



W&RSETA Annual Performance Plan

2026/2027

FOREWORD BY THE MINISTER

The Department of Higher Education and Training plays a pivotal role in advancing the strategic priorities of the 2024–2029 Medium-Term Development Plan (MTDP). Education, training and skills development sit at the heart of South Africa's efforts to drive inclusive and sustainable economic growth, reducing poverty and hunger and building a capable and ethical state. The Department's interventions remain fundamental in ensuring that the country meets its developmental aspirations in alignment with the National Development Plan (NDP) 2030 as well as its regional and international commitments.

The 7th Administration has set priority actions to tackle unemployment, poverty and inequality, while driving economic growth. Guided by these national priorities, the Department aims to support inclusive growth by building a skilled workforce and widening learning opportunities, especially for women, youth and people with disabilities.

The Department's efforts are underpinned by a six pillar vision for the Post-School Education and Training (PSET) sector that guides long term system transformation. The vision aims to integrate the sector into a single, coherent and well coordinated system that functions seamlessly across institutional types. It further seeks to expand equitable access for all individuals who stand to benefit from post school opportunities, while ensuring that programmes and qualifications remain responsive to the evolving needs of the economy, labour market and broader society. Central to this vision is the commitment to raise the quality of provision and improve learning outcomes, alongside strengthening efficiency, governance and accountability across all PSET institutions and entities.

Achieving this vision requires addressing the structural and information related barriers that constrain national development and hinder the performance of the PSET sector. Progress towards these objectives depends on the Department's ability to respond decisively to these structural and information bottlenecks that impede development outcomes and limit system effectiveness. Central to this effort is the resetting of the PSET system through evidence based, outcome focused reforms that are closely aligned with national development priorities.

There are also persistent challenges related to energy insecurity that continue to disrupt teaching and learning, research and the overall operational continuity of institutions. In addition, logistics and infrastructure limitations impede access and constrain institutional effectiveness, while gaps in digital readiness hinder the sector's ability to fully leverage technology for enhanced learning, innovation, administrative efficiency and global competitiveness. Addressing these systemic barriers is important in building institutional resilience and ensuring that the sector is prepared to meet the changing national and global demands.

To this end, the Department is prioritising targeted interventions to improve energy stability, modernise institutional infrastructure, strengthen digital capabilities and enhance support systems across the PSET sector. These initiatives include collaborative planning with key stakeholders, investment in sustainable and resilient technologies and the development of sector-wide frameworks to advance coherence, operational efficiency and long term sustainability.



Our determination is to pursue far-reaching and transformative outcomes aimed at enhancing the provision, equity and quality of post-school opportunities. We remain committed to exerting a meaningful impact on the lives of individuals and contributing to broader improvements in the labour market, economy and society at large. Through strategic interventions, strengthened institutional capacity and focused efforts to remove structural obstacles, the Department seeks to build a PSET sector that is responsive, future-oriented and capable of supporting South Africa's long-term developmental agenda.

The educational and socio-economic challenges unfold within a broader national context marked by the fragility of the state. Fragmentation across government institutions, persistent corruption, crime and a deepening trust deficit undermine policy coherence and weaken service delivery. However, the Department remains committed in addressing these interlinked challenges through targeted interventions, strengthened partnerships with municipalities and local stakeholders and a renewed focus on equity and transformation.

Over the Medium-Term Expenditure Framework (MTEF) period, our focus is on improving access to and success in post school education as a key driver of youth employability, poverty reduction and social equality. A central priority is advancing student success through targeted academic support, strengthened career guidance and improved learning environments that enable students to complete their studies within the anticipated timeframes. By improving student access and success, expanding alternative skills pathways and responding to the systemic barriers that constrain the PSET sector, the Department aims to contribute meaningfully to the country's broader developmental objectives and support a more inclusive, skilled and resilient society.

To support access, the Department continues to promote widespread awareness of NSFAS funding opportunities. Admission requirements, funding criteria and application procedures are communicated widely to prospective students across schools, universities, TVET and CET colleges and Sector

Education and Training Authorities (SETAs). NSFAS is monitored on uptake and its impact on student access and success remains an ongoing priority, ensuring that financial aid continues to serve as a cornerstone of inclusive education and equitable participation.

There are also intensified efforts to support students from vulnerable households, including beneficiaries of the South African Social Security Agency (SASSA). These students are prioritised within NSFAS funding allocations and it is ensured that they are supported and guided throughout the funding application process. The approach directly promote equity within the PSET system, particularly for learners from historically disadvantaged communities.

Despite these ongoing efforts, many learners continue to face financial, academic, geographic and informational barriers that limit access to PSET institutions. To support their meaningful participation in the economy, alternative skills pathways are strengthened by SETAs in expanding artisanal training, workplace based learning and other occupational programmes in partnership with industry.

In addition, opportunities presented by the Just Energy Transition are leveraged to equip learners with emerging green economy skills, including renewable energy technologies, energy efficiency and sustainable infrastructure development. Digital and foundational skills, entrepreneurship training and community based learning initiatives are also promoted to ensure that both young people and adults are equipped with the capabilities needed for employment, livelihoods and lifelong learning.

To support these developments, robust governance frameworks to guide and regulate partnerships are established across the PSET sector. These frameworks strengthen coordination, accountability and oversight, ensuring that collaboration with external stakeholders is coherent, strategically aligned and contributes to national development priorities. Within this structured environment, partnerships with industry, academic institutions and civil society organisations are being expanded to enhance the responsiveness and



relevance of the PSET system. These partnerships provide a foundation for interdisciplinary collaboration, promote innovation and facilitate the integration of academic and workplace-based learning.

The Department continues to deepen its engagement with industry to create structured opportunities for students to acquire practical, hands on experience through apprenticeships, learnerships and workplace based exposure. These initiatives support the alignment of qualifications with labour market requirements and enhance the employability of graduates. Interdisciplinary approaches are similarly promoted to ensure that students develop the analytical, technical and problem solving capabilities necessary to navigate complex socio economic environments.

Parallel to these efforts, the Department is undertaking significant investments to strengthen internal capacity. This includes the construction of new facilities and refurbishment of existing infrastructure across universities, Technical and Vocational Education and Training (TVET) colleges and Community Education and Training (CET) colleges. These investments aim to create high quality, sustainable and technologically enabled learning environments capable of supporting modern pedagogical approaches and expanding institutional reach.

As part of its broader strategic interventions, the Department is intensifying efforts to address the systemic challenges affecting its Information and Communication Technology (ICT) environment, including the SETA integrated learner management system to ensure improved functionality, reliability and regulatory compliance. The Department recognises that weaknesses in ICT infrastructure, data management and systems integration have far reaching implications for operational efficiency, planning, reporting and service delivery. To reinforce its remediation efforts, the Media, Information and Communication Technologies Sector Education and Training Authority (MICTSETA) is providing targeted technical support and capacity building assistance.

The Department is committed to enhancing governance and leadership across the PSET sector. Strong institutional governance is the foundation for academic excellence, financial sustainability and public trust. Over the next MTEF, the Department will focus on building leadership capacity, promoting ethical governance practices and ensuring that institutional councils and management structures are equipped to lead with integrity and accountability. This includes targeted leadership development programmes, improved oversight mechanisms and the enforcement of governance standards that reflect the values of transparency, responsiveness and service to the nation. A key priority is the timely filling of critical positions across the sector to strengthen institutional stability and ensure effective decision-making and service delivery.

Through these interventions, the Department ensures alignment with the NDP 2030 goals and international commitments, including Sustainable Development Goal 4 on quality education. By fostering inclusive education, skills development and ethical governance, the Department contributes significantly to South Africa's long-term vision of a prosperous, equitable and capable society.

I am confident that the Annual Performance Plan for 2026/27 will enable the Department to fulfil its commitments to transform the PSET sector. Under the leadership and support of Deputy Ministers, Dr M Gondwe, MP and Dr N Dube-Ncube, MP, along with the guidance of the Director-General, Dr N Sishi, the implementation of this plan will steer the Department in addressing the socio-economic challenges facing our country.

MR BUTI MANAMELA, MP

EXECUTIVE AUTHORITY OF HIGHER EDUCATION AND TRAINING



ACCOUNTING AUTHORITY STATEMENT

As we enter the 2026/27 financial year, the Wholesale and Retail SETA (W&RSETA) remains committed to strengthening the sector's responsiveness to evolving economic, technological, and societal shifts. In this context, the Annual Performance Plan prioritises translating sectoral insights into targeted skills development, enterprise resilience, and inclusive opportunities for youth, women, persons with disabilities, and marginalised communities, while simultaneously aligning with national priorities outlined in the NDP 2030, MTDP 2025–2029, and NSDP 2030.

Given the changing consumer behaviour, constrained household spending, and evolving market dynamics, the SETA recognises the critical importance of digitalisation, e-commerce, and technology-enabled retail solutions. Accordingly, district-level delivery compacts ensure that provincial skills plans respond directly to local economic realities, employer demand, and regional development priorities. Moreover, special emphasis is placed on supporting SMMEs, co-operatives, and informal traders through integrated interventions, including technical training, digital upskilling, entrepreneurship coaching, market access facilitation, compliance guidance, and targeted micro-grants, thus enabling small enterprises to transition from informal vulnerability to sustainable mainstream participation.

Furthermore, digital and technological competencies are embedded across programmes, including e-commerce, retail technology, logistics, and data-driven operations, while circular economy principles, sustainability, and resilience are mainstreamed to equip a workforce capable of adapting to rapid sectoral transformation. Equity, inclusivity, and ethical leadership remain central, with measurable advancement for women and designated groups, expanded disability-inclusive learning, and the cultivation of accountable sector leaders capable of navigating complex and rapidly evolving market environments.

In addition, specialised Research Chairs will be established in Gauteng and KwaZulu-Natal to strengthen evidence-based, demand-led skills interventions, thereby guiding responses to emerging occupations, sector trends, and priority skills pipelines. Delivery will remain outcomes-focused, evidence-led, and risk-aware, emphasising learner placements, retention, enterprise sustainability, and simplified, accountable pathways for employers, providers, and communities.

Through disciplined execution, strategic collaboration, and innovation, the SETA is positioned to accelerate digital and green transformation, expand youth employment, strengthen enterprise resilience, and contribute decisively to South Africa's inclusive socio-economic development, ultimately shaping a wholesale and retail sector that is competitive, adaptive, and transformative for all South Africans in 2026/27 and beyond.



THULAN TSHEFUTA

ACCOUNTING AUTHORITY CHAIRPERSON


CHIEF EXECUTIVE OFFICER STATEMENT

The W&RSETA Annual Performance Plan for 2026/27 reflects a strategic shift from execution to delivery at scale, prioritising measurable impact, inclusive growth, and sustainable enterprise development across South Africa's wholesale and retail sector. Central to this plan is the commitment to translating skills investments into jobs, enterprise resilience, and equitable opportunities for youth, women, persons with disabilities, and marginalised communities. District-level delivery compacts will ensure that the Provincial Skills Plan responds directly to local economic realities, aligning programmes with employer demand and regional development priorities. Recognising the foundational role of SMMEs, co-operatives, and informal traders in sector growth, the SETA will provide integrated support combining practical technical training, entrepreneurship coaching, market access facilitation, compliance guidance, and targeted micro-grants, enabling small enterprises to transition from informal vulnerability to sustainable participation in the mainstream economy.

In parallel, digital and technological competencies will be embedded across all programmes, incorporating digital literacy, e-commerce operations, retail technology, and data management, while advanced streams will prepare supervisors and managers for analytics-driven and AI-assisted retail operations. Circular economy principles, including waste minimisation, sustainable sourcing, and energy efficiency, will be mainstreamed in training to ensure that the workforce is equipped for a sustainable, resilient, and forward-looking sector. Moreover, transformation and ethical leadership remain central to all interventions, with a focus on measurable progression for women and designated groups, expanded disability-inclusive learning and workplace access, and the development of sector leaders capable of ethical, transparent, and accountable decision-making.

A key strategic innovation for 2026/27 is the launch of specialised Research Chairs in Gauteng and KwaZulu Natal, which will strengthen evidence-based, demand-led skills interventions, foster collaboration between the SETA and academic institutions, and provide authoritative guidance on sectoral trends, emerging occupations, and priority skills pipelines. In addition, delivery will be evidence-led, outcomes-focused, and risk-aware, emphasising placements, retention, and enterprise outcomes, while leveraging digital platforms and accountable partnerships to monitor performance, streamline reporting, and address operational challenges proactively.

The SETA's compact with stakeholders ensures that employers gain a simplified, responsive digital pathway to co-design programmes in exchange for WSP/ATR compliance and placement commitments, providers receive predictable funding tied to measurable outcomes and workplace exposure, and communities benefit from interventions that promote decent work, inclusion, and sustainable economic growth. Through disciplined execution, strategic partnerships, and innovative delivery, the 2026/27 APP positions the wholesale and retail sector to accelerate digital and green transformation, expand youth employment, strengthen enterprise resilience, close opportunity gaps, and contribute decisively to South Africa's inclusive socio-economic development.



TOM MKHWANAZI
CHIEF EXECUTIVE OFFICER

OFFICIAL SIGN-OFF

It is hereby certified that this Annual Performance Plan:

- Was developed by the management of the W&RSETA under the guidance of the W&RSETA Accounting Authority.
- Considers all the relevant policies, legislation, and other mandates for which the W&RSETA is responsible.
- Accurately reflects the Outputs which the W&RSETA will endeavour to achieve over the period 2025/26- 2029/30.



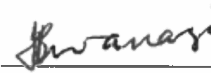
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Approved by

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EXECUTIVE AUTHORITY OF HIGHER EDUCATION AND TRAINING**



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LIST OF ACRONYMS

4IR	Fourth Industrial Revolution	NEET	Not in Employment, Education or Training
AET	Adult Education & Training	NGP	New Growth Path
AG	Auditor General	NQF	National Qualifications Framework
AGSA	Auditor General South Africa	NSA	National Skills Authority
AI	Artificial Intelligence	NSDP	National Skills Development Plan
APP	Annual Performance Plan	NUMSA	National Union of Metal Workers of South Africa
ATR	Annual Training Report	OD	Organisational Design
B-BBEE	Broad-Based Black Economic Empowerment	OFO	Organising Framework for Occupations
BBC	Black Business Council	PESTEL	Political, Economic, Social, Technological, Environmental, and Legal
BUSA	Business Unity South Africa	PIVOTAL	Professional, Vocational, Technical and Academic Learning
CET	Community Education and Training	POPIA	Protection of Personal Information Act
CGCSA	Consumer Goods Council of South Africa	PSET	Post-School Education and Training
COO	Chief Operations Officer	PSP	Priority Skills Plan
COSATU	Congress of South African Trade Unions	PWD	Persons with Disabilities
CPI	Consumer Price Index	QCTO	Quality Council for Trades and Occupations
CRM	Customers Relationship Management	QLFS	Quarterly Labour Force Survey
CSD	Central Supplier Database	RA	Retailers Association
DDM	District Development Model	ROI	Return on Investment
DG	Discretionary Grant	SAQA	South African Qualifications Authority
DHET	Department of Higher Education and Training	SCM	Supply Chain Management
ERRP	Economic Reconstruction and Recovery Plan	SDP	Skills Development Provider
ETDP SETA	Education, Training and Development Practices SETA	SETA	Sector Education and Training Authority
FRA	Fuel Retailers Association	SIC	Standard Industrial Classification
GDP	Gross Domestic Product	SMME	Small, Medium, and Micro Enterprises
GNU	Government of National Unity	SOP	Standard Operating Procedure
HDI	Historically Disadvantaged Individuals	SPPE	Strategic Planning & Performance & Evaluation
HEI	Higher Education Institute	SSP	Sector Skills Plan
HET	Higher Education and Training	STI	The Science, Technology, and Innovation
HR	Human Resources	SWOT	Strengths, Weaknesses, Opportunities and Threat
HRM&D	Human Resources Management and Development	TID	Technical Indicator Descriptor
HTFV	Hard-To-Fill-Vacancies	TVET	Technical and Vocational Education and Training
ICT	Information and Communication Technology	UAT	User Acceptance Test
ILD	International Leadership Development Programme	W&R	Wholesale and Retail
IPAP	Industrial Policy Action Plan	W&RSETA	Wholesale and Retail SETA
IT	Information Technology	WBL	Workplace-Based Learning
ITAMED	Informal Traders and Micro Enterprises Development	WP-PSET	White Paper for Post-School Education and Training
MG	Mandatory Grant	WSP	Workplace Skills Plan
MOU	Memorandum of Understanding		
MTDP 2025-2029	Medium Term Development Plan		
MTEF	Medium-Term Expenditure Framework		
NDP	National Development Plan		
NEDLAC			



PART A: OUR MANDATE

1. Updates to the Relevant Legislative and Policy Mandates

1.1. Legislative and Policy Mandates

The W&RSETA is a schedule 3A public entity and derives its mandate from the Skills Development Act No. 97 of 1998 (as amended). The SETA is responsible for supporting skills development in the wholesale and retail sector in South Africa, through the disbursement of grants to facilitate the implementation of learning programmes and monitoring of education and training (as outlined in the Act, in accompanying regulations and the NSDP).

1.1.1. Legislative Mandate

Table 1 below provides a summary of the legislative framework governing the operations of the W&RSETA.

Table 1: Legislative Mandate

LEGISLATION OR REGULATION	SUMMARY OF PURPOSE
Skills Development Act, No. 97 of 1998 (as amended)	<p>The purpose of the Skills Development Act is to:</p> <ul style="list-style-type: none"> • Ensure credible labour market analysis to provide a supply & demand analysis that inform sector skills priorities. • Develop the skills of the South African workforce. • Increase the levels of investment in education & training in the labour market. • Encourage employers to use the workplace as an active learning environment. • Encourage workers to participate in learning programmes.
Skills Development Levies Act, No. 9 of 1999	<p>Imposes the payment of skills levies by employer organisations in order to motivate investment in skills development. Employers pay 1% of the total payroll, which is utilised as follows:</p> <ul style="list-style-type: none"> • 20% to the National Skills Fund • 10% for operating costs • 80% to the SETAs

LEGISLATION OR REGULATION	SUMMARY OF PURPOSE
	<ul style="list-style-type: none"> • 0.5% to the Quality Council for Trades and Occupations (QCTO) • 20% for mandatory grants • 49.5% for discretionary grants (DG)
National Qualifications Framework Act, No. 67 of 2008	<ul style="list-style-type: none"> • Creates a single integrated national framework for learning • Enhances the quality of education & training • Facilitates access to education, training & career path • Accelerates the redress of past unfair discrimination • Allows for South African Qualifications Authority (SAQA) & the quality councils to oversee the National Qualifications Framework (NQF)
Public Finance Management Act, No. 29 of 1999	<ul style="list-style-type: none"> • Regulates financial management in the national government & provincial governments to ensure that all their revenue, expenditure, assets & liabilities are managed efficiently & effectively • Provides for the responsibilities of persons entrusted with financial management of those governments
Broad-Based Black Economic Empowerment (B-BBEE) Act, No. 53 of 2003.	<ul style="list-style-type: none"> • Proposed amendments to the Act now include higher education. The Skills Development target, which is still at 6%, is now to be allocated as 3.5% spend on Black people & 2.5% on Black students in higher education. In the past the Skills Development Element was focused on learnerships, internships & apprenticeships. The Skills Development spent on Black students includes bursaries at higher education institutions as a new indicator.
SETA Grant Regulations, 3 December 2012, Vol. 570, 35940	<ul style="list-style-type: none"> • Assists the SETAs to develop internal policies & procedures in response to the Grant Regulations • Requires 80% of discretionary funds to be spent on the delivery of Professional, Vocational,



LEGISLATION OR REGULATION	SUMMARY OF PURPOSE
	Technical and Academic Learning (PIVOTAL) programmes.
Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2017	<ul style="list-style-type: none"> • Promotes socio-economic transformation. • To ensure that government procurement practices are fair, equitable, transparent, competitive, & cost-effective while advancing the socio-economic objectives of the country. • To outline how public entities, including SETAs, should implement preferential procurement policies. • To promote the participation of historically disadvantaged individuals (HDIs) & small, medium, & micro-enterprises (SMMEs) in public procurement processes. • To leverage government procurement to achieve broader socio-economic goals, ensuring that public spending contributes to reducing inequality, creating jobs, & fostering inclusive economic growth in South Africa.
Workplace-Based Learning programme agreement regulations, 2018	<ul style="list-style-type: none"> • Provides guidelines for the management of WBL programme agreements.
Disaster Management Act, No. 57 of 2002	<ul style="list-style-type: none"> • The SETA may need to revisit processes & avail additional support to stakeholders as a result of any pandemics, natural disasters or acts outside of its control that have a severe impact on the sector & its ability to deliver on its mandate.

2. Updates to Institutional Policies and Strategies

Table 2 below provides a summary of the W&RSETA policy mandates and the key strategies that underpin its operations. Additionally, the table highlights how the W&RSETA's Annual Performance Plan aligns with national government policies and strategies.

Table 2: National strategies or policies and implications for W&RSETA

NATIONAL STRATEGIES OR POLICIES	IMPLICATIONS FOR W&RSETA
<p>National Development Plan 2030 (NDP).</p> <p>The National Development Plan 2030 has identified the following 9 key areas to achieve a developmental approach that is sustainable & inclusive:</p> <ul style="list-style-type: none"> • Creating jobs & livelihoods • Expanding infrastructure • Improving education & training • Transforming urban & rural spaces • Transitioning to low-carbon economy • Fighting corruption & enhancing accountability 	<ul style="list-style-type: none"> • Support initiatives addressing unemployment, poverty & inequality. • Subscribe to the ethos of clean administration & good corporate governance • Increase capacity in the sector in order to respond to the economic dynamics. • Support initiatives addressing unemployment, poverty & inequality • Respond to the needs of the sector with regard to artificial intelligence (AI) • Capacity building of SMMEs & informal traders
<p>National Skills Development Plan (NSDP)</p>	<ul style="list-style-type: none"> • NSDP seeks to ensure that South Africa has adequate, appropriate & high-quality skills that contribute towards economic growth, employment creation & social development • The NSDP outcomes, sub-outcomes & indicators set the basis for the W&RSETA strategic plan
<p>Economic Reconstruction & Recovery Plan (ERRP) & ERRP Skills Strategy</p>	<p>ERRP is a strategic framework developed by the South African government to address the economic challenges exacerbated by the COVID-19 pandemic, with a focus on stimulating economic growth, job creation, & social</p>



NATIONAL STRATEGIES OR POLICIES	IMPLICATIONS FOR W&RSETA
	development. In the context of the SETA system, including the W&RSETA, the ERRP serves as a critical guide for aligning skills development initiatives with the broader national goals of economic recovery & transformation.
Medium Term Development Plan (MTDP)	MTDP is a strategic framework used by governments to outline their development objectives & priorities over a medium-term period, typically spanning five years. It serves as a blueprint for guiding national development efforts, aligning government initiatives with long-term goals, & ensuring the efficient allocation of resources across various sectors.
HRDS 2024–2033	Aimed at building a skilled, adaptable, and inclusive workforce to drive socio-economic growth, support industrialisation, and respond to technological changes such as the 4IR. For the W&RSETA, this strategy implies a stronger alignment of its skills planning and programmes with national priorities, a focus on equipping the wholesale and retail workforce with future-ready digital and entrepreneurial skills, and a commitment to inclusivity by empowering women, youth, persons with disabilities, and supporting SMMEs and the informal economy. In response, the SETA will intensify stakeholder partnerships, integrate innovation-

NATIONAL STRATEGIES OR POLICIES	IMPLICATIONS FOR W&RSETA
	driven training models, expand research to anticipate sector skills needs, and implement targeted interventions that enhance employability, foster enterprise growth, and contribute meaningfully to South Africa's human capital development goals.
National Skills Accord 8 commitments to be followed: <ul style="list-style-type: none"> • Expand training using existing facilities • Set ratios for trainees & artisans, as well as across the technical vocations, to improve training • Improve training funding & incentives for companies to train • Create internship & placement opportunities • Set annual targets for training in state-owned enterprises • Improve SETA governance, fiscal management, & stakeholder involvement • Align training to the New Growth Path & improve SSPs • Improve the role & performance of TVET colleges 	The implications are: <ul style="list-style-type: none"> • Increase learnership, apprenticeship, internship & bursaries • Increase the number of accredited training providers • Expand partnerships with the college sector • Strengthen relations with other strategic partners & role players. • Alignment in response to the 4th IR.
Industrial Policy Action Plan (IPAP) 2018/19-2020/21 IPAP has identified a collaborative approach between government, the private sector & labour; an approach itself characterised by ongoing processes of mutual discovery.	<ul style="list-style-type: none"> • Addressing the skills/education profile of the unemployed • Deeper involvement of the public & private sectors in providing resources for training • A more strategic & sustainable approach to meeting scarce skills needs in identified high priority areas of the economy



NATIONAL STRATEGIES OR POLICIES	IMPLICATIONS FOR W&RSETA
<p>New Growth Path (NGP)</p> <p>The NGP identifies 5 job drivers:</p> <ul style="list-style-type: none"> • Infrastructure for employment & development • Seizing the potential of new economies • Improving job creation in employment • Investing in social capital • Spatial development 	<ul style="list-style-type: none"> • Create projects to increase college-to-work transitions. • Increase learnerships, apprenticeships, internships & bursaries in clothing, textiles, footwear & leather goods & automotive. • Develop projects for promoting green industries. • Capacity building of SMMEs & informal traders
<p>White Paper for Post-School Education & Training (WPPSET)</p>	<ul style="list-style-type: none"> • Review of curriculum to respond to sector needs

The following court rulings are noted:

Business Unity South Africa versus the Minister of Higher Education and Training:

SETA Grant Regulations 3 December 2012 as re-promulgated:

Mandatory Grants. Regulation 4(4) of the 2012 Grant Regulations, as promulgated in 2012, reduced the mandatory grant that an Employer could claim from 50% to 20% of the total levies paid. The way that the Regulations

NATIONAL STRATEGIES OR POLICIES	IMPLICATIONS FOR W&RSETA
<ul style="list-style-type: none"> • It is a vision for an integrated system of post-school education & training with all institutions playing their roles. • Set out strategies to improve the capacity of the PSET system to meet SA's needs 	<ul style="list-style-type: none"> • Increase the number of accredited training providers. • Expand partnerships with college sector. • SMME development & support • Redressing through skills development initiatives • Support skills development Centres in rural & urban setting through infrastructure development projects

3. Updates to Relevant Court Rulings

were promulgated led to litigation by Business Unity South Africa (BUSA), to which a ruling was ultimately made by the Labour Appeal Court in October 2019, the effect of which Regulation 4(4) was set aside.

The ruling is silent on the percentage quantum that can be claimed back by employers and on the effective date of the order. The effect is that the Minister would have to decide on the percentage for mandatory grants, in consultation with the sector. To date, there has been no communication regarding the approved mandatory grant percentage. The Minister is in consultation with the sector regarding this matter.



PART B: W&RSETA STRATEGIC FOCUS

4. Updated Situational Analysis

The W&RSETA recognises the profound impact of the external environment on its overall performance and annual levy receipts. The performance of the South African economy and the Wholesale and Retail (W&R) sector has a direct influence on the W&RSETA's effectiveness, shaping how levy resources are prioritised and allocated. This update to the 2026/27 Annual Plan will incorporate these external factors and their implications for the sector, as detailed in the W&RSETA SSP 2026/27. The Standard Industrial Classification (SIC) codes, which categorise business establishments and economic activities, are crucial in this context. Wholesale trade deals with the bulk buying of goods from various manufacturers and the breaking down of this bulk into smaller quantities which are then sold directly to consumers. Retail trade deals with the buying of goods from the wholesaler and selling of such goods to the consumer. The activities that fall within the scope of the wholesale and retail sector are demarcated according to SIC codes. The scope of coverage of the W&RSETA in terms of the Skills Development Act 97 of 1998, is as follows:

Table 3: The W&RSETA SIC Codes

SIC CODE	TRADE CATEGORY
Major Division 6: Wholesale & Retail Trade; Repair of Motor Vehicles, Motorcycles & Personal & Household Goods; Hotels & Restaurants	
61000	Wholesale & commission trade, except for motor vehicles & motorcycles
61100	Wholesale trade on a fee or contract basis
61200	Wholesale trade in agricultural raw materials, livestock, food, beverages, & tobacco
61220	Wholesale trade in food, beverages, & tobacco
61310	Wholesale trade in textiles, clothing, & footwear
61391	Wholesale trade in household furniture requisites & appliances
61392	Wholesale trade in books & stationery
61393	Wholesale trade in precious stones, jewellery, & silverware
61394	Wholesale trade in pharmaceuticals, toiletries, & medical equipment
61420	Wholesale trade in metal & metal ores
61430	Wholesale trade in construction materials, hardware, plumbing & heating equipment
61501	Office machinery & equipment, including computers
61509	Other Machinery
61510	Sale of new parts & accessories excluding the retail sale of new motor vehicle parts & accessories

SIC CODE	TRADE CATEGORY
1901	General wholesale trade
61909	Other wholesale trade not elsewhere classified (n.e.c.)
Retail	
62000	Retail trade, except for motor vehicles & motorcycles; repair of personal & household goods
62110	Retail trade in non-specialised stores with food, beverages, & tobacco predominating
62190	Other retail sale in non-specialised stores
62201	Retail trade in fresh fruit & vegetables
62201	Retail trade in fresh fruit & vegetable
62202	Retail trade in meat & meat products
62203	Retail trade in bakery products
62204	Retail trade of beverages (bottle stores)
62209	Other retail trade in food, beverages, & tobacco (n.e.c.)
62311	Retail of non-specialised medicines & pharmaceutical products other than pharmacists
62321	Retail trade in men's & boy's clothing
62322	Retail trade in ladies' & girls' clothing
62323	Retail trade by general outfitters & by dealers in piece goods, textiles, leather & travel accessories.
62324	Retail trade in shoes
62330	Retail trade in household furniture appliances, articles & equipment
62340	Retail trade-in hardware, paints & glass
62391	Retail trade in reading matter stationery
62392	Retail trade in jewellery, watches & clocks
62393	Retail trade in sports goods & entertainment requisites
62399	Retail Trade by other specialised stores
62400	Retail Trade in second hand good stores
63122	Retail sale of used motor vehicles
63310	Sale of new parts & accessories
63311	Sale of new tyres
63500	Retail sale of Automotive fuel
65000	Selling & retail of new plastic bags & plastic products
65001	Selling of Garage equipment
65002	Retail of baby clothing
65003	Retail of wooden doors
65004	Retail of beauty products
65005	Sale of marine equipment & everything to do with boats
65006	Retail of packing material

Source (Government Notice, No. 42589, Government Gazette, 22 July 2019)



i. Strategic focus of the W&RSETA over the annual planning period

For the upcoming year, the W&RSETA’s strategic focus emphasises strengthening adaptability and growth within the wholesale and retail sector in response to evolving challenges. Key objectives include designing and implementing targeted skills development and entrepreneurship support programmes for small, micro, and informal businesses, providing workplace-based learning, mentorship, and business development services that address sector-specific challenges while enhancing formalisation pathways, competitiveness, and job creation. The SETA will also implement targeted skills interventions to address critical and emerging shortages, leveraging research and labour market data to align training, upskill existing workers through accredited programmes, and retrain staff to support workforce adaptability amid digital disruption. In addition, initiatives to close the youth employment gap will include bursaries, internships, apprenticeships, and experiential learning opportunities, with a focus on preparing youth for priority occupations, reducing barriers to entry, and increasing participation through industry partnerships. This comprehensive annual approach aims to deliver impactful interventions, enhance skills development, support inclusive economic growth, and foster sector resilience and transformation, including targeted support for previously disadvantaged individuals and persons with disabilities (PWD), and the integration of circular economy principles in alignment with national strategies such as the ERRP.

ii. Recent statistics relevant to the W&RSETA and the sector

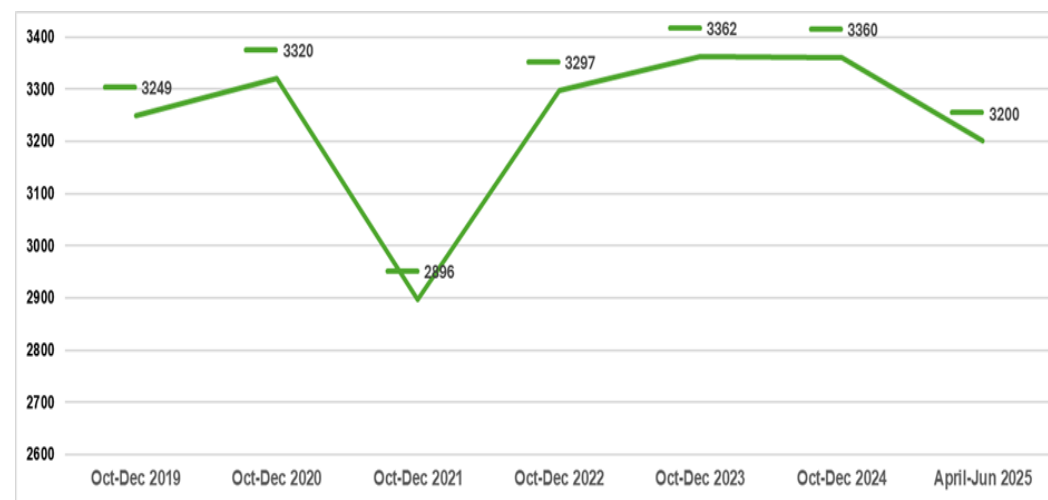
As of 2025, there are 155,077 employers operating in South Africa’s wholesale and retail sector, reflecting the sector’s significant role in the national economy. The sector is overwhelmingly composed of small enterprises (0–49 employees), which account for 62,475 employers or roughly 40% of the total. Gauteng North (20%), SA National (20%), and Western Cape (13%) together account for over half of the sector, underscoring the dominance of metropolitan and urban centres in driving retail activity. Moreover, KwaZulu-Natal and Gauteng South, each at 10%, further reinforce the trend toward urban economic clustering. In contrast, provinces such as Northern Cape (2%), North West (3%), and Limpopo (4%)

show relatively low representation, pointing to limited sector penetration and possible barriers to growth in rural and underserved areas.

iii. Demographic data that will be used to inform planning for the annual planning period

As of the fourth quarter of the 2024/25 financial year, the wholesale and retail trade sector in South Africa employed approximately 3.36 million people. This figure reflected a relatively stable employment level, demonstrating the sector’s continued importance as one of the country’s largest sources of jobs despite the persistent economic challenges faced nationally. The sector had shown resilience amid fluctuating consumer demand, supply chain disruptions, and broader economic pressures. However, the latest data from the first quarter of 2025 reveals a slight but notable decline in employment to around 3.2 million people, marking a loss of roughly 160,000 jobs in just one quarter. Below is a presentation of the trends around employment in the trade sector over the years.

Figure 1: Number of Employees in the Trade Sector

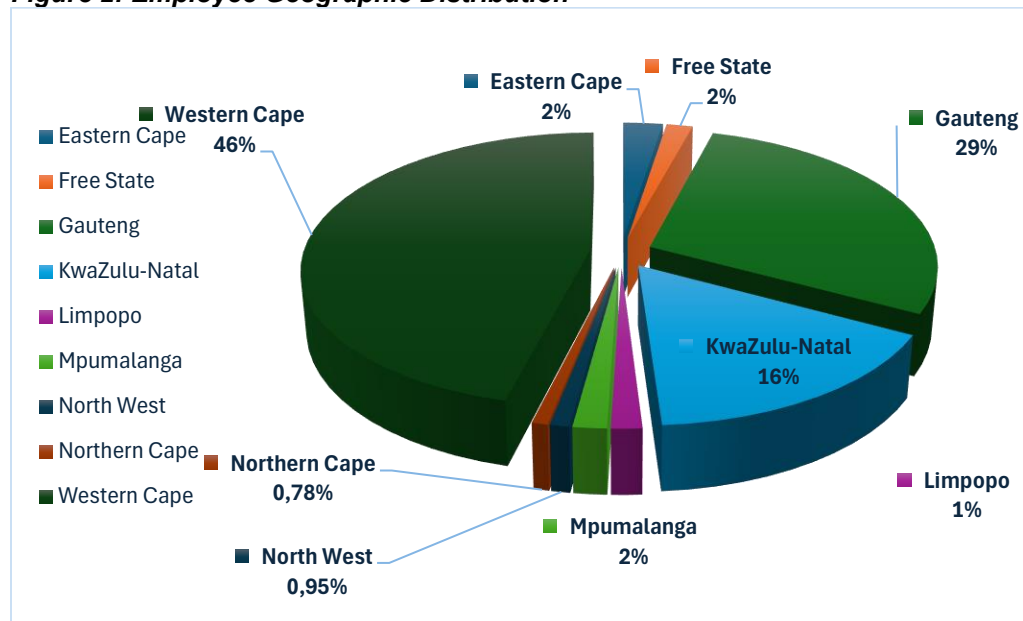


Source: STATSSA SA QLFS 4th Quarter 2019-2025



Despite ongoing economic challenges, several sectors continue to offer critical entry points for youth employment in South Africa. In Q1:2025, the Trade industry which includes retail, wholesale, and hospitality remained the largest employer of young people, accounting for 24.5% of employed youth. This was followed by Community and Social Services (19.8%), Finance (18.4%), and Manufacturing (10.5%). However, the occupational distribution reveals a concentration of youth in low-skilled and service-based roles, with 25.3% employed in Elementary occupations, 20.0% in Sales and Services, 13.5% in Clerical positions, and 11.2% in Craft and Related Trades. These patterns point to a structural reliance on accessible, but often precarious roles with limited career mobility. While these sectors serve as vital gateways to employment, they highlight the urgent need for targeted interventions to promote skills development, improve job quality, and expand opportunities in more stable and future oriented industries.

Figure 2: Employee Geographic Distribution



Source: WSP/ATR DATA, 2025

The below table reveals a complex interplay of race, gender, and geography, highlighting enduring structural patterns and regional inequalities

Table 4: Racial Profile by Gender

Province	Female				Male			
	African %	Coloured %	Indian %	White %	African %	Coloured %	Indian %	White %
Eastern Cape	2%	3%	1%	4%	2%	3%	0,48%	4%
Free State	1%	1%	0,17%	3%	2%	1%	0,26%	4%
Gauteng	23%	12%	28%	42%	36%	21%	36%	46%
KwaZulu-Natal	18%	6%	46%	8%	17%	5%	44%	8%
Limpopo	2%	0%	0,27%	1%	2%	0,05%	1%	1%
Mpumalanga	2%	0%	0,39%	3%	2%	0,11%	1%	3%
North West	1%	0%	0,24%	2%	1%	0,26%	0,42%	2%
Northern Cape	0%	3%	0,05%	1%	1%	3%	0,08%	1%
Western Cape	51%	75%	25%	36%	36%	67%	17%	32%

Source: WSP/ATR DATA, 2025

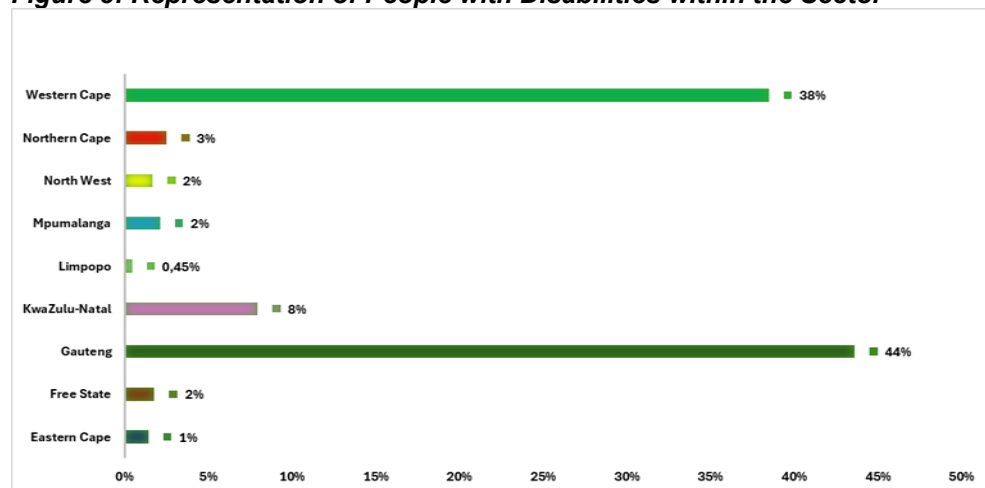
Gauteng and the Western Cape dominate employment across all population groups and genders, with the highest representation of White, Indian, and Coloured employees, particularly among males. In Gauteng, males from the African (36%), Indian (36%), and White (46%) population groups are significantly represented, indicating a relatively more diversified workforce. The Western Cape stands out with exceptionally high representation of Coloured females (75%) and Coloured males (67%), reflecting the province's unique demographic profile and its strong integration of this group into retail employment.



In contrast, provinces such as Limpopo, Mpumalanga, and the North West show markedly low employment figures across all race groups, suggesting limited sectoral activity or formal employment in these regions. Employment of Indian and White South Africans is largely concentrated in urban provinces (Gauteng, KZN, Western Cape), while African employees, particularly females, maintain a more modest, but consistent presence across most provinces. The data also reflects gender disparities, with male representation generally exceeding that of females across all race groups in high-employment provinces.

The figure below reveals a concerning disparity in the geographic distribution of employment opportunities for persons with disabilities, with profound implications for equity and inclusive development. The data reveals that Gauteng (44%) and the Western Cape (38%) account for the vast majority of reported employees with disabilities, over 82% collectively suggesting that inclusion efforts are largely concentrated in economically advanced and urbanised regions. These provinces likely benefit from more structured employment environments, greater compliance with employment equity legislation, and better infrastructure to accommodate diverse employee needs.

Figure 3: Representation of People with Disabilities within the Sector



Source: WSP/ATR DATA, 2025

While the above reflects on the representation of people with disabilities with the sector per province, the below reflects on employment profile in terms of Race and Gender Profile by OFO Major Group.

Table 5: Race and Gender Profile by OFO Major Group

OFO Major Group Code	Major Groups	Female				Male			
		African	Coloured	Indian	White	African	Coloured	Indian	White
2021-1	Clerical Support Workers	43,58%	10,49%	2,66%	4,73%	30,48%	4,52%	1,78%	1,75%
2021-2	Elementary Occupations	38,18%	6,68%	0,39%	0,37%	44,95%	7,28%	0,92%	1,21%
2021-3	Managers	26,17%	7,46%	3,56%	9,72%	23,64%	5,72%	5,74%	17,99%
2021-4	Plant and Machine Operators and Assemblers	7,53%	2,59%	0,22%	0,24%	73,82%	11,19%	2,10%	2,32%
2021-5	Professionals	21,05%	8,75%	4,95%	16,69%	17,97%	7,52%	5,56%	17,52%
2021-6	Service and Sales Workers	53,61%	7,85%	1,04%	1,26%	29,59%	4,20%	0,96%	1,49%
2021-7	Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	25,98%	4,34%	0,58%	0,61%	53,27%	7,60%	1,51%	6,11%
2021-8	Technicians and Associate Professionals	32,08%	9,23%	3,21%	8,82%	29,61%	6,05%	3,04%	7,95%

Source: WSP/ATR DATA, 2025



The above table reveals persistent transformation gaps across key occupational levels in the Wholesale and Retail Sector. African and Coloured individuals, particularly women, remain underrepresented in managerial and professional roles. For instance, African females comprise only 26.17% of managers, while White males account for a disproportionately high 17.99%, highlighting continued barriers to leadership access.

iv. Relevant stakeholders contributing to the institution’s achievement of its outcomes

The key stakeholders which contribute to the SETA’s achievement of its outcomes in the sector are categorised into groups of organised employers, the W&RSETA board, training providers, organised labour, government, community, and others as shown in Table 4 below.

Table 6: W&RSETA Stakeholders: Organised Labour

ORGANISED EMPLOYERS	<ul style="list-style-type: none"> • Retailers Association (RA) • Consumer Goods Council of South Africa (CGCSA) • National Clothing Retail Federation (NCRF) • Black Business Council (BBC) • Enterprise Mentorship of South Africa (EMOSA) • Business Unity South Africa (BUSU) • Fuel Retailers Association (FRA) • South African Petroleum Retailers Association • Retail Motor Industry Organisation • Wholesale & retail enterprises (small, medium, & large)
ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • Represented equally on the W&RSETA committees • Represent & articulate employer (small, medium, large) interests • Contribute to education & training, negotiations, marketing, finance, human resources & legal
NSDP OUTCOME ALIGNMENT	<ul style="list-style-type: none"> • Engaging workplaces to enable them to provide increasingly relevant data on the skills of their existing workforce and projected skills needs, through relevant templates.

W&RSETA BOARD	<ul style="list-style-type: none"> • Engaging stakeholders to learn their perceptions of future trends in the sectors & the implications of these for the demand & supply interventions signals to steer the supply of skills • Continuously analysing workplace data & stakeholder input on sector trends & national policy priorities; effective & meaningful stakeholder engagement to support ownership & participation among stakeholders which include social partners, individuals, employers, labour, providers, prospective learners and the public.
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Table 7: W&RSETA Stakeholders: W&RSETA Board

W&RSETA BOARD	<ul style="list-style-type: none"> • W&RSETA Board
ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • To govern & control the W&RSETA by providing strategic direction & leadership. • To provide corporate governance guidance • To approve the W&RSETA SSP • To approve the Strategic plan & budget
NSDP OUTCOME ALIGNMENT	<ul style="list-style-type: none"> • Improve the governance oversight, monitoring & evaluation mechanisms & capacity, with strong social partners’ involvement • Institute mechanisms to ensure that actions are taken based on findings from these monitoring & evaluation systems. This is to understand the strengths, challenges, & impact of the system • Review the system where evidence suggests that there are obstacles that are preventing the realisation of the agreed-upon outcomes. This will ensure that the Minister can act where there is non-performance or maladministration • Introduce mechanisms for instructions to the SETAs by the Minister, where there are challenges • Review the SETA Standard Constitution to strengthen governance & accountability mechanisms. The decision about numbers on the Accounting Authority will take into consideration the nature of the sector (for example, the



TRAINING PROVIDERS	<p>number of sub-sectors) & the need to support effective decision-making & good governance. The accounting authority will continue to have governing powers & steer the sector in terms of the scope (mandate & functions) of the SETA whilst, the management of the SETA will focus on operational & administrative roles</p> <ul style="list-style-type: none"> • The roles & responsibilities of the accounting authority will further be defined. This will include a clear statement regarding conflict of interest & guidelines regarding the number of meetings per annum & the rates at which members of the Accounting Authority are remunerated
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Table 8: W&RSETA Stakeholders: Training Providers

TRAINING PROVIDERS	<ul style="list-style-type: none"> • Further Education & Training Committee • Higher Education & Training Committee • Association of Private Providers of Education Training & Development • Southern African Society for Cooperative Education • Universities • TVET Colleges • Private Training Providers • CET Colleges
ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • Represent interests of training providers – public & private • Contribute to education & training, quality assurance, curriculum development
NSDP OUTCOME ALIGNMENT	<ul style="list-style-type: none"> • The delivery of programmes against qualifications (on all the sub-frameworks) that support economic growth, encourage employment creation & enable social development for workers, unemployed & pre-employed (students) • Facilitating workplace-based experience as part of a qualification or a postgraduate qualification with a specific focus on occupations that support growth, encourage employment creation, & enable social development

ORGANISED LABOUR	<ul style="list-style-type: none"> • Support for, & prioritisation of, Centres of Specialisation, where possible • Support for TVET colleges in implementing occupationally directed programmes • Partnerships & collaboration with the higher education & research institutions, amongst others will be central for evidence-based understanding of skills demand & supply
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Table 9: W&RSETA Stakeholders: Organised Labour

ORGANISED LABOUR	<ul style="list-style-type: none"> • Congress of South African Trade Unions (COSATU) • Southern African Clothing & Textiles Workers Union (SACTWU) • South African Commercial, Catering & Allied Workers Union (SACCAWU) • Federal Council of Retail Allied Workers (FEDCRAW) • Development Institute for Training, Support & Education for Labour (DITSEL) • Entertainment Catering Commercial & Allied Workers Union (ECCAWUSA) • National Union of Metal Workers of South Africa (NUMSA)
ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • Represented equally on the committees of the W&RSETA • Represent & articulate worker interests. • Contribute to education & training, negotiations, public management, & dispute resolution
NSDP OUTCOME ALIGNMENT	<ul style="list-style-type: none"> • Skills levy institutions will work with the federations/trade unions in their sectors in identifying the required skills needs, especially in better understanding the sectors & implementing the relevant interventions • Engaging stakeholders (incl. employers, labour, & government) to ascertain their perceptions of future trends in their sectors & the implications of these for the demand & supply interventions signals to steer the supply of skills • Trade unions & worker education & training initiatives are able to use the critical networks of their organisations (e.g., shop stewards & union officials) to educate their members & other workers to suit their needs in a manner that is also beneficial to the economy as a whole.



Table 10: W&RSETA Stakeholders: Community

COMMUNITY	<ul style="list-style-type: none"> • South African Community at large
ROLES & RESPONSIBILITIES	<ul style="list-style-type: none"> • Represent interests of communities and co-operatives • Contribute to education and training, small enterprise and co-operative development, and advancement of women
NSDP OUTCOME ALIGNMENT	<ul style="list-style-type: none"> • Social partners will continue to play an active role, amongst others, in SETA Accounting Authorities and the NSA, these roles will be further elaborated in the Act and relevant skills development Regulations with key responsibility for the implementation of the NSDP. • Career development services (including material) must be accessible to all, especially in rural areas and targeted beneficiaries; and • Ensure that prospective learners and the public are aware of when and how to apply for programmes and have access to a simplified process;

4.1. External Environment Factors

(i) Factors Contributing to The Performance of Policy and Regulatory Institutions

In the dynamic external environment of the W&RSETA, the performance of policy and regulatory institutions is significantly shaped by a complex interplay of factors, as revealed by a comprehensive Political, Economic, Social, Technological, Environmental, and Legal (PESTEL) analysis. Politically, shifts in governance and changes in regulatory frameworks directly affect strategic directions and operational effectiveness. Economically, fluctuations in market conditions and investment trends influence the sector's growth and sustainability. Socially, evolving demographics and societal expectations drive adjustments in policy priorities and workforce needs. Technologically, the rapid pace of advancements and digital transformation necessitates ongoing adaptation and innovation.

Environmentally, sustainability concerns and regulatory requirements impact operational practices and strategic planning. Legally, alterations in legislation and compliance standards redefine the regulatory landscape. By understanding these PESTEL factors, the SETA can better navigate and enhance the performance of its policy and regulatory institutions.

Table 11: PESTEL Analysis

Factor	Key Issues	Implications for the Sector
Political	<ul style="list-style-type: none"> - Collapse of the GNU, resulting in heightened instability and policy paralysis. - Departure of international companies due to political risk. - Influence of new ministers and shifting political alliances. - Potential regulatory changes from new ministries. - Persistent corruption scandals and political uncertainty. 	<ul style="list-style-type: none"> - Weak investor confidence and reluctance of multinationals to expand. - Fragmented policymaking delays reforms needed for retail/wholesale growth. - Businesses face unpredictability in compliance, taxation, and trade rules. - Possible swings in labour, BEE, and competition policy depending on new leadership. - Higher operating risks and need for contingency planning.
Economic	<ul style="list-style-type: none"> - Low GDP growth and fiscal pressures. - High unemployment (>30%) limiting disposable income. - Inflation and rising food prices straining household budgets. - Expansion of the informal sector 	<ul style="list-style-type: none"> - Stagnant consumer demand slows retail sales volumes. - Price-sensitive consumers force retailers into discounting and margin compression. - Informal traders intensify competition, eroding formal sector share.



	<ul style="list-style-type: none"> operating outside regulatory frameworks. - Taxation and new levies under review to address fiscal gaps. - SMME growth opportunities. - Growing informal and unregulated market 	<ul style="list-style-type: none"> - Supply chain and pricing strategies must be continuously adjusted. - Niche opportunities for SMMEs in affordable/localised goods and services. - Risk of increased taxation adding to cost burden. - Unregulated market operate outside regulatory frameworks, avoiding tax obligations and contributing nothing to the fiscus. They compete unfairly with compliant businesses, erode margins in the formal sector, undermine job creation and B-BBEE transformation efforts, and fuel illicit trade through counterfeit goods and untaxed imports.
- Social	<ul style="list-style-type: none"> - Poor service delivery in transport, electricity, and water. - Widening inequality gap and entrenched poverty. - High crime impacting staff, customers, and logistics. - Unemployment entrenched. 	<ul style="list-style-type: none"> - Logistics inefficiencies raise costs, passed on to consumers.- Market segmentation requires tailored offerings for low-income vs. middle-class shoppers. - High shrinkage, theft, and security expenditure. - Pressure on employers to provide training/upskilling.

	<ul style="list-style-type: none"> - Low education/skills base. 	<ul style="list-style-type: none"> - Greater corporate social responsibility expectations to address community needs.
- Technological	<ul style="list-style-type: none"> - 4IR adoption (AI, machine learning, automation, robotics). - Shift to e-commerce and omni-channel retail. - Decline of traditional marketing, rise of digital engagement. - Threat of cybercrime and data breaches. - Lack of integration across systems in many local retailers. - Platform economy disrupting traditional models. - Emergence of new qualifications for digital & tech-driven roles. 	<ul style="list-style-type: none"> - Digital idlers risk losing relevance to nimble online-first players. - Costly investments needed in logistics, data infrastructure, and cybersecurity. - Workforce displacement requiring reskilling in digital tools and analytics. - Fragmented IT reduces customer satisfaction and efficiency. - Opportunities in fintech, delivery apps, and platform retail ecosystems. - Education and SETA-linked programmes must evolve rapidly to supply new skills.
- Environmental	<ul style="list-style-type: none"> - Climate change disruptions (drought, floods) threatening agricultural supply chains. - Waste management regulations tightening. - Push for circular economy models. 	<ul style="list-style-type: none"> - Rising procurement costs and supply chain volatility. - Mandatory compliance with sustainability reporting and climate disclosure frameworks. - Firms adopting recycling, energy efficiency, and sustainable packaging can enhance reputation and reduce costs.



	<ul style="list-style-type: none"> - Rising resource scarcity (water, electricity, raw materials). - Growing consumer demand for sustainable products. 	<ul style="list-style-type: none"> - Non-compliance risks reputational damage and regulatory fines. - Opportunities for innovation in eco-friendly product lines.
Legal	<ul style="list-style-type: none"> - Employment Equity Act (2023/25): numerical racial targets create compliance and litigation risks.- Sectoral Determination 9: strict wage/conditions regulation burdens SMMEs.- Labour law enforcement: ongoing scrutiny, risk of penalties for non-compliance. - Bargaining Council Agreements: compulsory adherence inflates labour costs. - Data Protection (POPIA): stricter enforcement on personal data usage. - Health & Safety Regulations: heightened compliance requirements. 	<ul style="list-style-type: none"> - Increased HR and legal costs to comply with equity and labour regulations. - Potential exclusion from public procurement for non-compliance with EE targets. - Higher wage bill, making formal sector less competitive vs. informal traders. - Increased litigation risk if obligations not met. - Rising costs of cybersecurity and IT compliance. - Safety regulations add compliance overhead, but also reduce liability exposure.

The following opportunities emanate from the above analysis concerning the W&RSETA's core mandate and priorities:

Opportunities for alignment based on potential **political** factors identified:

- Position the SETA as a neutral knowledge partner offering research, evidence-based policy advice, and sector intelligence to guide government and industry.
- Use existing Research Chairs and labour market studies to influence labour, transformation, and skills policies.
- Build stakeholder coalitions (labour, business, regulators) to strengthen policy advocacy and ensure skills planning continuity despite political instability.

Opportunities for alignment based on potential **economic** factors identified:

- Formalise and professionalise informal traders through training, compliance support, and market linkages.
- Develop entrepreneurship and innovation programmes to help SMMEs grow.
- Expand youth employability programmes (learnerships, internships) in growth areas like e-commerce, logistics, and digital retail.

Opportunities for alignment based on potential **social** factors identified:

- Drive upskilling and reskilling of unemployed youth and vulnerable workers.
- Introduce inclusive training models for underserved communities (townships, rural areas).
- Offer security, logistics, and risk management training to strengthen sector resilience.



Opportunities for alignment based on potential **Technological** factors identified:

- Develop new qualifications in AI, data analytics, digital retail, logistics automation, and e-commerce.
- Introduce cybersecurity and data governance training to protect businesses.
- Build skills pipelines for the platform economy and fintech-enabled retail.

Opportunities for alignment based on potential **environmental** factors identified:

- Embed green skills in curricula (sustainable packaging, waste reduction, energy efficiency).
- Train for supply chain resilience and sustainable resource management.

Opportunities for alignment based on potential **legal** factors identified:

- Provide compliance training for Employment Equity, diversity, and inclusion.
- Support SMMEs with labour law and wage regulation compliance.
- Introduce training on data protection and POPIA compliance.

- Demand for services and other factors which inform the development of the Annual Performance Plan

The wholesale and retail sector is a key contributor to South Africa's Gross Domestic Product, yet it operates within a rapidly changing environment shaped by multiple dynamic drivers. These forces ranging from technological innovation to shifting consumer behaviour can accelerate growth or create significant challenges. Examining these drivers through the lens of skills supply and demand provides critical insight into how workforce capabilities influence the sector's trajectory. Understanding where skills gaps emerge, and how they intersect with evolving industry needs, highlights both

opportunities for strategic growth and potential constraints, emphasizing the need for a workforce that is agile, adaptable, and aligned with the sector's future direction.

(a) Technological Advancements & AI:

The wholesale and retail sector is undergoing a profound transformation driven by digitalization and automation, reshaping operations across logistics, warehousing, and customer engagement. The staggering impact of freight system failures, estimated at R1 billion per day, highlights the urgent need for digitally resilient supply chains and a workforce equipped with advanced digital, logistics analytics, and AI-related competencies. While emerging roles such as Data Analysts, Cybersecurity Specialists, Web Designers, Digital Marketers, and E-commerce Project Managers reflect this shift, traditional positions including Retail Buyers and Customer Service Managers are evolving to integrate new technologies, whereas roles like Data Capturers, Secretaries, Call Centre Agents, and Cashiers are diminishing. Current training offerings, however, lag in providing applied digital tools and sector-specific AI content, with uneven access to learning particularly pronounced in rural and resource-constrained areas. In response, the SETA is driving strategic partnerships to develop AI and digital skills curricula, prioritizing real-time logistics, inventory management, and e-commerce applications, while expanding regional digital access through public-private platforms and promoting work-integrated learning in logistics hubs and innovation centers to ensure a future-ready, adaptable workforce.

(b) Generation Z (Gen Z):

The rising presence of Generation Z in the labour force is driving transformative change in the retail sector, as young workers demand purpose-driven, flexible, and digitally enabled roles. Their expectations for adaptive skills, remote work, social media fluency, and entrepreneurial opportunities are reshaping traditional employment pathways, with roles



such as Social Media Strategists, Digital Content Creators, and Learning Experience Designers gaining prominence, while conventional positions like Shop Assistants decline. High youth unemployment, unequal access to training, and provincial disparities in digital infrastructure continue to limit inclusion, highlighting the need for flexible learning models, mentorship schemes, and targeted support for entrepreneurship. In response, the SETA is expanding youth-focused pathways through digital delivery, micro-credentials, mentorship networks, and inclusive leadership development, while leveraging provincial partnerships to bridge infrastructure gaps and ensure equitable access to sector skills development.

(c) Consumer Behaviour Changes:

Rising inflation, global trade tensions, and domestic logistics challenges have heightened South African consumers' price sensitivity and value-consciousness, driving a marked shift in purchasing behaviour that now emphasizes ethical sourcing, local product availability, and seamless omnichannel experiences. In response, retailers have expanded rewards and loyalty programmes to capture behavioural data and deliver personalised promotions, creating demand for employees skilled in consumer analytics, behavioural segmentation, and real-time campaign execution. However, existing sector training remains largely generic, overlooking critical areas such as CRM systems, personalised loyalty mechanisms, and sustainability-focused customer engagement. The digital retail transition further accelerates the need for hybrid roles including Visual Merchandisers, Digital CX Designers, and E-commerce Managers while traditional in-store roles decline and supervisors must integrate physical and digital operations. To align skills development with these evolving consumer-driven dynamics, the SETA will update retail qualifications and learning materials to incorporate applied consumer behaviour analysis, ethical retail principles, and practical CRM applications, while partnering with major retailers and supporting SMMEs to implement customer-centric and green

value propositions within local retail ecosystems.

(d) Economic Trends:

South Africa's economy continues to face significant pressure from persistent inflation, low growth, recessionary trends, and freight network inefficiencies, further exacerbated by international disruptions such as the Ukraine war and tariff disputes. These economic conditions have intensified the demand for skills in operational cost analysis, inventory planning, stock strategy management, and supply chain resilience, while highlighting gaps in current training programmes that do not adequately equip retail operators with practical budgeting, macroeconomic risk awareness, or continuous professional development particularly for small business operators. As a result, roles such as Supply Chain Analysts and Logistics Tech Coordinators are increasingly critical to improving efficiency and managing operational risks, whereas traditional roles like General Clerks and Service Station Attendants are declining due to automation and margin pressures, and high-turnover positions such as Call Centre Operators and Retail Buyers remain unstable amid growing sourcing and customer service complexities. In response, the SETA plans to update learning programmes by integrating practical modules on scenario analysis, financial literacy, and resilience planning, in collaboration with accredited training providers, while piloting a regional skills support programme in high-impact logistics corridors to equip affected communities with short courses in supply chain recovery, alternative distribution methods, and operational adaptability in volatile economic contexts.



(e) **Data Privacy and Protection of Personal Information Act:**

The rapid expansion of digital transactions, remote customer engagement, and data analytics has heightened the need for robust data governance, with POPIA enforcement acting as a key change driver by compelling businesses to manage data securely amid escalating cyber threats. This regulatory shift has increased demand for skills in data protection compliance, cyber risk identification, and secure digital handling, particularly within e-commerce and data-driven retail ecosystems. However, sector-specific, POPIA-aligned training remains limited, leaving many retail workers and managers unaware of compliant data practices and their legal obligations. Consequently, new specialised roles such as Cybersecurity Specialists and Data Privacy Officers are emerging to ensure regulatory adherence and secure handling of customer information, while traditional roles, including Customer Service Managers, are evolving to integrate compliance awareness and digital tools. In response, the SETA will develop and implement accessible POPIA and cybersecurity training frameworks, collaborating with regulators to foster a compliance culture across subsectors, supporting SME retailers in meeting data security requirements, and creating shared awareness toolkits to address sector-wide vulnerabilities.

(ii) **Challenges in the External Environment and Interventions for Addressing Challenges**

The table below outlines key challenges that necessitate a proactive approach by the SETA. By identifying these challenges early, the SETA is better positioned to address them effectively in its implementation strategy.

Table 12: Challenges in the External Environment and Interventions Addressing Challenges

CHALLENGES	MITIGATIONS
1. Employers not releasing employees for training due to operational pressures.	<ul style="list-style-type: none"> - Offer flexible, modular, or online training programmes - Incentivize employers with recognition or tax benefits for training participation. - Establish partnerships to integrate training into work schedules.
2. Low uptake of SETA-funded programmes because businesses perceive them as irrelevant or outdated.	<ul style="list-style-type: none"> - Co-develop programmes with industry to ensure relevance. - Use real-time labour market data to update curricula. • Promote success stories and case studies to increase credibility.
3. Delays in government approvals or funding allocations impacting programme timelines.	<ul style="list-style-type: none"> - Implement proactive planning with contingency buffers. - Maintain regular engagement with funders to expedite approvals. - Explore alternative funding partnerships for continuity.
4. Limited compliance with reporting requirements by levy-paying employers.	<ul style="list-style-type: none"> - Automate reporting and provide user-friendly online portals. - Offer compliance workshops and helpdesk support. • Apply penalties consistently for non-compliance.
5. Inadequate digital skills among trainers and learners to engage with e-learning platforms.	<ul style="list-style-type: none"> - Invest in digital literacy programmes for trainers and learners. - Provide low-bandwidth and mobile-friendly learning solutions. - Partner with tech companies for capacity-building initiatives.



<p>6. High youth unemployment and mismatch between training and available jobs.</p>	<ul style="list-style-type: none"> - Align training programmes with actual employer demand. - Develop structured internships and apprenticeships tied to job placements. - Track graduate outcomes to continuously refine programmes.
<p>7. Increased regulatory compliance burdens may strain the SETA's resources and focus, diverting attention from strategic objectives.</p>	<ul style="list-style-type: none"> - Develop internal capacity and resources to support compliance, reducing the burden on operational units and ensuring that the SETA remains focused on its strategic objectives.

(iii) Trend analysis based on annual reports and end-term reports that will inform the strategy going forward

As the SETA continues to navigate the complexities of a rapidly evolving sector, reflecting on past performance remains essential. The trend analysis table below provides a critical tool for this reflection, offering a comprehensive overview of the patterns, outcomes, and shifts that have shaped the SETA's progress over recent years. This exercise goes beyond a mere retrospective, it serves as a strategic review that highlights successes, identifies challenges, and underscores the sectoral dynamics influencing the SETA's work. By systematically analyzing these trends, the SETA gains valuable insights into the effectiveness of its interventions, the resilience of its strategies, and the changing demands of the sector. These insights are not only vital for understanding past performance, but also foundational for informing strategic decisions and planning for the 2026/27 period. The table below presents a detailed examination of the SETA's key past performance indicators.



Table 13: Trend Analysis Based on Annual Reports and End Term Reports

Programme Performance Indicator	Audited Actual Performance				
	2020/21	2021/22	2022/23	2023/24	2024/25
Percentage of WSPs and ATRs approved for Small Companies per annum	81%	90,25%	93.8%	91%	94%
Percentage of WSPs and ATRs approved for Medium Companies per annum	82%	86,41%	88.25%	85%	93%
Percentage of WSPs and ATRs approved for Large Companies per annum	85%	90,68%	90.43%	90%	96%
Number of unemployed persons awarded bursaries per annum	2170	2163	2303	3535	3944
Number of employed persons awarded bursaries per annum	-	941	1090	1513	1803
Number of employed and unemployed bursars completing their studies per annum	101	106	340	553	951
Number of unemployed learners registered on learning programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	4664	10308	11852	13144	13702
Learnerships	3595	8350	9279	11979	10416
Skills Programme	1069	1958	2573	1165	3286
Number of unemployed learners completing learning programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	2435	3565	5196	3794	4228
Learnerships	1973	1845	3107	3015	2356
Skills Programme	462	1720	2089	779	1872
Number of employed and unemployed learners enrolled on Artisan / technician programmes per annum	-	323	598	717	945
Number of employed and unemployed learners completing Artisan / technician programmes per annum	-	0	415	534	775
Number of learners from TVET colleges and HETs are placed in Work Integrated Learning Programmes per annum	728	1227	2782	2628	3496
Number of learners from TVET colleges and HETs completed their Work Integrated Learning Programmes per annum	230	352	470	1119	854
Number of employed learners registered on learning programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	7452	10399	10447	9139	10431
Learnerships	0	6131	5546	5723	6311
Skills Programme	7452	4268	4901	3416	4120
Number of employed learners completing learning programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	1676	1978	3926	5089	3801
Learnerships	638	928	1166	2359	2382
Skills Programme	1038	1050	2760	2730	1419
Number of small and micro businesses supported per annum	2446	2508	4321	3573	3501



Number of Informal Traders supported per annum	2426	2401	3006	3453	3092
Number of Cooperatives / Community-based entities supported per annum	120	31	197	124	139
Number of persons enrolled on entrepreneurship development programmes per annum	303	177	257	397	332
Number of Trade Union beneficiaries who participated in Trade Union Capacitation Programmes per annum	1095	1010	1629	1770	1406
Number of career guidance interventions per annum	-	950	244	254	252
Number of learners assisted to access opportunities in the W&R sector per annum	-	1803	523	560	750
Number of unemployed learners enrolled for Candidacy Programmes per annum	-	27	58	58	58
Number of signed partnership agreements with HET Institutions, annually	-	2	2	2	2
Number of Public TVET Centres of Specialisation supported annually	-	6	5	4	4
Number of signed partnership agreements with TVET's, annually	-	9	20	16	17
Number of TVET colleges where the SETA has or maintains a presence, annually	35	33	35	36	34
Number of partnerships formed with CETs to improve the delivery of retail and related programmes, annually	-	3	3	7	3



The priority actions below have been strategically identified through rigorous research and are central to aligning the SSP with the W&RSETA's five-year plan, as reflected in this APP. These initiatives define the core strategies required to respond to sectoral changes and advancements, establishing a focused skills development agenda. Ordered by priority, they are designed to address evolving sector needs and drive sustainable progress in the coming years.

Table 14: Planned Strategic Priority Actions

Planned Strategic Priority Actions	SETA Focus area
<p>Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement</p>	<p>The SETA will develop and sustain robust partnerships with Higher Education Institutions, TVET and CET colleges, focusing on curricula co-development aligned to emerging sector technologies and occupations. It will drive capacity building for educators and institutional governance to improve training quality. By integrating workplace-based learning and industry exposure, the SETA ensures learners gain relevant, practical skills. Special emphasis will be placed on broadening access and equity, particularly for youth, women, and people with disabilities, addressing critical skills gaps highlighted in recent sector research.</p>
<p>Strengthen SMME, Cooperatives & Informal Traders Development for Inclusive Sector Growth</p>	<p>The SETA will design and implement tailored skills development and entrepreneurship support programmes for small, micro, and informal businesses. This includes facilitation of workplace-based learning, mentorship, and business development services that directly address sector-specific challenges faced by emerging entrepreneurs and informal traders. By collaborating with industry and training providers, the SETA will enhance the formalisation pathways and competitiveness of these enterprises, thereby supporting inclusive economic growth and job creation.</p>
<p>Enhance Responsiveness to Skills Demand and Supply</p>	<p>The SETA will implement targeted skills development programmes addressing critical and emerging skills shortages in the sector. It will leverage research data to continuously</p>

	<p>update occupational demand forecasts and align training interventions accordingly. Efforts include upskilling existing workers through accredited programmes and retraining to support workforce adaptability in the face of digital disruption and changing market demands. Trade unions and employers are key partners in delivering these programmes to preserve jobs and strengthen sector resilience.</p>
<p>Advance Sector Transformation, including the Training and Employment of Persons with Disabilities (PWD)</p>	<p>The SETA will promote inclusive sector transformation by prioritising training and employment of people with disabilities, in line with national equity objectives. It will ensure CET colleges are capacitated to deliver relevant retail and related programmes that cater to diverse learners. The SETA will also monitor transformation targets across skills development initiatives, ensuring equitable access and participation from historically marginalised groups, thus fostering a diversified and representative workforce.</p>
<p>Address Youth Unemployment through Targeted Skills Development and Transition Pathways</p>	<p>Focus will be on closing the youth employment gap by implementing skills development initiatives that bridge education and employment. These initiatives include targeted bursaries, internships, apprenticeships, and experiential learning opportunities designed to prepare youth for priority occupations in wholesale and retail. The SETA will actively work to reduce barriers to entry and ensure youth participation in learning programmes is significantly increased, leveraging industry partnerships and continuous labour market insights.</p>
<p>Drive the integration of Circular Economy principles (Green) to promote sustainable resource utilization.</p>	<p>Key will be to explore opportunities to integrate green skills into sector training programmes, aligning with national commitments to the circular economy and sustainable practices. This includes developing curricula that embed environmental awareness, resource efficiency, and sustainable retail practices, supporting the sector's transition to greener business models</p>



	as outlined in the ERRP. Collaboration with industry partners and training providers will be critical to mainstream these green skills.
Align skills development with the Economic Reconstruction and Recovery Plan (ERRP)	The SETA will actively contribute to the implementation of the ERRP by aligning skills development programmes with ERRP priorities. This includes strengthening post-school education, supporting entrepreneurship and innovation, retraining workers, and enabling workforce adaptability to economic shifts. The SETA's programmes will support recovery through targeted skills interventions that enhance sector competitiveness and sustainable employment growth.

(iv) Findings of Internal and External Evaluations that will be used to Inform this Annual Performance Plan

The W&RSETA has systematically leveraged insights from recent internal and external evaluations to strengthen its skills development interventions and inform strategic priorities for the 2026/27 period. Across multiple studies including evaluations of unemployed the SETA-funded beneficiaries, the Youth Empowerment Project, and the strategic alignment of skills supply and demand, the evidence underscores the importance of targeted, practical, and industry-aligned programmes in addressing persistent youth unemployment and bridging sectoral skills gaps. These evaluations reveal that while SETA initiatives such as learnerships, bursaries, internships, and graduate placements have successfully enhanced employability and entrepreneurial capacity, outcomes remain uneven, highlighting areas for refinement and continuous improvement.

Key findings point to systemic challenges, including curriculum misalignment with evolving industry standards, limited practical work exposure, insufficient mentorship, and structural barriers such as limited job availability and geographic disparities. At the same time, beneficiaries consistently emphasised the need for programmes that integrate technological competencies, formalised career guidance, and structured pathways from learning to employment. These insights reflect a clear demand for

interventions that are not only technically relevant, but also responsive to the holistic needs of youth and the sector.

The impact of the W&RSETA-funded interventions is evident in the transition of beneficiaries into gainful employment, increased entrepreneurial activity, and enhanced career readiness. However, evaluations also highlight that sustained outcomes require strategic collaboration with industry partners, academic institutions, and government stakeholders to ensure curricula, training methods, and work-integrated learning are effectively aligned with sectoral demands. Strengthened mentorship programmes, expanded practical work experience, and targeted support for scarce and high-demand skills are critical to enhancing employability and addressing systemic inequities.

Looking ahead to 2026/27, the SETA will prioritise modernising training programmes, deepening stakeholder engagement, and embedding innovative approaches to skills development that reflect both current and emerging sector trends. By systematically responding to the evidence generated through these evaluations, the SETA aims to maximise the impact of its investments, support sustainable employment and entrepreneurial outcomes, and contribute to the continued professionalisation and transformation of the wholesale and retail sector.

4.2. Internal Environment Factors

(i) SETA's Capacity to Deliver on Mandate

The W&RSETA operates with nationally with eleven offices across all nine provinces. In Gauteng, there are three offices: two provincial offices and one Head Office. This distribution ensures that the offices are well-positioned to serve most stakeholders effectively.

As at the 31 March 2025, the SETA employed 242 permanent staff members out of 303 total positions. The primary goal of the W&RSETA offices is to facilitate access to services and projects. They are also staffed with skilled



and competent employees responsible for managing various programmes

The Turnaround Strategy in the SETA started in 2019/20, which proposed several business interventions, and one such intervention was the organisational redesign. The organisational structure was developed in alignment with the decentralised model as adopted in the Turnaround Strategy. The development of the revised organisational structure is meant to yield the following results/outputs:

- Effectiveness and efficiency
- Designed to meeting the desired results/outputs
- Stakeholders service delivery.

(ii) Implications of the New Structure:

- Clustering of regions for greater efficiencies
- Clear unambiguous job profiles and descriptions
- Migration to the new structure and remuneration framework
- Decentralisation of operational and identified services

(iii) Human Resources Management and Development (HRM&D) Strategy

W&RSETA developed and adopted an HRM&D Strategy during the 2020/21 and its updated every three years. The strategy is reduced to HR Annual Operational Plan aimed at:

- Skilling and re-skilling staff to improve organisational performance,
- Ensuring that the W&RSETA is configured strategically and correctly in terms of the organisational structure
- Ensuring that the W&RSETA attracts and retains the right capacity to deliver on the mandate to address the organisational needs

- Promote a sound organisational culture and environment that enhance service delivery.

(iv) Approved Macro Structure

The approved macro structure represents the culmination of the second phase of the organisational design (OD) process for the SETA. This macrostructure encompasses the following components:

- **Executive Management Structure**
- **Functional Structure**

The OD is centred around three primary focus areas:

- **Value Creators , Value Enablers and Value Defenders**

This design as indicated comprehensive and often long-term effort aimed at achieving transformational change in specific operational areas. These areas include Values, Strategy, Structure, People, and Processes.



Figure 4: Approved W&RSETA Structure: Executive Managers

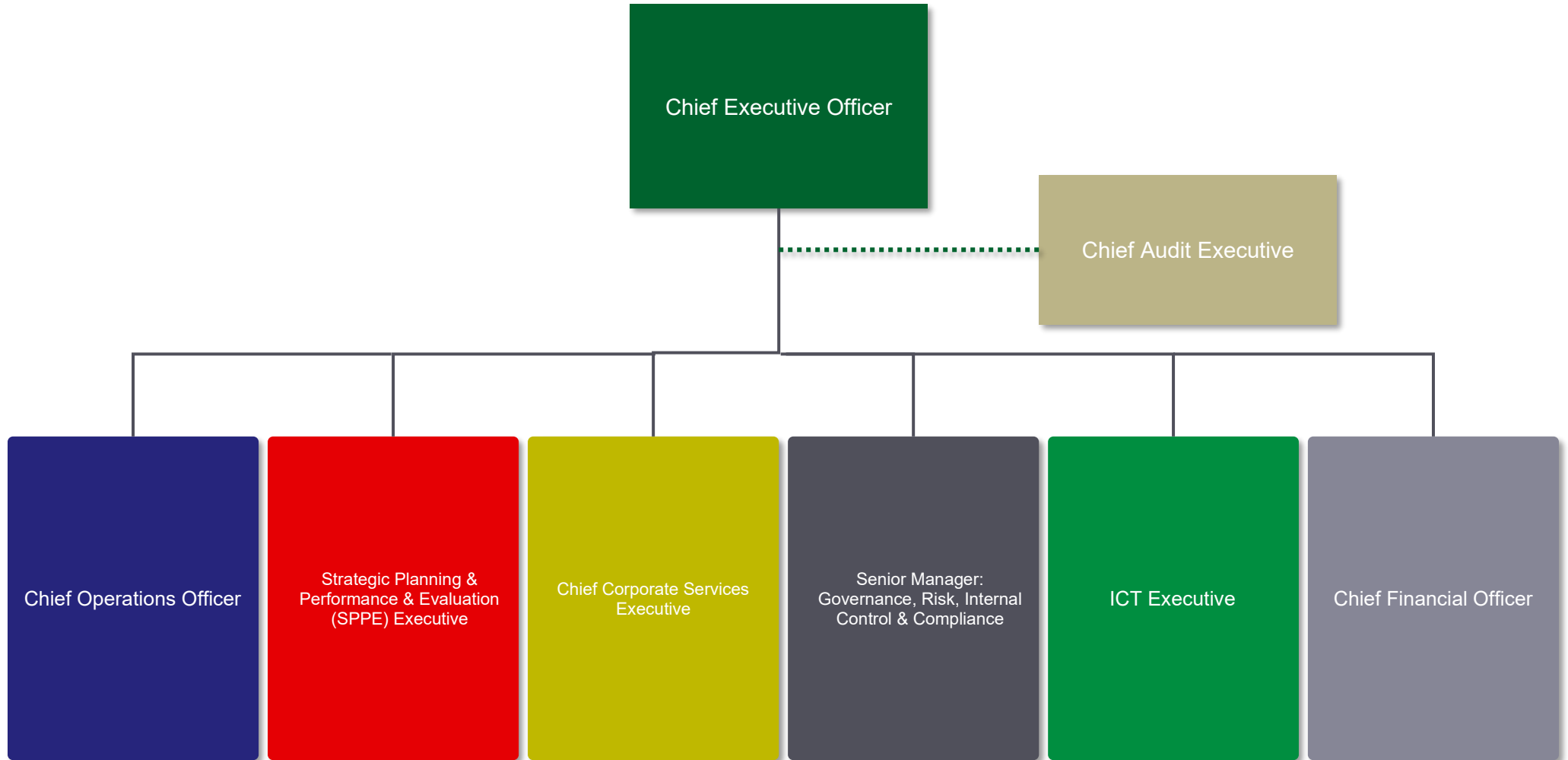
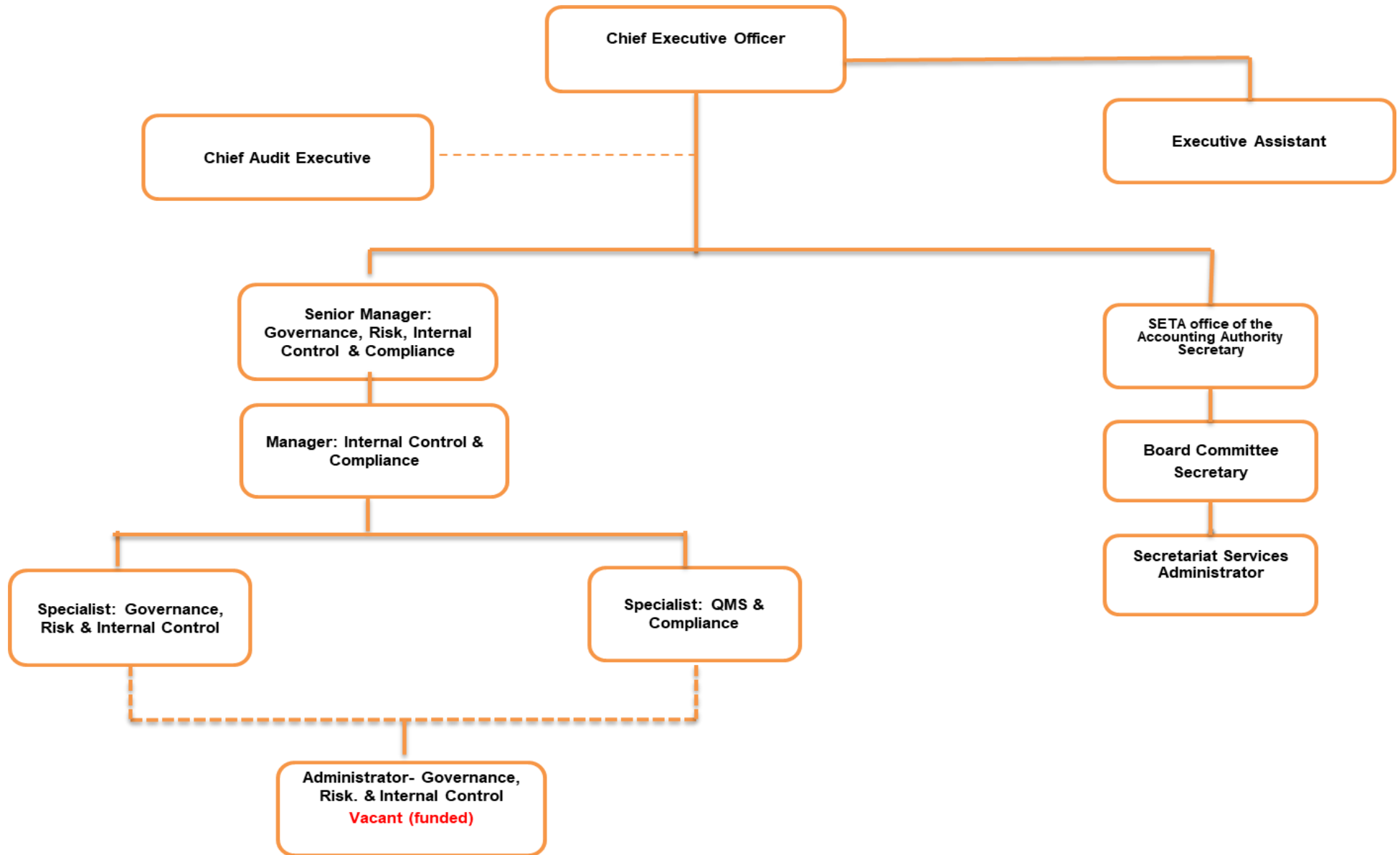


Figure 5: Office Of The CEO



Employee Costs

Employee costs are projected to rise by 5-6 % from the 2024/25 to 2025/6 financial year. This anticipated increase accounts for expected wage negotiations and the filling of several vacant positions.

As part of the Turnaround Strategy, the W&RSETA has undertaken various initiatives to enhance operational efficiency. One key initiative is the OD process, which involves realigning the W&RSETA's organisational structure to better respond to the evolving demands and needs of the sector.

(v) **W&RSETA Status on Compliance with B-BBEE Act**

In South Africa, Broad-Based Black Economic Empowerment (B-BBEE, or BEE as it is more commonly known) is a complex system of rules and guidelines designed to effect socio-economic transformation by levelling the playing field for people of all races. The W&RSETA ensures compliance with the B-BBEE Act in its procurement of goods and services. All adverts for tenders and requests for quotations include a clause on B-BBEE, and the award of contracts considers the B-BBEE points.

(vi) **The status of the W&RSETA in responding to interventions relating to women, youth and PWD.**

Section 15 of the Employment Equity Act No. 55 of 1998 stipulates that Designated Employers must implement affirmative action measures to ensure that suitably qualified employees from Designated Groups have equal opportunities and are equitably represented across all occupational categories and levels within the workforce. Per the provisions of the Act, the W&RSETA workforce as of the end of June 2025 is detailed in the table below:

Table 15: HR Statistical Picture

Item	Numbers	Comment
Total Staff	242/52?	None
Women	170	70 % of the W&RSETA's workforce are women
PWD	1	0.41 % is the number representing the PWD.

The table above illustrates that the W&RSETA has exceeded its target for female representation in the workplace, achieving 70% compared to male employees at 30%. While the Employment Equity Plan of the SETA aims to address the under-representation of males, PWD, and other groups, it is important to emphasise that this effort does not involve reducing the number of women employed within the organisation.

According to the Employment Equity Quarterly Labour Force Survey by Stats SA, the national workforce comprises 54% males and 46% females. This data indicates that the W&RSETA's numeric goals in the Employment Equity Plan should focus on progressively addressing the under-representation of males and other groups, in alignment with the overall demographic trends.

The W&RSETA has, however, lagged in the representation of PWD within its workforce. As of 31 March 2025, there was only one employee with disabilities, representing just 0.41% of the workforce. The SETA is committed to implementing and monitoring its Employment Equity Plan to address this gap. The national target for the employment of PWD has consistently been set at 2% over recent years, highlighting a need for the W&RSETA to enhance its efforts to align with these national objectives.

Additionally, the W&RSETA annually prepares and submits an online Employment Equity Report in compliance with legal. HR is in its third year of implementing the recommendations from the skills audit report, which



identified priority interventions including Executive Coaching, Project Management, Planning, Business Writing, and General Office Assistants Training.



(vii) **SETA Strengths, Weaknesses, Opportunities and Threat (SWOT Analysis)**

As part of its forward-looking strategy for the 2026/27 period, the W&RSETA is conducting a comprehensive SWOT analysis. This analysis is a crucial component of the organisation’s strategic planning and will provide an in-depth evaluation of its Strengths, Weaknesses, Opportunities, and Threats. By assessing these factors, the SETA aims to align its strategic objectives with the evolving needs of the sector, ensuring it is well-positioned to proactively address challenges and seize emerging opportunities. This analysis will serve as a foundational tool to guide the SETA's efforts in driving sustainable growth and sector transformation over the next five years.

Figure 6: W&RSETA SWOT Analysis



BUDGET FOR ANNUAL PERFORMANCE PLAN

(viii) SETA's Capacity to Deliver: Financial Resources

The Medium-Term Expenditure Framework (MTEF) delineates the strategic priorities for the W&RSETA. Budget adjustments within this framework are guided by external economic factors. Key influences include the overall performance of the economy and the state of employment in South Africa, both of which affect the levies collected by the W&RSETA.

(ix) Financial Resource

The W&RSETA receives 80% of the 1% skills levy paid by levy-paying companies. Projected revenue streams for the 2025/2026 to 2028/2029 financial years are derived from actual levies collected during the 2024/2025 financial year, considering the prevailing economic conditions and the Consumer Price Index (CPI) percentiles following the MTEF guidelines. Historically, revenue streams have been conservatively projected, with an average annual increase of 5% to 6%. This projection is based on salary negotiations within the sector, which underpin the calculation of the 1% skills levy.

Table 16: Goods and Services

2025/26 FY R' 000	2026/27 FY R' 000	2027/28 FY R' 000	2028/29 FY R' 000
100 633	123 477	128 860	134 646

Goods and services expenditures are anticipated to increase by 23% from the 2025/26 to the 2026/27 financial years. This is as a result of alignment made to admin budget with the expected administration revenue to avoid strains encountered on the admin budget in the past two financial periods, leading to application to exceed the 10.5% administration costs. The expenditure will then be adjusted by the CPI of 4.36% for the 2027/28

financial year, with a further increase of 4.49% projected for the 2028/29 financial year.

Table 17: Levy Revenue

2025/26 FY R' 000	2026/27 FY R' 000	2027/28 FY R' 000	2028/29 FY R' 000
1 639 497	1 744 806	1 820 880	1 902 638

Levy revenue is anticipated to rise by 6.4% from the 2025/26 to 2026/27 financial year, with subsequent increases of 4.36% in 2027/28 and 4.49% in 2028/29. The 6.4% growth from 2025/26 to 2026/27 reflects the levy income over a complete 12-month period. The stability of the business environment and the increase in additional businesses in the country have led to a greater number of levy-paying companies, resulting in increased levy collections

Table 18: Transfers and Subsidies

2025/26 FY R' 000	2026/27 FY R' 000	2027/28 FY R' 000	2028/29 FY R' 000
2 105 751	2 045 791	2 001 955	1 963 645

Transfers and subsidies expenditure encompasses the total value of both mandatory and discretionary grant spending for the W&RSETA. This expenditure is projected to decline by 3% from the 2025/26 to the 2026/27 financial year. Decreases of 2% are anticipated for both the 2027/28 and 2028/29 financial years. These decreases are directly correlated with the anticipated grant disbursements and are aligned with the heightened performance targets established by the W&RSETA. Additionally, the adjustments account for the surplus retained from previous financial periods.

(x) Programme Resource Considerations

The following outlines the MTEF for the period 2026/27 to 2028/29:



	R'000	R'000	R'000	R'000	R'000	R'000	R'000	R'000
				Approved				
Financial Performance data	Audited Outcome/ Actual values			Original budget	Revised budget	Medium Term Estimates		
R thousand	2022/23	2023/24	2024/25	2025/26	2025/26	2026/27	2027/28	2028/29
Revenue								
Non-tax revenue	142 125	199 131	212 912	357 437	174 230	181 443	199 587	199 587
Interest income	142 125	198 880	212 562	357 437	174 230	181 443	199 587	199 587
Other		251	350					
Transfers received	1 409 604	1 581 018	1 671 341	1 639 497	1 639 497	1 744 806	1 820 880	1 902 638
Administration Grant (10.5%)	181 897	204 641	233 527	211 562	211 562	243 195	253 798	265 194
Mandatory Grant (20%)	346 471	389 699	398 875	402 977	402 977	419 660	437 958	457 622
Discretionary Grant (49,5%)	857 515	964 835	1 026 263	997 368	997 368	1 068 750	1 115 348	1 165 427
Penalties and interest on levies	23 721	21 843	12 676	27 589	27 589	13 201	13 776	14 395
Total revenue	1 551 729	1 780 149	1 884 253	1 996 934	1 813 727	1 926 250	2 020 467	2 102 225
Expenses								
Current expenses	181 022	203 647	223 219	211 562	218 562	243 195	253 798	265 194
Compensation of employees	100 672	92 164	94 825	106 862	106 862	109 149	113 908	119 022
Goods and services	70 350	100 061	118 568	93 633	100 633	123 477	128 860	134 646
Depreciation	10 000	11 422	9 826	11 067	11 067	10 569	11 030	11 526
Transfers and subsidies	1 820 649	1 847 123	1 742 445	2 363 380	2 105 751	2 045 791	2 001 955	1 963 645
Transfers and subsidies excluding project costs	1 713 027	1 736 658	1 613 021	2 216 350	1 958 720	1 922 753	1 883 656	1 850 693
- Compensation of employees	79 422	75 406	77 584	86 663	86 663	88 518	92 377	96 525
- Other Project Expenses	28 200	35 059	51 840	60 367	60 367	34 520	25 922	16 427
Total expenses	2 001 671	2 050 770	1 965 664	2 574 942	2 324 313	2 288 986	2 255 754	2 228 839
Surplus / (Deficit)	-449 942	-270 621	-81 411	-578 008	-510 586	-362 736	-235 286	-126 614
Retained Surpluses	449 942	270 621	81 411	578 008	510 586	362 736	235 286	126 614
Total Surplus / (Deficit)	-	-	-	-	-	-	-	-

	R'000	R'000	R'000	R'000	R'000	R'000	R'000	R'000
				Approved				
Financial Performance data				Original budget	Revised budget	Medium Term Estimates		
R thousand	2022/23	2023/24	2024/25	2025/26	2025/26	2026/27	2027/28	2028/29
Total Revenue Budget	1 551 729	1 780 149	1 884 253	1 996 934	1 813 727	1 926 250	2 020 467	2 102 225
1. Administration Grant (10.5%)	181 897	204 641	233 527	211 562	211 562	243 195	253 798	265 194
2. Mandatory Grant (20%)	346 471	389 699	398 875	402 977	402 977	419 660	437 958	457 622
3. Discretionary Grant (49,5%)	857 515	964 835	1 026 263	997 368	997 368	1 068 750	1 115 348	1 165 427
4. Other Income	165 846	220 974	225 588	385 027	201 819	194 644	213 364	213 982
Expense Breakdown per Grant Category								
Total Expenditure Budget	2 001 671	2 050 770	1 965 664	2 574 942	2 324 313	2 288 986	2 255 754	2 228 839
1. Administration Grant (10%)	172 782	193 954	212 623	199 019	206 019	230 133	240 167	250 950
2. QCTO (0.5%)	8 240	9 693	10 596	12 543	12 543	13 062	13 632	14 244
3. Mandatory Grant (20%)	278 067	263 530	282 001	402 977	402 977	419 660	437 958	457 622
4. Discretionary Grant (49.5%)	1 542 582	1 583 593	1 460 444	1 960 403	1 702 773	1 626 131	1 563 998	1 506 023
4.1 Project Expenses (7.5% Admin)	107 622	110 465	129 424	147 030	147 030	123 038	118 299	112 952
- Compensation of employees	79 422	75 406	77 584	86 663	86 663	88 518	92 377	96 525
- Other Project Expenses	28 200	35 059	51 840	60 367	60 367	34 520	25 922	16 427
4.2 Discretionary Grant excluding project expenditure	1 434 960	1 473 128	1 331 020	1 813 373	1 555 743	1 503 093	1 445 698	1 393 071
4.2.1 Discretionary Grant: Pivotal (80%+ of 49,5%)	1 147 968	1 178 502	1 064 816	1 450 698	1 244 594	1 202 474	1 156 559	1 114 457
4.2.2 Discretionary Grant: Various Projects (20%- of 49,5%)	286 992	294 626	266 204	362 675	311 149	300 619	289 140	278 614



	R'000	R'000	R'000	R'000	R'000	R'000	R'000	R'000
				Approved				
Financial Performance data				Original budget	Revised budget	Medium Term Estimates		
R thousand	2022/23	2023/24	2024/25	2025/26	2025/26	2026/27	2027/28	2028/29
Programme 1: Administration	181 022	203 647	223 219	211 562	218 562	243 195	253 798	265 194
1.1 Compensation of employees	100 672	92 164	94 825	106 862	106 862	109 149	113 908	119 022
1.2 Good and services	70 350	100 061	118 568	93 633	100 633	123 477	128 860	134 646
1.3 Depreciation	10 000	11 422	9 826	11 067	11 067	10 569	11 030	11 526
Programme 2: Skills Planning	17 110	14 301	5 172	19 753	19 753	23 848	24 887	25 920
2. Project Expenses	3 777	4 037	1 002	4 393	4 393	4 487	4 683	4 893
2.1 Research (Agendas, post-doctoral & Chairs)	9 170	7 059	3 515	10 564	10 564	16 564	17 287	17 978
2.2 Strategic documents (SSP, SP & APP)	4 163	3 205	655	4 796	4 796	2 796	2 918	3 049
Programme 3: Learning Programmes and Projects	1 608 837	1 564 428	1 727 897	2 277 495	2 037 864	1 989 395	1 943 101	1 902 223
3. Project Expenses	137 844	101 811	123 596	125 639	125 639	111 189	105 934	100 031
3.1. Work Skills Plans and Annual Training Reports (Mandatory Grant)	278 067	263 530	282 001	402 977	402 977	419 660	437 958	457 622
3.2. Implementation of learning Programmes per NSDS goals	1 231 302	1 357 378	1 165 846	1 633 186	1 393 556	1 340 378	1 275 890	1 215 713
3.3. SMME and Informal Traders	85 097	90 034	103 301	98 976	98 976	101 094	105 502	110 239
3.4. Career guidance and access to opportunities	2809	2 972	18 336	3 268	3 268	3 338	3 483	3 640
3.5. Trade Union capacitation and sponsorships	11 562	12 233	34 817	13 448	13 448	13 736	14 335	14 978
Programme 4: Quality Assurance	56 859	4 864	7 191	66 133	48 133	32 548	33 967	35 502
4. Project Expenses	14 614	3 618	1 404	16 998	16 998	7 362	7 683	8 028
4.1 Artisans/Technician programmes and Occupational qualifications	20 998	1 246	2 327	24 423	16 423	14 945	15 597	16 307
4.2 Partnerships with HET, TVETs and CETs	21 247	-	3 460	24 712	14 712	10 241	10 688	11 167
Total expense	2 001 671	2 050 770	1 963 479	2 574 943	2 324 312	2 288 986	2 255 754	2 228 839



PART C: MEASURING OUR PERFORMANCE

Programme 1: Administration

The purpose of this programme is to provide effective and efficient support functions within the organisation. The programme is responsible for creating an enabling environment for the W&RSETA to deliver on its outputs and goals.

The success of this programme over the MTEF will be measured in terms of its ability to establish organisational capacity and capability that will enable a culture of high-performance productivity which will enable the delivery of the SETA's mandate. This will be attained through the deployment of robust business processes and systems, embedding effective corporate governance, strengthening oversight and compliance, as well as monitoring and evaluation capabilities for measuring the impact of skills interventions in the sector.

Table 19: Programme 1 Outcomes, Outputs, Output Indicators & Targets

Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Outcome 1: An efficient and effective organisation with good corporate governance	Output 1: Attainment of an unqualified audit Opinion from the Auditor General (AG) South Africa	[1.1] Audit opinion annually	Unqualified	Unqualified	Unqualified	Unqualified	Unqualified	Unqualified	Unqualified
	Output 2: stakeholder sessions that advocate for participation in skills development programmes	[1.2] Number of stakeholder sessions conducted annually to advocate for participation in skills development programmes	16	16	20	20	20	22	22



Table 20: Indicators, Annual and Quarterly Targets

Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
Output 1: Attainment of an unqualified audit opinion from the AG South Africa	[1.1] Audit opinion annually	Unqualified	-	-	-	Unqualified
Output 2: stakeholder sessions that advocate for participation in skills development programmes	[1.2] Number of stakeholder sessions conducted annually to advocate for participation in skills development programmes	20	2	8	6	4

Explanation of Planned Performance over the Medium-Term Planning Period

In this 2026/27APP, the SETA prioritises the effective and efficient use of resources as a cornerstone of its strategy to achieve and sustain an unqualified audit opinion from the Auditor-General South Africa. Building on the governance framework established in previous years, the SETA is committed to advancing its sound administration practices, ensuring that all operations are aligned with the highest standards of compliance and resource management.

The pursuit of an unqualified audit opinion by the end of the 2026/27 financial year represents a critical milestone in this journey. Achieving this goal will not only validate the institution's commitment to transparency and accountability but also reinforce stakeholder confidence in the W&RSETA's ability to deliver on its mandate. The unqualified audit opinion for 2026/27 will serve as a key performance indicator, reflecting the SETA's ongoing dedication to governance excellence and resource stewardship. This focus on sound administration and governance underscores W&RSETA's strategic approach to driving sectoral transformation, ensuring that all resources are optimally utilised to support the development of a skilled and agile workforce within the wholesale and retail sector.



Programme 2: Skills Planning and Research

Functions falling within the ambit of this programme include skills planning, monitoring, evaluation, reporting and research programmes. These programmes provide key inputs in advancing skills development in the sector.

Programme 2 implements its mandate through robust planning, improving the quality and quantity of research outputs, as well as strengthening the integrity of monitoring, evaluation, and reporting on performance information.

Table 21: Programme 2 Outcomes, Outputs, Output Indicators & Targets

Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Outcome 4: A sector responsive Research Agenda that supports and informs the establishment of W&R skills development programmes	Output 3: Board approved planning documents submitted to DHET within prescribed timeframes	[2.1] Number of Board approved planning documents submitted to DHET within prescribed timeframes annually	1	2	3	2	2	2	2
	Output 4: Strategic partnerships established to address priority occupations	[2.2] Number of Memorandums of Understanding with strategic partners addressing sector needs, annually	3	2	3	2	2	2	2
	Output 5: Sector research reports completed	[2.3] Number of sector research reports completed annually	2	5	7	5	5	5	5
	Output 6: Sector directed evaluation studies completed	[2.4] Number of sector directed tracer / impact study reports completed annually	4	2	5	2	2	3	3
	Output 7: Post-Doctoral Fellows Appointed to Support the Implementation of the Sector Research Agenda	[2.5] Number of Post-Doctoral Fellows appointed to support sector research agenda implementation annually	-	-	2	2	2	2	2
	Output 8: W&RSETA Research Chairs to advance sector-specific knowledge, innovation, and skills development	[2.6] Number of Research Chairs formally established annually	-	-	-	-	2	2	2



Table 22: Indicators, Annual and Quarterly Targets

Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
Output 3: Board approved planning documents submitted to DHET within prescribed timeframes	[2.1] Number of Board approved planning documents submitted to DHET within prescribed timeframes annually	2	0	1	1	0
Output 4: Strategic partnerships established to address priority occupations	[2.2] Number of Memorandums of Understanding with strategic partners addressing sector needs, annually	2	0	0	2	-
Output 5: Sector research reports completed	[2.3] Number of sector research reports completed annually	5	0	0	0	5
Output 6: Sector directed evaluation studies completed	[2.4] Number of sector directed tracer / impact study reports completed annually	2	0	0	0	2
Output 7: Post-Doctoral Fellows Appointed to Support the Implementation of the Sector Research Agenda	[2.5] Number of Post-Doctoral Fellows appointed to support sector research agenda implementation annually	2	0	0	2	0
Output 8: W&RSETA Research Chairs to advance sector-specific knowledge, innovation, and skills development	[2.6] Number of Research Chairs formally established annually	2	-	-	-	2

Explanation of Planned Performance over the Medium-Term Planning Period

Programme 2 is a cornerstone initiative, designed to directly advance Outcome 4: A sector-responsive Research Agenda that informs the development of impact driven W&R skills programmes. This outcome is firmly aligned with the NSDP mandate for SETAs to integrate skills planning into broader economic planning processes, highlighting the imperative for applied research and innovation projects that respond dynamically to sectoral needs. The outputs within Programme 2 from strategic planning facilitation to the ongoing enhancement of labour market intelligence are central to achieving this mandate.

A critical feature of Programme 2 is its emphasis on strategic, purposeful research. This research transcends academic exploration, focusing on practical applications that enhance the W&RSETA’s capacity to forecast skills demand and plan interventions effectively. Such alignment is vital in the context of a rapidly evolving wholesale and retail sector, where technological advancement, market fluctuations, and socio-economic shifts necessitate adaptive and evidence-based skills strategies. Moreover, Programme 2 also underscores the strategic importance of formalised partnerships with institutions capable of contributing to sectoral development. These partnerships extend beyond collaboration, serving to amplify the SETA’s initiatives and mobilise key industry stakeholders. Through targeted stakeholder sessions during the financial year, the SETA seeks to raise awareness, galvanise engagement, and prioritise interventions addressing critical occupations across the sector.

Inclusivity remains a defining focus of the research agenda. By assessing the needs of women, children, and people with disabilities, and identifying associated market opportunities, Programme 2 ensures that W&R skills initiatives are equitable and transformative. This approach aligns with national priorities and the ERRP Skills Strategy particularly Intervention 8, and the MTDP’s emphasis on inclusive economic participation. Alignment with the STI Decadal Plan (2022–2032) further reinforces the SETA’s commitment to innovation and the cultivation of a workforce that is skilled, adaptable, and responsive to the demands of a rapidly changing industry.



Programme 3: Learning Programmes and Projects

The purpose of this programme is to contribute to addressing the HTFVs identified in the SSP and reducing HTFVs in the wholesale and retail sector through the provisioning of quality learning programmes. Sub-programmes under this programme include career guidance and the implementation of learnerships, apprenticeships, skills programmes, internships, workplace-based learning programmes (learnerships) and bursaries for students at TVET Colleges and Higher Education Institutions.

Table 23: Programme 3 Outcomes, Outputs, Output Indicators & Targets

Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Outcome 8: An appropriately skilled, agile, and responsive workforce and skills pool able to meet the W&R sector's current and emerging skills needs	Output 9: Approved WSP & ATRs	[3.1a] Number of WSPs and ATRs approved for Small Companies per annum	93.8%	91%	94%	2458	2704	2974	3271
		[3.1b] Number of WSPs and ATRs approved for Medium Companies per annum	88.25%	85%	93%	748	823	905	996
		[3.1c] Number of WSPs and ATRs approved for Large Companies per annum	90.43%	90%	96%	348	383	421	463
	Output 10: Unemployed persons awarded bursaries	[3.2] Number of unemployed persons awarded bursaries per annum	2 303	3 535	3 944	3 000	3000	3000	3000
	Output 11: Employed persons awarded bursaries	[3.3] Number of employed persons awarded bursaries per annum	1 090	1 513	1 803	900	950	950	950
	Output 12: Employed and unemployed bursars completing their studies	[3.4] Number of employed and unemployed bursars completing their studies per annum	340	553	951	600	600	600	600
Outcome 5: Increased opportunities to access W&R occupationally directed programmes	Output 13: Unemployed learners registered on learning programmes addressing Key Skills Priority Areas	[3.5a] Number of unemployed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	9 279	11 979	10416	10 000	10 000	10 000	10 000



Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
		[3.5.b] Number of unemployed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	2573	1165	3286	2 000	2 000	2 000	2 000
	Output 14: Employed and unemployed learners enrolled on Artisan / technician programmes	[3.6] Number of employed and unemployed learners enrolled on Artisan / technician programmes per annum	598	717	945	1000	1500	1500	1500
	Output 15: Learners from TVET colleges and HETs are placed in Work Integrated Learning Programmes	[3.7a] Number of learners from TVET colleges are placed in Work Integrated Learning programmes per annum	2 782	1 730	2272	2 045	2045	2045	2045
		[3.7b] Number of learners from HETs are placed in Work Integrated Learning programmes per annum			898				
	Output 16: Learners from TVET colleges and HETs completed their Work Integrated Learning Programmes	[3.8a] Number of learners from TVET colleges completed their Work Integrated Learning Programmes per annum	470	869	553	550	550	550	550
		[3.8b] Number of learners from HETs completed their Work Integrated Learning Programmes per annum			250				
	Output 17: Employed learners registered on learning programmes addressing Key Skills Priority Areas	[3.9a] Number of employed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	5 546	5 723	6311	4 800	5 000	5 000	5 000
		[3.9b] Number of employed learners registered on Skills Programmes addressing Key Skills Priority Areas as	4 901	3 416	4120	3 200	3 000	3 000	3 000



Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
		identified in the W&RSETA SSP per annum							
Outcome 6: Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, and small, medium and informal business enterprises to enhance their participation in the mainstream economy.	Output 18: Small and micro businesses supported	[3.10] Number of small and micro businesses supported per annum	4 321	3 573	3 501	3 000	3 000	3 000	3 000
	Output 19: Informal Traders supported	[3.11] Number of Informal Traders supported per annum	3 006	3453	3 092	3 500	3 500	3 500	3 500
	Output 20: Cooperatives/ Community-based entities supported	[3.12] Number of Cooperatives/ Community-based entities supported per annum	197	124	139	120	120	120	120
	Output 21: Persons enrolled on entrepreneurship development programmes	[3.13] Number of persons enrolled on entrepreneurship development programmes per annum	257	397	332	500	700	700	700
Outcome 7: Capacitated trade unions within the W&R sector	Output 22: Trade Union beneficiaries who participated in Trade Union Capacitation Programmes	[3.14] Number of Trade Union beneficiaries who participated in Trade Union Capacitation Programmes per annum	1 629	1 770	1 406	1 400	1450	1450	1450
Outcome 2: Increased access to Informed Career choices through the implementation and utilization of the Career Guidance Toolkit.	Output 23: Targeted youth and job seekers reached and engaged with the toolkit	[3.15] Number of career guidance interventions per annum	244	254	252	211	220	220	220



Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Outcome 5: Increased opportunities to access W&R occupationally directed programmes	Output 24: Learners assisted to access opportunities in the W&R sector	[3.16] Number of learners assisted to access opportunities in the W&R sector per annum	523	560	750	500	500	500	500
	Output 25: Unemployed learners enrolled for Candidacy Programmes	[3.17] Number of unemployed learners enrolled for Candidacy Programmes per annum	58	58	58	100	60	60	60
Outcome 3 : Growth focused programmes for the development and support of public Training Providers and the Higher Education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances	Output 26: TVET colleges where the SETA has or maintains a presence	[3.18] Number of TVET colleges where the SETA has or maintains a presence annually	35	36	34	24	30	30	30



Table 24: Indicators, Annual and Quarterly Targets

Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
Output 9: Approved WSP and ATRs	[3.1a] Number of WSPs and ATRs approved for Small Companies per annum	2 704	1 352	1 352	-	-
	[3.1b] Number of WSPs and ATRs approved for Medium Companies per annum	823	411	412	-	-
	[3.1c] Number of WSPs and ATRs approved for Large Companies per annum	383	190	193	-	-
Output 10: Unemployed persons awarded bursaries	[3.2] Number of unemployed persons awarded bursaries per annum	3 000	1 000	1 500	-	500
Output 11: Employed persons awarded bursaries	[3.3] Number of employed persons awarded bursaries per annum	950	-	500	-	450
Output 12: Employed and unemployed bursars completing their studies	[3.4] Number of employed and unemployed bursars completing their studies per annum	600	-	-	-	600
Output 13 Unemployed learners registered on learning programmes addressing Key Skills Priority	[3.5 a] Number of unemployed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	10 000	200	5 000	4 800	-
	[3.5.b] Number of unemployed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	2 000	100	1000	900	-
Output 14: Employed and unemployed learners enrolled on Artisan / technician programmes	[3.6] Number of employed and unemployed learners enrolled on Artisan / technician programmes per annum	1 500	-	1 000	500	-
Output 15: Learners from TVET colleges and HETs are placed in Work Integrated Learning Programmes	[3.7a] Number of learners from TVET colleges are placed in Work Integrated Learning programmes per annum	2 045	145	1 000	900	-
	[3.7b] Number of learners from HETs are placed in Work Integrated Learning programmes per annum	900	-	600	300	-
Output 16: Learners from TVET colleges and HETs completed their Work Integrated Learning Programmes	[3.8a] Number of learners from TVET colleges completed their Work Integrated Learning Programmes per annum	550	-	250	-	300



Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
	[3.8b] Number of learners from HETs completed their Work Integrated Learning Programmes per annum	300	-	-	200	100
Output 17: Employed learners registered on learning programmes addressing Key Skills Priority Areas	[3.9a] Number of employed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	5 000	-	2500	1 500	1 000
	[3.9b] Number of employed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	3 000	-	1 200	1 000	800
Output 18: Small and micro businesses supported	[3.10] Number of small and micro businesses supported per annum	3 000	-	-	3 000	-
Output 19: Informal Traders supported	[3.11] Number of Informal Traders supported per annum	3 500	-	-	3 500	-
Output 20: Cooperatives/ Community-based entities supported	[3.12] Number of Cooperatives/ Community-based entities supported per annum	120	-	-	120	-
Output 21: Persons enrolled on entrepreneurship development programmes	[3.13] Number of persons enrolled on entrepreneurship development programmes per annum	700	-	-	700	-
Output 22: Trade Union beneficiaries who participated in Trade Union Capacitation Programmes	[3.14] Number of Trade Union beneficiaries who participated in Trade Union Capacitation Programmes per annum	1 450	-	725	725	-
Output 23: Targeted youth and job seekers reached and engaged with the toolkit	[3.15] Number of career guidance interventions per annum	220	100	75	45	-
Output 24: Learners assisted to access opportunities in the W&R sector.	[3.16] Number of learners assisted to access opportunities in the W&R sector per annum	500	-	-	-	500
Output 25: Unemployed learners enrolled for Candidacy Programmes	[3.17] Number of unemployed learners enrolled for Candidacy Programmes per annum	60	-	-	-	60
Output 26: TVET colleges where the SETA has or maintains a presence	[3.18] Number of TVET colleges where the SETA has or maintains a presence, annually	30	-	-	30	-



Explanation of Planned Performance over the Medium-Term Planning Period

In alignment with the Strategic Plan, this programme is resolutely committed to leveraging its outputs to drive significant outcomes and impact. This commitment is deeply rooted in the priorities set by the NDP, which emphasises fostering employment and enhancing education, training, and innovation. The W&RSETA's dedication to addressing the needs of women, youth, and people with disabilities is a cornerstone of this strategy, ensuring that these groups are not only included but are pivotal in every project. Furthermore, the alignment with the STI Decadal Plan (2022-2032) highlights the SETA's focus on advancing technology and innovation within the wholesale and retail sectors.

The diverse learning programmes offered by W&RSETA ranging from bursaries and internships to artisanal training are instrumental in meeting the strategic outcomes. These initiatives are designed to develop a skilled talent pool that supports the sector's long-term growth. By partnering with TVET and other Higher Education Institutions (HEIs), the SETA enhances access to education and professionalises careers in the sector. This programme's alignment with strategic outcomes, such as increased access to occupationally directed programmes and the support of emerging entrepreneurs, underscores the SETA's role in building a resilient and adaptable workforce.

Looking ahead to the 2026/27 cycle, the SETA is poised to refine and advance its strategies. The performance indicators and budget programmes are carefully aligned to ensure effective resource utilisation and progress towards desired outcomes. By focussing on inclusive growth and integrating e-learning and employer partnerships, the SETA aims to enhance the impact of its programmes. This approach not only supports broader socio-economic advancement but also strengthens the SETA's ability to drive transformation in the wholesale and retail sectors, aligning with national priorities and contributing to a more equitable and prosperous society.



Programme 4: Quality Assurance

The purpose of this Programme is to execute the QCTO delegated quality assurance functions.

Table 25: Programme 4 Outcomes, Outputs, Output Indicators & Targets

Outcome	Outputs	Output indicators	Annual Targets						
			Audited / Actual Performance			Estimated Performance	MTEF Period		
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Outcome 8: An appropriately skilled, agile, and responsive workforce and skills pool able to meet the W&R sector's current and emerging skills needs	Output 27: Occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand developed and/or reviewed	[4.1] Number of occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand are developed and/or reviewed annually	-	-	-	6	6	4	2
	Output 28: Unemployed learners completing learning programmes addressing Key Skills Priority Areas	[4.2a.] Number of unemployed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	3 107	3 015	2356	3 745	3750	3800	3900
		[4.2b.] Number of unemployed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	2 089	779	1872	1 400	1400	1400	1400
	Output 29: Employed and unemployed learners completing Artisan / Technician programmes	[4.2c] Number of employed and unemployed learners completing Artisan / Technician programmes per annum	415	534	775	750	750	800	800
	Output 30: Employed learners completing learning programmes addressing Key Skills Priority Areas	[4.2 d] Number of employed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	1 166	2 359	2382	2 000	2100	2200	2300



		[4.2e] Number of employed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	2 760	2 730	1419	2 500	2500	2500	2500
Outcome 3: Growth focused programmes for the development and support of Training Providers and the Higher Education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances (By 2030 partnerships with 50 TVET Colleges, 9 CET and 26 HET)	Output 31: Signed partnership agreements with HET Institutions	[4.3] Number of signed partnership agreements with HET Institutions, annually	2	2	2	3	3	3	3
	Output 32: Public TVET Centres of Specialisation supported	[4.4] Number of Public TVET Centres of Specialisation supported annually	5	4	4	4	4	4	4
	Output 33 : Signed partnership agreements with TVET's	[4.5] Number of signed partnership agreements with TVET's annually	20	16	17	20	20	20	20
	Output 34: Partnerships formed with CETs to improve the delivery of retail and related programmes	[4.6.] Number of partnerships formed with CETs to improve the delivery of retail and related programmes annually	3	7	3	3	3	3	3



Table 26: Indicators, Annual and Quarterly Targets

Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
Output 27: Occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand developed and/or reviewed	[4.1] Number of occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand are developed and/or reviewed annually	6	0	0	0	6
Output 28: Unemployed learners completing learning programmes addressing Key Skills Priority	[4.2a.] Number of unemployed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	3750	250	1500	1500	500
	[4.2b.] Number of unemployed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum	1400	100	400	300	600
Output 29: Employed and unemployed learners completing Artisan / Technician programmes	[4.2c] Number of employed and unemployed learners completing Artisan / Technician programmes per annum	750	0	0	0	750
Output 30: Employed learners completing learning programmes addressing Key Skills Priority Areas	[4.2 d] Number of employed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	2100	250	800	800	250
	[4.2e] Number of employed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.	2500	200	1000	1000	300
Output 31: Signed partnership agreements with HET Institutions	[4.3] Number of signed partnership agreements with HET Institutions, annually	3	0	0	0	3



Outputs	Output indicators	Annual Targets	Q1	Q2	Q3	Q4
Output 32: Public TVET Centres of Specialization supported	[4.4] Number of Public TVET Centres of Specialisation supported annually	4	0	0	0	4
Output 33: Signed partnership agreements with TVET's	[4.5] Number of signed partnership agreements with TVET's annually	20	0	0	10	10
Output 34: Partnerships formed with CETs to improve the delivery of retail and related programmes	[4.6.] Number of partnerships formed with CETs to improve the delivery of retail and related programmes annually	3	0	0	0	3

Explanation of Planned Performance over the Medium-Term Planning Period

Over the medium term, the SETA's strategic initiatives will focus on enhancing the alignment between vocational training and the evolving demands of the wholesale and retail sector. Central to this is the development and meticulous review of occupational qualifications, part qualifications, and skills programmes designed to address high-demand occupations. By ensuring these qualifications remain relevant and industry-driven, the SETA aims to better equip learners for the modern job market. Concurrently, this will expand the SETA's efforts to increase the number of TVET Colleges accredited to offer W&RSETA qualifications, thereby broadening access to quality training across a wider array of institutions. A crucial aspect of our plan is the establishment of additional assessment centres at TVET Colleges. These centres will provide standardised and practical assessment opportunities, facilitating a smoother transition from training to employment. By focusing on these key areas, the SETA is dedicated to bridging the gap between education and employment, ensuring vocational training systems are both robust and responsive to sectoral needs. This approach will not only enhance the quality of training programmes but also contribute significantly to the growth and advancement of the sector.



Link between Outputs and Outcomes and National Priorities

Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
<p>Outcome 4: A sector responsive Research Agenda that supports and informs the establishment of W&R skills development programmes</p>	<p>Output 4: Strategic partnerships established to address priority occupations</p>	<p>SSP Priority 1: Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement</p>	Ch3. Economy and employment	<p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 1.3: Targets for priority qualifications</p>	<p>Intervention one: Embedding skills planning into sectoral processes</p>	<p>Integrated skills planning systems; strong labour market intelligence (LMI); research aligned to national development priorities; evidence-based SSPs to drive transformation and growth</p>	<p>The SETA will establish a robust labour market intelligence (LMI) system, integrating real-time data and stakeholder insights to inform SSPs. This ensures alignment with HRDS 2024–2033’s evidence-based planning, ERRP’s economic recovery priorities, and NSDP 2030’s focus on targeted qualifications. Moreover, Strategic partnerships with academia, industry, and government will drive future-oriented research addressing emerging skills, ensuring a proactive, transformative skills ecosystem.</p>
	<p>Output 5: Sector research reports completed</p>							
	<p>Output 6: Sector directed evaluation studies completed</p>	<p>SSP Priority 4: Enhance Responsiveness to Skills Demand and Supply</p>	Ch4. Economic infrastructure		<p>Sub-Outcome 1.4: Identification of interventions required to improve enrolment and completion of priority occupations</p>			
	<p>Output 7: Post-Doctoral Fellows Appointed to Support the Implementation of the Sector Research Agenda</p>		Ch5. Ensuring environmental sustainability		<p>Sub-Outcome 4.2: Increase access for Intermediate and high-level skills</p>			
<p>Output 8: W&RSETA Research Chairs to advance sector-specific knowledge, innovation, and skills development</p>	<p>SSP Priority 7: Align skills development with the Economic Reconstruction and Recovery Plan (ERRP)</p>							
<p>Output 9: Approved WSP & ATRs</p>								



Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
Outcome 2: Increased access to Informed Career choices through the implementation and utilisation of the Career Guidance Toolkit.	Output 5: Sector research reports completed	SSP Priority 4: Enhance Responsiveness to Skills Demand and Supply	Ch3. Economy and employment	Strategic Priority 1: Inclusive growth and job creation	Sub-Outcome 1.4: Identification of interventions required to improve enrolment and completion of priority occupations	Intervention one: Embedding skills planning into sectoral processes	Career development ecosystems; technology-driven guidance; targeting NEETs, youth, rural communities	The SETA will leverage digital platforms, AI-driven guidance tools, and stakeholder collaborations to provide inclusive, sector-specific career guidance aligned with HRDS 2024–2033's career development ecosystems. This will target NEET youth, rural communities, and PWDs, directly supporting NSDP 2030's enrolment interventions and ERRP's focus on hard-to-fill vacancies, creating a pipeline of work-ready entrants for priority occupations.
	Output 6: Sector directed evaluation studies completed							
Output 23: Targeted youth & job seekers reached with the career toolkit	Output 24: Learners assisted to access opportunities in the W&R sector							



Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
<p>Outcome 3: Growth-focused programmes for the development and support of Training Providers and the Higher Education, TVET, and CET sectors to enable their responsiveness to changing occupations and technological advances</p>	<p>Output 32: Public TVET Centres of Specialization supported</p>	<p>SSP Priority 1: Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement</p>	<p>Chapter 3: Economy and Employment</p>	<p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 5.1: Support the TVET Colleges</p>	<p>Intervention ten: Strengthening the post-school education and training system</p>	<p>Responsive PSET system; partnerships with industry; focus on digital, green & emerging skills</p>	<p>The SETA will strengthen the PSET system through industry-driven curriculum development, modernised and enhanced educator capacity. By aligning with the HRDS 2024–2033's call for a responsive PSET, ERRP's digital and green skills agenda, and NSDP's post-school education reform, the SETA will ensure training providers deliver adaptive, future-proof learning experiences that meet evolving sectoral demands.</p>
	<p>Output 34: Partnerships formed with CETs to improve the delivery of retail and related programmes</p>				<p>Sub-Outcome 5.2: Support the CET colleges</p>	<p>Intervention four: Access to targeted skills programmes</p>		

Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
<p>Outcome 5: Increased opportunities to access W&R occupationally directed programmes</p>	<p>Output 10: Unemployed persons awarded bursaries</p> <p>Output 11: Employed persons awarded bursaries</p> <p>Output 12: Employed and unemployed bursars completing their studies</p>	<p>SSP Priority 6: Advance Sector Transformation, including the Training and Employment of Persons with Disabilities (PWD)</p>	<p>Ch3. Economy and employment</p>	<p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 4.2: Increase Access for Intermediate and High-Level Skills</p>	<p>Intervention four: Access to targeted skills programmes</p> <p>Intervention seven: Retraining/up-skilling of employees to preserve jobs.</p>	<p>Future skills pathways; ERRP-aligned occupational programmes; reskilling for disrupted occupations</p>	<p>.The SETA will prioritise future skills pathways, expanding occupational programmes aligned with ERRP sectors, reskilling workers in disrupted occupations, and advancing transformation targets. This supports HRDS 2024–2033's focus on lifelong learning, NSDP 2030's access to intermediate and high-level skills, the MTDP and NDP's employment goals, creating a resilient, competitive workforce.</p>



<p>Output 13: Unemployed learners registered on learning programmes addressing Key Skills Priority Areas</p> <p>Output 14: Employed and unemployed learners enrolled on Artisan / technician programmes</p> <p>Output 15: Learners from TVET colleges and HETs are placed in Work Integrated Learning Programmes</p> <p>Output 17: Employed learners registered on learning programmes addressing Key Skills Priority Areas</p> <p>Output 25: Unemployed learners enrolled in candidacy programmes</p>							
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	<p>Output 29: Employed and unemployed learners completing Artisan / Technician programmes</p> <p>Output 30: Employed learners completing learning programmes addressing Key Skills Priority Areas</p>							
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Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
Outcome 7: Capacitated Trade Unions within the W&R sector	Output 22: Trade Union beneficiaries who participated in Trade Union Capacitation Programmes	SSP Priority 1: Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement	Ch3. Economy and employment	Strategic Priority 1: Inclusive growth and job creation	Sub-Outcome 4.2: Increase access for Intermediate and high-level skills	Intervention seven: Retraining/up-skilling of employees to preserve jobs.	Social compacting; worker engagement in transformation; future-focused union roles	The SETA will engage unions as transformation partners, embedding upskilling and re-skilling initiatives into collective agreements, fostering worker-driven innovation, and supporting HRDS 2024–2033’s social compacting agenda. This ensures unions actively shape workforce transitions, securing jobs, enhancing productivity, and contributing to inclusive sector growth.



Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
<p>Outcome 3: Growth focused programmes for the development and support of Training Providers and the Higher Education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances</p>	<p>Output 26: TVET colleges where the SETA has or maintains a presence</p>	<p>SSP Priority 1: Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement</p>	<p>Ch3. Economy and employment</p>	<p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 1.4: Identification of interventions required to improve enrolment and completion of priority occupations</p>	<p>Intervention ten: Strengthening the post-school education and training system</p>	<p>Pillar 2: Strengthening and Supporting PSET Institutions Pillar 3: Skills for Inclusive Economic Growth and Development Pillar 5: Partnerships for an Adaptive Skills System</p>	<p>The SETA will play a pivotal role in shaping the future of the sector by actively empowering training providers to serve as catalysts for inclusive growth and development. It will:</p> <ul style="list-style-type: none"> • Conduct sector skills gap assessments and develop industry-responsive curricula to address current and emerging needs. • Strengthen the capacity of educators to enhance the quality and relevance of training delivery. • Forge and maintain strategic partnerships to embed workplace-based learning across the sector. • Drive inclusivity by expanding opportunities for women, youth, and people with disabilities. • Proactively align training interventions with global trends, emerging technologies, and evolving market demands to ensure workforce adaptability and resilience.
	<p>Output 31: Signed partnership agreements with HET Institutions</p> <p>Output 32: Public TVET Centres of Specialization supported</p> <p>Output 33 : Signed partnership agreements with TVET's</p> <p>Output 34: Partnerships formed with CETs to improve the delivery of retail and related programmes</p>			<p>Sub-Outcome 5.2: Support the CET colleges</p>	<p>Intervention three: Increased access to programmes resulting in qualifications in priority sectors.</p>			



Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
Outcome 6: Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, and small, medium and informal business enterprises to enhance their participation in the mainstream economy	<p>Output 18: Small and micro businesses supported</p> <p>Output 19: Informal Traders supported</p> <p>Output 20: Cooperatives/ Community-based entities supported</p> <p>Output 21: Persons enrolled on entrepreneurship development programmes</p>	<p>SSP Priority 1: Advance the implementation of the Priority Skills Plan (PSP) through structured stakeholder engagement</p> <p>SSP Priority 4: Enhance Responsiveness to Skills Demand and Supply</p> <p>SSP Priority 3: Address Youth Unemployment through Targeted Skills Development and Transition Pathways</p> <p>SSP Priority 6: Advance Sector Transformation, including the Training and Employment of Persons with Disabilities (PWD)</p>	<p>Ch3. Economy and employment</p> <p>Ch4. Economic infrastructure</p>	<p>Strategic Priority 1: Inclusive growth and job creation</p> <p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 2.1: Workplace-based learning opportunities increased</p> <p>Sub-Outcome 3.1: Increase workers participating in learning programmes to 80% by 2030</p> <p>Sub-Outcome 1.2: Targets for priority occupations</p>	<p>Intervention six: Supporting entrepreneurship and innovation.</p>	<p>Entrepreneurship ecosystems; innovation-driven SMME support; integrated skills-business growth approach</p>	<p>The SETA will build entrepreneurship ecosystems by integrating skills training, access to innovation hubs for SMMEs, informal traders, and cooperatives. This responds to HRDS 2024–2033's entrepreneurship focus, ERRP's job creation imperatives, and NSDP's targets for workplace-based learning, positioning small enterprises as engines of inclusive economic transformation, responding to the MTDP.</p>

Outcomes	Outputs	SSP Priorities	NDP	MTDP	NSDP 2030 Priorities	ERRP	HRDS 2024–2033	Focus Area for the SETA
Outcome 8: An appropriately skilled, agile, and responsive workforce and skills available to meet the	<p>Output 12: Employed and unemployed bursars completing their studies</p>	<p>SSP Priority 2: Strengthen SMME, Cooperatives & Informal Traders Development for Inclusive Sector Growth</p>	<p>Ch3. Economy and Employment</p>	<p>Strategic Priority 1: Inclusive growth and job creation</p>	<p>Sub-Outcome 6.1: To increase skills development support to stimulate entrepreneurial activity and the establishment of new</p>	<p>Intervention six: Supporting entrepreneurship and innovation.</p>	<p>Adaptive workforce; continuous upskilling; alignment to sector transitions</p>	<p>The SETA will champion continuous upskilling, future-proofing workers against technological disruption, and driving adaptability through sectoral skills forecasting. By aligning with HRDS 2024–2033's adaptive workforce vision, NSDP 2030's enterprise support, ERRP's economic resilience goals, and the MTDP's focus on sustainable growth and</p>



	<p>Output 18: Small and micro businesses supported</p> <p>Output 21: Persons enrolled on entrepreneurship development programmes</p> <p>Output 27: Occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand developed and/or reviewed</p> <p>Output 28: Unemployed learners completing learning programmes addressing Key Skills Priority Areas</p> <p>Output 29: Employed and unemployed learners completing Artisan / Technician programmes</p> <p>Output 30: Employed</p>	<p>SSP Priority 5: Drive the integration of Circular Economy principles (Green) to promote sustainable resource utilization</p> <p>SSP Priority 6: Advance Sector Transformation, including the Training and Employment of Persons with Disabilities (PWD)</p>			enterprises and cooperatives			employment creation, the SETA ensures a workforce that sustains sector competitiveness, drives inclusive growth, and equips employees to thrive in a rapidly evolving economic landscape.
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learners completing learning programmes addressing Key Skills Priority Areas								
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5. Updated Key Risks

Table 27: Key Risks and Mitigation Factors

OUTCOME	KEY RISK	RISK MITIGATION STRATEGIES
<p>Outcome 1: An efficient and effective organisation with good corporate governance</p>	<ul style="list-style-type: none"> • Impact of changes in Grant Regulations on available funds • Delays in the disbursement of the skills development grants • Fraud, corruption, and other related unethical behaviours • Inadequate optimisation and stability of the ICT core solutions • High turnover of competent staff members 	<ul style="list-style-type: none"> • SETA has significant cash reserves to manage cash-low challenges and thus can meet liquidity and solvency requirements. • Consistency of an annual request to the National Treasury to retain surplus funds. • Standard Operating procedure (SOP) with service delivery standards (Finance 7 days to effect payment and operations has 15 days to verify deliverables and claims) • Central receipt of claims to enable tracking and monitor compliance • Weekly payments report detailing payment status of all claims. • Decentralised SETA operations, increasing capacity at provincial levels. • Continued monitoring of the reported age analysis. • Governance Structures in place [including Financial Misconduct Committee] • Policies and procedures in place including applicable laws and regulations. • Functional Fraud hotline in place. • Fraud prevention policy and plan in place. • HR policy Code of Conduct • Annual declaration of interest. • Build project management capacity and discipline within the organisation, enrolling project personnel in an online Project Management programme. • Develop and implement a monitoring and evaluation programmes to report on impact • Revised Fraud Prevention Policy and Plan • Ongoing training for Supply Chain officials • Probity and Proactive Security Audits (including SCM, Grant reviews, Validation of Disclosure of Interest, Phishing reviews etc.) • ICT network and hosting of infrastructure are in place. • The ERP system is in place and operational. • The learner management system in place • ICT contract management P in place



OUTCOME	KEY RISK	RISK MITIGATION STRATEGIES
		<ul style="list-style-type: none"> • Provincial ICT dashboard • SOP for contract management • Progressive key salary scale. • HR policies that support the employee value proposition. • Competitive remuneration model. • Employee wellness programme

OUTCOME	• KEY RISK	• RISK MITIGATION STRATEGIES
<p>Outcome 2: Increased access to Informed Career choices through the implementation and utilisation of the Career Guidance Toolkit.</p>	<ul style="list-style-type: none"> • Skills provisioning (mandated services) not aligned to sector needs. • Non-achievement of strategic outcomes 	<ul style="list-style-type: none"> • Approved skills development grant policy • Research and SSP Policy • Continuous stakeholder engagement • Implementation of short-term research interventions • Increased research methods and processes when updating the SSP • Transformation policy and strategy • Annual evaluations of the Annexure II process • Contracts with SLO's • Provincial databases are utilised to invite stakeholders to SSP consultations. • Alignment of APP with SSP is considered by Internal Audit during the APP review • Implementation of projects to meet sector needs is managed via Operations which is in direct control of allocations, management of projects, etc. • Continuously conduct the internal control awareness session within the organisation, including provincial offices to strengthen the internal control activities. • Continuous improvements on control deficiencies identified by both internal and external auditors by tracking through audit action plans. • Assessments on the main internal controls[Financial, operational, and performance-related activities, furthermore, issue reports to various oversight structures] • Ensure that quarterly operations performance reviews are conducted. • Require budget to ensure implementation of formative evaluation for all programmes relevant to the operations department.
<p>Outcome 3: Growth focused programmes for the development and support of Training Providers and the Higher Education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances.</p>		
<p>Outcome 5: Increased opportunities to access W&R occupationally directed programmes.</p>		
<p>Outcome 6: Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, and small, medium and informal business enterprises to enhance their participation in the mainstream economy.</p>		
<p>Outcome 7: Capacitated trade unions within the W&R sector</p>		
<p>Outcome 8: An appropriately skilled, agile, and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs.</p>		



6. Infrastructure Projects

No.	Project Name	Programme	Description	Outputs	Start Date	Completion Date	Total Estimated Cost	Current Year Expenditure
1.	Free State CET Skills Development Centre: DHET-W&RSETA Partnership for Infrastructure Support	Other: CET Infrastructure Support	The Construction of Free State CET Skills Development Centre	The provision of the Free State CET Skills Development Centre with the proposed teaching and learning facility	31 March 2021	31 March 2025	R100 998 700.00 (updated)	R0.00
2.	CETA & W&RSETA Collaborative Project	Other: TVET Infrastructure Support	The Construction of the KwaMpumuza Skills Development Centre	The provision of the KwaMpumuza Skills Development Centre with the proposed teaching and learning facility	31 March 2022	31 March 2025	R50 000 000.00	R0.00



PART D: TECHNICAL INDICATOR DESCRIPTOR (TID)

Programme 1: Administration

INDICATOR TITLE	1.1 Audit opinion annually
DEFINITION	This indicator aims to ensure that the unqualified audit opinion is obtained by the 2024/25 financial year. An unqualified audit opinion in the context of this indicator means that the financial statements of the W&RSETA contain no material misstatements.
SOURCE OF DATA	Signed Auditor General report
METHOD OF CALCULATION / ASSESSMENT	Determine achievement of target by assessing the Auditor General's report. An unqualified Audit opinion indicates the achievement of the set target.
MEANS OF VERIFICATION	Signed Auditor General report
ASSUMPTIONS	Internal processes are implemented while complying with all regulations as required by the Auditor General
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	Unqualified
INDICATOR RESPONSIBILITY	Chief Financial Officer

INDICATOR TITLE	1.2 Number of stakeholder sessions conducted annually to advocate for participation in skills development programmes.
DEFINITION	This indicator aims to ensure that stakeholder outreach programmes are conducted to create awareness of the W&RSETA brand, publicise its programmes, advocate for participation in skills development and communicate to stakeholders the benefits of participation in the W&RSETA skills development programmes
SOURCE OF DATA	Online and physical attendance registers of stakeholder outreach sessions
METHOD OF CALCULATION / ASSESSMENT	Count the number of stakeholder sessions conducted
MEANS OF VERIFICATION	Attendance registers of stakeholder sessions
ASSUMPTIONS	There will be prioritisation for the inclusion of all relevant stakeholders to participate in stakeholder sessions
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Throughout the 9 provinces of South Africa
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	20
INDICATOR RESPONSIBILITY	Chief Financial Officer



Programme 2: Skills Planning and Research

INDICATOR TITLE	2.1 Number of Board approved planning documents submitted to DHET within prescribed timeframes annually.
DEFINITION	<ul style="list-style-type: none"> The indicator measures submission of board approved planning documents (Sector Skills Plan and Annual Performance Plan) to DHET within prescribed timeframes. The Sector Skills Plan (SSP) is approved by the Board annually and submitted to DHET within prescribed timeframes. The prescribed timeframe to submit the final SSP is August each year. The APP is developed/updated annually and approved by the Board prior to submission to DHET within prescribed timeframes. The prescribed timeframe to submit the final APP for consideration by the Executive Authority is 30 November each year.
SOURCE OF DATA	SSP and APP documents signed by the W&RSETA Board Chairperson and proof of submission
METHOD OF CALCULATION / ASSESSMENT	A simple count of the SSP and APP approved by the Board and submitted to DHET within the prescribed timeframes.
MEANS OF VERIFICATION	Board Approved SSP and APP Proof of submission of the SSP and APP to DHET
ASSUMPTIONS	Credible information provided during the SSP and APP consultation process as well as alignment to recommended actions
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-annual
DESIRED PERFORMANCE	2 documents (Board approved SSP and APP submitted to DHET within prescribed timeframes)
INDICATOR RESPONSIBILITY	SPPE Executive

INDICATOR TITLE	2.2 Number of Memorandums of Understanding with strategic partners addressing sector needs, annually.
DEFINITION	The indicator measures the total number of strategic partnerships on research and innovation entered into with strategic partners that address sector needs.
SOURCE OF DATA	Signed Partnership agreements / MOUs
METHOD OF CALCULATION / ASSESSMENT	A simple count of the signed Partnership agreements / MOUs that addresses sector needs
MEANS OF VERIFICATION	Signed MOUs
ASSUMPTIONS	Identified potential strategic partners who are willing to enter into a partnership agreement with the W&RSETA The Partnership agreements / MOUs will be implemented
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	Two (2) Partnership agreements / MOUs signed with strategic partners annually
INDICATOR RESPONSIBILITY	SPPE Executive



INDICATOR TITLE	2.3 Number of sector research reports completed annually.
DEFINITION	The indicator measures the number of research reports that were completed that provide insight into W&RSETA skills development interventions
SOURCE OF DATA	Research reports
METHOD OF CALCULATION / ASSESSMENT	Simple count of the number of research reports completed annually
MEANS OF VERIFICATION	Completed research reports.
ASSUMPTIONS	Credible and quality research reports that contribute to the sector needs
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	5 Research reports completed
INDICATOR RESPONSIBILITY	SPPE Executive

INDICATOR TITLE	2.4 Number of sector directed tracer / impact study reports completed annually.
DEFINITION	The indicator measures the number of sector directed tracer/ impact studies reports that are completed per year. Tracer and impact assessment of W&RSETA programmes are undertaken for the purpose of providing insight on skills development interventions.
SOURCE OF DATA	Research reports
METHOD OF CALCULATION / ASSESSMENT	A simple count of tracer/ impact study reports completed
MEANS OF VERIFICATION	Completed impact/tracer study reports
ASSUMPTIONS	Credible and quality impact/tracer study reports that contribute to the sector
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	Two (2) impact / tracer studies reports completed annually
INDICATOR RESPONSIBILITY	SPPE Executive



INDICATOR TITLE	2.5 Number of Post-Doctoral Fellows appointed to support sector research agenda implementation annually
DEFINITION	The indicator measures the number of Post-Doctoral Fellows that are appointed for the implementation of W&RSETA Research Agenda. The objective is to enhance sector research agenda implementation through the appointment of Post-Doctoral students and contribute to sector transformation.
SOURCE OF DATA	Award Letters Linked with Research Leadership Chair
METHOD OF CALCULATION / ASSESSMENT	A simple count of Post-Doctoral Fellows
MEANS OF VERIFICATION	Proof of appointment for Post-Doctoral Fellows
ASSUMPTIONS	Credible and quality sector research agenda
DISAGGREGATION OF BENEFICIARIES	Post-Doctoral Fellows (50%) should be a Black South African woman and priority given to Black South Africans
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	Two (2) Post-Doctoral Fellows appointed
INDICATOR RESPONSIBILITY	SPPE Executive

INDICATOR TITLE	[2.6] Number of Research Chairs formally established annually
DEFINITION	Measures the total number of W&RSETA Research Chairs that have been officially established within the reporting year, contributing to sector-specific research and skills development.
SOURCE OF DATA	Signed agreements/MOUs with host institutions
METHOD OF CALCULATION / ASSESSMENT	Count all Research Chairs that meet the criteria of being formally established within the reporting period.
MEANS OF VERIFICATION	Signed Memoranda of Agreement (MoA) with hosting universities, official approval letters from W&RSETA
ASSUMPTIONS	Participating universities and institutions have the capacity, willingness, and resources to host and manage the research chairs.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	2
INDICATOR RESPONSIBILITY	SPPE Executive



Programme 3: Learning Programmes and Projects

INDICATOR TITLE	3.1a Number of WSPs and ATRs approved for Small Companies per annum 3.1b Number of WSPs and ATRs approved for Medium Companies per annum 3.1c Number of WSPs and ATRs approved for Large Companies per annum
DEFINITION	The indicator measures the number of approved Annexure II submissions (Work Skills Plans (WSP) and Annual Training Reports – ATRs) for small, medium, and large companies. The size of companies (small, medium, large) is defined according to the number of employees employed by said companies, as follows: <ul style="list-style-type: none"> • Small company = 1 to 49 employees • Medium company = 50 to 149 employees • Large company = more than 149 employees
SOURCE OF DATA	System report indicating submitted and approved WSPs and ATRs for the relevant period
METHOD OF CALCULATION / ASSESSMENT	Count of total number of Annexure II submissions (WSPs and ATRs) approved
MEANS OF VERIFICATION	MIS System report indicating the submitted and approved Annexure II submissions (WSPs and ATRs) for Small, Medium, and Large firms.
ASSUMPTIONS	Companies will continue to submit compliant Annexure II documents to be approved.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	a) Small: 2 704 approved submissions b) Medium: 823 approved submissions c) Large: 383 approved submissions
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.2 Number of unemployed persons awarded bursaries per annum
DEFINITION	<p>This indicator measures the number of unemployed persons awarded bursaries (new bursaries and continuing bursaries) by the W&RSETA to study towards their undergraduate qualifications at HET and TVET Institutions in the 2026/27 period.</p> <ul style="list-style-type: none"> • New Bursary definition: <ul style="list-style-type: none"> ○ First time award of a bursary to a learner for studies towards a particular qualification. • Continuing Bursary definition: <ul style="list-style-type: none"> ○ Continued funding of a learner that was funded by the W&RSETA in the previous academic year to enable them to continue with the next academic level in the same qualification they had been funded for.
SOURCE OF DATA	System report.
METHOD OF CALCULATION / ASSESSMENT	Count the number of registered new and continuing unemployed bursars.
MEANS OF VERIFICATION	<ul style="list-style-type: none"> • New Bursaries: Bursary agreements. • Continuing Bursaries: Bursary Agreements and Renewal letters (Bursary Agreement is the Initial Agreement entered into with the W&RSETA; Renewal letter is a letter indicating the list of bursars approved to continue their studies)
ASSUMPTIONS	Unemployed persons will have an appetite to study in the fields of retail studies or related qualifications.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural and Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	2 500 New Bursaries 500 Continuing Bursaries
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.3 Number of employed persons awarded bursaries per annum
DEFINITION	<p>This indicator measures the number of employed persons in the wholesale and retail sector that are awarded bursaries (new bursaries and continuing bursaries) by the W&RSETA to study towards qualifications at HET and TVET Institutions in the 2026/27 period.</p> <ul style="list-style-type: none"> • New Bursary definition: <ul style="list-style-type: none"> ○ First time award of a bursary to a learner for studies towards a particular qualification. • Continuing Bursary definition: <ul style="list-style-type: none"> ○ Continued funding of a learner, that was funded by the W&RSETA in the previous academic year, to enable them to continue with the next academic level in the same qualification they had been funded for.
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of registered new and continuing employed bursars using signed bursary agreements (new) and renewal letters (continuing) awarded to individuals.
MEANS OF VERIFICATION	<p>New Bursaries: Bursary agreements.</p> <ul style="list-style-type: none"> • Continuing Bursaries: Bursary Agreements and Renewal letters (Bursary Agreement is the Initial Agreement entered into with the W&RSETA; Renewal letter is a letter indicating confirmation of continued funding for the bursar)
ASSUMPTIONS	Employed people within the W&R sector will have an appetite to study in the fields of retail studies or related qualifications.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural and Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	950
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.4 Number of employed and unemployed bursars completing per annum
DEFINITION	The indicator measures the number of W&RSETA's bursary beneficiaries (both employed and unemployed) who completed their studies.
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of certificates or Statements of Results (SORs) received by W&RSETA bursars who have completed their qualifications.
MEANS OF VERIFICATION	Learner statement of results or certificates from the HET or TVET Institutions
ASSUMPTIONS	Bursary beneficiaries will submit their certificates or SORs timeously on completion of their studies
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural & Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-Annual
DESIRED PERFORMANCE	600
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.5a Number of unemployed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum 3.5.b Number of unemployed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum
DEFINITION	The indicator measures the number of unemployed learners registered to participate in Learnerships and/or Occupational Qualifications and/ or skills programmes that address the Key Skills Priority Areas as identified in the W&RSETA SSP.
SOURCE OF DATA	System Report
METHOD OF CALCULATION / ASSESSMENT	Count the number of signed learner agreements used to register unemployed learners that participate in W&RSETA funded Learnerships and/or Occupational Qualifications and/or skills programmes.
MEANS OF VERIFICATION	Registered learner agreements
ASSUMPTIONS	Employers will be agreeable to host unemployed youth participating in programmes that address the HTFVs as identified in the SSP.
DISAGGREGATION OF BENEFICIARIES	The unemployed population for learnerships to be disaggregated as follows: 100% Youth 60% Female 4% PWD
SPATIAL TRANSFORMATION	Rural (20%), Township, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	10 000 registered on Learnerships or Occupational Qualifications 2000 unemployed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.6 Number of employed and unemployed learners enrolled on Artisan / Technician programmes per annum
DEFINITION	The indicator measures the number of learners (employed and unemployed) enrolled on Artisan / Technician / ARPL programmes on an annual basis. An artisan is a person who has been certified as competent to perform a listed trade per the skills development act, 1998 (Act of 97 Of 1998).
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of learners enrolled on Artisan programmes, ARPL, Trade Tests or Artisan Accelerated Programmes.
MEANS OF VERIFICATION	Signed learner agreements
ASSUMPTIONS	There are sufficient host sites to accommodate learners.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	1 500
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.7a Number of learners from TVET colleges are placed in Work Integrated Learning programmes per annum 3.7b Number of learners from HETs are placed in Work Integrated Learning programmes per annum
DEFINITION	The indicator measures the number of unemployed learners from TVET Colleges and HETs who are placed with organisations to gain workplace experience or to obtain their qualifications.
SOURCE OF DATA	System Report
METHOD OF CALCULATION / ASSESSMENT	Count the number of unemployed learners from TVET Colleges and HETs who are registered on Work Integrated Learning Programmes.
MEANS OF VERIFICATION	WBLP agreements
ASSUMPTIONS	There will be a sufficient number of organisations to host learners to gain workplace experience.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban & Rural
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	(TVET: 2 045 enrolled) (HET: 900 enrolled)
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.8a Number of learners from TVET colleges completed their Work Integrated Learning Programmes per annum 3.8b Number of learners from HETs completed their Work Integrated Learning Programmes per annum
DEFINITION	The indicator measures the number of learners (Interns and Graduates) from TVET colleges and HETs who complete their Work Integrated Learning Programmes, annually. Work Integrated Learning Programmes aims to provide students / learners with the required work experience.
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of learners from TVET colleges and HETs completing their WIL programmes
MEANS OF VERIFICATION	Completion letter
ASSUMPTIONS	Learners will fully complete their WIL programmes
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban & Rural
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	(TVET placements: 550 completed) (HET placements: 300 completed)
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.9a Number of employed learners registered on Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum 3.9b Number of employed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum
DEFINITION	The indicator measures the number of employed learners registered on Learnerships and/or occupational qualifications and/or skills programmes that address the Key Skills Priority Areas as identified in the W&RSETA SSP.
SOURCE OF DATA	System report.
METHOD OF CALCULATION / ASSESSMENT	Count the number of employed learners registered on learnerships and/ or occupational qualifications and/or skills programmes as per the system report
MEANS OF VERIFICATION	Learner agreements
ASSUMPTIONS	Employers will release staff to attend training interventions.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	5 000 employed learners registered on Learnerships or Occupational Qualifications 3000 employed learners registered on Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.10 Number of small and micro businesses supported per annum
DEFINITION	Measures the total number of small and micro businesses that receive support from W&RSETA aimed at enabling their growth and/or sustainability
SOURCE OF DATA	Benefit Template or MIS Report
METHOD OF CALCULATION / ASSESSMENT	Count each small and micro business that operate in the Wholesale and Retail Sector, which has participated in W&RSETA SME development programme in the financial year
MEANS OF VERIFICATION	Registration form
ASSUMPTIONS	Small and micro business entities apply for SME Discretionary Grants
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Townships, Rural, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-Annual
DESIRED PERFORMANCE	3 000
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.11 Number of Informal Traders supported per annum
DEFINITION	The indicator measures the number of Informal Traders who are supported through participation in Wholesale and Retail SETA Skills Development Programmes to enable the growth and sustainability of their businesses.
SOURCE OF DATA	Benefit Template or MIS Report
METHOD OF CALCULATION / ASSESSMENT	Count each informal trader that participated in W&RSETA development programmes by assessing attendance through attendance registers
MEANS OF VERIFICATION	Informal Traders Development Programmes attendance register
ASSUMPTIONS	Informal Traders participate in skills development interventions and workshops organised by the W&RSETA
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Townships, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-Annual
DESIRED PERFORMANCE	3 500
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.12 Number of Cooperatives/ Community-based entities supported per annum
DEFINITION	The indicator measures the number of registered Cooperatives or Community-based entities (Community based entities may include Non-governmental organisations and Non-profit organisations) supported through their participation in W&RSETA Skills Development Initiatives to enable them to participate in the mainstream economy and address Key Skills Priority Areas as identified in the W&RSETA Sector Skills Plan
SOURCE OF DATA	Benefit Template or MIS Report (Beneficiary Report)
METHOD OF CALCULATION / ASSESSMENT	Count the number of Cooperatives and Community-based entities participating in the skills development initiatives
MEANS OF VERIFICATION	Signed Agreements with Cooperatives or Community-based entities
ASSUMPTIONS	Targeted Cooperatives and Community-based entities are operating within Wholesale and Retail Sector
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Townships, Rural
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-Annual
DESIRED PERFORMANCE	120 Cooperatives: 70 Community-based entities: 50
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.13 Number of persons enrolled on entrepreneurship development programmes per annum
DEFINITION	The indicator measures the number of entrepreneurs operating in the W&R sector, who were enrolled to participate in W&RSETA Entrepreneurship Development Programmes to enable the growth and sustainability of their businesses.
SOURCE OF DATA	System Report
METHOD OF CALCULATION / ASSESSMENT	Count the number of persons enrolled on W&RSETA entrepreneurship development programmes
MEANS OF VERIFICATION	Learner Agreements
ASSUMPTIONS	There are people who are willing and available to attend the programmes
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Townships, Rural
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	700
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.14 Number of Trade Union beneficiaries who participated in trade union capacitation programmes per annum
DEFINITION	The indicator measures the number of trade Union members who participate in capacitation programmes that address the skills needs of the Trade Unions within the sector.
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of trade union members who attended Capacitation Programmes by verifying signed attendance registers.
MEANS OF VERIFICATION	Attendance registers
ASSUMPTIONS	Availability of Trade Union members to participate in Capacitation Programmes.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Townships, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	1 450
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.15 Number of career guidance interventions per annum
DEFINITION	The indicator measures the number of Career guidance events or Career Guidance interventions participated in or conducted, as well as the number of events implemented for capacitation of Life Orientation (LO) Educators.
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of Career Guidance interventions implemented or participated in.
MEANS OF VERIFICATION	Career Guidance Events: Invitations and Attendance registers LO Capacitation: Attendance Register and Invitations
ASSUMPTIONS	Practitioners are equipped to offer sound career advice to LO Educators and youth attending career exhibitions.
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Rural & Townships
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-annual
DESIRED PERFORMANCE	220 Career Guidance interventions Events: 210 LO Educator workshops: 10
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.16 Number of learners assisted to access opportunities in the W&R sector per annum
DEFINITION	Learners enrolled in programmes aimed at imparting skills that enable them to access opportunities in the W&R sector. Programmes to include entrepreneurship development/ bridging programmes/ retail work readiness programmes/ skills programmes/ RPL/ AET programmes to further learning opportunities or placement opportunities in the retail sector.
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of learners enrolled in W&RSETA funded projects aimed at enabling access to opportunities in the W&R sector by using signed learner agreements.
MEANS OF VERIFICATION	Learner Agreements
ASSUMPTIONS	Sufficient accredited providers to offer bridging programmes. Resources are available for the SETA to provide work readiness programmes
DISAGGREGATION OF BENEFICIARIES	Learners in Rural Areas
SPATIAL TRANSFORMATION	Rural
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	500
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	3.17 Number of unemployed learners enrolled for candidacy programmes per annum
DEFINITION	The indicator measures the number of unemployed learners who are assisted to obtain professional designation through the candidacy programmes.
SOURCE OF DATA	System report/ Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of registered candidates using signed learner agreements
MEANS OF VERIFICATION	Learner agreements
ASSUMPTIONS	Candidates in need of professional designation will accept and participate in the candidacy programmes funded by the W&RSETA
DISAGGREGATION OF BENEFICIARIES	Not Applicable
SPATIAL TRANSFORMATION	Rural, Township, Urban
CALCULATION TYPE	Non-cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	60
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	3.18 Number of TVET colleges where the SETA has or maintains a presence annually
DEFINITION	The indicator measures the number of TVET colleges where the SETA has or maintained its presence through the implementation of an MOU between the W&RSETA. The MOU to include accessibility of the SETA to the TVET college as well as to enable the College to access W&RSETA programmes.
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of TVET colleges where the Wholesale and Retail SETA has maintained a presence by assessing the Implementation Report
MEANS OF VERIFICATION	MOU/ Contract Implementation Reports
ASSUMPTIONS	TVET colleges will allow the Wholesale and Retail SETA to maintain a presence at their various campuses
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Townships and Urban
CALCULATION TYPE	Non – Cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	30
INDICATOR RESPONSIBILITY	COO



Programme 4: Quality Assurance

INDICATOR TITLE	4.1 Number of occupational qualifications/part qualifications/skills programmes promoting Occupations in High Demand are developed and/or reviewed annually
DEFINITION	This indicator measures the number of occupational qualifications, part qualifications, or skills programmes that are developed or reviewed to promote relevant skills for W&R occupations.
SOURCE OF DATA	2026/27 Register of W&RSETA qualifications reviewed/ developed and submitted to QCTO
METHOD OF CALCULATION / ASSESSMENT	Count the number of qualifications that have been developed or reviewed during the 2026/27 period
MEANS OF VERIFICATION	Proof of submission/Acknowledgement Letter from the QCTO
ASSUMPTIONS	<ul style="list-style-type: none"> • Availability of Accurate OIHD Lists in the SSP • Effective collaboration and communication with industry stakeholders • Funding and Capacity for Development/Review
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	N/A
CALCULATION TYPE	Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	6
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	4.2a Number of unemployed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum. 4.2b Number of unemployed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum
DEFINITION	This indicator measures the number of unemployed learners completing learning programmes funded by the W&RSETA. Types of learning programmes include learnerships, skills programmes, occupational qualifications, and part qualifications.
SOURCE OF DATA	System Report
METHOD OF CALCULATION / ASSESSMENT	Count each unemployed learner who completed a Learnerships/ Skills Programme/ Occupational Qualification/ Part Qualification and was issued a certificate or SOR in 2026/27
MEANS OF VERIFICATION	Agreements and Certificates / Statement of results issued
ASSUMPTIONS	Learners will complete the Programme
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Township, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	5150 4.2 a Learnerships and/or Occupational Qualification completions: 3 750 4.2 b Skills Programme completions: 1 400
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	4.2 c Number of employed and unemployed learners completing Artisan / Technician programmes per annum
DEFINITION	The indicator measures the number of learners (employed and unemployed) funded by W&RSETA who completed Artisan / Technician programmes annually. An artisan is a person who has been certified as competent to perform a listed trade per the skills development act, 1998 (Act of 97 Of 1998).
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count the number of W&RSETA learners who fully completed artisan/technician programmes
MEANS OF VERIFICATION	Certificates or trade test certificate or statements of results issued for completions.
ASSUMPTIONS	Learners will complete their programmes
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Rural
CALCULATION TYPE	Non-cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	750
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	4.2d Number of employed learners completing Learnerships and/or Occupational Qualifications addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum. 4.2e Number of employed learners completing Skills Programmes addressing Key Skills Priority Areas as identified in the W&RSETA SSP per annum.
DEFINITION	This indicator measures the number of employed learners completing learning programmes funded by the W&RSETA. Types of learning programmes include learnerships, skills programmes, occupational qualifications, and part qualifications.
SOURCE OF DATA	System report
METHOD OF CALCULATION / ASSESSMENT	Count each employed learner who completed/ certificated in Learning Programmes addressing Key Skills Priority Areas as identified in the SSP.
MEANS OF VERIFICATION	Certificates or statement of results issued.
ASSUMPTIONS	Learners will complete the Programme
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Quarterly
DESIRED PERFORMANCE	4600 4.2 d Learnerships and/or Occupational Qualification completions: 2 100 4.2 e Skills Programme completions: 2 500
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	4.3 Number of signed partnership agreements with HET Institutions, annually
DEFINITION	This indicator measures the partnership agreements that are concluded with HET Institutions to improve the delivery of Wholesale and Retail related qualifications through using a variety of interventions, including: <ul style="list-style-type: none"> • Workshops • Infrastructure support • Equipment • Training Material • Lecturer Capacitation • Establishing Assessment Centres
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of partnership agreements concluded with HET Institutions.
MEANS OF VERIFICATION	Signed partnership agreements
ASSUMPTIONS	Sufficient interest from HET Institutions to partner with W&RSETA
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Rural
CALCULATION TYPE	Non – Cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	3
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	4.4 Number of Public TVET Centres of Specialisation supported annually
DEFINITION	This indicator measures the number of Public TVET Centres of Specialisation supported and had entered a partnership agreement, with W&RSETA, that outlines the support to be provided.
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of Centres of Specialisation supported using signed agreements
MEANS OF VERIFICATION	Signed Agreements
ASSUMPTIONS	Public TVET Centres of Specialisation need support
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Urban, Rural
CALCULATION TYPE	Non – Cumulative
REPORTING CYCLE	Annually
DESIRED PERFORMANCE	4
INDICATOR RESPONSIBILITY	COO



INDICATOR TITLE	4.5 Number of signed partnership agreements with TVET's annually
DEFINITION	<p>This indicator measures partnership agreements that were concluded with TVET Institutions to improve the delivery of Wholesale and Retail related qualifications through using a variety of interventions, including:</p> <ul style="list-style-type: none"> • Workshops • Infrastructure Support • Equipment • Training Material • Lecturer Capacitation • Establishing Assessment Centres • Training interventions
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of partnership agreements concluded with TVET Institutions
MEANS OF VERIFICATION	Signed agreements
ASSUMPTIONS	Sufficient interest from TVET Institutions to partner with W&RSETA
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural, Urban
CALCULATION TYPE	Cumulative (year-end)
REPORTING CYCLE	Bi-Annual
DESIRED PERFORMANCE	20
INDICATOR RESPONSIBILITY	COO

INDICATOR TITLE	4.6 Number of partnerships formed with CETs to improve the delivery of retail and related programmes annually
DEFINITION	<p>This indicator measures partnership agreements that were concluded with CET Institutions to improve the delivery of Wholesale and Retail related qualifications through using a variety of interventions, including:</p> <ul style="list-style-type: none"> • Workshops • Infrastructure Support • Equipment • Training Material • Lecturer Capacitation • Establishing Assessment Centres • Training interventions
SOURCE OF DATA	Benefit Template
METHOD OF CALCULATION / ASSESSMENT	Count the number of partnership agreements concluded with CET Institutions
MEANS OF VERIFICATION	Signed partnership agreements
ASSUMPTIONS	Sufficient interest from CETs to partner with W&RSETA
DISAGGREGATION OF BENEFICIARIES	Not applicable
SPATIAL TRANSFORMATION	Rural, Urban
CALCULATION TYPE	Non-Cumulative
REPORTING CYCLE	Annual
DESIRED PERFORMANCE	3
INDICATOR RESPONSIBILITY	COO



ANNEXURE A: MATERIALITY FRAMEWORK

In terms of Treasury Regulations, 28.3.1 for purposes of material [sections 50(1), 55(2) and 66(1) of the Act] and significant [section 54(2) of the Act], the accounting authority must develop and agree on a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.

The Wholesale & Retail SETA has developed a materiality and significance framework which outlines materiality and significance as follows:

TREASURY REGULATION 28.1.5

“For purposes of “material” [sections 50(1), 55(2) and 61(1) (c) of the Act] and “significant” [section 54(2) of the Act], the accounting authority must develop and agree a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.”

		Materiality approach adopted
Section 50 (1)	<p>(1) The accounting authority for a public entity must -</p> <p>(a) Exercise the duty of utmost care to ensure reasonable protection of the assets and records of the public entity;</p> <p>(b) Act with fidelity, honesty, integrity and in the best interest of the public entity in</p>	<p>Appropriate systems of control and risk management are maintained as well as a corporate risk management policy which is reviewed annually for effectiveness and a high level of compliance.</p> <p>W&RSETA sets high standards for good governance and ethical behaviour. The best interest of the public entity is always relevant and reflected in the business plan as approved by the Board (accounting authority) and the implementation of the business plan is of the utmost importance.</p>



	<p>managing the financial affairs of the public entity;</p>	
	<p>(c) On request, disclose to the executive authority responsible for that public entity or the legislature to which the public entity is accountable, all material facts, including those reasonably discoverable, which in any way influence the decision or actions of the executive authority or that legislature; and</p>	<p>W&RSETA is committed to an open and transparent culture and inrevealing any relevant information to its stakeholders. Materiality can only be determined if the nature of the information which will affect the decision of the stakeholder is known.</p> <p>W&RSETA employs risk management plans and reviews.</p> <p>Identified processes are aimed at preventing any prejudice to the financial interest of the state.</p>



	<p>(d) Seek, within the sphere of influence of that accounting authority, to prevent any prejudice against the financial interests of the state.</p>	
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TREASURY REGULATION 28.1.5

“For purposes of “material” [sections 50(1), 55(2) and 61(1) (c) of the Act] and “significant” [section 54(2) of the Act], the accounting authority must develop and agree a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.”

		Materiality approach adopted
	<p>(e) On request, disclose to the executive authority responsible for that public entity or the legislature to which the public entity is accountable, all material facts, including those reasonably discoverable, which in any way influence the decision or actions of the executive authority or that legislature; and</p> <p>(f) Seek, within the sphere of influence of that accounting authority, to prevent any prejudice against the financial interests of the state.</p>	<p>W&RSETA is committed to an open and transparent culture and in revealing any relevant information to its stakeholders. Materiality can only be determined if the nature of the information which will affect the decision of the stakeholder is known.</p> <p>W&RSETA employs risk management plans and reviews. Identified processes are aimed at preventing any prejudice to the financial interest of the state.</p>
Section 55 (2)	<p>(2) The annual report and financial statements referred to by PFMA Subsection 55 (1)(d) must –</p> <p>(a) Fairly present the state of affairs of the public entity, its business, its financial results, its performance against pre-determined objectives and its financial position as of the end of the financial year concerned;</p> <p>(b) include particulars of –</p> <p>(i) Any material losses through criminal conduct and any irregular expenditure and fruitless and wasteful expenditure that occurred during the financial year;</p> <p>(ii) Any criminal or disciplinary steps taken as a consequence of such losses or irregular expenditure or fruitless and wasteful expenditure;</p> <p>(iii) Any losses recovered or written off;</p>	<p>W&RSETA makes use of independent assurance providers and is involved with disclosure forums for the presentation of annual financial statements to ensure that its affairs are fairly represented in the AFS.</p> <p>All losses are disclosed in the AFS.</p> <p>All activities are disclosed in the AFS.</p> <p>All losses are disclosed in the AFS.</p> <p>All financial assistance received or committed is disclosed.</p> <p>W&RSETA will apply any other matters that become prescriptive.</p>



TREASURY REGULATION 28.1.5

“For purposes of “material” [sections 50(1), 55(2) and 61(1) (c) of the Act] and “significant” [section 54(2) of the Act], the accounting authority must develop and agree a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.”

		Materiality approach adopted
	<p>(iv) Any financial assistance received from the state and commitments made by the state on its behalf; and</p> <p>(v) Any other matters that may be prescribed; and</p> <p>(g) (c) Include the financial statements of any subsidiaries.</p>	Not applicable.
Section 54 (2)	<p>(3) (1) Before a public entity concludes any of the following transactions, the accounting authority for the public entity must promptly and in writing inform the relevant treasury of the transaction and submit relevant particulars of the transaction to its executive authority for approval of the transaction</p> <p>(a) Establishment or participation in the establishment of a company;</p> <p>(b) Participation in a significant partnership, trust, unincorporated joint venture, or similar arrangement</p> <p>(c) Acquisition or disposal of a significant shareholding in a company</p> <p>(d) Acquisition or disposal of a significant asset</p> <p>(e) Commencement or cessation of a significant business activity;</p> <p>A significant change in the nature or extent of its interest in a significant partnership, trust, unincorporated joint venture, or similar arrangement.</p>	<p>Not applicable.</p> <p>Not applicable.</p> <p>Not applicable.</p> <p>Management attains the approval of the Accounting Authority. Not applicable.</p> <p>Not applicable.</p>
Section 61(1)(c)	<p>(a) The report of an auditor appointed in terms of section 58(1)(b) must be addressed to the executive authority responsible for the public entity concerned and must state separately in respect of each of the following matters whether in the auditor's opinion –</p>	<p>The materiality of 0.5% of the total value of the sum of the revenue received for the year is applied.</p> <p>Budgeted Revenue 2026/27 = R 1,926 billion (based on MTEF estimate)</p>



TREASURY REGULATION 28.1.5

“For purposes of “material” [sections 50(1), 55(2) and 61(1) (c) of the Act] and “significant” [section 54(2) of the Act], the accounting authority must develop and agree a framework of acceptable levels of materiality and significance with the relevant executive authority in consultation with the external auditors.”

		Materiality approach adopted
	(b) The transactions that had come to the auditor’s attention during auditing were in all material respects per the mandatory functions of the public entity determined by law or otherwise.	Materiality for 2026/27 = R 9,6 million
Section 66 (1)	<p>(1) An institution to which this Act applies may not borrow money or issue a guarantee, indemnity, or security, or enter into any other transaction that binds or may bind that institution or the Revenue Fund to any future financial commitment, unless such borrowing, guarantee, indemnity, security, or other transaction</p> <p>–</p> <p>(2)</p> <p>(a) Is authorised by this Act; and</p> <p>(b) In the case of public entities, is also authorised by other legislation, not in conflict with this Act; and</p> <p>(c) In the case of loans by a province or a provincial government business enterprise under the ownership control of a provincial executive, is within the limits as set in terms of the Borrowing Powers of Provincial Governments Act, 1996 (Act No 48 of 1996).</p>	W&RSETA operates within the ambit as set by this clause and its related Act.



Quantitative Aspects

Materiality level for consideration, the level of materiality for 2026/27 has been set as follows:

FINANCIAL STATEMENT BASE	BASE AMOUNT	MATERIALITY %	MATERIALITY VALUE FOR 2026/27
Total assets	R 2 195 391 000	1%	R 21 953 910
Total revenue	R 1 926 250 000	0.5%	R 9 631 250
Total Surplus	Not relevant as the W&RSETA is not budgeting for a surplus		

The total revenue amount is based on the MTEF Estimates for the 2026/27 financial year while the total assets value is based on the audited financial statements for the 2024/25 financial year.

Therefore, final materiality is set at R 9 631 250 for the 2026/27 financial year.

Qualitative aspects

Materiality is not merely related to the size of the entity and the elements of its financial statements. Misstatements that are large either individually or taken together may affect a “reasonable” user’s judgement. However, misstatements may also be material on qualitative grounds. These qualitative grounds include amongst others:

- New contracts that the SETA has entered into.
- Unusual transactions entered into that are not repetitive and are disclosable purely due to the nature thereof due to knowledge thereof affecting the decision making of the user of the financial statements.
- Transactions entered into that could result in a reputational risk to the SETA.
- Any fraudulent or dishonest behaviour of an officer or staff of the SETA.
- Any infringement of W&RSETA’s agreed performance levels.
- Procedures/processes required by legislation or regulation (e.g., PFMA and the Treasury Regulations)

This Materiality Framework is re-assessed and adjusted on an annual basis with the Audit Committee, Internal and External Auditors and assessed and approved by the Accounting Authority.



CHIEF FINANCIAL OFFICER



ANNEXURE B: GLOSSARY OF TERMS

Artisan	the person who has been certified as competent to perform a listed trade in accordance with the skills development act, 1998 (Act of 97 Of 1998)
Certification	the formal recognition of a student who successfully completed all courses required to obtain a qualification or part qualification
Continuing Education Training	all learning and training Programmes leading to qualifications or part qualifications at Levels 1-4 of the NQF contemplated in the National Framework Act, 2008 (Act No. 67 of 2008)
Data source	a record, organisation, individual or database from which data is obtained
Higher Education Institution	any institution that provides higher education on full time, part time or distance basis and which is established deemed to be established or declared as a public higher education institution or registered or conditionally registered as a private higher education institution under the higher Education Act No 101 of 1997
Hard to Fill Vacancies (HTFVs)	hard to fill vacancies are defined as those vacancies that take the employer a period longer than six months to find suitable candidates to fill the vacancy (with mainly skills-related reasons)
Learnership	a learning Programme that leads to an occupational qualification or part qualification
Recognition of prior learning	the principles and processes, through which the prior knowledge and skills of a person are made visible, mediated and assessed for the purpose of alternative access and admission, recognition and certification, or further learning and development
Workplace based learning	an educational approach with a quality assured curriculum through which a person internalises knowledge, gain insights and acquire skills and competences through exposure to a workplace to achieve specific outcomes applicable to employability





ANNEXURE D: AMENDMENTS TO THE STRATEGIC PLAN 2025-2030

SECTION A: AMENDMENTS TO THE STRATEGIC PLAN

1. Changes Proposed

The following changes are proposed to the Strategic Plan. To enable improved tracking and monitoring, the targets have been revised from a percentage-based approach to a number-based approach.

Outcome and Outcome Indicators

Old outcome indicator	New outcome indicator	Old target	Revised target
Percentage increase in number of partnerships with HET, TVET, and CET institutions aimed at enabling their growth by 2029/30.	Number of partnerships with HET, TVET, and CET institutions aimed at enabling their growth by 2029/30	10% increase in the number of partnerships with HET, TVET and CET	68
Percentage increase in the number of learners participating in occupationally directed programmes by 2029/30	Number of learners participating in occupationally directed programmes by 2029/30	100%	60 000

Below is the revised/final product on the two indicators and targets as per the changes proposed above:

OUTCOME	OUTCOME INDICATOR	BASELINE	FIVE-YEAR TARGET
Outcome 3: Growth focused programmes for the development and support of public Training Providers and the Higher Education Institutions, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances	Number of partnerships with HET, TVET, and CET institutions aimed at enabling their growth by 2029/30	62 partnerships	68
Outcome 5: Increased opportunities to access W&R occupationally directed programmes	Number of learners participating in occupationally directed programmes by 2029/30	43 619	60 000



2. Proposed changes to the Technical Indicator Descriptors:

In the previous version, the indicators were aligned to percentage-based targets and reporting. To improve tracking and monitoring, the Technical Indicator Descriptors have been revised to ensure closer alignment with the indicators and targets contained in the main strategic document. The revised approach shifts from percentage-based targets to number-based targets, which allows for clearer measurement, easier verification, and more effective performance reporting. Below is the proposed revision:

Outcome 3: Growth focused programmes for the development and support of Training Providers and the Higher Education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances (By 2030 partnerships with 50 TVET Colleges, 9 CET and 26 HET)

INDICATOR TITLE	Number of partnerships with HET, TVET, and CET institutions aimed at enabling their growth by 2029/30
DEFINITION	Measures the SETA's progress in establishing and enhancing formal partnerships with HET, Technical and TVET, and CET institutions.
SOURCE OF DATA	Memorandum of Understandings (MOUs) signed with HETs, TVETs and CETs
METHOD OF CALCULATION / ASSESSMENT	Simple count: Count the number of partnerships with HET, TVET, and CET institutions aimed at enabling their growth by 2029/30
ASSUMPTIONS	The identified public TVET Colleges, CETs and HEIs will be willing to partner with the W&RSETA
DISAGGREGATION OF BENEFICIARIES	N/A
SPATIAL TRANSFORMATION	Rural Urban
DESIRED PERFORMANCE	68
INDICATOR RESPONSIBILITY	COO

Outcome 5: Increased opportunities to access W&R occupationally directed programmes

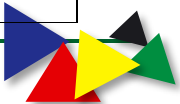
INDICATOR TITLE	Number of learners participating in occupationally directed programmes by 2029/30
DEFINITION	Measures the growth in the number of learners enrolled in occupationally directed training and educational programmes over a defined baseline period, with a target to achieve a specified percentage increase by the 2029/30 fiscal year.
SOURCE OF DATA	Signed Learner agreements
METHOD OF CALCULATION / ASSESSMENT	Simple count: Count number of learners participating in occupationally directed programmes by 2029/30
ASSUMPTIONS	Favourable uptake of allocations by employers and participation by learners
DISAGGREGATION OF BENEFICIARIES	4% PWD 60% Females
SPATIAL TRANSFORMATION	Rural (12.5% persons from rural areas) and urban beneficiaries supported
DESIRED PERFORMANCE	60 000
INDICATOR RESPONSIBILITY	COO



3. Proposed changes to the implementation of the previous Strategic Priorities

The analysis below reflects the SETA's final, audited performance information and provides a reflective assessment of its implementation of approved outcomes and outputs.

OUTCOME	OUTCOME INDICATOR	BASELINE	FIVE YEAR TARGET	PROGRESS/ACHIEVED TO DATE
Outcome 1: An efficient and effective organisations with good corporate governance	Audit opinion by 2024/25	Unqualified	Unqualified audit opinion	Unqualified Audit Opinion
	Percentage reduction of manual processes as a result of seamless and optimised business processes	70% manual processes	90% reduction of manual processes	A total of 56 manual processes were automated, resulting in an overall rate of 119%. Below is the breakdown per financial year: <ul style="list-style-type: none"> • 2020/21 – 10 processes were automated (21%) • 2021/22 – 46 manual processes were automated (98%)
Outcome 2: An integrated career guidance programme	A comprehensive career guidance and career development strategy developed	A new target	A career guidance and career development strategy which is developed and implemented to guide the W&RSETA career guidance interventions over the period 2020/21 – 2024/25	<p>Career Guidance Strategy developed and approved in the 2020/21 period. The strategy is currently being implemented</p> <p>In 2021/22: 307 career guidance interventions were implemented</p> <p>During the 2022/23 financial year, 244 were implemented</p> <p>The development of a Careers Toolkit and online careers platform commenced and completion in 2024-2025</p> <p>Videography of the W&R sector</p> <p>In 2023/24, 254 career guidance interventions were implemented and included capacitation of 20 life orientation educators</p> <p>In 2024/25, 252 career events were implemented, which includes capacitation of 26 Life Orientation Educators</p>
Outcome 3: Growth- focused programmes for the development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances	Percentage increase in the number of HET, TVET and CET partnerships aimed at enabling their growth	A new target	10% increase in the number of partnerships with Training Providers and Further and Higher Education and Training Institutions	<p>The target of percentage increase in partnerships with HET, TVETs and CETs was exceeded over the 5-year period</p> <p>In 2024/25, the partnerships formed increased to 58, from a small number of 2 partnerships that were formed in 20/21</p>
	Number of education and training institutions and training providers offering W&R occupationally directed programmes	A new target	20 HET, TVETs, CET sites/ campuses 40 Training Providers (of which 100% are HDI Providers)	<p>A total of 58 education and training institutions and training providers offered W&R occupationally directed programmes</p> <p>A total of 41 HDI Skills Development Providers (SDP) were trained and graduated</p>



Outcome 4: A sector-responsive research agenda that supports and informs	Number of research studies conducted in response to the sector needs	4 research reports	20 research reports completed	23 research studies were conducted
the establishment of impact-driven W&R skills development programmes	Number of impact assessment reports published	4	5	13 impact tracer studies were conducted and reports published
Outcome 5: Increased access to wholesale and retail occupationally directed programmes	Number of learners participating in occupationally directed programmes	6,536	7,000 (4% person with disability 12.5% persons from rural areas)	A total of 43 619 (9.17% Disability and 29.97% persons from rural areas) learners participated in occupationally directed programmes
Outcome 6: Growth-focused skills development and entrepreneurship development support for emerging entrepreneurs, the cooperative sector and small, medium, and informal enterprises, aimed at enhancing their participation in the mainstream economy	Number of informal businesses that have participated in W&RSETA skills development initiatives registered with relevant business or enterprise registration bodies	New Target	1 000 Informal Businesses registered with relevant registration bodies	169 informal businesses were registered with the relevant bodies However, it should be noted that 14,378 informal businesses participated in the W&RSETA skills initiatives
	Number of Cooperatives participating in skills development initiatives	New Target	100	111 Cooperatives have participated in skills development initiatives It should be noted that the SETA further enabled 203 community based entities to participate in skills development initiatives
	Number of transformation projects implemented in collaboration with industry partners	New Target	3	Four transformation projects were implemented in collaboration with industry partners
Outcome 7: Capacitated trade unions within the W&R sector	Number of interventions conducted to capacitate Trade Union members	N/A	15 interventions	20 Trade Union Interventions conducted to capacitate Trade Union members
	Percentage increase in trade union member participation in Trade Union Capacitation Programmes	800	20%	It should be noted that 6,910 trade union members have participated over the five-year period, from a baseline of 800



Outcome 8: An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs	Number of workers registered in programmes addressing Hard to Fill Vacancies, as identified in the SSP	New Target	10 000	The target was overachieved, with 47,869 workers registered in programmes addressing HTFVs, as identified in the SSP
	Comprehensive impact evaluation of W&RSETA strategic programmes aimed at addressing the imbalance between skills supply and demand	New Target	1	One impact evaluation of W&RSETA strategic programmes was conducted to assess progress towards addressing imbalance between skills supply and demand
	Number of employed and unemployed individuals obtaining qualifications through programmes that address current and emerging skills needs in the W&R sector, enhancing the sector's responsiveness to 4IR and related technological advances	New Target	2000	188 learners obtained qualifications through programmes designed to meet the W&R sector's current and emerging skills needs, enhancing sector responsiveness to 4IR and related technological advances
	Number of young people supported with ICT skills to access digital job and entrepreneurship opportunities within the sector	874	1500	2,302 young people were supported with ICT skills to access digital job and entrepreneurship opportunities in the sector
	Number of learners exiting W&RSETA programmes	21 252	39 470	42,658 individuals have completed W&RSETA programmes
Number of previously unemployed individuals who, after completing W&RSETA programmes, are now employed or have started their own businesses	9 064	12 000	1,887 previously unemployed individuals who completed W&RSETA programmes are now employed or have started their own businesses	



4. Motivation:

The proposed revisions to the Strategic Plan were necessitated by the need to strengthen the credibility, clarity, and practicality of performance measurement and reporting. While the previous approach relied on percentage-based indicators, the evolving complexity of implementation, monitoring, and verification highlighted the need for a more precise and measurable framework that supports effective oversight and decision-making.

Percentage-based targets, although useful for illustrating proportional growth, present limitations in tracking actual progress over time, particularly where baselines fluctuate or where year-on-year performance must be assessed against concrete deliverables. In contrast, number-based targets provide greater certainty in planning, implementation, and evaluation, as they define explicit outputs that can be directly monitored and verified. This shift therefore improves the ability to accurately assess performance against intended outcomes and enhances accountability across the implementation cycle.

The revision also ensures stronger alignment between the outcome indicators, targets, and the information contained in the main strategic document. Consistency across these elements is essential to avoid ambiguity during reporting, auditing, and performance reviews. In addition, aligning the Strategic Plan with the Technical Indicator Descriptors further supports uniform interpretation of indicators and enables seamless integration between planning, monitoring, and reporting processes. Importantly, these changes do not alter the strategic intent or outcomes of the plan. Rather, they refine the measurement approach to better reflect actual delivery and impact.



ANNEXURE E: LIST OF TVET COLLEGES WITH W&RSETA OFFICES

NAME OF THE COLLEGE	PHYSICAL ADDRESS	REGION
uMgungundlovu TVET College	44 Burger Street, Pietermaritzburg	KwaZulu Natal
Majuba TVET College (Madadeni Campus)	CPD, Nelson Mandela Drive, Section 2; Madadeni	KwaZulu Natal
uMfolozi TVET College (Esikhawini Campus)	Lot: 11 Eskhawini Highway, Eskhawini	KwaZulu Natal
Mthashana TVET College (Vryheid Campus)	90 Hlobane Street, Vryheid	KwaZulu Natal
Esayidi TVET College (Enyenyenzi Campus)	Boboyi Location, N2 Main Harding Road, Port Shepstone	KwaZulu Natal
Enhlanzeni TVET College	29 Bell Street, Nelspruit	Mpumalanga
Gert Sibande TVET College	No. 2 Tambourin Ave, Standerton	Mpumalanga
Taletso TVET College	Carrol Street, Lichtenburg	North West
Vuselela TVET College	133 OR Tambo Street, Klerksdorp	North West
West Coast College	2 Loedolf Street, Malmesbury	Western Cape
False Bay College	Khayelitsha Campus, Mew Way	Western Cape
Boland College	85 Bird Street, Stellenbosch	Western Cape
South Cape College	125 Mitchell Street, George	Western Cape
Maluti TVET College	Central Office, Mampoi Road Phuthaditjhaba 9866	Free State
Goldfields TVET College	Cnr Toronto Rd & Petrus Bosch Str. City Centre Welkom	Free State





ANNEXURE F: DISTRIC DEVELOPMENT MODEL

Areas of intervention	Medium Term (3 years - MTEF)				
	Project description	District Municipality	Location: GPS coordinates	Project Leader	Social Partners
CET Infrastructure Support	The Construction of Free State CET Skills Development Centre	Thabo Mofutsanyana	27°47'33.2"S and 28°25'46.7"E	Marcus Mokgohloa	Free State CET College
CET Infrastructure Support	The Construction of the KwaZulu-Natal CET Skills Development Centre	uMzinyathi	28°51'55.0"S and 30°17'52.0" E.	Marcus Mokgohloa	KwaZulu-Natal CET College and Independent Development Trust (IDT)
TVET College Infrastructure Support	The Construction of Ntabankulu Skills Development Centre	Alfred Nzo	30°56'38"S and 29°18'03"E	Marcus Mokgohloa	Ingwe TVET College

