: outages, tariffs, connections
Eskom, NERSA, and distributor connection processes

Skills: artisans unfindable; visa delays for scarce skills
education departments and Home Affairs

Transport's two strands: freight, and the commute
Transnet, TNPA, PRASA

Base: 369 businesses nationally; valid responses per constraint in brackets (not-applicable answers excluded). The three themes are the report's grouping of the leading constraints (detailed results report, section 5), and the what-businesses-mean lines come from the survey's written answers — themes, not measured shares. Respondent testimony, not population estimates; no margin of error applies. Source: 2026 National Business Environment Survey — Cape Chamber of Commerce and Industry, Bureau for Economic Research (Stellenbosch University), Impact Economix.

FROM FINDINGS TO ACTION: SOME NEXT STEPS

1. REGULATORY RELIEF FOR SMALL BUSINESS

Regulatory compliance burden **58.0%** (295) Western Cape; **58.7%** (351) national

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- DTIC · SARS · Treasury · Empl. and Labour
- Red-tape reduction unit
- Chamber advocacy

What businesses wrote: empowerment and equity requirements named most; SARS administration; small-firm thresholds; and an enforcement gap — more enforcement against non-compliant competitors, not less regulation

2. DEVELOPMENT APPROVALS OUTSIDE THE METRO

Development approvals **55.6%** (54) non-metro; business-municipal coordination **50.9%** (53)

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- Municipal planning and building control
- DEDAT red-tape unit

What businesses wrote: a building-plan backlog described as years deep; rezoning delays; a R7–R9 billion project pipeline claim, reported strictly as one respondent's unverified assertion

3. METRO CONGESTION AND MOBILITY

Traffic congestion **54.8%** (230); crime and safety **43.6%** (289); public transport **36.2%** (279)

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- City of Cape Town: mobility and safety
- WC Mobility Department
- PRASA

What businesses wrote: named corridors and four-hour commutes; rail decay

4. ELECTRICITY: OUTAGES, TARIFFS, CONNECTIONS

Electricity supply **47.6%** (292) precinct and **49.5%** (295) province

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- Eskom
- City of Cape Town electricity
- NERSA and tariff processes

What businesses wrote: multi-day outages; tariffs described as prohibitive for manufacturers; a 300-day connection upgrade wait; a refused solar grid connection

5. SKILLS, HIRING AND LABOUR RULES FOR LARGE EMPLOYERS

Labour legislation **78.3%** (23) large firms; **73.6%** (53) manufacturing

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- Empl. and Labour · Home Affairs · DHET · SETAs
- Provincial education
- Sector bodies

What businesses wrote: growth thresholds binding at 45–50 staff; artisans unfindable; entrants described as unemployable; visa delays for scarce skills

6. THE PORT OF CAPE TOWN AND FREIGHT LOGISTICS

Transport and logistics **44.9%** (287); sector logistics **35.0%** (263)

KEY DIALOGUE AND IMPLEMENTING ORGANISATIONS TO BE INVOLVED INCLUDE AT LEAST THE FOLLOWING

- Transnet · TNPA · PRASA
- SARS customs
- City: sidings and access roads

What businesses wrote: port congestion and demurrage; customs holds; rail decay forcing freight onto roads; unused sidings; cancelled investment attributed to harbour access

National · Provincial · Municipal · State-owned entity · Chamber & sector bodies

The four levels in detail

The questionnaire asked questions at four separate levels.

The firm

14 constraints

Constraints on the business's own operations

The precinct

15 constraints

The business precinct or local area

The sector

16 constraints

The respondent's industry

The province

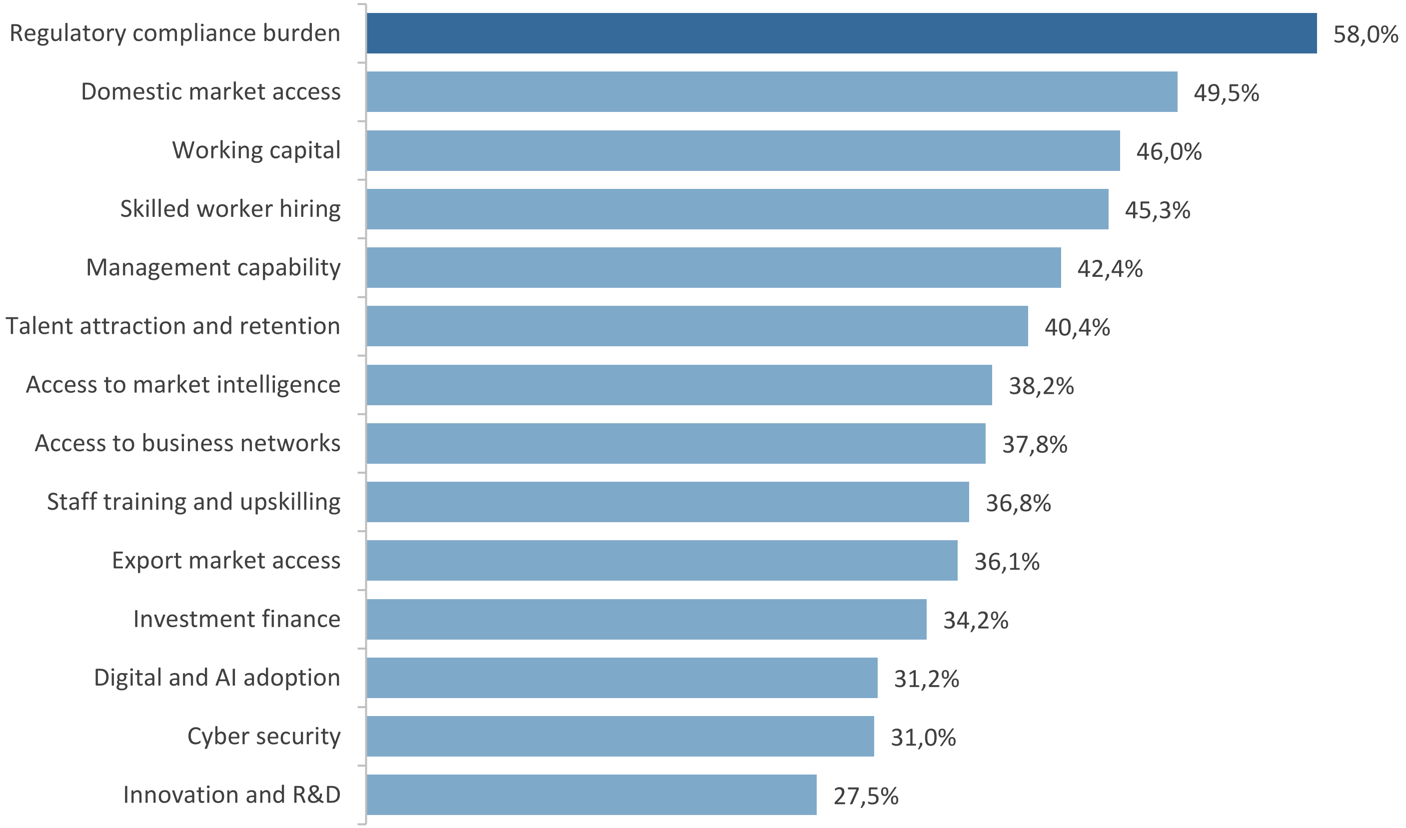
16 constraints

The Western Cape operating environment

Each level is covered in the same order: what matters most, who is saying it, and what businesses said in their own words.

At firm level: What matters most

Regulatory compliance burden tops both the firm-level category and the overall survey: 58.0% of 295 Western Cape businesses rate it as a serious constraint—nine percentage points ahead of the next highest issue.



The next four are the business's own capability: market access, working capital, hiring skilled people, and management capability.

Export market access carries 81 not applicable answers, the highest in the section, because most respondents do not export.

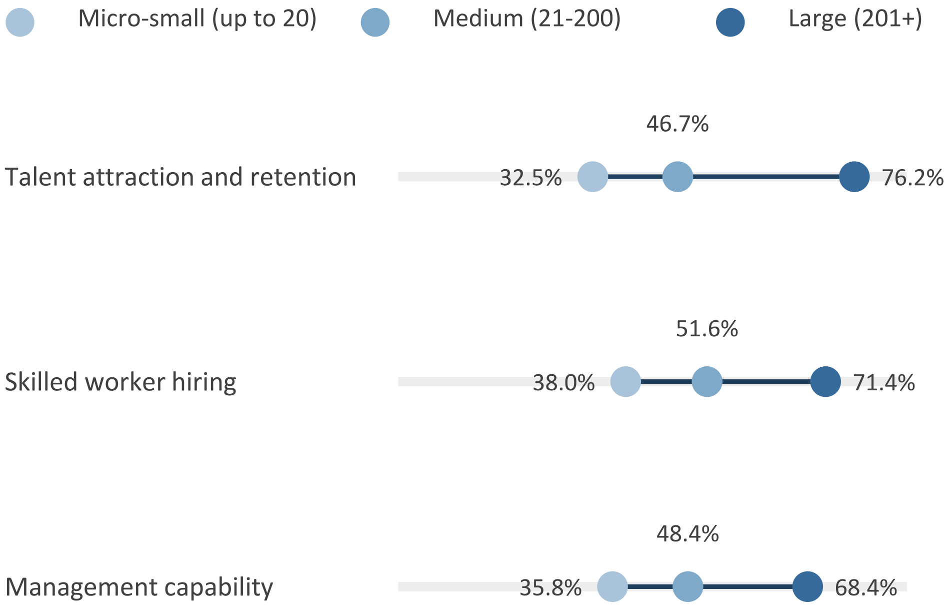
Only one firm-level constraint clears half the respondents.

Base: Western Cape respondents; valid responses range from 227 to 296 across the 14 constraints. % rating it a serious constraint. Source: 2026 National Business Environment Survey, analysis workbook sheet 20_FIRM_WC; detailed results report Table 1.

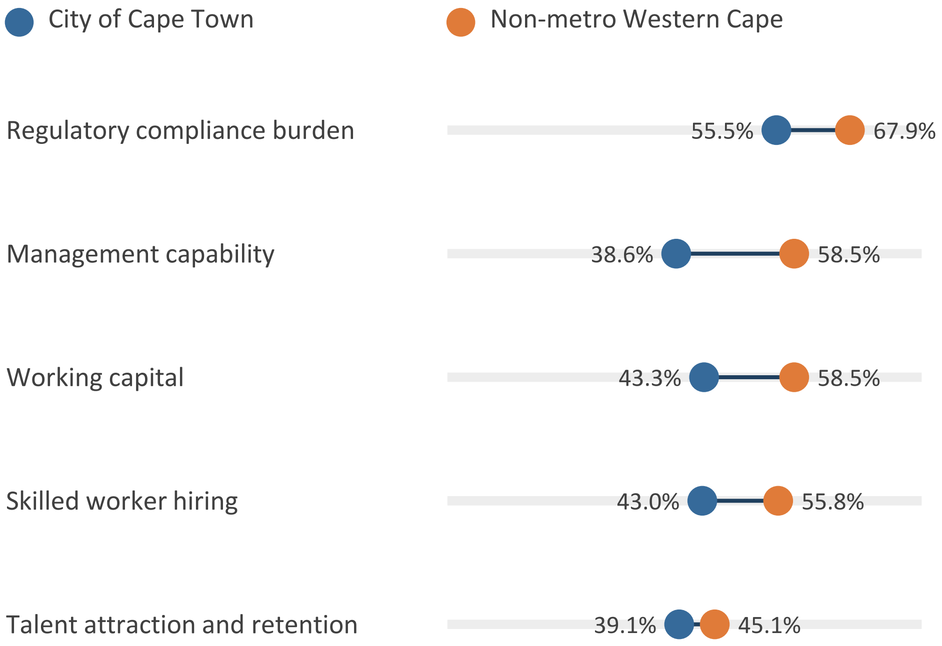
At firm level: Who is saying it

Two distinct trends emerge from the firm-level data: human resource constraints escalate rapidly as business size increases, and non-metro businesses rate all 14 constraints as more severe than their metropolitan counterparts.

Rises with employer size



Metro against non-metro



> Regulatory compliance burden and skilled worker hiring are the only two firm-level constraints in all three size groups' top fives. Compliance peaks among medium businesses, at 66.7% of 90, not at the top.

Base: Western Cape respondents. Size-group valid responses 169 to 181 micro and small, 90 to 91 medium, 19 to 22 large; metro 217 to 227, non-metro 51 to 56. Large-firm figures rest on 19 to 22 valid responses: read the direction, not the exact gap. Source: analysis workbook sheets 62_WC_BY_SIZE and 60_WC_BY_MUNI; detailed results report Annexures D and E.

At firm level, in the businesses' own words: One label, four problems

The written answers show that regulatory compliance burden refers to at least four separate issues, each with a different owner.

1

Empowerment and employment equity

The issue raised most often, by a wide margin. Businesses describe thresholds that stop them growing past 45 to 50 staff.

2

Tax and revenue administration

How the revenue service operates, rather than the tax rates: an export licence unresolved for close to a year, customs holds, claim systems that fail.

3

Compliance costs for the smallest firms

The thresholds at which simplified regimes start, which exclude two-person businesses.

4

Sector-specific regulators

Named individually across the answers: SAHPRA, the QCTO, the PPRA, ECSA, bargaining councils, health and safety agents.

> A fifth thread runs the other way. Businesses that comply ask for less regulation of themselves and more enforcement against non-compliant competitors. A case for relief that ignored that demand would misrepresent half the evidence.

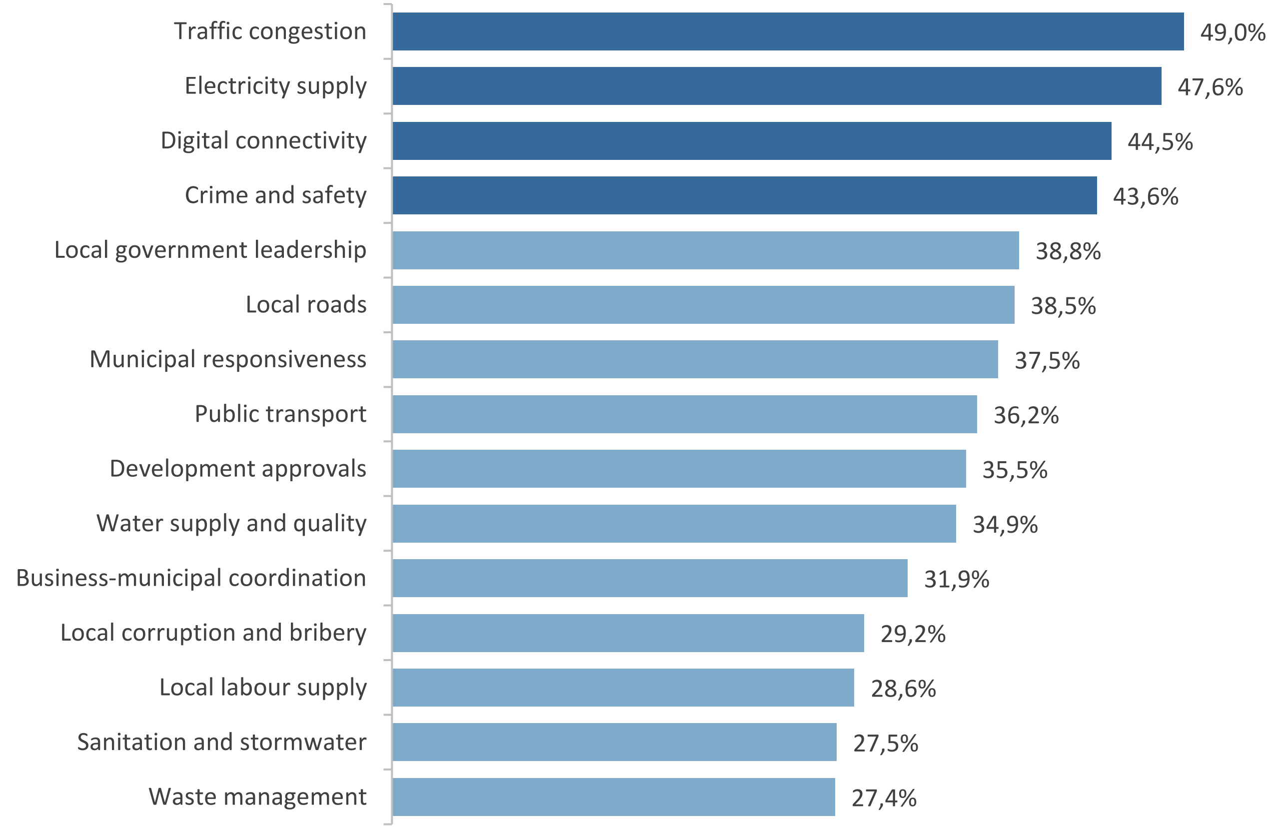
> We can not transition from 45 staff to more than 50 due to the massive additional cost and legislatively burden posed by EE. With no BEE we could employ another 3 staff, with a reduced CCMA another 1 — so that's a 10% increase in employment that we might have EXCEPT for BEE and CCMA.
>
> a medium-sized manufacturer in the City of Cape Town

> Stupid Government red tape for a micro enterprise e.g.SDL, SETA funding, VAT and Turnover tax only available to orgs who employ more than 5 staff!
>
> a small financial and business services firm in the City of Cape Town

Base: written answers from Western Cape respondents. Quotations are reproduced exactly as submitted, including spelling and capitalisation, and are attributed by sector and size only. Businesses rated how serious a constraint is, not what causes it. Source: analysis workbook sheets 50_OPEN_TEXT and 72_RATINGS_TO_TEXT.

At precinct level: What matters most

Traffic congestion leads the precinct section at 49.0% of 294 Western Cape businesses, followed closely by electricity supply, digital connectivity and crime as set out in the next slide



The top four are the conditions of trading in a place: getting there, keeping the lights on, being connected, and being safe.

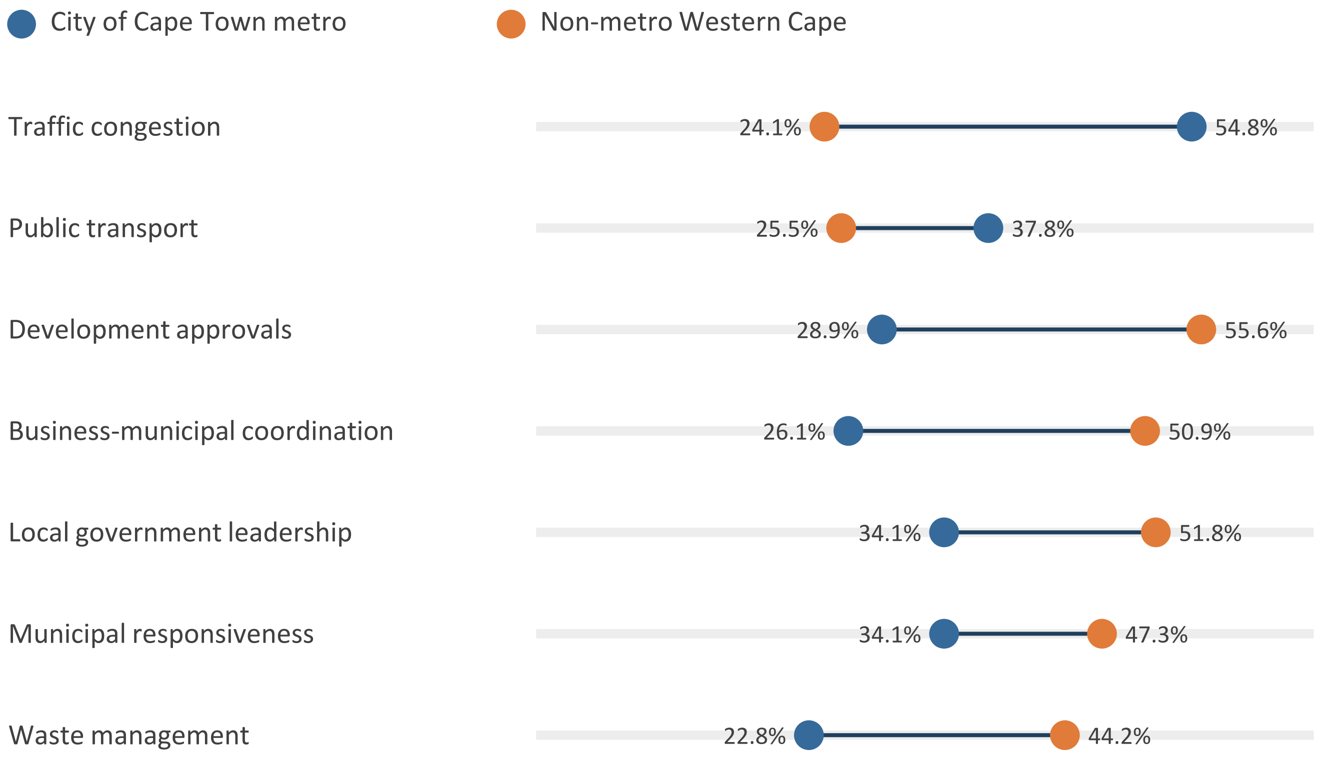
The municipal cluster sits in the middle of the ranking for the Western Cape as a whole. That average conceals the sharpest split in the survey, which the next slide sets out.

Development approvals carries 48 not applicable answers.

Base: Western Cape respondents; valid responses range from 259 to 294 across the 15 constraints. % rating it a serious constraint. Source: 2026 National Business Environment Survey, analysis workbook sheet 21_PRECINCT_WC; detailed results report Table 5.

At precinct level: Where you are changes what you raise

This is the sharpest geographic split in the survey.
Metro businesses raise movement; businesses outside the metro raise the municipality.



> Traffic congestion separates the two by 31 percentage points. Development approvals separates them by 27 in the other direction.

Precinct type separates businesses more clearly than individual business areas do

Industrial precincts and business parks

102 respondents

Traffic congestion **62.6%** of 99

Commercial central business districts

63 respondents

Traffic congestion **50.0%** of 60

Secondary commercial nodes

73 respondents

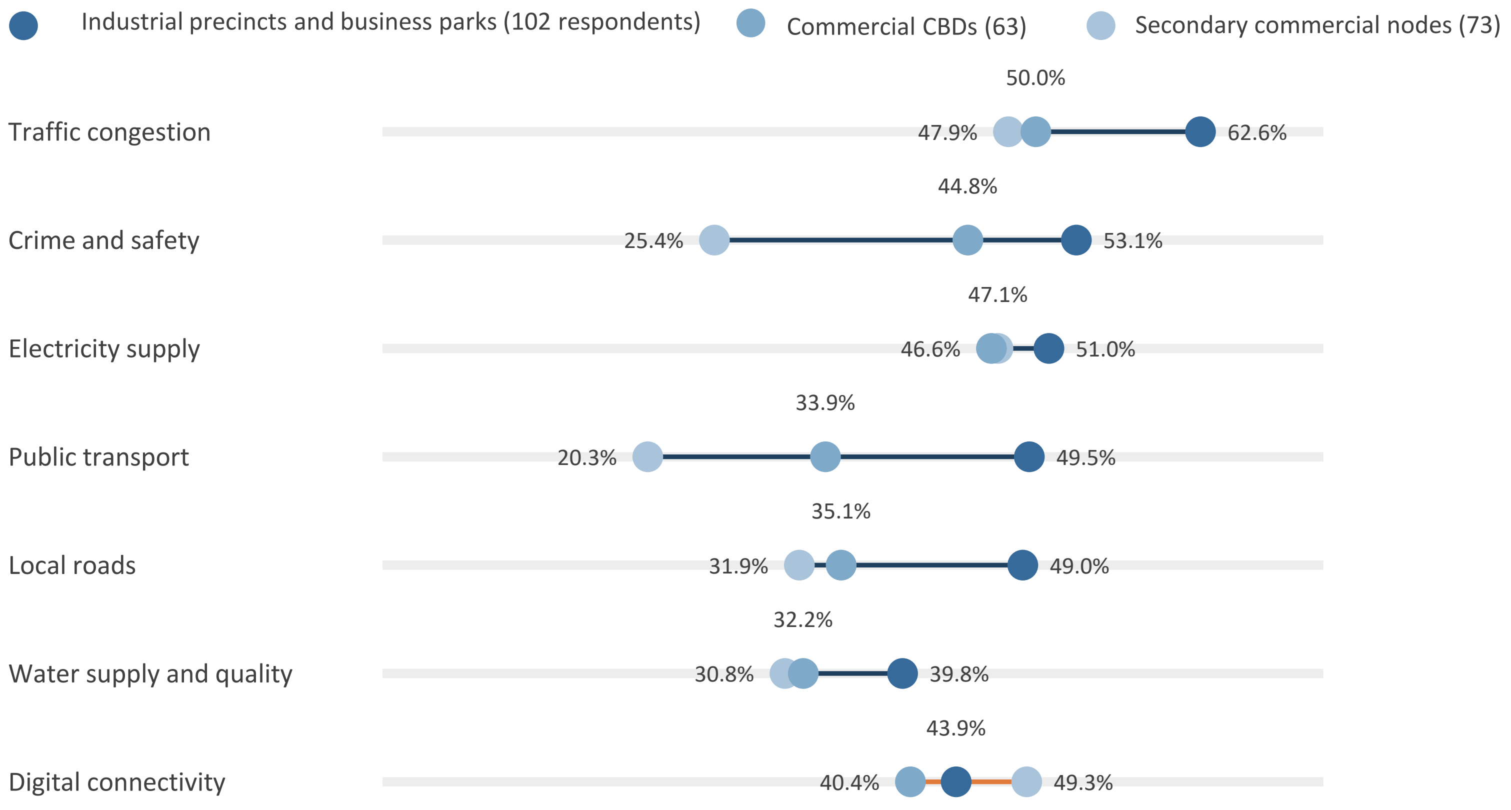
Digital connectivity **49.3%** of 69

Industrial precincts rate 14 of the 15 precinct constraints above commercial CBDs. Public transport separates the three types most sharply, by 29 percentage points.

Base: Western Cape respondents. Metro valid responses 194 to 230; non-metro 51 to 56. Precinct types are assigned from the questionnaire's controlled list of business areas; 16 respondents in small towns and rural areas and 36 in untyped locations are not shown. Source: analysis workbook sheets 60_WC_BY_MUNI and 03_PRECINCT_TYPOLOGY; detailed results report Tables 7 and 8.

At precinct level: Variation by precinct type

Industrial precincts and business parks rate 14 of the 15 precinct constraints more seriously than the commercial CBDs. Digital connectivity is the one constraint that leads the secondary nodes.



Public transport separates the three precinct types most sharply, by 29 percentage points, with crime and safety close behind at 28.

Digital connectivity is the exception: the leading constraint in secondary commercial nodes at 49.3%, and the only one they rate above the industrial areas.

The one constraint CBDs rate above industrial areas is sanitation and stormwater, by a fraction of a percentage point.

Base: Western Cape respondents assigned to a precinct type from the questionnaire’s controlled list of business areas: industrial precincts and business parks 102 respondents, commercial central business districts 63, secondary commercial nodes 73. Percentages are of valid responses to each constraint, which are fewer because not-applicable answers are excluded (for example 97 to 99 in industrial precincts). % rating it a serious constraint. 16 respondents in small towns and rural areas and 36 in untyped locations are not shown. Source: 2026 National Business Environment Survey, analysis workbook sheets 80_WC_PRECINCT_TOP5_BY_TYPE and 03_PRECINCT_TYPOLOGY; detailed results report section 2.2.

At precinct level: In businesses’ own words

The largest theme in the written answers is one the questionnaire never asked about: homelessness, vagrancy and people living on the street.

The questionnaire gap

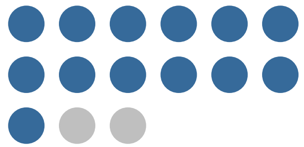
Homelessness and street-based distress has five primary mentions, mostly from City of Cape Town businesses in the central city and inner areas. With crime, informal trading and protest disruption it forms a public order and social distress group of 12 primary mentions, the biggest single grouping in the written material. Businesses connect it directly to trading conditions. There is no question on it anywhere in the survey.

Where the words and the ratings part company

Where a written comment matches a rated constraint the two mostly agree: all four businesses writing about crime rated crime serious, and four of the five writing about development approvals rated that serious. Electricity is the exception. Three of the four writing about electricity rated it only a slight constraint, because what they raised was tariffs, illegal connections and getting a connection, not outages. The rating scale caught load-shedding; the written answers caught the rest.

Two business areas stand out on counts

Philippi: all 6 respondents rate both crime and safety and local government leadership a serious constraint



Killarney Gardens: 13 of the 15 respondents rate traffic congestion a serious constraint

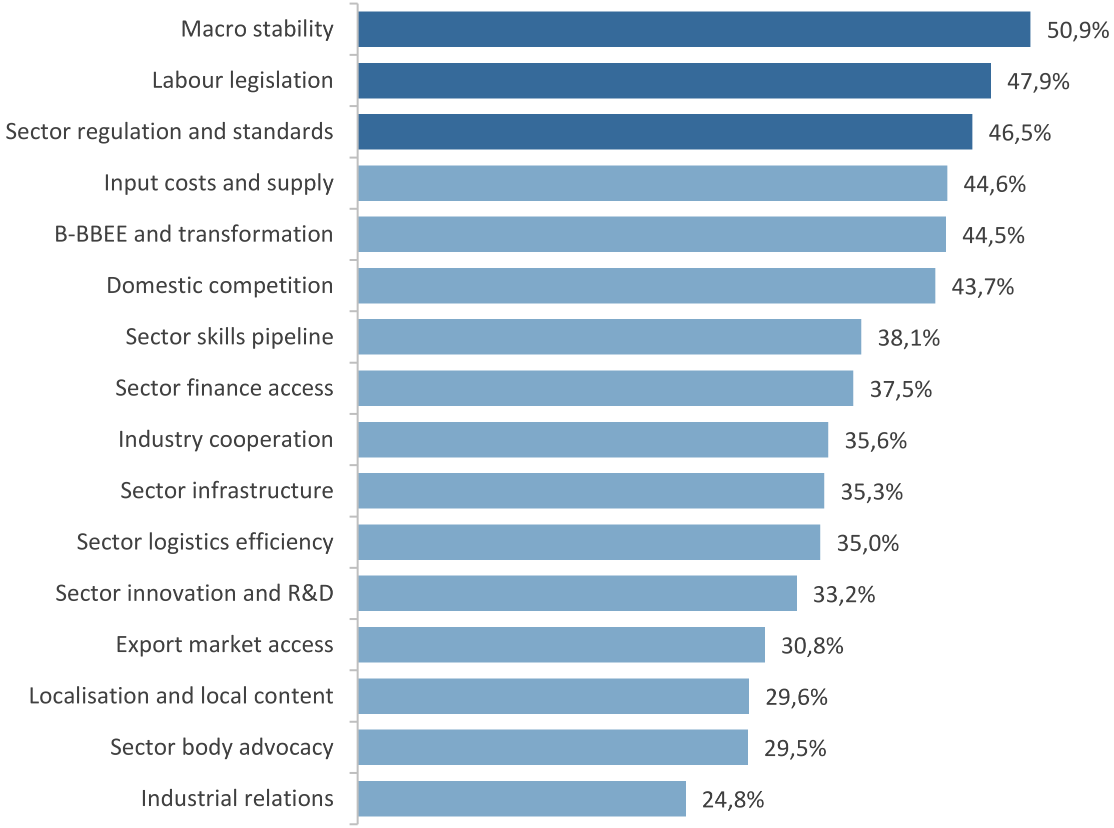
> Not being able to connect our solar power system to the municipal grid.
>
> a small financial and business services firm in the City of Cape Town

> Building Plan Approval Offices at X Municipality is slow and very behind
>
> a large wholesale and retail firm in a non-metro Western Cape municipality

Base: of the 308 Western Cape respondents, 49 wrote something at the precinct open question and 36 of those are substantive; 33 are available to quote, 21 from inside the metro and 12 from outside it. Individual business areas are too small for percentages, so counts are used. Source: analysis workbook sheets 80_WC_PRECINCT_VERBATIMS and 65_WC_OPEN_TEXT; detailed results report Annexure H.

At sector level: What matters most, and where sectors part company

Macro stability leads the sector section at 50.9% of 279. The two sharpest divisions between sectors in the whole survey are both in this section.



Labour legislation: a 45-point spread

Manufacturing	**73.6%**
Agriculture, forestry and fishing	**69.2%** *
Construction	**64.7%** *
Wholesale, retail and hospitality	**53.3%**
Transport, storage and communication	**44.4%** *
Government, education and health	**39.1%**
Other services	**33.3%**
Finance and business services	**28.6%**

Sector regulation and standards: a 47-point spread

Wholesale, retail and hospitality	**75.9%**
Agriculture, forestry and fishing	**69.2%** *
Transport, storage and communication	**61.1%** *
Government, education and health	**59.1%**
Construction	**44.4%** *
Finance and business services	**43.5%**
Other services	**40.6%**
Manufacturing	**28.8%**

Base: Western Cape respondents; valid responses 224 to 286 across the 16 sector constraints. In the two panels, * marks a group with fewer than 20 valid responses, which should be read with care: agriculture 13, construction 17 and 18, transport 18. Three labels are given in the short form the detailed results report uses; Annexure A of that report carries the full labels. Source: analysis workbook sheets 22_SECTOR_WC and 61_WC_BY_SECTOR.

At sector level: The narrowest constraint, and the broadest

Sector logistics efficiency is a single sector’s problem.
Tax and rates is the most consistently top-ranked constraint anywhere in the survey.

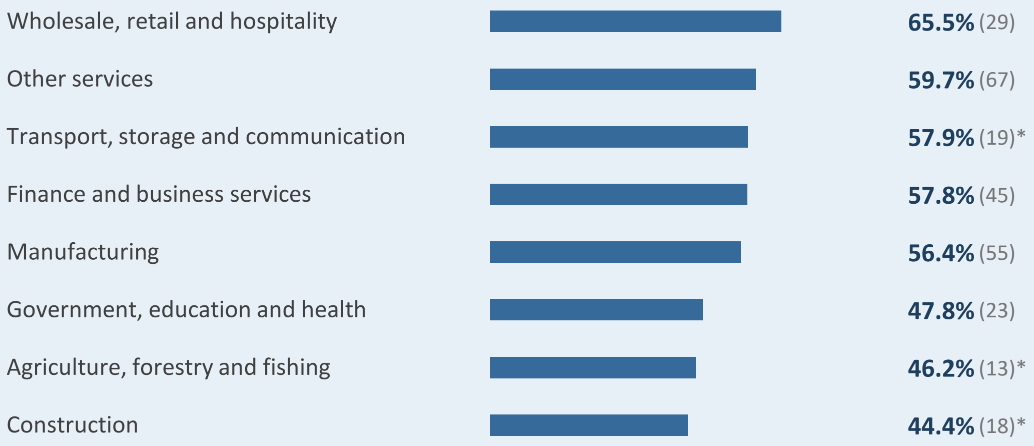
Sector logistics efficiency

Western Cape average 35.0% of 263.

Leads agriculture and reaches no other sector’s top five.

Tax and rates

Western Cape average 55.4% of 294.



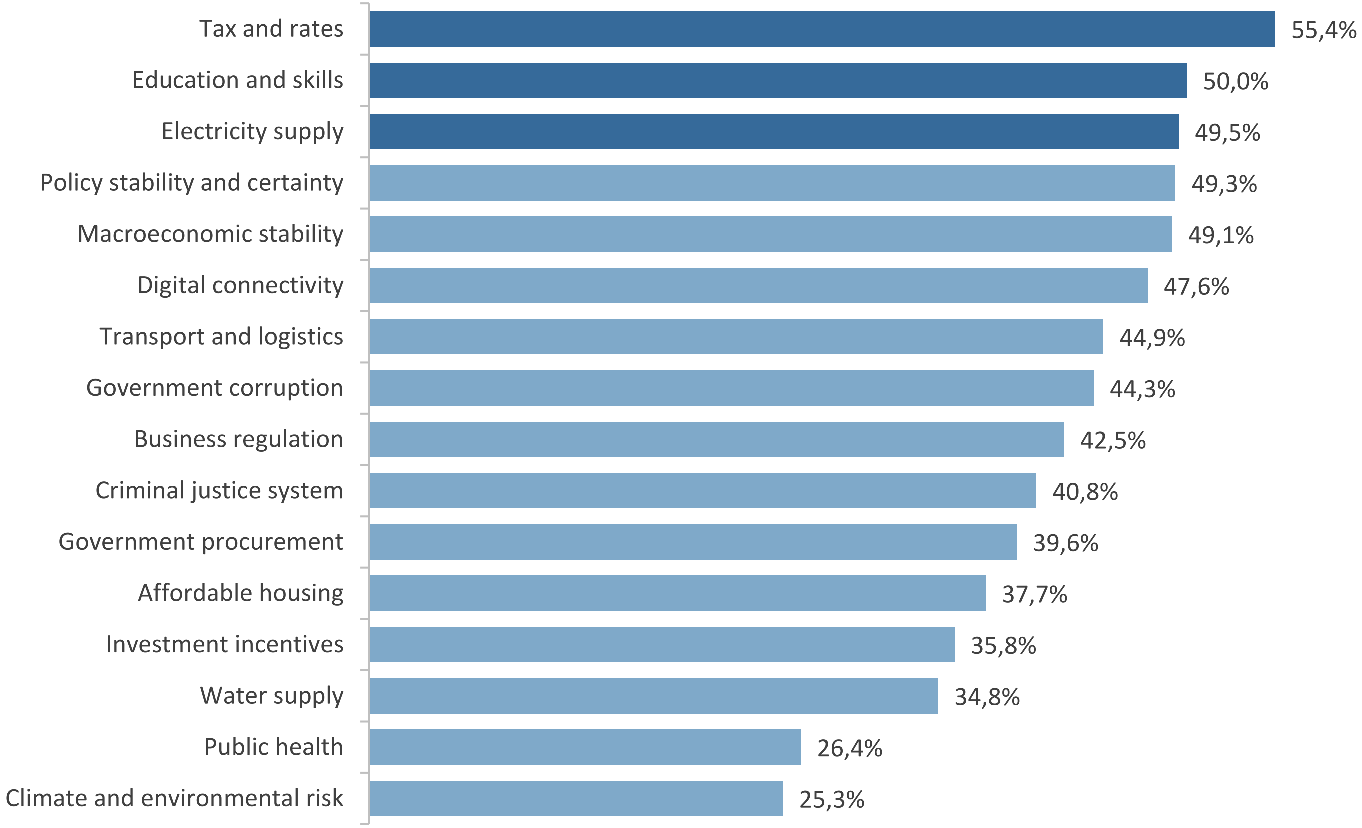
Leads three of the eight sectors and both sides of the metro split, and varies least from one sector to the next of anything in the survey.

Agriculture, construction and transport rest on 13 to 19 valid responses throughout this slide. They are shown because the sector pattern needs them, and they carry the small-base marker.

Base: Western Cape respondents. Valid responses in brackets after each figure; * marks a group with fewer than 20 valid responses. Source: analysis workbook sheet 61_WC_BY_SECTOR; detailed results report Annexure F.

At province level: What matters most

Tax and rates leads the provincial section at 55.4% of 294, and is second in the whole survey. Education and skills falls exactly on 50.0% of 290.



Electricity supply is the clearest difference between the Western Cape and the country: 49.5% of 295 here against 51.8% of 353 nationally.

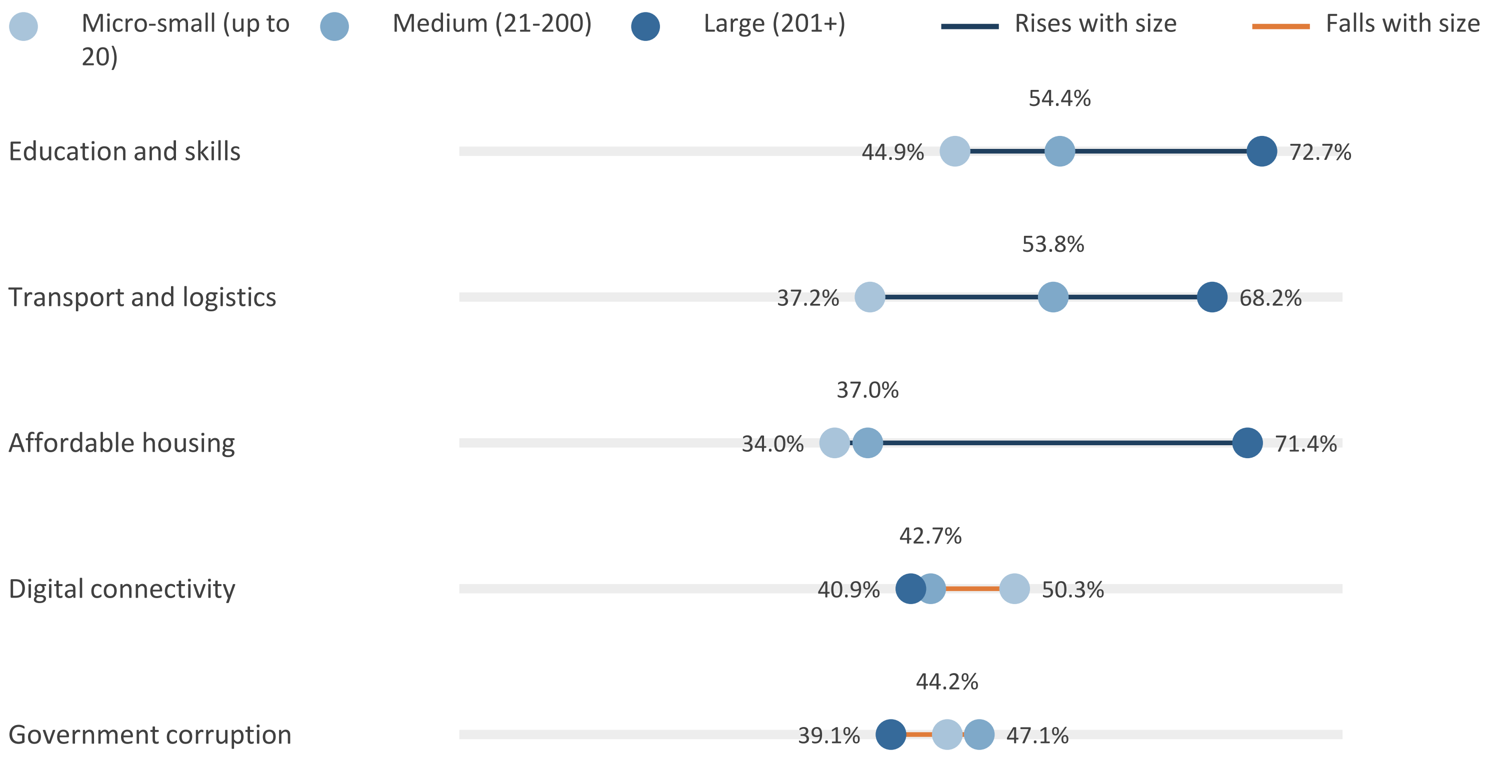
Policy stability and macroeconomic stability sit together near the top. In the written answers they are the reason investment decisions stall.

The bottom of this list is not a verdict that those constraints are mild.

Base: Western Cape respondents; valid responses 260 to 295 across the 16 provincial constraints. % rating it a serious constraint. Source: analysis workbook sheet 23_PROVINCE_WC; detailed results report Table 14.

At province level: Constraints rise steeply with employer size

The provincial section repeats the size pattern more steeply than any other.
Two constraints run the other way, and both are provincial.



What this means

Large firms rate more than half the questions about municipal services and the wider operating environment at least 20 percentage points above the smallest firms, on 18 of the 31 precinct and provincial constraints where both groups can be reported.

These 23 businesses are much the largest employers in the sample, so what constrains them constrains a large share of the employment behind the survey.

Only two constraints run the other way, and both are about services the smallest businesses buy for themselves.

Large-firm figures rest on 21 to 23 valid responses. Read the direction, which is consistent across every question, not the exact size of each gap.

Base: Western Cape respondents. Valid responses: micro and small 156 to 181, medium 81 to 91, large 21 to 23. Source: analysis workbook sheet 62_WC_BY_SIZE; detailed results report Annexure E.

All four levels together: Whose problem is it

No constraint in the survey is everyone’s problem to the same degree.
Which dimension divides a constraint is the more useful result.

All 61 constraints classified across seven ways of dividing the sample

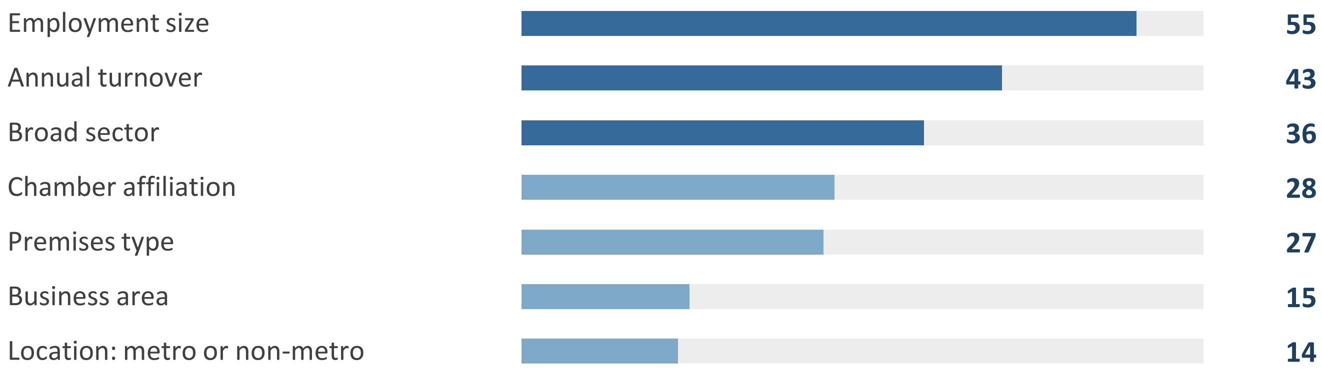
0 shared concerns

24 concentrated concerns

37 divided concerns

Four come closest to shared, dividing on only one of the seven: policy stability, precinct digital connectivity, industry cooperation, and sector export market access.

How many of the 61 constraints each dimension divides



Turnover is not simply repeating employment size. It separates regulatory compliance burden far more sharply: from 36.4% of 55 businesses turning over less than R1 million to 78.4% of 37 in the R50 million to R200 million band. That is a spread of 42 percentage points, against 14 points across the three employment size groups.

The most divided constraint in the survey is development approvals, with twelve outlying groups, driven together by large employers, businesses belonging to another chamber, and non-metropolitan location. Traffic congestion and input costs and supply follow with eleven each. On 47 of the 61 constraints, metro and non-metro businesses sit within ten percentage points of one another.

Base: 308 Western Cape respondents. A group counts only where its valid responses on that constraint reach 20, which leaves 27 reportable groups for the median constraint. A group more than ten percentage points from the Western Cape average is an outlying group; the limit for a concentrated concern is 15% of the groups reportable for that constraint. Source: analysis workbook sheet 73_CONSENSUS; detailed results report Annexure I.

Six groups to bring together

Each group names the businesses affected, the topic, and the institutions that would need to be at the table.

National · Provincial · Municipal · State-owned entity · Chamber and sector bodies

#	Group			
1	**Regulatory relief for small business** Regulatory compliance burden 58.0% (295); sharpest for wholesale, retail and hospitality, non-metro and medium firms	DTIC, SARS, National Treasury, Employment and Labour	Red-tape reduction unit	Chamber advocacy
2	**Development approvals outside the metro** Development approvals 55.6% (54) non-metro; business-municipal coordination 50.9% (53)	Municipal planning and building control	DEDAT red-tape unit	
3	**Metro congestion, mobility and public space** Traffic congestion 54.8% (230); crime and safety 43.6% (289); public transport 36.2% (279)	City of Cape Town: urban mobility and safety	Western Cape Mobility Department	PRASA
4	**Electricity: reliability, tariffs and connections** Electricity supply 47.6% (292) precinct and 49.5% (295) province; 63.6% (22) among large firms at precinct level	Eskom	City of Cape Town electricity	NERSA and municipal tariff processes
5	**Skills, hiring and labour rules for the largest employers** Labour legislation 78.3% (23) large, 73.6% (53) manufacturing; education and skills 72.7% (22)	Employment and Labour, Home Affairs, DHET, SETAs	Provincial education	Sector bodies
6	**The Port of Cape Town and freight logistics** Transport and logistics 44.9% (287); sector logistics efficiency 35.0% (263)	Transnet and TNPA, PRASA	SARS customs	City for sidings and access roads

Four tests selected these six: the topic is at or near the top for a group the Chamber can reach; the businesses can be named individually; the counterpart institution can be named; and the written answers say something specific enough to put in front of it.

Base: Western Cape respondents, valid responses shown after each figure. Source: analysis workbook sheet 74_CLUSTERS; detailed results report section 6 and Tables 21 to 26.

What happens next?

The survey produces three kinds of next step: convene, brief, and fix the questionnaire.

Convene

Take the six groups forward, each with its named counterpart institutions and the evidence behind it.

Brief stakeholders and share results

Give each sector body, size group and municipality its own data and constraint ranking to work with .

Two questions the survey itself says are missing

Homelessness and people living on the street

The issue raised most often in the written answers from metro businesses. The questionnaire has no question on it at any level.

Affordable housing, asked below provincial level

Asked only at provincial level, and it reaches a top five just twice in the whole survey: among large firms and among public-service employers.

Both point to the same absence: where staff live and how they get to work. Both should be added when the questionnaire is reviewed for 2027.

Where the full results live

Detailed results report on CCCI web-site, with Annexures A to J carrying all 61 constraints for the Western Cape, nationally, by municipality split, by employment size, by broad sector and for Chamber members. | Survey overview technical report also available with methodology etc.

Thank you

Questions and comments on the 2026 National Business Environment Survey can be sent to the Cape Chamber of Commerce and Industry.

Cape Chamber of Commerce and Industry | Bureau for Economic Research, Stellenbosch University | Impact Economix

24 August 2026

Appendix

All 61 constraints ranked, Western Cape and national, and the constraint labels in plain terms

The seven audience modules follow the appendix.

All 61 constraints ranked, Western Cape respondents

#	Constraint	Section	% (base)
1	Regulatory compliance burden	Firm	58.0 (295)
2	Tax and rates	Province	55.4 (294)
3	Macro stability	Sector	50.9 (279)
4	Education and skills	Province	50.0 (290)
5	Domestic market access	Firm	49.5 (287)
6	Electricity supply	Province	49.5 (295)
7	Policy stability and certainty	Province	49.3 (288)
8	Macroeconomic stability	Province	49.1 (289)
9	Traffic congestion	Precinct	49.0 (294)
10	Labour legislation	Sector	47.9 (282)
11	Digital connectivity	Province	47.6 (294)
12	Electricity supply	Precinct	47.6 (292)
13	Sector regulation and standards	Sector	46.5 (286)
14	Working capital	Firm	46.0 (278)
15	Skilled worker hiring	Firm	45.3 (285)
16	Transport and logistics	Province	44.9 (287)
17	Input costs and supply	Sector	44.6 (278)
18	B-BBEE and transformation	Sector	44.5 (272)
19	Digital connectivity	Precinct	44.5 (290)
20	Government corruption	Province	44.3 (282)
21	Domestic competition	Sector	43.7 (284)
22	Crime and safety	Precinct	43.6 (289)
23	Business regulation	Province	42.5 (294)
24	Management capability	Firm	42.4 (288)
25	Criminal justice system	Province	40.8 (277)
26	Talent attraction and retention	Firm	40.4 (282)
27	Government procurement	Province	39.6 (268)
28	Local government leadership	Precinct	38.8 (278)
29	Local roads	Precinct	38.5 (288)
30	Access to market intelligence	Firm	38.2 (293)
31	Industry Sector skills pipeline	Sector	38.1 (273)

#	Constraint	Section	% (base)
32	Access to business networks	Firm	37.8 (296)
33	Affordable housing	Province	37.7 (260)
34	Municipal responsiveness	Precinct	37.5 (283)
35	Sector finance access	Sector	37.5 (269)
36	Staff training and upskilling	Firm	36.8 (285)
37	Public transport	Precinct	36.2 (279)
38	Export market access	Firm	36.1 (227)
39	Investment incentives	Province	35.8 (265)
40	Industry cooperation to improve value chain…	Sector	35.6 (270)
41	Development approvals	Precinct	35.5 (259)
42	Sector infrastructure	Sector	35.3 (278)
43	Industry sector logistics efficiency and/or…	Sector	35.0 (263)
44	Water supply and quality	Precinct	34.9 (284)
45	Water supply	Province	34.8 (287)
46	Investment finance	Firm	34.2 (263)
47	Sector innovation and R&D	Sector	33.2 (277)
48	Business-municipal coordination	Precinct	31.9 (263)
49	Digital and AI adoption	Firm	31.2 (292)
50	Cyber security	Firm	31.0 (287)
51	Export market access	Sector	30.8 (224)
52	Localisation and local content	Sector	29.6 (267)
53	Sector body advocacy	Sector	29.5 (264)
54	Local corruption and bribery	Precinct	29.2 (260)
55	Local labour supply	Precinct	28.6 (276)
56	Innovation and R&D	Firm	27.5 (273)
57	Sanitation and stormwater	Precinct	27.5 (291)
58	Waste management	Precinct	27.4 (281)
59	Public health	Province	26.4 (273)
60	Climate and environmental risk	Province	25.3 (281)
61	Industrial relations	Sector	24.8 (258)

Base: 308 Western Cape respondents; valid responses in brackets. % rating it a serious constraint. Constraints carrying the same label in different sections of the questionnaire are distinct questions. Two labels are shortened to fit; Annexure A of the report carries them in full. Source: detailed results report Annexure B; analysis workbook sheet 30_TOP_WC.

All 61 constraints ranked, national respondents

#	Constraint	Section	% (base)
1	Regulatory compliance burden	Firm	58.7 (351)
2	Tax and rates	Province	58.1 (351)
3	Macro stability	Sector	52.4 (336)
4	Electricity supply	Province	51.8 (353)
5	Education and skills	Province	51.1 (348)
6	Domestic market access	Firm	51.0 (345)
7	Policy stability and certainty	Province	51.0 (343)
8	Electricity supply	Precinct	50.9 (348)
9	Labour legislation	Sector	50.9 (340)
10	Macroeconomic stability	Province	50.6 (344)
11	Digital connectivity	Province	49.3 (351)
12	Sector regulation and standards	Sector	48.7 (343)
13	Traffic congestion	Precinct	48.7 (347)
14	Working capital	Firm	48.0 (331)
15	Input costs and supply	Sector	47.6 (336)
16	Digital connectivity	Precinct	47.0 (347)
17	Transport and logistics	Province	46.7 (345)
18	Government corruption	Province	46.3 (339)
19	Skilled worker hiring	Firm	46.2 (342)
20	Crime and safety	Precinct	45.5 (347)
21	Business regulation	Province	45.0 (351)
22	Domestic competition	Sector	44.4 (342)
23	B-BBEE and transformation	Sector	43.9 (330)
24	Local government leadership	Precinct	42.5 (334)
25	Management capability	Firm	42.3 (345)
26	Criminal justice system	Province	41.6 (334)
27	Municipal responsiveness	Precinct	41.5 (340)
28	Local roads	Precinct	41.4 (345)
29	Talent attraction and retention	Firm	41.1 (338)
30	Access to market intelligence	Firm	40.2 (353)
31	Government procurement	Province	40.0 (320)

#	Constraint	Section	% (base)
32	Sector finance access	Sector	39.0 (326)
33	Water supply	Province	38.6 (342)
34	Water supply and quality	Precinct	38.6 (339)
35	Staff training and upskilling	Firm	38.1 (341)
36	Public transport	Precinct	38.0 (334)
37	Affordable housing	Province	37.8 (312)
38	Access to business networks	Firm	37.3 (354)
39	Industry Sector skills pipeline	Sector	37.1 (329)
40	Investment incentives	Province	36.4 (321)
41	Sector infrastructure	Sector	36.3 (333)
42	Industry sector logistics efficiency and/or…	Sector	36.2 (318)
43	Development approvals	Precinct	36.0 (314)
44	Export market access	Firm	36.0 (272)
45	Industry cooperation to improve value chain…	Sector	36.0 (328)
46	Business-municipal coordination	Precinct	35.7 (319)
47	Investment finance	Firm	34.3 (312)
48	Sector innovation and R&D	Sector	34.3 (335)
49	Localisation and local content	Sector	32.9 (322)
50	Local corruption and bribery	Precinct	32.7 (315)
51	Sector body advocacy	Sector	32.7 (318)
52	Cyber security	Firm	32.1 (343)
53	Sanitation and stormwater	Precinct	32.0 (344)
54	Export market access	Sector	31.1 (270)
55	Digital and AI adoption	Firm	30.5 (347)
56	Waste management	Precinct	30.4 (335)
57	Public health	Province	29.8 (326)
58	Local labour supply	Precinct	29.5 (332)
59	Innovation and R&D	Firm	26.7 (322)
60	Climate and environmental risk	Province	26.3 (338)
61	Industrial relations	Sector	25.0 (312)

Base: 369 national respondents; valid responses in brackets. % rating it a serious constraint. Constraints carrying the same label in different sections of the questionnaire are distinct questions. Two labels are shortened to fit; Annexure A of the report carries them in full. Source: detailed results report Annexure C; analysis workbook sheet 30_TOP_SA.

Constraint labels, in plain terms

Ten labels need a definition because the same words are used at more than one level, or because the label is shorter than the question.

Regulatory compliance burden	Asked at firm level: the cost and effort of meeting the rules that apply to the business itself. Distinct from business regulation, which is asked at provincial level.
Business regulation	Asked at provincial level: the regulatory environment the province and national government set for business generally.
Sector regulation and standards	Asked at sector level: the rules, accreditation regimes and standards specific to the respondent's industry, and how consistently they are enforced across it.
Macro stability	Asked at sector level: the stability of demand and economic conditions as they bear on the respondent's industry. Distinct from macroeconomic stability.
Macroeconomic stability	Asked at provincial level: the stability of the wider economy, including inflation, the exchange rate and growth.
B-BBEE and transformation	Asked at sector level: broad-based black economic empowerment requirements and the transformation obligations that accompany them.
Industry cooperation to improve value chain competitiveness and/or growth	Asked at sector level: how well firms in the same value chain work together to raise the competitiveness or growth of the industry as a whole.
Industry sector logistics efficiency and/or effectiveness	Asked at sector level: how well the logistics on which the industry depends move goods, covering both cost and reliability.
Localisation and local content	Asked at sector level: requirements or pressures to source inputs locally, and the local-content thresholds that attach to them.
Sector body advocacy	Asked at sector level: how effectively industry associations and sector bodies represent the industry to government and other counterparts.

Source: detailed results report Annexure A.

Module 0

Cape Chamber Council and members

How the survey adds value to members, to local chapters organised by area, and to the Chamber’s largest employers.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber’s reading.

The membership result: the Chamber can speak from the full survey

Chamber members are 158 of the 308 Western Cape respondents, and the member ranking mirrors the full Western Cape picture, led by regulatory compliance burden at 53.2% of 154.

Cape Chamber members’ top five

Nothing in the member breakdown contradicts the whole-sample picture. The report’s own conclusion: the Chamber can speak from the full sample without misrepresenting its members, rechecked in each future wave rather than assumed.

A member-needs assessment the Chamber already owns

Advocacy: Compliance 58.0% (295) and tax and rates 55.4% (294) lead the survey — the advocacy agenda is confirmed

Skills programmes: Skilled worker hiring 45.3% (285); staff training 36.8% (285) — demand is measured, by size group

Networking and B2B: Access to business networks 37.8% (296) and market intelligence 38.2% (293) — mid-table, strongest among micro firms

The exposed gap: No current member service answers compliance support and tax administration assistance, the two issues members rate highest

The Chamber’s reading: the survey doubles as a member-needs assessment the Chamber did not have to commission separately. Where a top member constraint has no matching service, that is the service development pipeline.

Base: 158 Cape Chamber members among the 308 Western Cape respondents; member figures on 150 to 154 valid responses. Source: detailed results report section 5; analysis workbook sheets 70_TARGET_GROUPS and 40_XTAB_WC.

Value for local chapters: every chapter gets its own agenda

The survey separates cleanly by place, so a chapter's meeting can open with what its own members' area said, not the provincial average.

Metro chapters

Traffic congestion
54.8% of 230

Crime and safety
42.2% of 223

Homelessness
most-raised written issue, unasked in the survey

The public realm and movement agenda

Non-metro chapters

Development approvals
55.6% of 54

Business-municipal coordination
50.9% of 53

Local government leadership
51.8% of 56

The municipal partnership agenda

Industrial-precinct chapters

Above CBDs on 14 of 15 precinct constraints

Crime and safety
53.1% of 98

Municipal responsiveness
46.9% of 98

The precinct services agenda

Where a single business area is reportable, the chapter agenda is already written:

Killarney Gardens: 13 of 15 respondents rate traffic congestion serious

Philippi: 6 of 6 rate both crime and safety and local government leadership serious

The Chamber's reading: chapters stop competing for one provincial agenda and each pursues its own, with the Chamber consolidating upward.

Base: Western Cape respondents; metro figures on 223 to 230 valid responses, non-metro on 53 to 56, industrial precincts on 98. Individual business areas are counts, not percentages. Source: analysis workbook sheets 60_WC_BY_MUNI, 03_PRECINCT_TYPOLOGY and 80_WC_PRECINCT_TOP3_BY_AREA.

The large-firm consensus discussion

The 23 largest employers in the sample share a constraint list of their own, each item at least 20 percentage points above the smallest firms.

Rated a serious constraint by large firms (201+ employees)

> These figures rest on 21 to 23 valid responses each. The direction is consistent across 18 of the 31 reportable precinct and provincial constraints; read the pattern, not any single gap.

The proposal: a standing large-firm forum

The 23 large firms are much the largest employers in the sample, and their list — labour rules, talent, skills, housing, transport — barely overlaps the micro-firm list of working capital, market access and compliance thresholds.

A consensus discussion confined to large employers can agree positions on the constraints only they face, feeding the skills and labour follow-up group, without the general membership agenda diluting it.

What we are asking of you

1. Mandate the six follow-up groups and their counterpart institutions
2. Adopt the chapter agendas as standing chapter business
3. Convene the large-firm forum on labour, skills, housing and transport

Base: Western Cape large firms, 21 to 23 valid responses per constraint. Source: detailed results report Annexure E; analysis workbook sheet 62_WC_BY_SIZE.

Module 1

Industry sector bodies

Sectoral value: which sectors found value, which lost out and why, how to use the findings now, and what to do for the next wave.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber’s reading.

What the survey says to sectors

Sector identity changes the constraint list more than any geography does. The two sharpest divisions in the whole survey are both sectoral.

Labour legislation: a 45-point spread

Manufacturing	**73.6%**	(53)
Wholesale, retail, hospitality	**53.3%**	(30)
Govt, education, health	**39.1%**	(23)
Other services	**33.3%**	(63)
Finance and business services	**28.6%**	(42)

Sector regulation and standards: a 47-point spread

Wholesale, retail, hospitality	**75.9%**	(29)
Govt, education, health	**59.1%**	(22)
Finance and business services	**43.5%**	(46)
Other services	**40.6%**	(64)
Manufacturing	**28.8%**	(52)

> The two spreads run in opposite directions: the sector most burdened by labour legislation, manufacturing, is the least burdened by sector regulation, and the reverse holds for wholesale, retail and hospitality. One lobby cannot carry both.

The one-sector constraint: sector logistics efficiency leads agriculture, forestry and fishing at 76.9% of 13 businesses (small base) and reaches no other sector's top five.

The Chamber's reading: a generic business-environment lobby serves no sector well; the value sits in each sector's own list.

Base: Western Cape respondents; sector groups of 22 to 64 valid responses shown; agriculture 13, marked small base. Source: detailed results report Annexure F; analysis workbook sheet 61_WC_BY_SECTOR.

Who found value, who lost out

Reportability tracked mobilisation. Sectors whose bodies pushed the survey got a readable result; the reporting floor is 20 valid responses.

Found value

Other services 71 respondents
The largest sector group; reportable on every constraint

Manufacturing 55 respondents
The strongest labour-legislation evidence in the survey, 73.6% of 53

Finance and business services 50 respondents
Reportable throughout; the counterpoint on labour and regulation

Wholesale, retail and hospitality 32 respondents
Carries the sector-regulation finding, 75.9% of 29

Government, education, health 24 respondents
Reportable on most constraints

These sectors can take their own ranked list to members and regulators now.

Lost out

Transport, storage, communication 20 respondents
At the floor; constraint bases of 15 to 20, many marked small base

Construction 18 respondents
Below the floor; direction-only, small-base marker throughout

Agriculture, forestry and fishing 13 respondents
Below the floor despite the sharpest single finding

Electricity, gas and water 2 respondents
Not reportable

Mining and quarrying 1 respondent
Not reportable

These sectors’ members answered too few to report. Only recruitment changes this.

The survey went out through 29 industry bodies. The sectors on the left are the sectors whose bodies mobilised. That is the whole story, and it is fixable by 2027.

Base: Western Cape respondents by broad sector, in-scope counts. Constraint-level bases are lower and shown wherever a percentage is given. Source: analysis workbook sheets FIG_SECTOR and 61_WC_BY_SECTOR.

Use it now, and next year

Every reportable sector can act this quarter without new analysis; every thin sector can be reportable in 2027.

Use the findings now

Take delivery of your ranking

Workbook sheet 61_WC_BY_SECTOR holds all 61 constraints through your members' eyes. No new analysis needed — ask the Chamber for your column.

Brief your regulator

The labour-legislation finding goes to Employment and Labour with manufacturing; the sector-regulation finding to each named regulator with wholesale, retail and hospitality.

Lead with the enforcement gap

Compliant businesses ask for more enforcement against non-compliant competitors, not less regulation of themselves. That brief opens doors a deregulation brief does not.

For the 2027 wave

A response target of 30+

Each sector body commits to 30 or more member responses in the 2027 wave; 20 is the floor, 30 gives headroom on every constraint.

A named owner per thin sector

Transport, construction, agriculture, electricity and mining each need one body owning recruitment.

Question suggestions by a set date

Sector-specific additions are collected before the 2027 instrument review closes.

What we are asking of you

1. Take your sector's ranked list to your members this quarter
2. Put the regulation findings in front of your named regulator
3. Commit to a 2027 response target of 30 or more

Source: detailed results report sections 3 and 6; analysis workbook sheets 61_WC_BY_SECTOR and 74_CLUSTERS.

Module 2

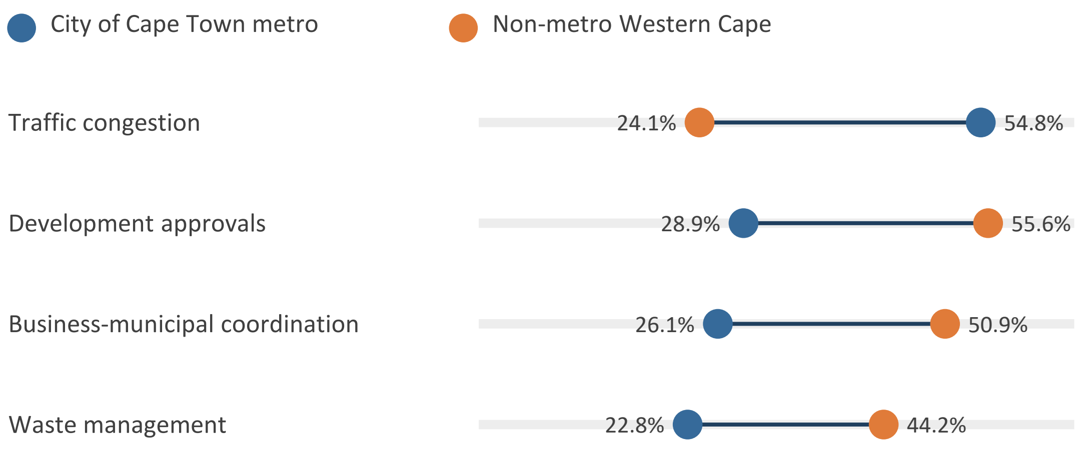
Municipalities, CIDs and ratepayers associations

Spatial value: which places found value, which lost out and why, how to use the findings now, and what to do for the next wave.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber's reading.

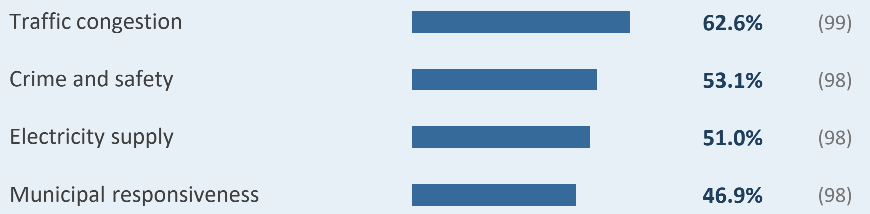
What the survey says to places

Metro businesses raise movement; businesses outside the metro raise the municipality. Precinct type separates businesses more clearly than suburb names do.



The report's reading: metro businesses describe a regulator and service provider that has stopped delivering; businesses outside the metro describe a partner whose capacity is itself the constraint. Both are municipal problems, but they are different problems.

For CIDs: the industrial-precinct agenda

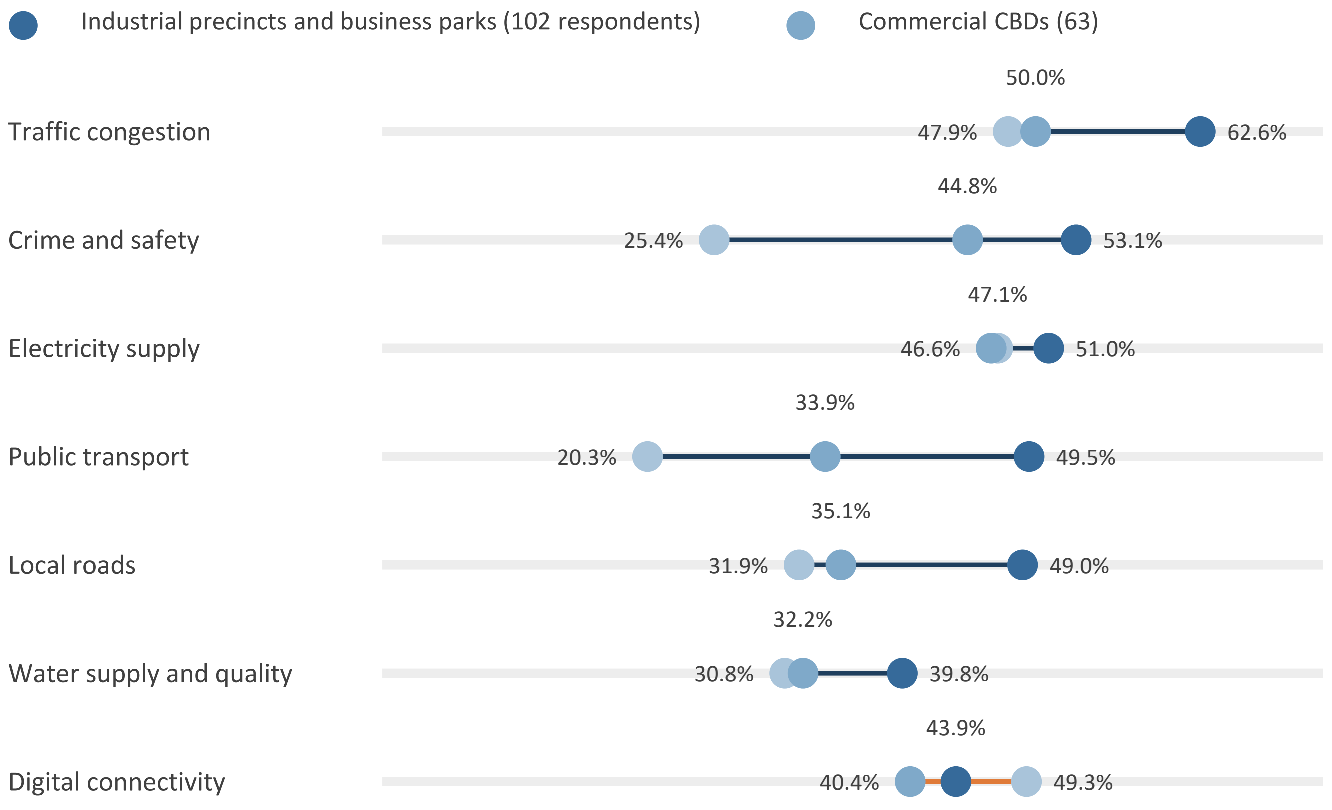


Industrial precincts and business parks (102 respondents) rate 14 of the 15 precinct constraints above the commercial CBDs (63). Public transport separates the three precinct types most sharply, by 29 points. And the homelessness finding from the written answers lands in exactly the central-city areas CIDs manage.

Base: Western Cape respondents. Metro figures on 194 to 230 valid responses, non-metro on 52 to 54, industrial precincts on 98 to 99. Source: analysis workbook sheets 60_WC_BY_MUNI and 03_PRECINCT_TYPOLOGY; detailed results report section 2.

The business precinct, by precinct type

Industrial precincts and business parks rate 14 of the 15 precinct constraints more seriously than the commercial CBDs. Digital connectivity is the one constraint that leads the secondary nodes.



Public transport separates the three precinct types most sharply, by 29 percentage points, with crime and safety close behind at 28.

Digital connectivity is the exception: the leading constraint in secondary commercial nodes at 49.3%, and the only one they rate above the industrial areas.

The one constraint CBDs rate above industrial areas is sanitation and stormwater, by a fraction of a percentage point.

Base: Western Cape respondents assigned to a precinct type from the questionnaire's controlled list of business areas: industrial precincts and business parks 102 respondents, commercial central business districts 63, secondary commercial nodes 73. Percentages are of valid responses to each constraint, which are fewer because not-applicable answers are excluded (for example 97 to 99 in industrial precincts). % rating it a serious constraint. 16 respondents in small towns and rural areas and 36 in untyped locations are not shown. Source: 2026 National Business Environment Survey, analysis workbook sheets 80_WC_PRECINCT_TOP5_BY_TYPE and 03_PRECINCT_TYPOLOGY; detailed results report section 2.2.

Which places found value, which lost out

The reporting floor is 20 valid responses. Places above it hold their own results; places below it are visible only in a group.

Found value

City of Cape Town 236 respondents
The only municipality with area-level texture in the results

Non-metro municipalities, as a group 60 respondents
The sharpest municipal findings in the survey

Industrial precincts and business parks 102 respondents
A full precinct-type profile, reportable throughout

Commercial CBDs and secondary nodes 63 and 73 respondents
Reportable precinct-type profiles

Killarney Gardens and Philippi 15 and 6 respondents
Reportable on counts; the two clearest single-area results

These places can open their next business-community meeting with their own evidence.

Lost out

Each individual non-metro municipality
Reported only inside the districts group; no municipality separable

Most individual business areas 1–2 responses each
79 areas named; only eleven reach even count-level reporting

Small towns and rural areas 16 respondents
Counts only

Untyped locations 36 respondents
Named through the free-text option; held outside the typology

These places are invisible below the group level. Only local recruitment changes this.

A CID, municipality or ratepayers association that gets 20 of its businesses to respond in 2027 gets its own results. That is the entire qualification.

Base: 308 Western Cape respondents; area counts from the precinct typology. Source: analysis workbook sheets 03_PRECINCT_TYPOLOGY and 80_WC_PRECINCT_TOP3_BY_AREA; detailed results report section 2.2.

Use it now, and next year

Three evidence packages are ready for delivery now, and one recruitment proposition sets up 2027.

To non-metro municipal managers, with the red-tape unit

The approvals evidence: 55.6% of 54 rating development approvals serious, the written answers describing a years-deep building-plan backlog, and the R7 to R9 billion pipeline figure — reported strictly as one respondent's unverified assertion. Delivered jointly with the provincial red-tape reduction unit, per follow-up group 2.

To CID boards

The industrial-precinct profile as a benchmark: crime and safety 53.1% of 98, municipal responsiveness 46.9% of 98, against the CBD figures. A CID can measure its precinct against its type.

To the City of Cape Town

The congestion, public-space and homelessness package from follow-up group 3: traffic congestion 54.8% of 230, crime and safety 43.6% of 289, and the unasked homelessness issue — flagged for the 2027 questionnaire and of direct municipal interest.

What we are asking of you

1. Receive your area's evidence package and respond to it
2. Table the approvals finding with the red-tape reduction unit
3. Recruit your area past 20 responses for the 2027 wave

Base: Western Cape respondents, valid responses shown with each figure. Source: detailed results report sections 2 and 6; analysis workbook sheet 74_CLUSTERS.

Module 3

Provincial and national government, SOEs

The surprises, the highlights, and the opportunities the survey hands each institution.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber’s reading.

What businesses put at government's door

Read by owner rather than by rank, the top of the ranking sorts into three clusters, and several of the largest sit with national institutions and SOEs, not the province.

Rules and their cost

Regulatory compliance burden 58.0% of 295; tax and rates 55.4% of 294; policy stability 49.3% of 288; labour legislation 47.9% of 282; sector regulation 46.5% of 286

Owners: national departments, SARS, sector regulators

Weak demand

Macro stability 50.9% of 279; macroeconomic stability 49.1% of 289; domestic market access 49.5% of 287

Owner: the national economic picture; no single department

Shared services

Education and skills 50.0% of 290; electricity supply 49.5% of 295; digital connectivity 47.6% of 294; transport and logistics 44.9% of 287

Owners: education institutions, Eskom and distributors, Transnet, PRASA

Tax and rates carries four separate referents with four separate owners: SARS administration, municipal rates and tariffs, customs duties, and tax design for the smallest firms. "Tax" is not one department's problem. Both strands of transport name Transnet and PRASA more often than any provincial institution.

The Chamber's reading: a provincial response alone cannot move most of this list; the province's strongest play is convening the national owners.

Base: 308 Western Cape respondents; valid responses shown with each figure. Source: detailed results report section 5; analysis workbook sheet 30_TOP_WC.

Four results that cut against expectation

Each is a finding first and a surprise second; the figures are the survey's, the significance is the Chamber's reading.

No constraint is everyone's problem

Across seven ways of dividing the sample: 0 shared concerns, 24 concentrated, 37 divided.

The reading: No single programme addresses "business" as one audience. Segment by size and turnover before geography.

The smallest firms lead on two constraints

Digital connectivity: 50.3% of 181 micro and small firms against 40.9% of 22 large. Government corruption: 44.2% of 172 against 39.1% of 23.

The reading: The only provincial constraints falling with size. Support programmes aimed at small firms are aimed at the right constituency here.

The electricity ratings understate the problem

Businesses whose written answers concerned tariffs and grid connections mostly rated electricity only a slight constraint.

The reading: The rating caught load-shedding; the written answers carry the tariff and connection story — of direct interest to NERSA processes and distributor connection backlogs.

Compliant businesses ask for more enforcement

Businesses that comply ask for less regulation of themselves and more enforcement against competitors that do not comply.

The reading: The enforcement gap inverts the standard red-tape narrative: the ask is better regulation, not less of it.

Base: 308 Western Cape respondents; large-firm figures on 22 to 23 valid responses, read for direction. Source: detailed results report sections 2.3, 4.2 and 5.1; analysis workbook sheets 73_CONSENSUS and 72_RATINGS_TO_TEXT.

The opportunity map, by institution

The six follow-up groups re-sorted by counterpart: what each institution gains from engaging.

Provincial red-tape reduction unit / DEDAT	A named non-metro approvals pipeline with written-answer cases attached — the clearest quick-win docket in the survey
Western Cape Mobility Department / City of Cape Town	The congestion and public transport evidence, sharpest for industrial precincts (public transport separates precinct types by 29 points)
Eskom / City electricity / NERSA processes	The three-part electricity problem: outages, tariffs, connections — including a 300-day connection upgrade case and a refused solar grid-connection
Skills institutions: DHET, SETAs, QCTO, provincial education	Named shortages — artisans, carpenters, upholsterers, food-technology specialists; the finding that QCTO accreditation transition costs are closing private providers; visa delays for scarce skills
SARS	The administration finding: the complaint is processes — an export licence unresolved near a year, customs holds, failing claim systems — more than rates
Transnet, TNPA, PRASA, SARS customs	The port and freight docket: congestion and demurrage at the Port of Cape Town, rail decay forcing freight onto roads, unused sidings

What we are asking of you

1. Nominate a counterpart for the follow-up group that names you
2. Respond to the specific written-answer cases in your docket
3. Tell the Chamber what question would make the 2027 wave more useful to you

Source: detailed results report section 6 and Tables 21 to 26; analysis workbook sheet 74_CLUSTERS. Written-answer cases are respondent testimony, reproduced under the report's quotation rules.

Module 4

Journalists

The surprises and highlights in plain language, who has to act, and what the survey can and cannot say.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber’s reading.

The survey in a journalist’s terms

A rating of 61 named constraints at four levels, answered by 369 businesses nationally, 308 of them in the Western Cape, between 20 July and 13 August 2026.

What it is

Commissioned by the Cape Chamber of Commerce and Industry; implemented by the Bureau for Economic Research, Stellenbosch University; analysed by Impact Economix. Distributed through Chamber campaigns, a paid social campaign, regional chambers and 29 industry bodies.

The survey overview technical report is the methods document written for this audience: design, fieldwork, data handling and limitations, in full.

What it can and cannot say

These results are the direct testimony of the businesses that chose to respond. They are not estimates of what all businesses think. No margin of error applies, and no sentence of the form "X% of Western Cape businesses" can be drawn from them. Every percentage is a share of the valid responses to that constraint, and that base is printed with every figure.

On 2024: the two surveys used different instruments and are not comparable number for number. No trend claim is valid.

The honest headline is about who answered: 369 businesses, reached through chamber and industry networks, saying what constrains them — a large body of testimony, reported with its bases showing.

Base: every record answering at least one of the 61 rated constraints. Source: survey overview technical report v2.2; detailed results report v2.2, how to read this report.

Five stories the data supports

Each with its figure and base; each survives the checks a sceptical editor will run.

1 **The top constraint is not load-shedding**
Regulatory compliance burden tops both rankings: 58.7% of 351 nationally, 58.0% of 295 in the Western Cape. Electricity is fourth nationally.

2 **The survey's biggest finding is a question it never asked**
Homelessness and people living on the street is the issue metro businesses raised most in written answers. The questionnaire has no question on it.

3 **The burden bites where growth should come from**
Compliance rated serious by 36.4% of 55 firms turning over under R1m, but 78.4% of 37 in the R50m–R200m band — a 42-point spread across the growth band.

4 **Two provinces in one**
Inside the metro the top precinct issue is congestion, 54.8% of 230. Outside it, development approvals, 55.6% of 54 — the municipality itself.

5 **Businesses want more enforcement, not less regulation**
Compliant firms ask for enforcement against non-compliant competitors: unlicensed premises, unregistered operators, sub-standard imports.

Quotations from the written answers are available under the report's rules: reproduced exactly as written, attributed by size and sector only, never by name or place; the R7–R9 billion approvals claim only ever as the respondent's unverified assertion.

Base: shown with each figure; national figures on 336 to 353 valid responses, Western Cape on 194 to 295, turnover bands on 37 to 55. Source: detailed results report sections 1 to 5; analysis workbook sheets 30_TOP_WC, 73_CONSENSUS and 60_WC_BY_MUNI.

Who has to act: the accountability trail

Six follow-up groups, each naming its counterpart institutions. The year’s story is whether the counterparts respond.

Small-business regulatory relief	DTIC, SARS, National Treasury, Employment and Labour; provincial red-tape unit
Development approvals outside the metro	Municipal planning; provincial red-tape reduction unit (DEDAT)
Metro congestion, mobility, public realm	City of Cape Town, Western Cape Mobility Department, PRASA
Electricity: outages, tariffs, connections	Eskom, City of Cape Town electricity, NERSA and tariff processes
Skills, hiring, labour rules	Employment and Labour, Home Affairs, DHET, SETAs, sector bodies
Port of Cape Town and freight	Transnet, TNPA, PRASA, SARS customs

What we are asking of you

1. Report the base with the number, every time
2. Take methods questions to the technical overview report
3. Follow the six groups through the year — the response is the story

Source: detailed results report section 6; analysis workbook sheet 74_CLUSTERS.

Module 5

Academia

What this instrument is, why it matters, and the openings it creates for research, skills development and industry alignment.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber’s reading.

The instrument, in research terms

61 constraints rated on a common scale at four nested levels — firm, precinct, sector, province — with open text linked at respondent level.

Design

A three-point severity scale (serious, slight, not a constraint) with an explicit not-applicable option, so every percentage has a per-item valid base. The four-level structure deliberately repeats labels — electricity, connectivity, water, export access — across levels, and respondents used the distinction. Six open-text questions link to the ratings at respondent level. The design draws on the global competitiveness survey tradition. Fielded in REDCap, 20 July to 13 August 2026.

Sample and materials

A self-selected panel of 369 businesses reached through chamber and industry networks, 308 with Western Cape premises — a limitation stated as a design fact and handled by non-projection rules throughout the reporting. To the Chamber's knowledge, the richest recent constraint-level dataset on Western Cape business conditions. The analysis workbook reproduces every published figure; the technical overview report documents design, fieldwork and data handling in full.

The Chamber's reading: the instrument's value to research is less any single estimate than the linked structure — ratings, open text and respondent profile in one dataset, repeatable in 2027.

Source: survey overview technical report v2.2; CCCI Final Survey questionnaire; analysis workbook v8.

Research openings, and the skills alignment material

Five questions the dataset raises and cannot itself settle — which is what makes them research.

Measurement. Respondents whose written answers concerned tariffs and grid connections mostly rated electricity a slight constraint. What do severity scales miss, and how should mixed-methods instruments catch it?

Size against turnover. Turnover separates compliance burden by 42 points where employment size separates it by 14. What is turnover proxying that headcount does not?

A replicable classification. The shared, concentrated and divided taxonomy across seven dimensions (0 / 24 / 37 of 61 constraints) is a stated, reproducible rule. Does it hold in other samples?

A spatial unit. The precinct typology — industrial, CBD, secondary node — separated results more cleanly than suburb names. Is precinct type the right spatial unit for business-environment work?

The panel question. What would a 2027 re-contact wave allow — within-firm change in ratings — that a repeated cross-section would not?

Skills development and industry alignment

Education and skills: 50.0% of 290 rate it serious, rising to 72.7% of 22 among large employers.

Named shortages in the written answers: artisans, carpenters, upholsterers, food-technology and credit-management specialists — direct evidence for curriculum and TVET research.

Training providers report QCTO accreditation-transition costs closing private providers.

Innovation-lab candidates where the survey shows sector demand: logistics in agriculture; digital and AI adoption among micro firms (31.2% of 292 rate it serious).

Base: Western Cape respondents; valid responses shown with each figure. Source: detailed results report sections 2.3, 3.3, 4.3 and 5.1; analysis workbook sheets 72_RATINGS_TO_TEXT and 73_CONSENSUS.

Working together

What the Chamber can share, under what conditions, and three invitations.

The analysis workbook
Every published figure reproduced, with live formulas and stated conventions — secondary analysis can start from it directly.

The code frame and coded open text
The precinct code frame with responsible-authority tags, as a model and a dataset.

The instrument
The questionnaire is the Cape Chamber of Commerce and Impact Economix's intellectual property, available for research use by arrangement.

A channel to respondent firms
Follow-up studies are possible through the Chamber under proper ethics and consent arrangements. No respondent-level data leaves the survey's confidentiality undertakings.

What we are asking of you

1. Propose secondary analysis — the workbook is ready for it
2. Co-design the 2027 additions with the BER and the Chamber
3. Bring a student pipeline to the follow-up groups' evidence needs

Conditions: research use of the instrument by arrangement with Impact Economix; respondent contact only via the Chamber under ethics and consent arrangements. Source: SLA IP terms; technical overview report.

Module 6

Presidency, BUSA, BLSA and national leadership

The findings and recommendations at national policy level, including the realities the evidence obliges us to face.

Findings are stated with their figure and base; what they mean for this audience is stated separately, as the Chamber's reading.

The national findings at policy level

Ten constraints were rated serious by more than half of national respondents. Regulatory compliance burden leads at 58.7% of 351 — ahead of electricity.

Regulatory compliance burden	**58.7%**	(351)
Tax and rates	**58.1%**	(351)
Macro stability (sector)	**52.4%**	(336)
Electricity supply (province)	**51.8%**	(353)
Education and skills	**51.1%**	(348)
Domestic market access	**51.0%**	(345)
Policy stability and certainty	**51.0%**	(343)

The shape of the list

Three parts, at every level of the questionnaire: the cost and unpredictability of rules; weak demand; and the state of shared services — skills, electricity, connectivity, transport.

> On policy stability, the written answers describe not one policy but accumulated uncertainty: spending deferred, hiring postponed, capital held back until conditions clarify. Around half of respondents rate policy stability and macroeconomic stability serious constraints.

The Chamber's reading: the binding constraints businesses report are predominantly national in origin — rules, demand conditions and network services — which is why this survey belongs in the national dialogue.

Base: 369 national respondents; valid responses 336 to 353 per constraint shown. Source: detailed results report section 5 and Annexure C; analysis workbook sheet 30_TOP_SA.

The realities the evidence obliges us to face

Five findings, each stated as what respondents report, with its implication separated. These are testimony from 369 businesses, not population estimates — and that testimony is itself the policy-relevant fact.

Businesses most often name empowerment and employment equity requirements as a constraint on job creation and firm growth

They describe the requirements themselves as the constraint: hiring thresholds binding at 45 to 50 staff, ownership rules deterring investment, and compliance and tender costs. Dominant, not unanimous: a few instead report exclusion or under-enforcement. Respondents rated severity, not cause.

Employers describe growth thresholds that stop hiring at 45 to 50 staff

The labour and skills cluster rises fastest with employer size — labour legislation 78.3% of 23 large firms. The firms that employ the most report the binding constraints on employing more.

Three of the six follow-up dockets belong to national SOEs

Eskom, Transnet and PRASA own the electricity, port, freight and passenger-rail constraints. No provincial or municipal actor can resolve them.

The skills pipeline findings are blunt

Entrants described as unemployable, artisans unfindable, visas delayed — under an education and skills constraint rated serious by 51.1% of 348 nationally.

The compliance burden peaks on the growing firm

Medium firms: 66.7% of 90. Turnover R50m–R200m: 78.4% of 37. The burden is heaviest exactly where growth and hiring should come from.

Base: national and Western Cape respondents as shown; large-firm and turnover-band figures on 23 to 90 valid responses. Source: detailed results report sections 1.3, 3.3, 5.1 and 6; analysis workbook sheets 73_CONSENSUS and 74_CLUSTERS.

Recommendations at national level

Four recommendations, framed as dialogue the survey can evidence, and three asks of this room.

A national regulatory-relief review, with the enforcement gap inside it
Compliance is the top-rated constraint nationally. The reported ask is twofold: lower the burden on compliant firms, and enforce against non-compliant ones. A review that hears only the first half misreads the evidence.

The SOE constraints named in the national business dialogue
Port of Cape Town congestion, freight and passenger rail, and grid connections — with the specific written-answer cases as the working agenda.

The employment-threshold effects examined with this evidence base
Employers report thresholds binding at 45 to 50 staff. The survey offers named, contactable evidence for the examination that claim deserves.

The survey offered as a repeatable national instrument
The 2027 wave, fielded through BUSA members and other chambers, would give the national dialogue a recurring, disaggregated evidence base.

What we are asking of you

1. Table the findings in the formal business-government channels
2. Respond on the three SOE dockets: port, rail, grid connections
3. Back a national 2027 wave of this survey

Source: detailed results report section 6; analysis workbook sheet 74_CLUSTERS. Recommendations are framed as follow-up and investigation, not as conclusions the data alone can carry.