W&RSETA
SECTOR SKILLS PLAN (SSP)
2020 – 2025

FINAL SUBMISSION

1 August 2021
Updated 2021-2022

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

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I. FOREWORD

This draft version of the Sector Skills Plan (SSP) for the Wholesale and Retail Sector Education and Training Authority (W&RSETA) for 2021-2022. The SSP is prepared in accordance with Department of Higher Education and Training (DHET) Sector *Skills Plan Framework and Requirements (Revised 2019).*

The principal aim of this SSP is to develop a "roadmap" for skills development in the wholesale and retail sector in South Africa. Hence, it is necessary to identify factors driving change in the sector, occupational supply and demand imbalances, skills gaps in the internal labour market of companies, and priority skills development interventions. These are determined through extensive research, literature review and stakeholder consultations country wide. The stakeholder consultations and Survey have been completed, and this input has been used to inform this Final SSP submission. We have done a comparative data analysis of the Workplace Skills Plan (WSP) / Annual Training Report (ATR) to validate the findings and recommendations.

We have considered national policy issues in the *New Growth Path (NGP), Human Resource Development Strategy of South Africa (HRDSA), National Development Plan (NDP), Industrial Policy Action Plan (IPAP), National Skills Development Plan (NSDP) and Skills Accord* in the development of the SSP.

The Sector Skills Plan is submitted to the Minister of Department of Higher Education and Training in compliance with the requirement of the *Skills Development Act 1998 (as amended)* and the *National Skills Development Plan (NDSP).*

APPROVED BY:

Mkhwanazi — 29/07/2021

Mr. Tom Mkhwanazi — **Date**

Chief Executive Officer (CEO)

Sibiya — 30 July 2021

Mr. Reggie Sibiya — **Date**

Board Chairperson

II. EXECUTIVE SUMMARY

The W&RSETA Executive summary highlights the key areas of the SSP per chapter and also indicates the progress made in the annual development of the SSP. Further update will be made on the various chapters outlined below as and when the research and data analysis has been concluded.

Chapter 1 (Sector Profile): The Wholesale and Retail sector employs 20,3 % of the active labour force.

- **Economic performance**: The South African economy recorded its worst year since 1946, with a negative growth rate of 7%. The poor economic performance is largely due to the restrictions in place as a result of the various lockdowns to combat the spread of COVID-19. This position is starting to turn around though, with the South African economy seeing a positive growth of 1,5%, from 8 out of 10 industries in the last quarter of 2020.
- **Economic performance of W&R Sector:** The South African wholesale trade sales fell by 9.1% in 2020. However, South Africa's year-on-year retail sales trade increased to 2,3% in February 2021.
- **Labour market profile**: The wholesale and retail sector employed 2.15 million people in December of 2020, which is about 15% of the total number of employed people. In 2019, there were 2.3 million employees compared to 2.15 million employees in 2020, which shows a significant decrease in employment figures.
- **Representation of people with disabilities within the sector:** According to report by Commission for Employment Equity (2018-2019), people with disabilities are least represented in the South African labour market and access remains a challenge. The South African people with disabilities are featured more prominently in the public sector as compared to the private sector.

To respond to some of the challenges facing people with disability in the sector, W&RSETA has identified disability as a priority and interventions will be implemented to ensure representation and awareness.

Chapter 2 (Key Skills Change Drivers): Key drivers of change within the sector include:

- **COVID-19:** The virus is an unprecedented public health emergency that is rapidly transforming the way we all live our lives. It is also mandating significant changes to retail and commerce. In this dynamic time of humanitarian and social uncertainty, what we buy, how we buy, and when and where we buy is undergoing a seismic shift. This movement brings about changes in the way business is conducted and how consumers and retailers respond to these changes is different. Implications for Skills Planning in the Sector include the health and safety of customers, employees, and partners remains of paramount importance; slowdown in business activity; decline in revenue; increased demand for e-commerce; and prioritize reskilling and retraining to minimize job losses.
- **Technology advancements and increased access to information:** Technology is changing the wholesale and retail industry. These changes include mobile applications, online shopping, big data, social media, cyber-crime, mobile phones and internet usage.
- **Data Privacy and Protection of Personal Information Act:** All businesses in South Africa are now required to adhere to the requirements of the Protection of Personal Information Act. These requirements can be onerous for businesses, especially for SMMEs (for example, the requirement of all businesses to appoint an Information Officer who can be held liable for data breaches in multiple ways). POPI will require a fundamental shift in how businesses store data and how they market themselves. Furthermore, cybersecurity and IT literacy skills will become essential as most data is stored on servers or in the cloud.
- **SMME development:** The SMME sector is relatively large and sources products from wholesalers. Changes include Small enterprise development, hawkers, casualisation and new training model.

Key policy drivers for the sector include:

- IPAP 4;
- New Growth Path (NGP);
- National Development Plan (NDP);
- HRD Strategy for SA (HRDSA);
- Department of Environmental Affairs Integrated Development Plan (IDP);
- Tourism Sector Skills Plan; and
- Broad Based Black Economic Empowerment (BBBEE).

- **Changing Expectations of W&R Stakeholders:** The expectations of customers, employees, suppliers and investors are constantly evolving and changing over time. For example, employers are encouraged to be more aware and responsive to differences in employee cultures and religions. Customers expect a much faster reaction time from their favoured stores. Competition is also being faced from a global perspective. Furthermore, consumers are more inclined to support businesses who operate ethically with a sustainable ecological footprint. With the rise in access to information consumers can easily seek out retailers who demonstrate these characteristics. These elements require employees to be skilled and knowledgeable in HR practices, environmentally friendly practices, be aware of the local and global economic and political context.

Chapter 3 (Occupational Shortages and Skills Gaps):

- **Sectoral Priority Occupations:** Retail General Manager / Retail Buyer/ Software Developer / Visual Merchandiser / Sales Manager / Retail Supervisor / Retail Store Manager / Butcher / Safety, Health, Environment and Quality (SHE&Q) Practitioner / Merchandiser
- **The following are new and emerging top-up skills:** Digital marketing skills; Digital customer communication skills; Problem solving skills; Financial literacy skills; Data analytics skills; Ethics & discipline; and Information Communication Technology (ICT) skills such as Software Developers, Business Analysts and Computer network and Systems engineer.
- **Skills gaps:** Emotional Intelligence/ People Skills / Communication Skills / Leadership Skills/ Mentoring and Coaching/ Planning and Project Management/ Conflict Management/ Business Management/ Financial Management/ Performance Management/ Human Resource Management / Financial Skills/ Product Knowledge/ Visual Merchandising/ First Aid/ Project Management/ Marketing Skills/ Covid-19 Safety/ Digital and 4IR Skills.

Chapter 4 (Sector Partnerships): Identify partnerships in the sector to examine best practices and measures to strengthen partnerships. The W&RSETA has partnerships with TVETs and Universities nationally and internationally. There is also a need to establish new partnerships with small enterprise associations to reach retail SMMEs, Co-operatives, and Informal Traders.

Chapter 5 (SETA Monitoring and Evaluation (M&E): The W&RSETA is conducting Workplace Based Learning (WBL) tracer studies targeting learnerships and internships beneficiaries under the NSDS III. The aim of this project is to investigate the destinations of learners who completed workplace-based learning (WBL) programmes that are funded by W&RSETA. The M&E information forms the basis of our plans as we use performance reports as well as evaluation findings to inform all our plans.

Chapter 6 (Strategic Skills Priority Actions): The W&RSETA recommends interventions to address skills needs in the sector, derived from earlier chapters. This section will be reviewed and updated once fieldwork is completed. This section has been reviewed and aligned to key finding and recommendation from the data analysis report.

This SSP identifies 7 key skills priorities for the W&R sector:

1. **Priority Skills Plan (PSP):** The Priority Skills Plan is intended to ensure that skills do not become a hindrance to economic growth and job creation. To guard against this, the SETA will identify key skills and occupations to support that will assist the labour market from the short term. Industry consultation to identify skills and develop priority skills necessary for economic growth and job creation within the digital economy.
2. **SMME and Co-Operatives development:** It is critical that these enterprises are supported with skills development. Alternative and new training models are needed to meet the training needs of SMMEs.
3. **Youth Unemployment:** The retail sector provides significant temporary employment opportunities for the youth. The challenge is to convert these into permanent employments and encourage career development in the sector.
4. **Hard-To-Fill Vacancies and Skills Gaps:** The identification of Hard-To-Fill Vacancies (Occupational shortages) and skills gaps is a key deliverable of the SSP. This ensures that the SSP responds to the demands of the sector.
5. **Stakeholder Engagement:** Stakeholder partnerships are the best way to meet industry needs for skilled workers and workers' needs for better jobs. It offers a platform to focus on job growth sectors and workforce training needs.
6. **Sector Transformation, including Training and Employment of People with Disabilities (PWD):** Despite progressive legislation and a commitment from the government, PWD do not have the same opportunities as others. Therefore, the SETA need to prioritise skills development interventions to improve access to training, education and employment for PWD. The W&R sector remains largely untransformed. There is poor representation from black, Indian and Coloured individuals in top and senior management. The demographics of the sector (and broader country) are not reflected in the demographics in leadership positions
7. **Economic Recovery and Reconstruction Plan:** The W&RSETA is planning a number of interventions to respond to the ERRP, including; Capacitation Workshops and Trading Vouchers: ITAMED (Informal Traders and Micro Enterprises Development), Entrepreneurship Development Programme, SME Grant (Small and Micro Enterprise Grant)

Yours sincerely

Mkhwanazi	29/07/2021
Mr. Tom Mkhwanazi	**Date**
Chief Executive Officer (CEO)	

Sibiya	30 July 2021
Mr. Reggie Sibiya	**Date**
Board Chairperson	

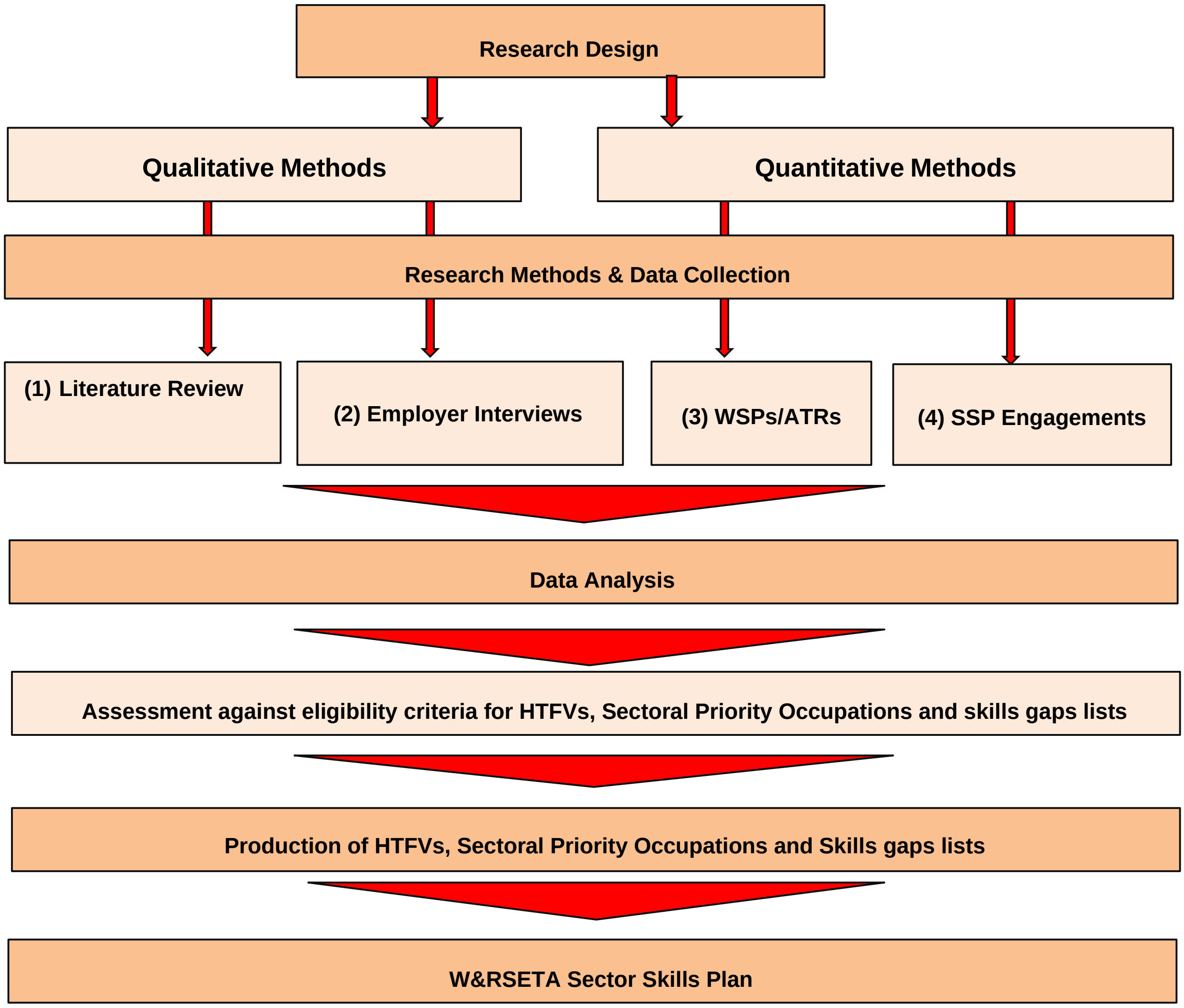
III. RESEARCH DESIGN AND METHODOLOGY

A multi-method research design was employed to develop the sector skills plan. This design uses qualitative and quantitative research methods to collect and analyse data for profiling the W&R sector, identifying change drivers, determining HTFVs, Skills Gaps and Sectoral Priority Occupations and devising skills development interventions.

Diagram 1: Research design and methodology

The research design used for the SSP includes both qualitative and quantitative methods for research and data collection. Qualitative methods include relevant literature and responses from W&RSETA employer interviews. Quantitative methods entail WSP/ATR data and data obtained from SSP engagements with stakeholders within the W&R sector. The data obtained is then analysed and assessed against relevant eligibility criteria to form HTFVs, Sectoral Priority Occupation and skills gaps lists. The different lists and data are used to create the relevant chapters of the Sector Skills Plan.

The research design is as follows:



SSP Implementation guidelines 2017/1 & DHET SSP Framework and Requirements 2019/20

i. Research Methodology

The research methodology used to determine critical, HTFVs and Sectoral Priority Occupations is intended to be inclusive, transparent, replicable and simple to calculate. The methodology is designed to enable information to be incorporated year-on-year, without the need to redesign the process. By establishing a user-friendly framework for identification and anticipation of HTFVs and Sectoral Priority Occupations, all companies, including micro-enterprises can participate in the research.

The primary research methods involved the following:

SSP Survey	
Objective	The primary objective of the W&RSETA Survey is to understand what the impact of COVID-19 on employees, employers, training in the sector has been, and which interventions should be prioritized by W&RSETA. The survey also seeks to validate and gain input on change drivers, hard-to-fill vacancies and skills gaps
Data Collection Tools	A survey was administered.
Time Frame	May 2021 to June 2021
Sampling	226 responses, randomised sample
Key Informant Interviews	
Objective	The primary objective of the SSP key informants' interviews is to set the tone, contribute to the development of the SSP engagement agenda and guide the discussions.
Data Collection Tools	Telephonic Interviews
Time Frame	May 2021 to June 2021
Workplace Skills Plans and Annual Training Reports	
The primary objective was to conduct a comparative analysis of the WSP data submitted by employers.	
SSP Engagement sessions	
Objective	The purpose of the SSP engagement sessions were to interact with stakeholders to solicit inputs on critical areas around skills development, economic and labour market to mitigate the impact of COVID-19 and other sector disruptions.
Data Collection Tools	Interactive discussions were held
Number of provinces consulted	9
Time Frame	May 2021 to June 2021
W&RSETA Employer Interviews	
Objective	The objective of the interview is to identify change drivers, skills gaps, HTFVs and skills interventions for the sector.
Data Collection Tools	Interview guide
Nr. of Stakeholders	6
Sampling	Random as per DHET guidelines
Time Frame	May 2021 to June 2021

Secondary data sources consulted included the following research studies commissioned by the W&RSETA:

- Development of a Model for Establishing Centres of Specialisation for W&R Sector
- The Economic and Social Impact of Covid-19 on the Wholesale and Retail Sector
- Implications of 4IR on new jobs in e-commerce, digitisation and innovation
- Evaluation of Blended Learning and training inventions
- Embracing Local Economic Development through the Identification of Skills Needs of Cooperatives and Small Medium Enterprises

- The Impact of PIVOTAL Programmes Toward the Implementation of Transformational Imperatives 2017/18
- The impact evaluation of the W&RSETA 2015/16 – 2019/20 Strategic Plan Projects (National Participation)
- Review and Update of the W&R sectors Careers Matrix
- New career Opportunities in the W&R Sector Resulting from 4IR
- The W&RSETA Strategic Framework for Career Guidance Delivery
- Benchmarking National and International Career Guidance Practice
- W&RSETA Stakeholder Analysis
- Skills Supply and Demand in South Africa
- Impact Assessment of the W&R Sector's International Leadership Development Programme (ILDP)
- Retail Management Development Programme (RMDP) Final Impact Assessment Research Report
- South African Disability Development Trust (SADDT) Final Impact Assessment Research Report
- Expansion into Africa by SA retailers Report
- Additional data sources included Trading Economics, StatsSA and HEMIS data.

ii. Data Analysis and Findings

Sector Profile (Chapter 1): Data from the literature review and WSP/ATR used to construct the sector profile. The following are some of the data sources that used in this chapter:

1. Statistics South Africa
2. Trading Economics
3. Research agenda and W&RSETA annual reports
4. Workplace Skills Plan/ Annual Training Report (WSP/ATR)
5. Commission for Employment Equity (CEE)

Key Skills Change Drivers (Chapter 2): Data from the literature review and workshops used to identify key skills issues, sector change drivers and alignment to National Strategy and Plans.

Occupational Shortages and Skills Gaps (Chapter 3): Data from the literature review, workshops, WSP/ATR and HTFV survey used to establish HTFVs Sectoral Priority Occupations and skills gaps. The Post-school education and training monitor report and Council for Higher Education (CHE) enrolment report used as part of providing an analysis of the nature of supply.

SETA Partnerships (Chapter 4): Information gathered through an analysis of the existing and planned partnership. The sector value chain analysis is being conducted as part of strengthening the outcomes and impact of W&RSETA partnerships.

SETA Monitoring and Evaluation (Chapter 5): An overview of W&R SETA monitoring and evaluation approach towards improving performance and implementation of strategic priorities. The following are data sources used in updating this chapter:

1. Annual Performance Report
2. Annual Performance Plan (APP)
3. Strategic Plan
4. Research Agenda

SETA Strategic Skills Priority Actions (Chapter 6): This information from chapters one to five consolidated in chapter six as findings and recommendations. The National Skill Development Plan (NSDP) outcomes are prioritised in the first year of implementation are also reflected. The SETA strategic priorities reflected in this chapter are aligned to key priorities in the Integrated Development Plans for the following municipalities:

1. City of Tshwane
2. City of Cape Town
3. Polokwane Municipality
4. Mbombela Municipality
5. Mangaung Municipality
6. City of Johannesburg

IV. ACRONYMS

Acronym	Description
ATR	Annual Training Report
CGCSA	Consumer Goods Council of South Africa
DHET	Department of Higher Education and Training
FET	Further Education and Training
FRA	Fuel Retailers Association South Africa
GDP	Gross Domestic Product
HTFV	Hard-To-Fill Vacancy
HET	Higher Education and Training
IDP	Integrated Development Plan
ILDP	International Leadership Development Programme
IPAP	Industrial Policy Action Plan
NDP	National Development Plan
NSDP	National Skills Development Plan
NGP	New Growth Path
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
OFO	Organising Framework for Occupations
PIVOTAL	Professional, Vocational, Technical and Academic Learning
PWC	Price Waterhouse Coopers
PWD	People with Disabilities
QCTO	Quality Council for Trades and Occupations
QLFS	Quarterly Labour Force Survey
RA	Retailers Association
RMI	Retail Motor Industry Organisation
RMDP	Retail Management Development Programme
SETA	Sector Education and Training Authority
SIC	Standard Industrial Classification
SIPs	Strategic Infrastructure Projects
SMME	Small, Medium and Micro Enterprises
SSP	Sector Skills Plan
STATSSA	Statistics South Africa
TVET	Technical and Vocational Education and Training
USD	United States Dollar
W&RSETA	Wholesale and Retail Sector Education and Training Authority
WP-PSET	White Paper for Post-School Education and Training
WSP	Workplace Skills Plan

1 CHAPTER ONE: SECTOR PROFILE

1.1 Introduction

Chapter One provides a sector profile of the Wholesale and Retail (W&R) sector. It gives a picture of the size and shape of the sector, allowing the reader to understand the contribution of the sector in economic and employment terms. Input and research into this section includes literature review (such as reports written on sector trends), WSP/ ATR data and data analysis (such as statistics released by Statistics South Africa).

1.1.1 Key Questions

This chapter will respond to:

- What is the scope of coverage of the sector?
- Who are the key role-players in the sector?
- What is the contribution of the sector to the economy?
- What is the employer profile of the sector?
- What are the implications for sector skills planning?

1.2 Scope of Coverage

The Wholesale and Retail Sector Education and Training Authority (W&RSETA) established in 2000 in terms of the *Skills Development Act 97 of 1998 (as amended)*. This public entity is responsible for supporting skills development in the wholesale and retail (W&R) sector of South Africa through the implementation of learning programmes, disbursement of grants and monitoring of education and training as outlined the *Act*, accompanying *regulations* and the *National Skills Development Strategy III (NSDS III)*.

Wholesale trade deals with the bulk buying of goods from various manufacturers and the breaking down of this bulk into smaller quantities is then sold direct to consumers. *Retail* trade deals with the buying of goods from the wholesaler and selling of such goods to the consumer. The actual activities that fall within the scope of the wholesale and retail sector demarcated according to Standard Industrial Classification (SIC) codes.
The scope of coverage of the W&RSETA in terms of the Skills Development Act 97 of 1998 is as follows:

TABLE 1: SCOPE OF COVERAGE

SIC Code	Trade Category
Major Division 6: Wholesale and Retail Trade; Repair of Motor Vehicles, Motorcycles and Personal and Household Goods; Hotels and Restaurants	
61000	***Wholesale and commission trade, except for motor vehicles and motor cycles***
61100	Wholesale trade on a fee or contract basis
61200	Wholesale trade in agricultural raw materials, livestock, food, beverages and tobacco
61220	Wholesale trade in food, beverages and tobacco
61300	Wholesale trade in household goods
61310	Wholesale trade in textiles, clothing and footwear
61391	Wholesale trade in household furniture requisites and appliances
61392	Wholesale trade in books and stationery
61393	Wholesale trade in precious stones, jewellery and silverware
61394	Wholesale trade in pharmaceuticals, toiletries and medical equipment
61400	Wholesale trade in non-agricultural intermediate products, waste and scrap
61420	Wholesale trade in metal and metal ores
61430	Wholesale trade in construction materials, hardware, plumbing and heating equipment
61500	Wholesale trade in machinery, equipment and supplies
61501	Office machinery and equipment, including computers
61501	Other machinery

SIC Code	Trade Category
61900	Other wholesale trade
61901	General wholesale trade
61909	Other wholesale trade not elsewhere classified (nec)
Retail	
62000	***Retail trade, except for motor vehicles and motor cycles; repair of personal and household goods***
62100	Retail trade in non-specialised stores with food, beverages and tobacco dominating
62110	Other retail trade non-specialised stores
62190	Other retail sale in non-specialized stores
62200	Retail trade in food, beverages and tobacco in specialised stores
62211	Retail trade in fresh fruit and vegetables
62212	Retail trade in meat and meat products
62213	Retail trade in bakery products
62220	Retail trade of beverages (bottle stores)
62230	Other retail trade in food, beverages and tobacco (nec)
62300	Other retail trade in new goods in specialised stores
62310	Retail trade in men’s and boy’s clothing
62320	Retail trade in ladies’ and girls’ clothing
62400	Retail trade in second-hand goods in stores
62500	Retail trade not in stores
62510	Retail trade via mail-order houses
62511	Retail trade in books via mail-order houses
62519	Other retail trade via mail-order houses
62520	Retail trade via stalls and markets
62590	Other retail trade not in stores

SOURCE 1: (STATISTICS SOUTH AFRICA, 2012)

1.3 Key Role Players

The following table provides the key role players in the Wholesale and Retail Sector along with their roles and expertise:

TABLE 2: KEY ROLE PLAYERS IN THE WHOLESALE AND RETAIL SECTOR

Key Role Players	Roles and Areas of Expertise	NSDP Outcomes Alignment
Organised Employers		
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 (BUSA) Fuel Retailers Association (FRA) South African Petroleum Retailers Association Retail Motor Industry Organisation Wholesale and retail enterprises (small, medium and large)	• Represented equally on the committees of the W&RSETA. • Represent and articulate employer (small, medium and large) interests. • Contribute to education and training, negotiations, marketing, finance, human resources and legal.	• Engaging workplaces to enable them to provide increasingly relevant data on the skills of their existing workforce as well as projected skills needs, through relevant templates; • Engaging stakeholders (including but not limited to employers, labour and government) to ascertain their perceptions of future trends in their sectors and the implications of these for the demand and supply interventions signals to steer supply of skills, • Continuously exploring the implications of the findings from the workplace data and stakeholder engagement with respect to sector trends and national policy priorities; and Effective and meaningful stakeholder engagement to support ownership and participation among stakeholders including social partners, individuals, employers, labour, providers, prospective learners, and the public.
W&RSETA Board		
W&RSETA Board	• To govern and control the W&RSETA by providing strategic direction and leadership • To provide corporate governance guidance • To approve the W&RSETA SSP • To approve the Strategic plan and budget	• Improve the governance oversight, and monitoring and evaluation mechanisms and capacity, with strong social partners' involvement; • Institute mechanisms to ensure that actions are taken based on findings from these monitoring and evaluation systems. This, with a view to understanding the strengths, challenges and 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; and Review the SETA Standard Constitution to strengthen governance and accountability mechanisms. The decision about numbers on the Accounting Authority will take into consideration the nature of the sector (for example the number of sub-sectors) and the need to support effective decision-making and good governance. The accounting authority will continue to have governing powers and steer the sector in terms of the scope (mandate and functions) of the SETA whilst, the management of the SETA will focus on operational and administrative roles; and

Key Role Players	Roles and Areas of Expertise	NSDP Outcomes Alignment
		• The roles and responsibilities of the accounting authority will further be defined. This will include a clear statement regarding conflict of interest and guidelines regarding the number of meetings per annum and the rates at which members of the accounting authority are remunerated.
Organised Labour		
Congress of South African Trade Unions (COSATU); Southern African Clothing and Textiles Workers Union (SACTWU); South African Commercial, Catering and Allied Workers Union (SACCAWU); Federal Council of Retail Allied Workers (FEDCRAW); Development Institute for Training, Support and Education for Labour (DITSEL;) Entertainment Catering Commercial and Allied Workers Union (ECCAWUSA); National Union of Metal Workers of South Africa (NUMSA)	• Represented equally on the committees of the W&RSETA. • Represent and articulate worker interests • Contribute to education and training, negotiations, public management and dispute resolution.	• 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, and implement the relevant interventions. • Engaging stakeholders (including but not limited to employers, labour and government) to ascertain their perceptions of future trends in their sectors and the implications of these for the demand and supply interventions signals to steer supply of skills; and • Trade unions and worker education and training initiatives are able to use the critical networks of their organisations (e.g. shop stewards and union officials) to educate their members and other workers to suit their needs in a manner that is also beneficial to the economy as a whole.
Training Providers		
Further Education and Training Committee; Higher Education and Training Committee; Association of Private Providers of Education Training and Development; Southern African Society for Cooperative Education; Universities; TVET Colleges; Private Training Providers; and Community Colleges.	▪ Represent interests of training providers – public and private. ▪ Contribute to education and training, quality assurance, curriculum development.	▪ The delivery of programmes against qualifications (on all the sub-frameworks) that support economic growth, encourage employment creation and enable social development for workers, unemployed and pre-employed (students), and ▪ 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 and enable social development ▪ Support for, and prioritisation of, Centres of Specialisation, where practically possible; ▪ Support for TVET colleges in implementing occupationally directed programmes; and ▪ Partnerships and collaboration with the higher education and research institutions, amongst others, will be central for evidence-based understanding of skills demand and supply;
Community		
South African Community at large.	▪ Represent interests of communities and co-operatives.	▪ Social partners will continue to play an active role, amongst others, in SETA Accounting Authorities and in the NSA, these roles will be further elaborated in the Act and

Key Role Players	Roles and Areas of Expertise	NSDP Outcomes Alignment
	▪ Contribute to education and training, small enterprise and co-operative development, advancement of women.	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;

1.4 Economic Performance

This section provides an economic profile of the W&R Sector for 2020-2021.

1.4.1 Economic Performance of South African Industries

This section assesses the current economic performance of the W&R Sector.

By Q4 of 2020, the South African economy saw a positive growth of 1,5%, from 8 out of 10 industries, which was less than the 13,7% of growth recorded in Q3. However, the positive growth did not compensate for the decline caused by the harsh impact of Covid-19 restrictions. Trade showed a negative growth of -9,1% which might be due to Covid-19 restrictions and changes to consumer habits. During this period, South Africa's economic activity was recorded to have the highest annual decline since 1946.

The diagram below shows the economic performance of South African industries by gross domestic product (GDP) for the year 2020.

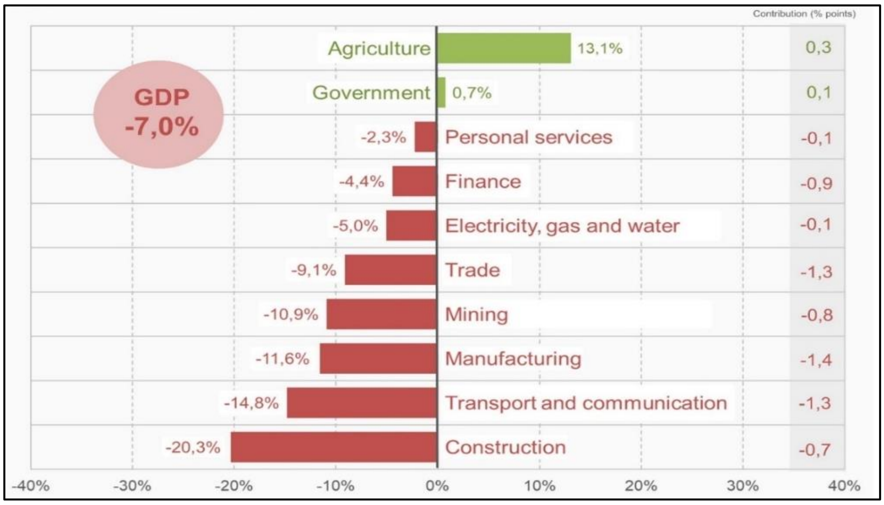


FIGURE 1: PERFORMANCE OF SOUTH AFRICAN INDUSTRIES (2020)
SOURCE: (STATISTICS SOUTH AFRICA, 2021)

1.4.2 South Africa's Unemployment

In February 2021, the unemployment rate increased to 32,6%, which was the highest rate recorded for unemployment since 2008. Covid-19 resulted in more companies closing and retrenching leaving 701 000 more people without employment causing the number of unemployed people to increase to 7.3 million, while employed people only increased by 333 000 to 15 million. The real unemployment rate decreased by 0,5% to 42,6% from the third quarter of 2020. The graph below shows the unemployment statistics in South Africa dated January 2018 to April 2021.

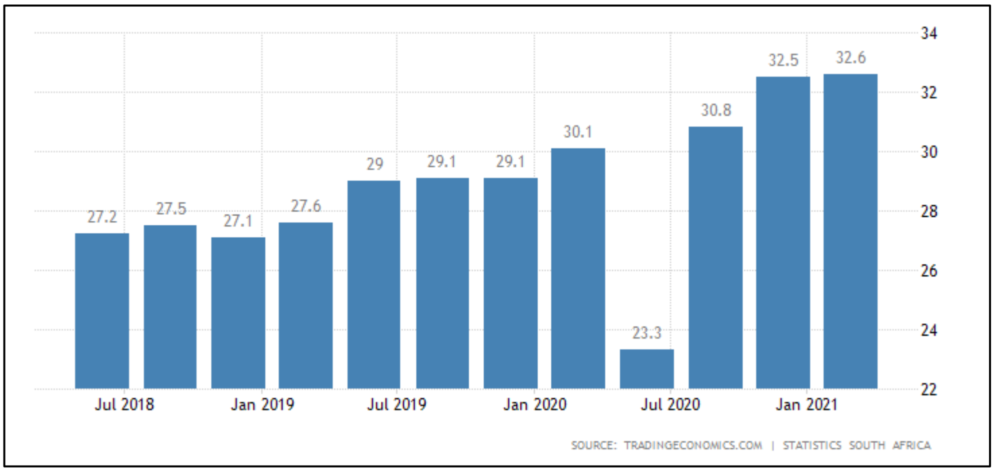


FIGURE 2: SOUTH AFRICA'S UNEMPLOYMENT
SOURCE: (TRADING ECONOMICS, 2021)

1.4.3 Share of employment per industry relative to its GDP share (%)

Similar to Q4 of 2020, trade, construction and agriculture have higher employment shares relative to their GDP contribution in the first quarter of 2021. The trade, catering and accommodation industries increased at a rate of 6,2% in Q1 of 2021, contributing 0,8 of a percentage point to GDP growth and an increased economic activity has been reported in wholesale trade and retail trade. This could lead to an increase in employment shares overtime, should increased trade be consistent. However, with a decrease in the trade of mineral products and long-term purchases, the growth in employment shares might be progressively slow in comparison to GDP contribution.

The graph below depicts the share of employment per industry in the first quarter of 2021, relative to its percentage GDP share.

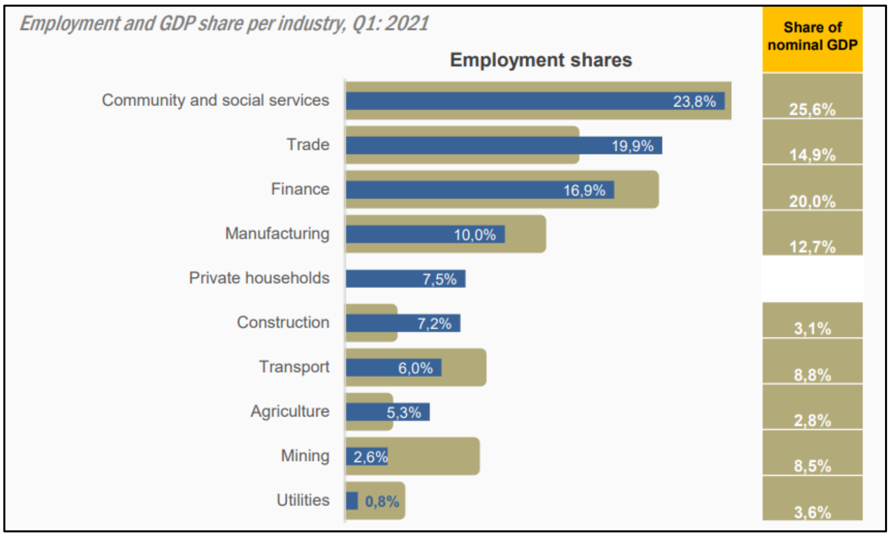


FIGURE 3: EMPLOYMENT SHARES PER INDUSTRY
SOURCE: (STATISTIC SOUTH AFRICA, 2021)

1.4.4 Employment Losses and gains

The employment losses were mainly driven by Construction, Trade and Private households. Agriculture has regressed in comparison to previous quarters, although the gains were previously relatively low. The quarterly labour force survey shows that employment gains were largely observed in Finance, and in Community and social services, Utilities and Mining. The largest percentage increase was in the Finance industry, with the lowest in Manufacturing.

The diagram below shows the employment losses and gains in various sectors.

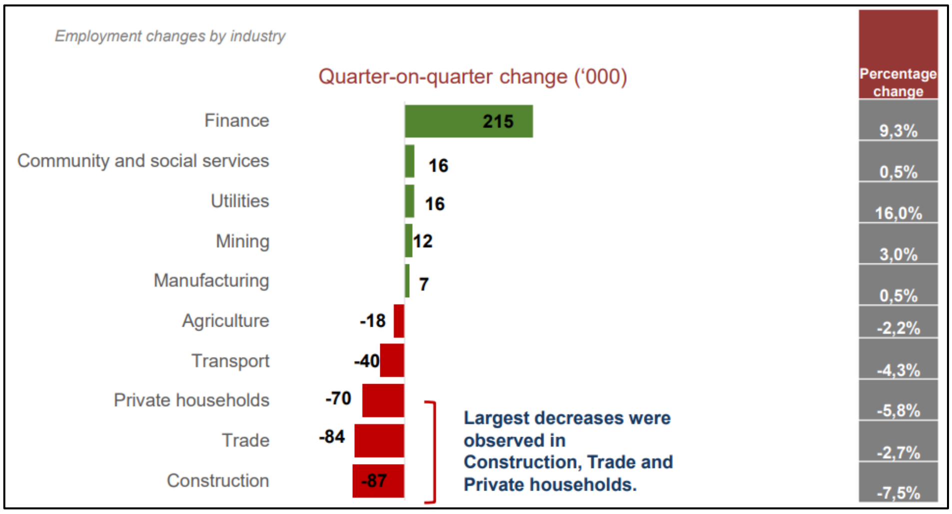


FIGURE 4: EMPLOYMENT LOSSES AND GAINS
SOURCE: (STATISTIC SOUTH AFRICA, 2021)

1.4.5 Economic Performance of W&R Sector

This section assesses the economic performance of the W&R sector from September 2020 to February 2021.

South Africa's year-on-year retail sales trade increased to 2,3% in February 2021, when measured in real terms at constant 2015 prices. The highest positive annual growth rates were for household furniture, appliances and equipment retailers and for textiles, clothing, footwear and leather goods retailers, at 17,3% and 12,3% respectively. The overall increase by 2,3% was mostly contributed to by the retailers in textiles, clothing, footwear and leather goods and general dealers, accounting. The diagram below shows South Africa's retail sales.

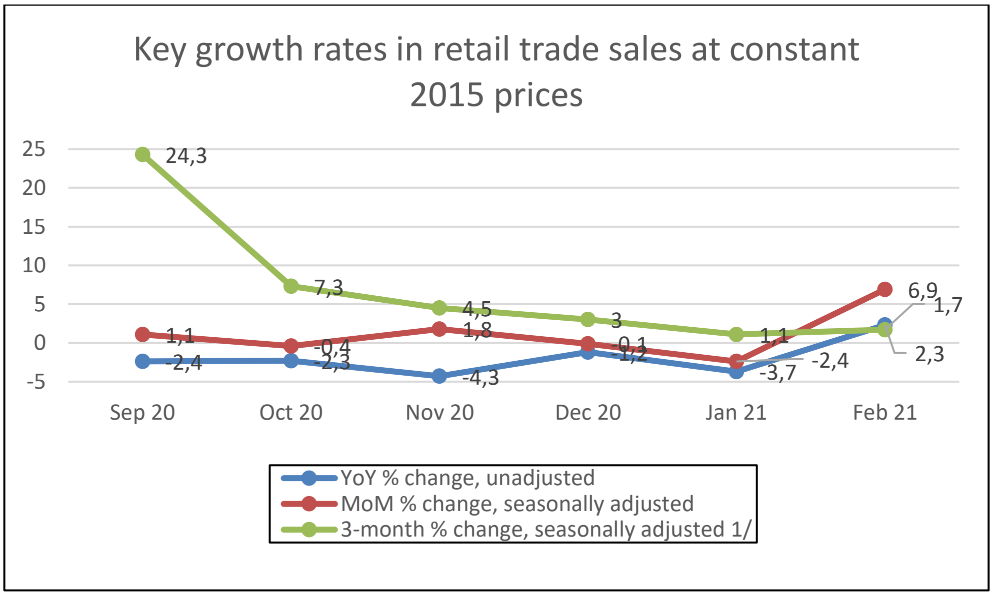


FIGURE 5: SOUTH AFRICA'S RETAIL TRADE SALES
SOURCE: (STATISTICS SOUTH AFRICA, 2021)

1.4.6 Growth by Industry Type

This section covers the percentage growth by various types of industry.

1.4.6.1 Growth by Type of Retailer

The South African retail trade is recorded at an overall 2,3% change comprised of a positive change of 17,3% in the household furniture, appliances and equipment and a contrasting -23,6% change by all other retailers. The retailer types with the lowest percentage change are all other retailers, pharmaceuticals and medical goods, cosmetics and toiletries and textiles, clothing, footwear and leather goods. Additionally, the food, beverages and tobacco and metal and metal ores subsectors might grow due the ERRP's focus on food security and exports in metals as part of boosting employment and supporting economic recovery.
The graph below shows the year-on-year percentage change in retail trade sales by type of retailer in February 2021.

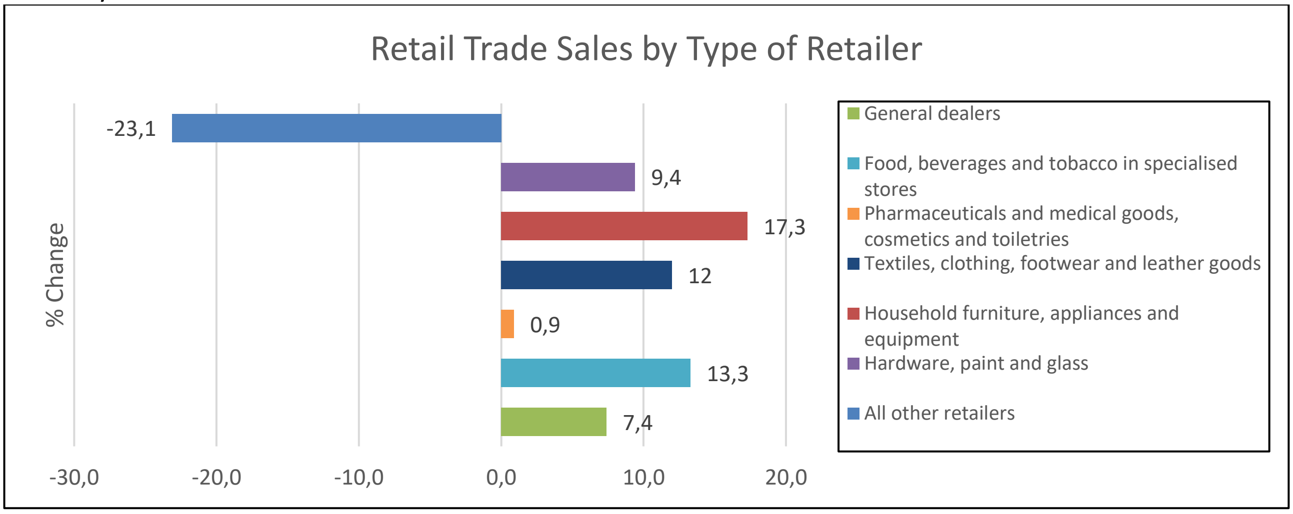


FIGURE 6: RETAIL TRADE SALES BY RETAILER TYPE
SOURCE: (STATISTICS SOUTH AFRICA, 2021)

1.4.6.2 Growth by Type of Wholesaler

In 2021, South Africa's annual wholesale trade sales saw a total percentage change of -11,8%. The largest negative change percentage was recorded in the precious stones, jewellery and silverware sub-sector, which is more than twice that of the textiles, clothing and footwear sub-sector. The highest positive change recorded was for the other household goods except precious stones sub-sector and the agricultural raw materials and livestock sub-sector, with 23,5% and 23,2%, respectively.
The graph below shows the growth rates of South Africa's wholesale industry.

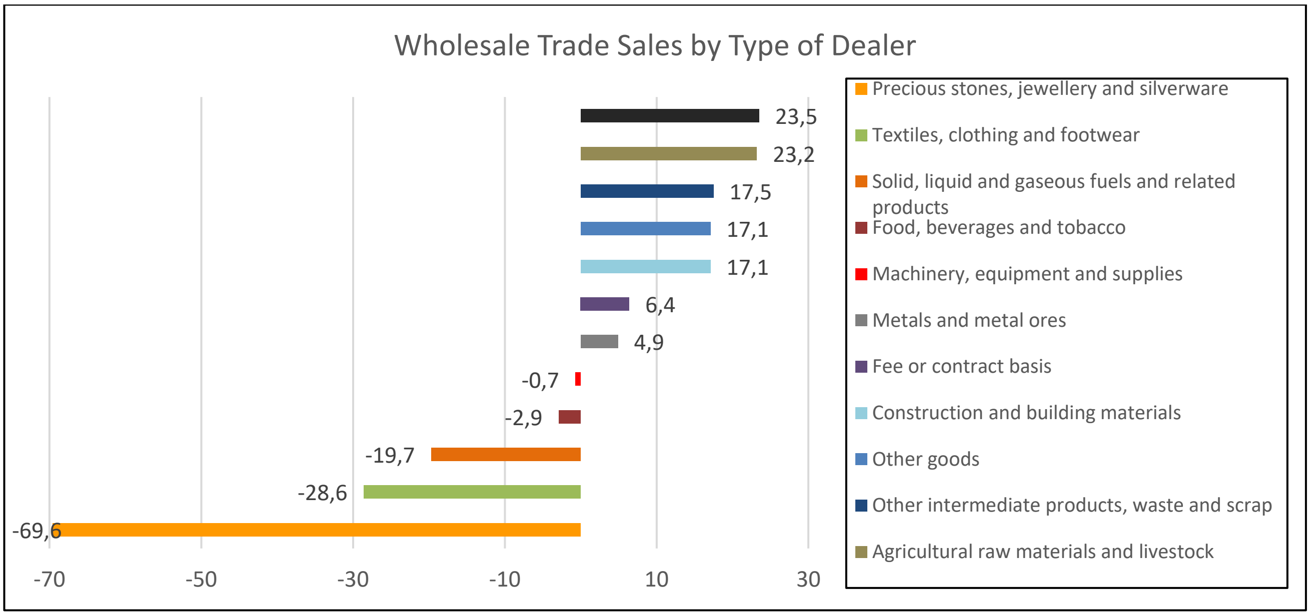


FIGURE 7: WHOLESALE TRADE SALES BY DEALER TYPE IN PERCENTAGE
SOURCE: (STATISTICS SOUTH AFRICA, 2021)

Disposable Personal Income in South Africa increased to R3 145 736 million in the fourth quarter of 2020 from R3 050 164 Million in the third quarter of 2020.

The disposable personal income in South Africa between January 2018 and January 2021 is displayed in the graph below.

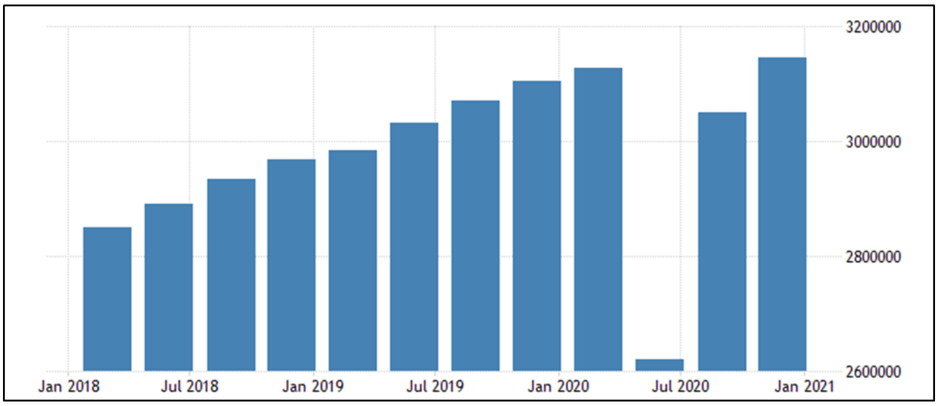


Figure 8: Disposable Income 2018-2021
Source: (Trading Economics, 2021)

Consumer Confidence in South Africa improved to -9 in the first quarter of 2021 from -12 in the fourth quarter of 2020. South Africa has already started its path in recovering from the losses caused by Covid-19, however, because of the continued economic uncertainty consumer confidence is still low. Unfortunately, the -9 figure is still below the +2 average from 1994. The graph below shows the consumer confidence from 2018 to 2021.

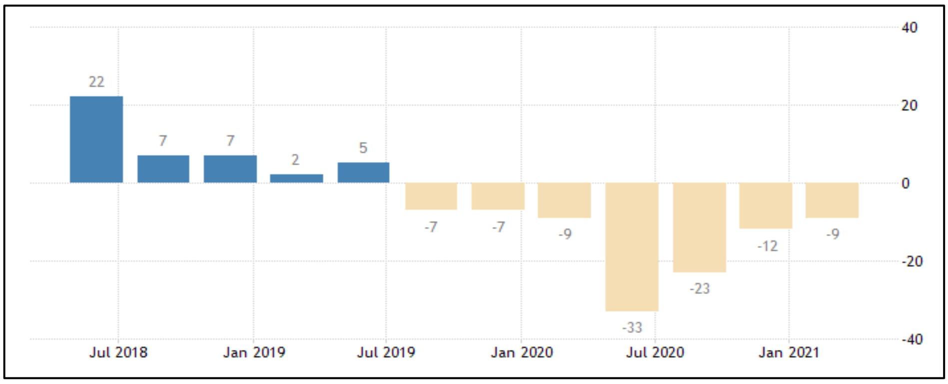


Figure 9: Consumer Confidence 2018-2021
Source: (Trading Economics, 2021)

The graph below shows South Africa's Consumer Price Inflation between March 2005 and April 2020.

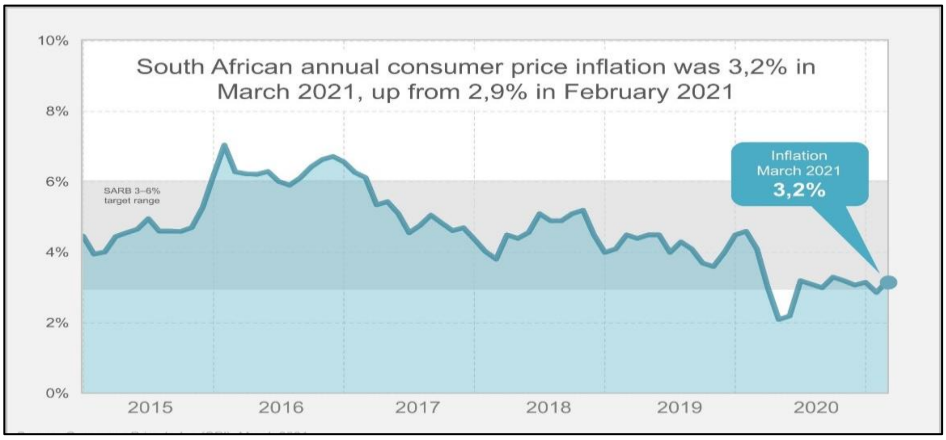


Figure 10: Consumer Price Inflation
Source: (Statistics South Africa, 2021)

As indicated by the figure below, general dealers have the highest weight in the retail sector with 42,2%; followed by textiles, clothing, footwear and leather goods and all other retailers with 19,4% and 12,3%, respectively. The pie chart below shows the biggest role players in South Africa's retail sector.

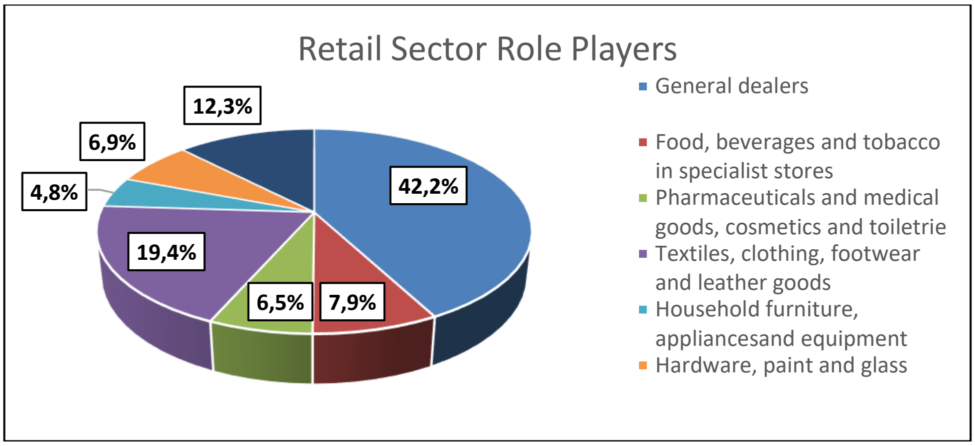


FIGURE 11: BIGGEST ROLE PLAYERS IN THE RETAIL SECTOR
SOURCES: (STATISTICS SOUTH AFRICA, 2021)

1.5 Employer Profile

This section provides an employer profile of the W&R Sector for the period of 2019/20 to 2020/21.

The highest number of levy-paying companies was in Gauteng with 6863 (Gauteng South = 1612, Gauteng North = 5251), followed by Western Cape with 4094 and Kwa-Zulu Natal with 2811. The high numbers of levy-paying companies is due to the higher concentration of companies in these 3 regions.
The graph below shows the levy-paying companies per province for the 2019/20 and 2020/21 periods.

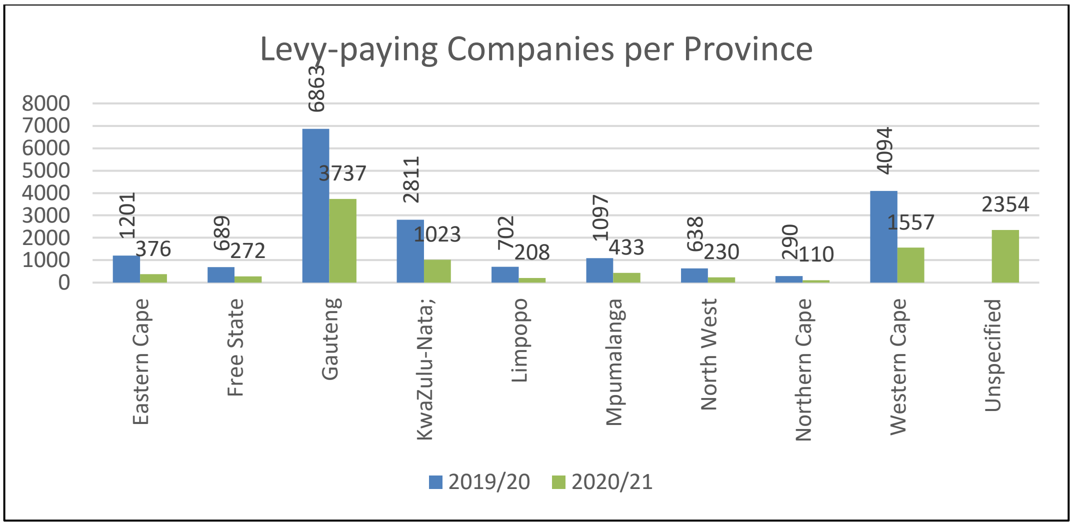


FIGURE 12: LEVY-PAYING COMPANIES PER PROVINCE
SOURCE: (W&RSETA, 2019/20); (W&RSETA, 2020/21)

Levy Income Trends

Levies received from Gauteng were the highest, followed by the Western Cape and KwaZulu-Natal due to the higher concentration of companies in these provinces. The graph below shows the levies received per province in the period 2019/20.

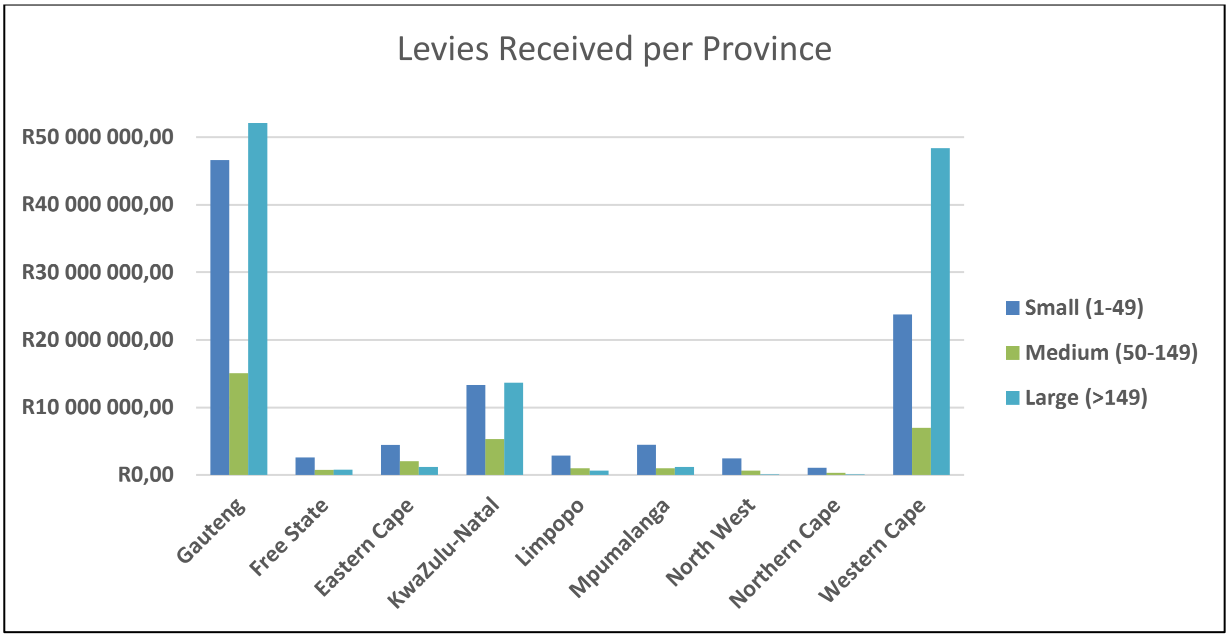


FIGURE 13: LEVIES RECEIVED PER PROVINCE
SOURCE: (W&RSETA, 2019/20)

1.6 Labour Market Profile

The employee profile of the W&R sector illustrates that job growth has decreased from December of 2019. This is due to the impact carried on companies and employment. The revised estimates in the graph below reveal the following:

- The wholesale and retail sector employed 2.155 million people in December of 2020, which is about 15% of the total number of employed people. In 2017, there were 2.206 million employees compared to 2.155 million employees in 2020. This represents a decrease of 51000 (2%) of employees in this period.
- Employment declined in the fourth quarter of 2020, by a net decrease of 1.4 million in total employment. The biggest proportions contributing to this decrease include losses in Finance (256 000), Community and social services (241 000), Manufacturing (230 000), Wholesale and retail trade (186 000) and Construction (184 000) industries.
- The informal sector employment increased by 65 000 people in the fourth quarter of 2020, 17 000 of those people were absorbed into the Wholesale and retail trade.

It is important to note that Covid-19 had a major influence in reduced employment in the sector, especially from early 2020 onwards.

The graph below shows the number of employees in the Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods; hotels and restaurants sector between 2017 and 2020.

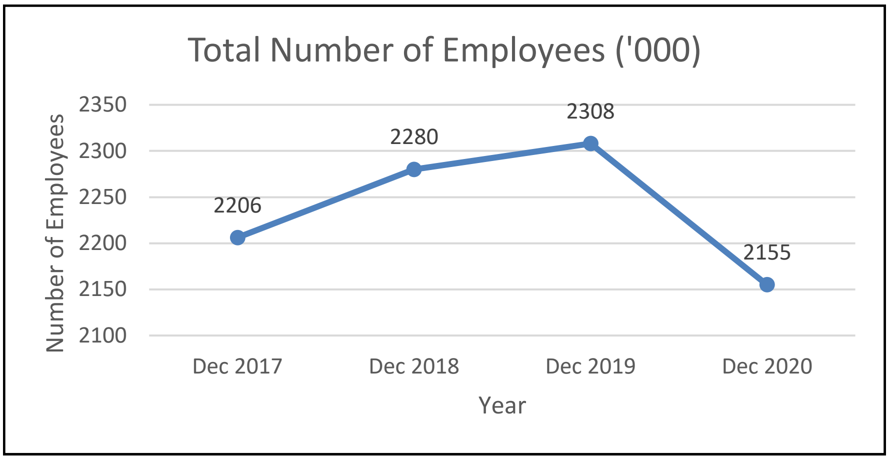


Figure 14: Number of Employees in W&R Sector 2017-2020 ('000)
Source: (W&RSETA, 2021)

The graph below shows the number of employees in the formal and informal sector.
The graph reveals the following:

- The number of people in formal employment increased by 0.8 million to 10.5 million in the period of 10 years, which is 69,9% of South Africa's total employment. The informal sector accounts for 16,6% (2.5 million people) of South Africa's total employment.
- Employment in both the formal sector and the informal sector experienced a relatively steady increase between 2010 and 2020. However, there was a rapid decline before the fourth quarter of 2020 likely due to the impact of Covid-19, amongst other possible reasons.

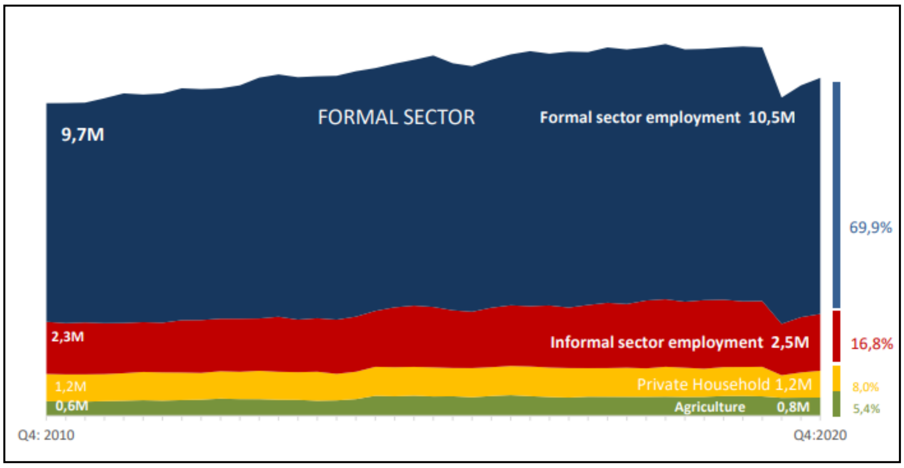


Figure 15: Employees in the Formal and Informal Sectors
Source: (Statistic South Africa, 2021)

The above table shows the amount of people employed in the 9 provinces. The total number of employed people is 15 024 000 in Q4 of 2020, which is 333 000 people more than the total recorded for Q3 of the same year. This 2,27% increase is spread across the 8 provinces that saw increases, with the largest contributions recorded in Western Cape which increased by 121 000. It was followed by KwaZulu-Natal and Gauteng which increased by 66 000 and 64 000, respectively.

The Graph below provides statistics on employment by province.

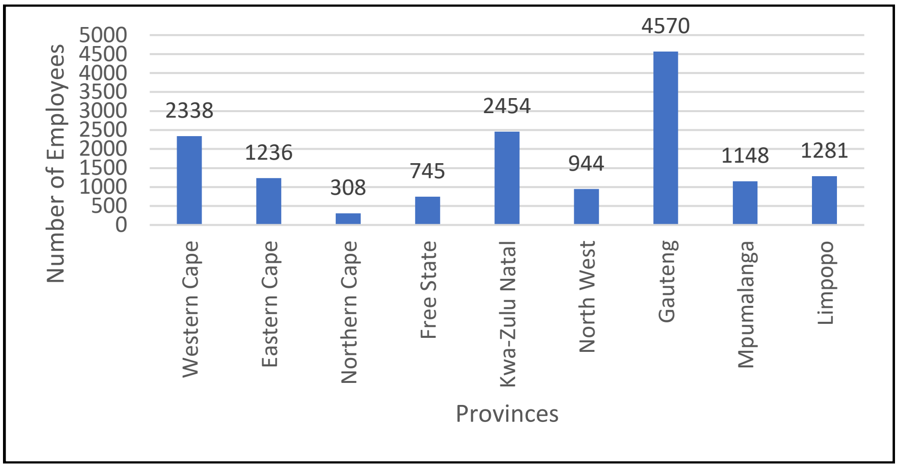


Figure 16: Employment by Province (‘000)
Source: (Statistic South Africa, 2021)

1.6.1 Employee Demographics

The Table below indicates that despite the fact that democratic transformation in South Africa began over 25 years, change is still not prominent in this sector. The figures indicate that 56,5% of people in top management are represented by White males, which constitutes as the largest group to represent any occupational level. In contrast, there are only 22,7% of South African women represented in top management, with only 2,2% being African. The number of African females represented has decreased from 5,1% in 2018/19 to 2,2% in 2019/20, while that of White females has increased by 1,9%.

Coloured males and females have the lowest representation in senior management. African males and females make up the largest representation of semi-skilled and unskilled workers by a large margin, with 31,1% and 46,3% semi-skilled workers and 40,8% and 43,2% unskilled workers, respectively. This is followed by Coloured males and females, making up 14% of semi-skilled workers and 11,6% of unskilled workers. Through a surface analysis of the below figures, a skewed representation in favour of White males, is visible. There is also an overall larger representation of males than females, with the exception of semi-skilled workers and unskilled workers.

The employment profile table below shows that the demographics for formal employment in the W&R sector are a challenge. According to the Commission for Employment Equity the racial and gender profile of the sector is as follows:

Table 3: Employee Demographics

OCCUPATIONAL LEVEL	MALE (%)				FEMALE (%)				FOREIGN NATIONAL		TOTAL (%)
	A	C	I	W	A	C	I	W	M	F	
Top Management	4,3	2,7	11,3	56,6	2,2	1,7	3,8	15,0	1,8	0,5	100
Senior Management	11,6	5,7	10,5	35,5	6,3	4,1	4,6	19,4	1,8	0,4	100
Professional	17,7	6,7	7,3	22,8	13,7	6,7	4,9	18,5	1,2	0,5	100
Technician	27,1	6,9	4,7	10,9	25,2	9,0	4,1	10,4	1,2	0,5	100
Semi-Skilled Workers	31,1	4,9	1,4	1,9	46,3	9,1	1,6	2,4	0,9	0,4	100
Unskilled Workers	40,8	5,0	0,7	0,7	43,2	6,6	0,6	0,4	1,4	0,6	100

(CEE, 2019/20)

The table below provides the racial profile of W&RSETA registered employees by Major OFO Groups.

The figures from the table indicate that African males constitute the most predominant group, followed by African females. Furthermore, the biggest demographic across Major OFO Groups is African male Plant and

Machine Operators and Assemblers with 66,1% in comparison to a combined total of 12,7% of female Plant and Machine Operators and Assemblers.

Overall, there are more males than females in 6 Major OFO Groups, which exclude the Clerical Support Workers, and the Service and Sales Workers Major OFO Groups. While this still indicates a skewed representation in favour of males, on a racial perspective there are more Africans than other racial group. Furthermore, there are more White males in the Manager and Professionals groups, with 26,9% and 23,9% respectively.

OCCUPATIONAL LEVEL	MALE (%)				FEMALE (%)				FOREIGN NATIONAL		TOTAL
	A	C	I	W	A	C	I	W	M	F	(%)
Managers	21,8	5,1	6,4	26,9	17,8	4,1	2,9	13,5	1,1	0,4	100
Professionals	12,4	6,3	6,8	23,9	11,8	6,0	6,7	24,5	1,1	0,5	100
Technicians and Associate Professionals	26,0	7,7	4,3	12,2	17,2	8,5	4,7	16,8	2,0	0,5	100
Clerical Support Workers	41,8	2,4	1,6	2,0	36,3	5,5	2,7	6,8	0,6	0,3	100
Service and Sales Workers	32,4	4,5	1,2	3,5	41,9	8,2	1,3	3,3	2,5	1,2	100
Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	45,7	11,0	2,3	10,1	15,6	7,2	0,4	1,0	5,5	1,1	100
Plant and Machine Operators and Assemblers	66,1	12,0	2,5	2,7	9,7	2,5	0,2	0,2	3,9	0,1	100
Elementary Occupations	39,8	10,6	0,9	2,0	31,3	9,7	0,4	0,7	3,6	1,0	100

The following table provides the racial profile of the W&R Sector by gender, based on WSP data.

TABLE 4: RACIAL PROFILE

	African	Coloured	Indian	White
Male	37%	6%	3%	7%
Female	32%	7%	2%	6%

Source: WSP Data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

The graph below illustrates that the number of females employed in the sector reached its lowest in 2020 with 1 392 000 employees, in comparison to the 6 years prior. The number of employed males in the sector increased to its highest in 2019 at 1 815 000 but decreased by 7,9% to 1 671 000.

The graph below illustrates the number of employees in the sector by gender between 2014 and 2020:

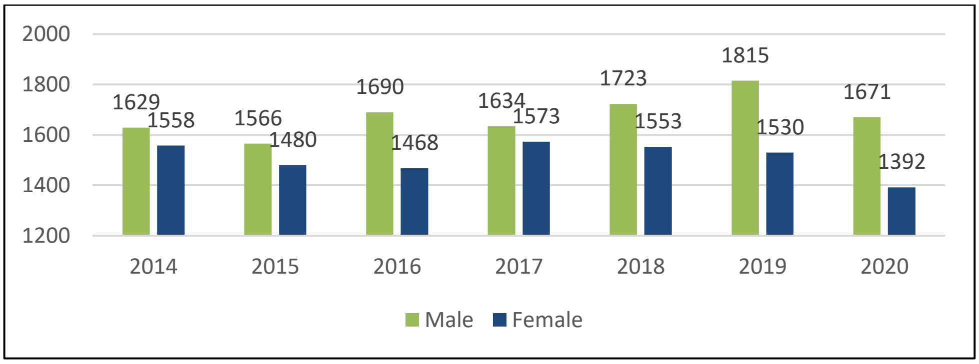


FIGURE 17: NUMBER OF SECTOR EMPLOYEES BY GENDER ('000)
SOURCE: (STATISTIC SOUTH AFRICA, 2021)

The following graph illustrates the breakdown of employees by gender, based on 2021 WSP data. From the figure below, it is evident that there are more males than females in the W&R Sector.

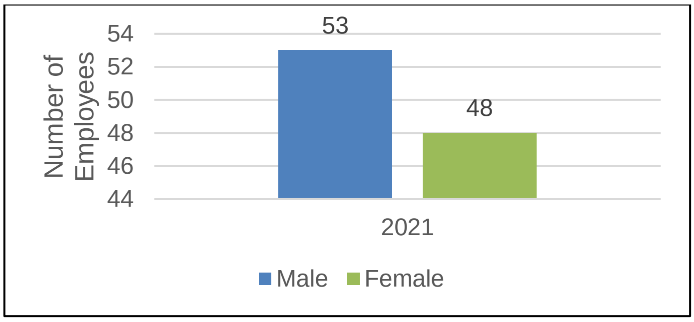


FIGURE 18: EMPLOYEES BY GENDER ('000)
Source: WSP Data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

The graph below illustrates the number of employed people per age group in thousands. The figure shows that people between the ages of 15 and 24 have the lowest number of employed people in 2020 when compared to 2019 and overall across the age groups. The age groups 25 to 34, 35 to 44 and 45 to 54 have all seen a decrease in the number of employed people. Overall, the number of employed people decreased across all the age groups in 2020.

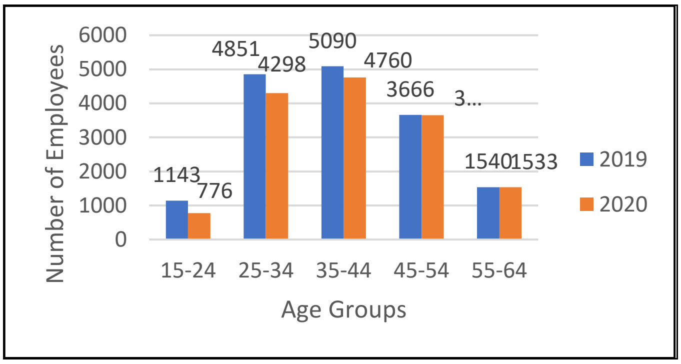
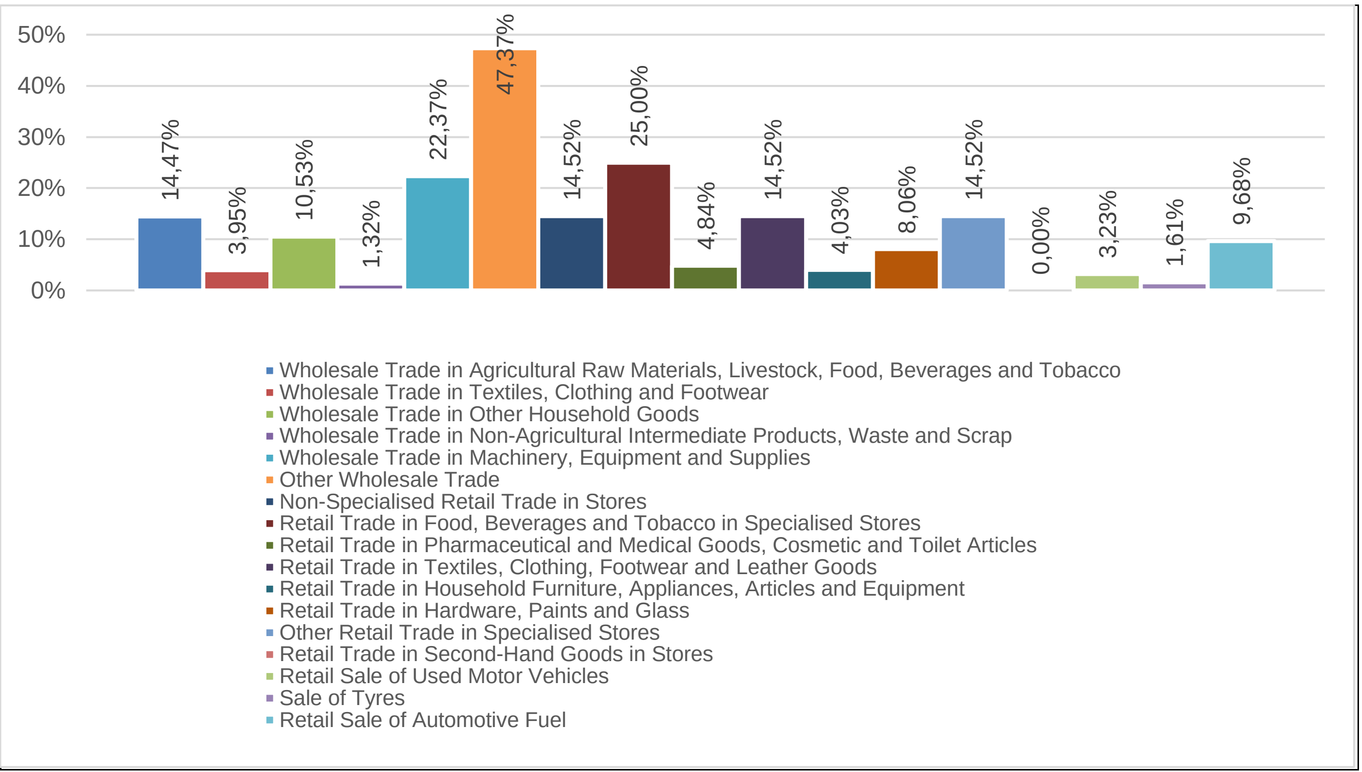


FIGURE 19: NUMBER OF EMPLOYED PEOPLE PER AGE GROUP ('000)
SOURCE: (STATISTIC SOUTH AFRICA, 2021)

The graph below shows the percentage of employers by subsector.



Source 2: Employer survey

The following figure shows the percentage of the workforce made up by people with disabilities over the three years from 2015 to 2019. The graph shows an average of 1,0% from 2015 until 2019. The representation of people with disabilities in the workforce has decreased since 2015, especially in2016 where it decreased by 0,4%. The percentage representation has since increased.

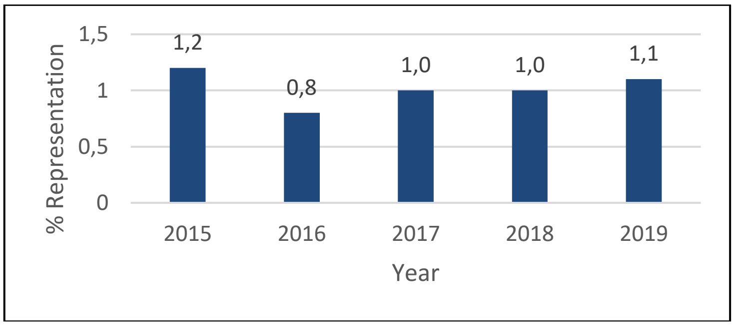


Figure 20: Percentage Representation of Workforce with Disabilities 2015 to 2019

Source: (CEE, 2018/2019); (CEE, 2019/20)

The following graph provides the percentage of employees with disabilities, as per the 2021 WSP data. The figure shows that less than 1% of employees had a disability.

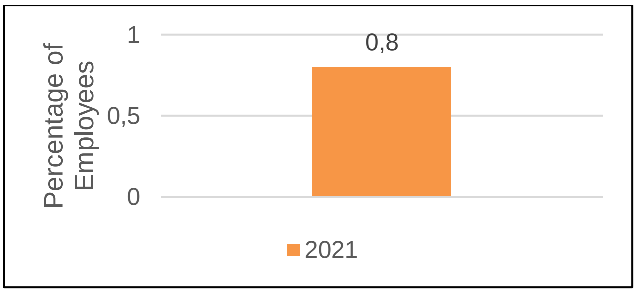


Figure 21: Percentage of Employees with Disabilities in 2021

Source: WSP Data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

Representation of People with Disabilities (PWD) within the Sector:

People with Disabilities are the least represented across the South African workforce, despite the commitment by companies to comply to the Employment Equity Act 55 of 1998 (EEA). The EEA serves 2 key purposes, one of which is 'implementing affirmative action measures to redress the disadvantages in employment experienced by designated groups, in order to ensure their equitable representation in all occupation categories and levels in the workforce' (Department of Labour, 2004).

The figures in the 20th Commission for Employment Equity Annual Report for 2019/20 show that the representation of People with Disabilities is extremely low, with an average representation percentage of 1% across the workforce since 2015 (CEE, 2019/20). This illustrates that the action taken towards transformation and equity in the workplace is taking place at a much slower pace than it should. The figures for the W&R sector were not much different either, as the sector only had slightly less than 1,2% employees that represent People with Disabilities (W&RSETA APP, 2021/22 - 2023/24). This is slightly concerning considering that People with Disabilities are one of the annual SSP priority areas. However, the SETA's strategy highlights the challenges faced by People with Disabilities and is geared towards highlighting this to the W&R sector, to assist in accelerating developmental programmes to alleviate the statistics alluded to.

A challenge with the transformation interventions set for People with Disabilities, and other individuals in marginalised groups, is that although the interventions are targeted the impact imparted does not always translate as well in employment as it does in academics and training. There is still a highly visible margin in the representation of Persons with Disabilities and able-bodied people.

1.7 Conclusion

From this chapter, the following conclusions can be drawn, with direct implications for skills development for the W&RSETA:

- The South African economy saw a positive growth of 1,5%, from 8 out of 10 industries, of which the trade industry contributed -9,1% in the fourth quarter of 2020. It should be noted though that on-line sales have more than doubled since 2018 (from approximately R14 billion to R30 billion).
- There is potential to improve the skills base of the sector, particularly at the lower and middle management level.
- Sector employee demographics are still misaligned with a high percentage, of 71,6%, of white employees occupying top management positions.
- Through a surface analysis of the above figures, a skewed representation in favour of Whites, particularly White males, is visible. There is also an overall larger representation of males than females across the occupational levels and races, with the exception of semi-skilled workers and unskilled workers.
- The gender disparity has been steadily increasing since 2017, reaching the largest gap. Women remain the hardest hit, and the training must encourage women participation as a sub-sector within the disability sector since before 2014. W&RSETA should provide training opportunities for women to help them enter the sector.
- The employee profile of the W&R sector illustrates that job growth has been subdued between 2014 and 2020. This is consistent with sluggish growth of the economy and the impact of Covid-19 on the economy. To stimulate growth, women and unemployed youth must be funded for training in the future occupations like 4th IR.
- The W&R sector is a major absorber of unskilled and semi-skilled workers. Hence, it is necessary to ensure healthy economic growth to provide employment for this unskilled and semi-skilled segment of the labour market, which consists of most of the labour force.

2 CHAPTER TWO: KEY SKILLS CHANGE DRIVERS

2.1 Introduction

This chapter identifies factors driving change in the W&R sector and influencing it to change either positively or negatively. Since there are a multitude of change drivers, the intention is to identify those that are skills-related and assess its implications for human resource development. Another issue addressed in this chapter is the alignment of sector skills planning to national strategies and plans such as the *National Development Plan, New Growth Path, Human Resource Development Strategy for South Africa, Industrial Policy Action Plan 3.*

Input and research into this section includes literature review (e.g. reports written on sector trends) including, but not limited to:

- W&RSETA Strategic Plan, 2020/21 – 2024/25
- PWC's Global Economic Crime and Fraud Survey South Africa
- Euromonitor International's Retailing in South Africa Market Research Report

2.2 Key Questions

This chapter will respond to:

- What are the major factors impacting on skills demand and supply in the sector?
- What are the implications of these for skills planning in the sector?
- What research methods have been employed to arrive at findings?
- Which national plans and strategies are aligned to the sector?

2.3 Factors affecting skills demand and supply

This section describes the key factors identified as change drivers influencing skills supply and demand either positively or negatively. The section also presents the implications of these factors for skills development of the sector.

2.3.1 COVID-19

COVID-19 is an unprecedented public health emergency that is rapidly transforming the way we all live our lives. It is also mandating significant changes to retail and commerce. In this dynamic time of humanitarian and social uncertainty, what we buy, how we buy, and when and where we buy is undergoing a seismic shift.

The implications of COVID-19 for Skills planning include slowing down of business activity, decline in revenue, increased demand for e-commerce, prioritising reskilling and retraining to minimise job losses, and higher health and safety risk of customers, employers, employees and partners. Skills planning also has to include transitioning to e-learning and/or blended learning to provide training for employees and learners. The strategic priority skills areas therefore include Safety, Health, Environmental and Quality (SHEQ), Food Safety, Product knowledge, Skills programmes for unemployed youth and supporting vulnerable sub-sectors of the economy (SMMEs, informal traders, cooperatives, NGOs and youth). Training in ICT literacy is also a priority due to an increased need for virtual team management.

2.3.2 Data Privacy and Protection of Personal Information Act

All businesses in South Africa are now required to adhere to the requirements of the Protection of Personal Information Act. These requirements can be onerous for businesses, especially for SMMEs (for example, the requirement of all businesses to appoint an Information Officer who can be held liable for data breaches in multiple ways). POPI will require a fundamental shift in how businesses process data and how they market themselves. Furthermore, cybersecurity and IT literacy skills will become essential as most data is stored on servers or in the cloud.

2.3.3 Technology Advancements and Access to Information

The wholesale and retail industries are rapidly changing due to technological advancements. These advancements offer wholesalers and retailers opportunity to increase their efficiency and revise their business models. However, these advancements have also given consumers more power in relation to retailers. This power is often through constant connectivity, communication and access to information.

Implications of technology for Skills Planning in the sector include the following:

- **Mobile Applications:** Smartphones, tablets and wearable devices present retailers with new opportunities for engagement with customers. Retailers can build personal relationships with customers based on their preferences, shopping styles, and mobile interaction[1].
- **Online Shopping:** Online shopping is growing rapidly in popularity. Companies are increasingly marketing online in order not to be outdone by rivals.
- **Big Data:** Large, complex datasets from multiple sources. Provides information on consumer behaviour and is a strong predictive sales indicator.
- **Social Media:** A platform for retailers to expand marketing to a wider range of consumers. Major platforms are Facebook, twitter, LinkedIn and others. Conversely, social media offers Consumers an opportunity to gather information about retailers. This includes negative publicity (e.g., retailers being accused of unethical conduct, poorly thought out marketing campaigns, etc.).
- **Cyber Crime:** Retailers are a target for cybercriminals. Retailers experience nearly three times as many cyber-attacks as those in the finance sector. With 77% of organisations being affected[2].

Other uncategorised implications include the following:

- The future of work is changing as technology is rapidly advancing towards latest trends such as automation and artificial intelligence, which will change the traditional roles leading to some jobs becoming absolute.[3]
- Employers and employees will require skills in the ICT and data analytics space.
- Re-capacitation and reskilling of workers is critical to ensure their readiness to embrace the new technological changes.
- Retailers may have an increased need for environmental managers, social corporate managers, public relations managers and HR Managers. Furthermore, it is increasingly important that companies have the skills to make the correct decision quickly (both in terms of business sustainability and ethically).
- Should the business make a decision that is unpopular (as was the recent case when a major retailer was accused of appropriating someone's product idea as their own) it is imperative that they have the required public relations skills to mitigate the negative impact this incident may pose.
- There are still areas that struggle with access to network, internet and technological resources. This will create a gap within the sector's development and transformation.

The Skills Gap Needs that were identified include ICT, analytics, graphic design, photography, programming, cloud computing, web development, data mining, statistics, research, forecasting, marketing and sales, management, networking, mobile device management, cyber security and ICT law. Re-capacitation and reskilling of workers is critical to ensure their readiness to embrace the new technological changes

The occupational needs include Software Developer/ Web Designer/ Web Administrator/ ICT Security Specialist/ Graphic Designer/ Analyst/ Researcher/ Marketing and Sales Manager Digital skills/Cognitive based work/ Programming/ machine device management/ Customer Service optimization.

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[1] Euromonitor International, Retailing in South Africa, Market Research Report, 2018

[2] PWC, Global Economic Crime and Fraud Survey South Africa 2018, 2018

[3] NEDLAC, Future of Work in South Africa, 2019

2.3.4 SMME Development

The W&R sector in South Africa is made up of many SMMEs in need of support and development.

The implications for Skills Planning in the sector are listed as follows:

- **Small enterprise development**: SMMEs should build a sustainable business model given that the gestation period for success in the retail sector is long. Sustainable product pricing, offering products that imply longevity, expanding operations in a calibrated but determined manner.
- **Hawkers:** Hawkers are a vulnerable group, since many are women with little family support. A major characteristic of hawkers is their mobility since they traverse on foot.
- **Casualization:** The entire retail sector is characterized by high casualization – the "permanent temporary worker". Most workers employed by unorganized businesses do not receive healthcare, educational and minimum wages.
- **New Training Model:** A new training model is required to upgrade the skills of SMMEs, since they cannot leave the business for skills training. Training for SMMEs should include e-training; toolkits; on-the-job training; digitization of training; industry clusters; mentoring and coaching. An SMME Strategy for skills development is needed. The SETA can also ensure partnerships between SMMEs and Training Providers.
- **Township Based Businesses and Smaller Retailers**: National supermarkets are saturating townships and peri-urban areas causing a strain on small retailers. There is therefore a need for smaller businesses to partner with the larger retailers and form part of these supply chains. This will raise the need for skills relating to business management, compliance training and quality assurance. There are many requirements that larger retailers have for their suppliers and business owners will need training in this space. There have been calls for informal businesses to become formal so they can better compete with the big chains but there are a series of barriers facing them.[4]

The occupational needs in the sector include tellers, packagers, cleaners, securities, sales managers, buyers, merchandisers, sales assistants, bakers, butchers, etc.

The skills gap needs include financial management, product knowledge, marketing and sales, communication, merchandising negotiation, technical, conflict management, buying, pricing, time management, customer relations, ICT, life skills and coaching.

The occupational needs include Coach/ Mentor, SMME specialist, and Finance/ Business Management.

2.3.5 Changing Expectations of W&R Stakeholders

The expectations of customers, employees, suppliers and investors are constantly evolving and changing over time. For example, employers are encouraged to be more aware and responsive to differences in employee cultures and religions.

Customers expect a much faster reaction time from their favoured stores. Competition is also being faced from a global perspective. Furthermore, consumers are more inclined to support businesses who operate ethically with a sustainable ecological footprint. With the rise in access to information consumers can easily seek out retailers who demonstrate these characteristics. There is also an increased demand for Customer Service and Emotional Intelligence to help with dealing with the pressures and trauma faced by employees and customers due to COVID-19. These elements require employees to be skilled and knowledgeable in HR practices, environmentally friendly practices, be aware of the local and global economic and political context.

2.4 Policy frameworks affecting skills demand and supply

National policies and legislation should inform the W&RSETA's Strategic Plan and Annual Performance Plan.

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[4] Charman, A., Bacq, S. & Brown, K., "Spatial determinants of formal retailers' impact on informal microenterprises in the township context: A case study of Philippi East, Cape Town." (February 2019). Food Security.

Below is a table summarising the national policies that guide the operations of the W&RSETA. It demonstrates the alignment of the W&RSETA's Strategic Plan to government's national policies and strategies.

TABLE 5: POLICY FRAMEWORKS AFFECTING SKILLS DEMAND AND SUPPLY

National Strategies / Policies	Implications & Measures For W&RSETA
National Skills Development Plan (NSDP)	• Increase research outputs focusing on sector economic development and job creation. • Promote sector collaboration with relevant public and private institutions aligned to labour market demands. • Increase training of occupations in high demand in the sector
National Skills Accord 8 commitments to be followed: • Expand training using existing facilities • Create internship and placement opportunities • Set ratios for trainees and artisans, as well as across the technical vocations, to improve training • Improve training funding and incentives for companies to train • Set annual targets for training in state-owned enterprises. • Improve SETA governance, fiscal management, and stakeholder involvement • Align training to the New Growth Path and improve SSPs • Improve the role and performance of TVET colleges.	The implications are: • Increase learnerships, apprenticeships, internships and bursaries. • Increase the number of accredited training providers. • Expand partnerships with TVET Colleges.
Industrial Policy Action Plan II (IPAP II) IPAP has identified several growth sectors that address high unemployment.	• Increase learnerships, apprenticeships, internships and bursaries in clothing, textiles, footwear and leather goods and automotive. • Develop projects for promoting green industries.
New Growth Path (NGP) The New Growth Path identifies 5 job drivers: • Infrastructure for employment and development • Improving job creation in employment and development • Seizing the potential of new economies • Investing in social capital • Spatial development.	• Create projects to increase college-to-work transitions. • Increase learnerships, apprenticeships, internships and bursaries in clothing, textiles, footwear and leather goods and automotive. • Develop projects for promoting green industries.
National Development Plan 2030 (NDP) The National Development Plan 2030 has identified the following 9 key areas to achieve a development approach that is sustainable and inclusive: • Creating jobs and livelihoods • Expanding infrastructure • Transitioning to low-carbon economy • Transforming urban and rural spaces • Improving education and training • Providing quality healthcare • Building a capable state • Fighting corruption and enhancing accountability • Transforming society and uniting the nation	The implications are: • Build capabilities of W&RSETA staff and Board members. • Increase learnerships, apprenticeships, internships and bursaries. • Increase the number of accredited training providers. • Expand partnerships with TVET Colleges. • Create projects to increase college-to-work transitions. • Develop projects for promoting green industries.

National Strategies / Policies	Implications & Measures For W&RSETA
White Paper for Post-School Education and Training (WPPSET) • It is a vision for an integrated system of post-school education and training with all institutions playing their roles • Set out strategies to improve the capacity of post-school education and training system to meet SA's needs.	• Increase learnerships, apprenticeships, internships and bursaries. • Increase the number of accredited training providers. • Expand partnerships with TVET Colleges.

2.5 Measures the W&RSETA has put in place in support of National Strategies and Plans including the Economic Reconstruction and Recovery Plan and its Skills Strategy

The W&RSETA has implemented/ is implementing the following projects in support of the ERRP:

- Capacitation Workshops and Trading Vouchers: ITAMED (Informal Traders and Micro Enterprises Development) (Completed)
- Entrepreneurship Development Programme
- SME Grant (Small and Micro Enterprise Grant)
- Unemployed Graduates (Degree and Diploma) are placed in the sector to gain workplace experience
- Unemployed Interns are placed in the sector to gain workplace experience in order to obtain their diplomas
- University SA Bursary funding awarded to cover student debt for 'missing middle' youth to be able to continue with their studies.

Additionally, the Economic Reconstruction and Recovery Plan (ERRP) includes issues of transformation and skills development. The W&RSETA has the International Leadership Development Programme (ILDP) and the Retail Management Development Programme (RMDP) for upskilling employees within the W&R sector. To ensure that the ERRP is deliberately responded to, the SETA can ensure the support of employees that form part of marginalised groups (such as women, people living with disabilities, people of colour) in joining and completing the programmes. Furthermore, W&RSETA can ensure that the curriculum used for these programmes is inclusive of relevant arising and future-related content to ensure that employees are able to relate and manage a changing environment regardless of their background.

2.6 Conclusion

From the multiplicity of factors driving change in the W&R sector, we have identified 5 major change drivers that are likely to change the sector in significant ways in the future. These factors have major implications for skills development and the work for the W&RSETA.

There is an increased formalisation in the sector, primarily in townships and peri-urban areas, putting pressure on small local retailers. Technology continues to be a driving force in the sector, with mobile applications becoming important players in the way the sector operates. There is an increase in alternatives for consumers to use which has increased their power, which they have used to move the market towards eco-friendlier and ethical products. The importance of SMMEs is large and requires the assistance of W&RSETA to ensure their sustainability. The youth need to be trained to effectively enter the W&R sector.

3 CHAPTER THREE: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

3.1 Introduction

Having profiled the sector, employment, and the key issues driving change, this chapter focuses on understanding occupation-specific skills mismatches in the sector. The issue of skills gaps is also addressed. The following are the data sources used in responding to chapter 3:

- WSP/ ATR data
- Hard-To-Fill Vacancy (HTFV) survey
- COVID-19 research and surveys
- Research reports

This chapter is set out as follows:

- Occupational shortages (also called Hard-To-Fill Vacancies) and skills gaps (also called skills gaps) are identified.
- Skills supply issues are discussed.

3.1.1 Key Questions

This chapter will respond to:

Hard-To-Fill Vacancies (HTFVs) and Skills Gaps

- What are HTFVs and skills gaps in the sector?

Demand

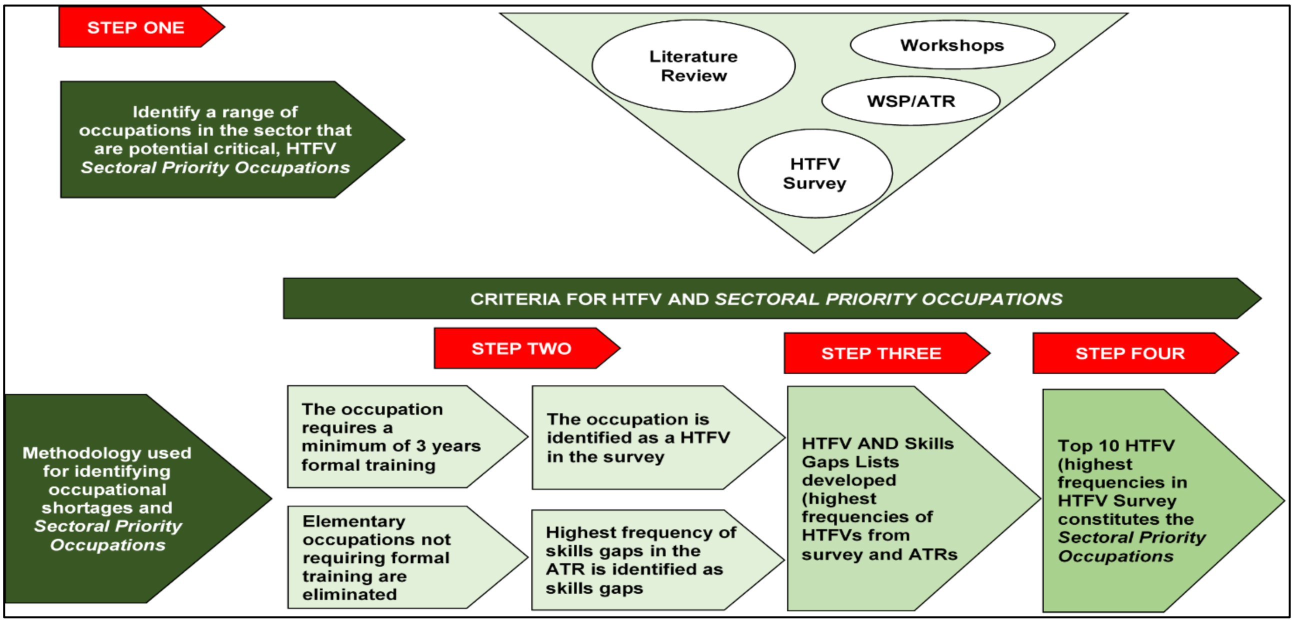
- What occupations are Hard-To-Fill Vacancies? Why are these occupations HTFVs?

Supply

- What is the extent of occupational skills supply in the sector? What is the state of education and training provision? What supply problems are firms experiencing?

The methodology and criteria to compile critical, HTFV and Sectoral Priority Occupations is as follows:

Figure 22: Methodology and Criteria



Source: DHET SSP Framework and Requirements 2019/20, SSP survey template, 2019

Step One:

The range of possible occupations for the HTFV, Sectoral Priority Occupations and skills gaps lists are identified through workshops, literature reviews and the administration of a HTFV survey.

Step Two:

Four eligibility criteria are used to eliminate occupations: (1) 3 years formal training; (2) elementary occupations eliminated; (3) administer HTFV survey; and (4) skills gaps mentioned in ATRs.

Step Three:

After elimination, the highest frequency of occupations (above the median) are included on the HTFV list. The highest frequency of skills gaps mentioned in the ATRs (above the median) are included on the Skills Gaps List.

Step Four:

The Top 10 HTFV (highest frequencies) become the Sectoral Priority Occupations.

3.2 Sectoral Occupational Demand (Hard-To-Fill Vacancies)

For the current training year, the following occupations were identified as HTFVs using WSP/ATR data and the HTFV survey.

The following table provides the Hard-to fill occupations along with the reasons that have been provided by the stakeholders.

TABLE 6: HARD-TO-FILL VACANCIES (HTFV)

Occupation (2020)	OFO Code	Requested In PIVOTAL[5]	Vacancies[6]	Reasons[7]
Retail General Manager	2019-142103	406	406	Lack of relevant experience; Lack of relevant qualifications
Retail Buyer	2019-332301	134	134	Lack of relevant experience; Lack of creative skills
Software Developer	2019-251201	132	132	Equity Consideration
Butcher (Blockman)	2019-681103	132	132	Lack of relevant experience; Lack of relevant qualifications
Visual Merchandiser	2019-343203	114	114	Lack of relevant experience; Equity Consideration; Lack of relevant qualifications
Sales Manager	2019-122102	111	111	Lack of relevant experience; Lack of relevant qualifications
Confectionary Baker	2019-681201	0	84	Lack of relevant experience; Unsuitable working hours

[5] The numbers below indicate the amount of people required to fill the relevant vacancy on the Sectoral Priority Occupation Intervention (SPOI/PIVOTAL) list. HTFVs that have a zero indicated below this column do not have vacancies identified as part of the SPOIs and, therefore, are not a part of the SPOI/ PIVOTAL list.

[6] The numbers below indicate the number of vacancies required as per the WSP/ ATR data. The two occupations that indicated zero vacancies do not appear on the WSP/ ATR data but are part of the ERRP-related innovative occupations.

[7] Reasons are given for each HTFV to give an explanation as to why the particular vacancy is difficult to fill. These reasons could be that employers are unable to find candidates that have the relevant qualifications required for the occupation (lack of relevant qualifications); inability to find candidates that have the relevant experience required for the occupation (lack of relevant experience); inability to find candidates that fit the equity considerations such gender, race, disability (equity consideration); inability to find candidates that are willing to work the required hours or do not live in/are unwilling to relocate to the job location (unsuitable working hours/ unsuitable job location); and sometimes candidates lack needed (technical) skills (lack of technical/creative) skills required.

Occupation (2020)	OFO Code	Requested In PIVOTAL[5]	Vacancies[6]	Reasons[7]
Retail Supervisor	2019-522201	82	82	Lack of relevant experience
Retail Store Manager	2019-142103-2	76	76	Unsuitable job location; Lack of relevant experience; Lack of relevant qualifications
Safety, Health, Environment and Quality (SHE&Q) Practitioner	2019-226302	53	53	Lack of relevant qualifications; Lack of relevant experience
Confectionery Maker	2019-681203	0	41	Lack of relevant experience
Merchandiser	2019-524201-1	38	38	Lack of relevant experience
General Accountant	2019-241101	0	34	Lack of relevant qualifications
Industrial Products Sales Representative	2019-243301	0	34	Lack of relevant qualifications
Marketing Practitioner	2019-243103	0	31	Lack of relevant qualifications
Programme/ Project Manager	2019-121905	0	22	Lack of relevant experience
Sales Representative	2019-333903	0	44	Lack of relevant experience
Computer Network and Systems Engineer	2019-252301	0	24	Lack of relevant experience
Inbound Contact Centre Consultant	2019-422201	0	0	Lack of technical skills required
ICT Security Specialist	2019-252901	0	0	Lack of relevant experience
ICT Communications Assistant	2019-351201	0	2	Lack of technical skills required
Forklift Driver	2019-734402	0	4	Lack of technical skills required

Source: WSP/ATR data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

While Butchers and Confectionary Makers have been included in the table above, feedback from stakeholder consultations had indicated that some occupations do not have OFO Codes and a shortage in such an occupation would be coded using the closest occupation to that one. For example, unemployed learners on an NQF Level 2 Learnership do not have an OFO Code and are, therefore, captured as Sales Assistants because it is the closest to what they do. However, the distinction becomes very important within the sales environment.

There are also appliance technicians needed, particularly because there doesn't seem to be accessible training for this occupation. The abovementioned challenges are national, as they have been raised by more than one province during the engagements.

The following occupations were mentioned as being high priority during consultations:

- Data Analyst
- Finance Manager
- Product Manager

It has been suggested that the following occupations are high turnover, high demand occupations.

TABLE 7: HIGH DEMAND, HIGH TURNOVER OCCUPATIONS

Occupation (2020)	OFO Code	Vacancies	Reasons
Sales Assistant (General)	2019-522301	309	Lack of relevant experience
Petrol Station Attendant	2019-524501-5	157	Lack of relevant experience
Cashier	2019-523102-3	120	Lack of relevant experience
Food Service Counter Attendant	2019-524601	82	Lack of relevant experience
Service Station Cashier	2019-523102-5	46	Lack of relevant experience
Service Station Attendant	2019-524501	45	Lack of relevant experience

Source: WSP/ATR data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

3.3 COVID-19 Research and Survey

Findings from the W&RSETA COVID-19 Impact Research and survey indicated the following:

- Only 56% of wholesalers and retailers are fully operational
- 32% of retailers shifted focus to e-commerce channels during the pandemic – indicating a real need for e-commerce related skills

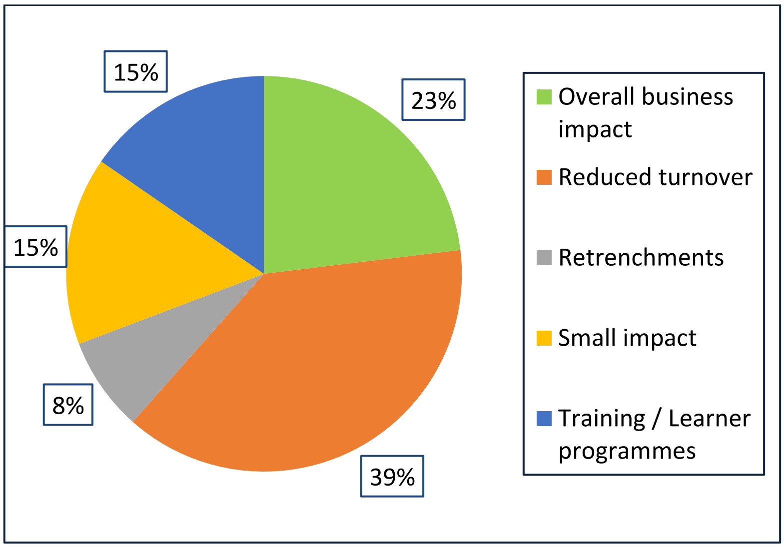
Findings from the BeyondCOVID Business Impact Survey revealed the following:

- 60% of Food and Beverages retailers were operating under reduced capacity
- 50% of Clothing retailers are operating under reduced capacity
- 50% of Motor Vehicle retailers are operating under reduced capacity

Below are SSP Survey findings on what impact COVID-19 has had on business operations/ employees/ learners for Food and Beverage, Textiles, and Hardware Retail Subsectors.

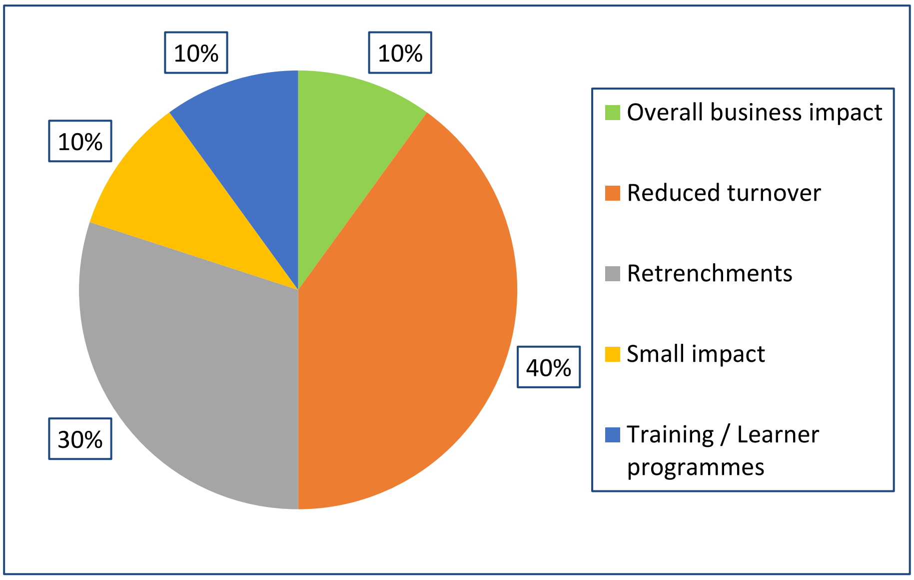
The food and beverage subsector have indicated that 39% of their businesses have been affected by a reduced turnover. This could be as a result of lockdown regulations regarding the sale of fresh food and shorter operation hours.

Figure 23: Covid-19 Impact on Food and Beverage Subsector



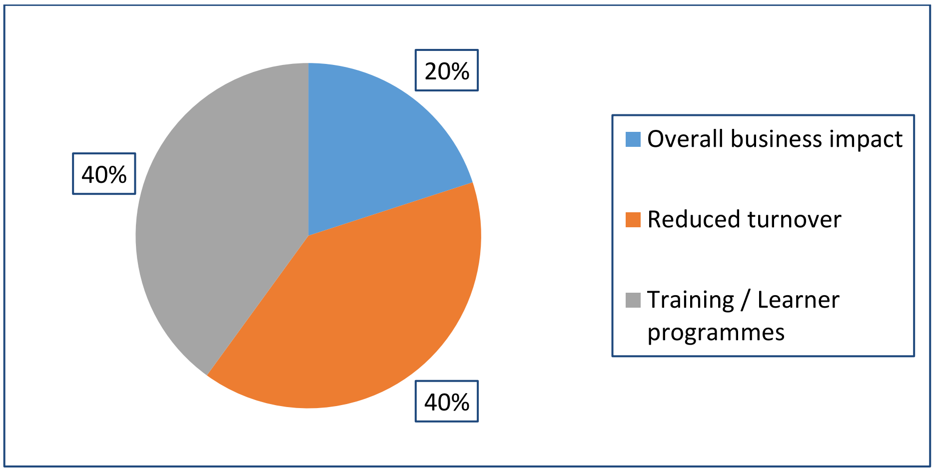
The Textiles and Clothing subsector has seen 40% of their businesses have a reduced turnover and 30% having had to retrench their workers due to Covid-19.

Figure 24: Covid-19 Impact on Textiles Subsector



The Hardware Retail Subsector has also had challenges, however, unlike the Food and Beverage and Textiles subsectors, indications show that it has only been impacted in three ways.

Figure 25: Impact of Covid-19 on Hardware Retail Subsector



3.4 Hard-To-Fill Vacancies (HTFVS) by Province

The following is the HTFV list by province:

TABLE 8: HTFV LIST FOR GAUTENG AND KWAZULU NATAL

Gauteng		Kwa-Zulu Natal	
Occupation	**Reasons**	**Occupation**	**Reasons**
Sales Assistant	Lack of experience	Retail General Manager	Lack of experience & lack of relevant qualifications
Retail General Manager	Lack of relevant experience	Retail Buyer	Unsuitable job location & salary expectations
Visual Merchandiser	Lack of relevant experience & equity consideration	Butcher (Blockman)	Lack of relevant qualifications
Sales Manager	Lack of relevant experience	Retail Supervisor	Lack of relevant experience
Software Developer	Equity consideration	Sales Manager	Lack of relevant qualifications
Confectionery Maker	Lack of relevant experience	Confectionary Baker	Lack of relevant qualifications
Retail Supervisor	Unsuitable job location & Lack of relevant experience	Fork Truck Operator	Lack of relevant qualifications
Butcher (Blockman)	Lack of experience & Lack of relevant qualifications	Head Chef	Lack of relevant qualifications
Retail Store Manager	Lack of relevant qualifications	Energy Efficiency Supplies Sales Representative	Lack of relevant experience
Industrial Products Sales Representative	Lack of relevant qualifications	Sales Assistant	Lack of relevant experience

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

In the Gauteng region, there are 3 positions at manager level. In the Kwa-Zulu Natal, 2 manager level occupations were also identified.

TABLE 9: HTFV LIST FOR NORTHERN CAPE AND FREE STATE

Northern Cape		Free State	
Occupation	**Reasons**	**Occupation**	**Reasons**
Butcher (Blockman)	Lack of relevant experience & Lack of relevant qualifications	Butcher (Blockman)	Lack of relevant qualifications
Millwright	Poor remuneration	Confectionary Baker	Unsuitable working hours
Truck Driver	Lack of relevant experience	Visual Merchandiser	Lack of relevant qualifications
Butcher's Assistant	Lack of relevant qualifications	Dispatching and Receiving Clerk / Officer	Lack of relevant qualifications

Diesel Mechanic	Project based work	Retail Pharmacist	Unsuitable job location
Store Person	Lack of relevant experience	Retail Store Manager	Unsuitable job location
Confectioner's Assistant	Lack of relevant experience	Artisan Aide Electrical	Lack of relevant qualifications
Auto Electrician	Poor remuneration	Retail Buyer	Unsuitable job location
		Food Trade Assistant	Lack of relevant experience
		Retail Supervisor	Lack of relevant experience

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

In the Northern Cape, there are no positions in the managerial level. In the Free State, 1 manager level occupation was identified. There appears to be more artisan related occupations in demand in these provinces.

TABLE 10: HTFV LIST FOR MPUMALANGA AND EASTERN CAPE

Mpumalanga		Eastern Cape	
Occupation	**Reasons**	**Occupation**	**Reasons**
Petrol Station Attendant	Lack of relevant experience	Confectionary Baker	Lack of relevant qualifications & Lack of relevant experience
Cashier	Lack of relevant experience	Butcher	Lack of relevant qualifications
Food Service Counter Attendant	Lack of relevant experience	Retail General Manager	Unsuitable job location
Safety, Health, Environment and Quality (SHE&Q) Practitioner	Lack of relevant experience & Lack of relevant qualifications	Retail Store Manager	Unsuitable job location
Service Station Attendant	Lack of relevant experience	Sales and Marketing Manager	Lack of relevant qualifications
Merchandiser	Lack of relevant experience	Programme/ Project Manager	Lack of relevant qualifications
Service Station Cashier	Lack of relevant experience	Office Manager	Lack of relevant qualifications & Lack of relevant experience
Retail General Manager	Lack of relevant qualifications & unsuitable job location	Software Developer	Lack of relevant experience
Service Station Salesperson	Lack of relevant experience	Sales Person/ Consultant	Lack of relevant experience
Confectionary Baker	Lack of relevant experience & Lack of relevant qualifications	Retail Buyer	Equity consideration

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

In the Eastern Cape, there are 5 occupations was at manager level. In the Mpumalanga, 1 occupation at manager level occupations were identified. A potential reason is the unwillingness of experienced managers to settle in an outlying province. It also indicates that the W&RSETA needs to give greater attention to management training in responding to the demand.

TABLE 11: HTFV LIST FOR NORTHWEST AND LIMPOPO

North West		Limpopo	
Occupation	**Reasons**	**Occupation**	**Reasons**
Retail Store Manager	Lack of experience	Retail General Manager	Lack of relevant qualification
Human Resource Manager	Unsuitable job location	Retail Supervisor	Lack of relevant qualifications
Receiving Clerk	Lack of relevant qualification	Butcher	Lack of relevant qualification
Sales Manager	Lack of relevant experience & Lack of relevant qualification	Service Station Cashier	Lack of relevant qualifications
Butcher	Lack of relevant experience	Camera Operator	Lack of relevant experience & Lack of relevant qualification
Automation and Control Engineer	Lack of relevant qualification	Cashier	Lack of relevant experience
Debtors Clerk	Lack of relevant experience	Bakery Assistant	Lack of relevant experience
Mechanical Engineer	Unsuitable job location	Butcher's Assistant	Lack of relevant experience
Metal Fabricator	Lack of relevant qualification	Retail Pharmacist	Lack of relevant experience
Electrical Engineer	Poor remuneration	Call/ Contact Centre Manager	Lack of relevant experience

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

In the North-West, 3 occupations are at manager level. In Limpopo, 1 manager level occupation was identified. The province is small and majority of businesses that operate are SMEs.

TABLE 12: HTFV LIST FOR WESTERN CAPE

Western Cape	
Occupation	**Reasons**
Retail Buyer	Lack of experience & Lack of relevant qualifications
Beauty Sales Consultant	Lack of relevant qualifications
Software Developer	Lack of relevant experience & Poor remuneration

Sales Assistant (General)	Lack of experience
Retail General Manager	Lack of relevant experience & Lack of skills
Merchandise Planner	Lack of relevant experience
Retail Store Manager	Lack of relevant qualifications & Lack of relevant experience
Computer Network and Systems Engineer	Lack of skills & Lack of relevant qualifications
General Accountant	Lack of relevant experience
Visual Merchandiser	Lack of relevant experience & Lack of relevant qualifications

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

3.4.1 Skills Gaps

Skills gaps refer to skills gaps within an occupation or 'top up' skills. Training for skills gaps usually takes the form of short courses delivered in-house or externally. Such programmes, due to their short duration, do not require accreditation and thus does not lead to national qualifications on the NQF.

Both HTFVs and skills gaps must be identified at the occupational level, with occupational shortages being considered against the occupation itself and skills gaps being reflected as specific skills within the occupation.

The following skills gaps skills were identified from WSP/ATR 2021. These lists will be updated for the final submission once fieldwork is complete:

TABLE 13: SKILLS GAPS

SOFT SKILLS: Emotional intelligence/ People skills such as managing diversity/ Communication skills
MANAGEMENT: Leadership skills/ Mentoring and coaching/ Planning and project management/ Conflict management/ Business Management/ Financial Management/ Performance Management/ Human Resource Management/ Change Management
TECHNICAL: Financial Skills/ Product knowledge/ Visual Merchandising/ First aid/ Project management/ Marketing Skills/ COVID-19 Safety/ Digital and 4IR Skills
OTHER: Customer service/ Communication skills/ Numeracy and literacy/ Ability to apply knowledge/ Sales skills/ Conflict resolution skills

Source: WSP/ATR data 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

The most important Skill Gaps by major occupation group as are:

TABLE 14: SKILLS GAPS BY MAJOR OCCUPATION GROUP

#	Skills Gap	Managers	Professional	Technician & Associate Professionals	Clerical Support Workers	Service & Sales Workers	Craft & Related Trades Workers	Plant & Machine Operators	Elementary Occupations
1	**Occupational health and safety**	First Aid Basic Fire Fighting Occupational Health & Safety	First Aid Basic Fire Fighting Occupational health and safety	First Aid Basic Fire Fighting Occupational health and safety	First Aid Basic Fire Fighting Occupational health and safety	First Aid Basic Fire Fighting Occupational health and safety	Basic Fire Fighting First Aid Occupational Health & Safety	First Aid Basic Fire Fighting Occupational health and safety	Basic Fire Fighting First Aid Occupational health and safety
2	**Product Knowledge**	Product Training Product Knowledge	Product Training Product Knowledge Market Knowledge	Product Training Product Knowledge Market Knowledge	Product Training Product Knowledge Sales, Product and Workshop Training	Product Knowledge / Inhouse training Product Training Product updates	Product Knowledge Product Training ZRF Product/service Training	Product Knowledge Product Training New Product Lines And Designs	Product Knowledge Product Training NEW PRODUCT LINES
3	**Labour Relations / HR**	Harassment Training Diversity Management Labour Law in the workplace	Conflict Management and Resolution Harassment Training HR Skills	Conflict Management and Resolution Harassment Training HIV and Aids Training / Awareness	Harassment Training Conflict Management and Resolution Labour Law in the workplace	Harassment Training Customer Service HIV and Aids Training / Awareness	Harassment Training Conflict Management and Resolution Employment Equity, Diversity and Discrimination	Conflict Management and Resolution HIV and Aids Training / Awareness Customer Service	Harassment Training HIV and Aids Training / Awareness Customer Service
4	**Customer Service**	Customer Service	Customer Service	Customer Service	Customer Service	Customer Service Certificate Service Excellence	Customer Service	Customer Service	Customer Service
5	**COVID-19 related skills**	COVID 19 In The Workplace (Continuous Training)		COVID-19 Awareness & Protocols	COVID-19 Awareness & Protocols	COVID-19 Awareness & Protocols	COVID-19 Training	COVID 19 In The Workplace (Continuous Training)	COVID 19 In The Workplace (Continuous Training)

#	Skills Gap	Managers	Professional	Technician & Associate Professionals	Clerical Support Workers	Service & Sales Workers	Craft & Related Trades Workers	Plant & Machine Operators	Elementary Occupations
		COVID-19 Training Maintaining Safety Within the Workplace Amidst COVID 19		COVID-19 Training Induction & OHS COVID Prevention	COVID 19 In the Workplace (Continuous Training) Maintaining Safety Within the Workplace Amidst COVID 19	COVID-19 Training COVID 19 In the Workplace (Continuous Training)		COVID-19 Awareness & Protocols COVID-19 Training	COVID-19 Awareness & Protocols Induction & OHS COVID Prevention
6	**Sales (Other)**	National Sales Meeting, Manager Training Instrumentation, Nozzles, Sales and Customer Care Sales and Marketing Management	National Sales Meeting, Manager Training, Operations workshop Sales Training SALES AND CUSTOMER CARE	National Sales Meeting Sales and expense business plan Salesmanship Level 3	Internal Sales Sales Training Sales/Marketing	Sales Training SALES AND CUSTOMER CARE Marketing/Sales	National Sales Meeting	Sales Training Salesmanship Level 2	
7	**Systems Skills**	Systems Training Audio Recording Monitoring Systems Trained on New System-IQ	Systems Training Audio Recording Monitoring Systems Pastel Evolution & Magic software	Systems Training Pastel Evolution & Magic software Pastel Payroll Training	Systems Training Accounting & Payroll systems Pastel Evolution & Magic software	Audio Recording Monitoring Systems Systems Training CBU Retail Heroes Systems Access	Systems Training	Plant operation - part in smooth operating of system	Audio Recording Monitoring Systems Systems Training Winfreight System, Introduction on Dispatch System
8	**Supervisory, Leadership and Mentoring Skills**	Leadership and Supervisory Skills Internal Management Training	Leadership and Supervisory Skills	Leadership and Supervisory Skills Supervisory Management Retail Supervisor	Junior Management Leadership and Supervisory Skills Retail Supervisor	Supervisor Training Leadership and Supervisory Skills Retail Supervisor	Supervisory Management	Supervisory Management Leadership and Supervisory Skills	Leadership and Supervisory Skills Supervisory Skills WRSETA Retail Supervisor (the system does not

#	Skills Gap	Managers	Professional	Technician & Associate Professionals	Clerical Support Workers	Service & Sales Workers	Craft & Related Trades Workers	Plant & Machine Operators	Elementary Occupations
									allow me to select a Skills Programme as no list appears
9	**Stock / Stores Management and Control**	Stores and Stock Control point of sale design and layout, store planning and layout Stock loss prevention	Stores and Stock Control	Stores and Stock Control Procedure and Stock training	Stores and Stock Control Stock loss prevention Procedure and Stock training	Stores and Stock Control Stock taking Store policy and Procedure induction	Stores and Stock Control	Stores and Stock Control Stores And Maintenance Training	Stores and Stock Control Stock Management Procedure and Stock training
10	**Non-retail Management**					none Retail Manager (Chain Store) (Staff Scheduling) none Retail Supervisor (Front End Supervisor)			none Retail Supervisor (Front End Supervisor)

Source: WSP/ATR 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

The key finding from the skills gap by occupation group is that Customer Service, Teamwork and Product Knowledge are important for middle and lower occupations in the sector. However, skills such as a matric (grade 12) and work readiness are equally important throughout the occupation groups for progression in the sector.

3.5 Extent and Nature of Skills Supply

This section examines skills supply for Universities and TVET Colleges:

3.5.1 Enrolment in Post-School Education and Training Institutions

The Post-School Education and Training system had 503 institutions which included 26 public Higher Education Institutions, 131 private Higher Education Institutions, 50 Technical and Vocational Education and Training (TVET) colleges, 287 registered private colleges and 9 Community Education and Training (CET) colleges.

The Technical and Vocational Education and Training (TVET) colleges provide technical and vocational education and training programmes to learners who completed at least Grade 9 at school level. However, there are also opportunities for learners with a Grade 12 certificate. In 2019, TVET colleges were inclusive of 50 public TVET colleges with 253 registered campuses and other sites of delivery relating to provision of part-qualifications, qualifications and other programmes. The TVET College enrolment process and cycle is different because it has 6 enrolment cycles in 1 academic year, where enrolments will be annually, per semester or per trimester.

Majority of enrolments in TVET colleges in 2019 were youth between the ages of 20 and 24 years, which accounted for 58,66% of total enrolment in TVET colleges (395 064 of 673). Enrolment was the lowest for students who were 35 to 39 years old and those older than 40 years of age. Of the 673 490 students that enrolled in 2019, 73,36% of students enrolled for Report 191 (N1 – N6) qualifications, of which 59,16% are between the ages of 20 and 24 years old. Of the 673 490 students that were enrolled, 92,23% are African students, 6,74% are Coloured, 0,23% are Indian/Asian students and 0,78% are White students. Of the enrolled students, 2 537 of the students have reported to have a disability in 2019, of which 1 468 are female and 1 069 are male.

The Higher Education (HE) Sector is intended to perform the following three functions as outlined in the National Development Plan (NDP) which are to educate and equip people with high-level skills to meet the employment needs of the public and private sectors; to produce new knowledge and assess and find new applications for existing knowledge; and to provide opportunities for social mobility while strengthening equity, social justice and democracy to deal with the injustices brought about by the apartheid system. In 2019, there Higher Education (HE) sector comprised of 26 universities and 131 private higher education institutions (PHEIs).

Access to quality education and dissemination of structured educational content has become more challenging due to Covid-19 and the restrictions placed on a national level, which affect the way in which classes can be conducted. This has meant that Higher Education Institutions along with DHET have had to develop new ways to ensure that students continue on their path of education without disruption from restrictions. This has seen a shift to a blended learning approach inclusive of face-to-face, remote and online classes. Not only has it been beneficial in adherence to the Covid-19 restrictions, it has also opened the path to transitioning to a virtual work of school and working which is also being fostered in by the Fourth Industrial Revolution. An added challenge to this was how to ensure that students from disadvantaged and/or rural areas are still able to attend and engage in online and remote lessons and school work despite access to internet and the required hardware and software. However, most institutions responded by providing means for those students to attend their classes and continue with school work.

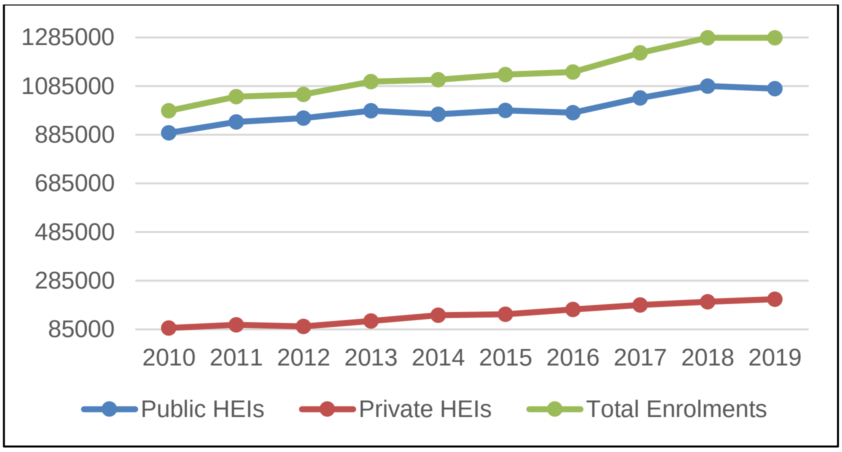


Figure 26: Number of Students Enrolled in Public and Private HEIs

Source: (DHET, 2021)

Enrolment in public HEIs reached over 1 074 912 while private HEIs reached 208 978 enrolments in 2019. TVET Colleges saw 673 490 enrolment in 2019, which shows a 2,5% increase. There has been an overall increase in enrolments for public and private HEIs between 2010 and 2019. The total enrolment in HEIs reached 1 283 890 in 2019 which is only a 0,03% increase as the total number of student enrolment in public and private HEIs in 2018 was 1 283 466. However, although public HEIs saw a slight decrease in 2019, the decrease was only by less than 1%. Enrolment at private HEIs increased by 5,6% to 208 978. Additionally, while total enrolments for 2019 tallied up to 1 283 890, access to university education opportunities was unevenly distributed across the country leaving Mpumalanga and Northern Cape at a disadvantage, which led to the development of University of Mpumalanga and Sol Plaatje University.

The number of students enrolled for Post-School Education and Training in TVET Colleges and universities in 2019 are as follows:

TABLE 15: PSET ENROLMENT IN SOUTH AFRICA 2019

Institution	Enrolment
TVET Colleges	673 490
Universities	1 283 890

SOURCE 3: STATISTICS ON POST-SCHOOL EDUCATION AND TRAINING IN SOUTH AFRICA, 2019

Enrolment at public and private HEIs reached over 1.28 million in 2019, with public HEIs enrolling 1 074 912 students and private HEIs 208 978 students. The target set out in the National Development Plan (NDP) is 1.6 million enrolments by 2030.

TABLE 16: NUMBER OF STUDENTS ENROLLED IN TVET COLLEGES 2013 - 2019

Qualification Category	2013	2014	2015	2016	2017	2018	2019
NC(V)	154 960	166 433	165 459	154 739	142 373	131 212	138 912
Report 191 (N1-N6)	442 287	486 933	519 464	513 026	510 153	482 175	494 070
Occupational Qualifications	19 000	19 825	20 533	13 472	10 969	20 106	22 886
Other	23 371	29 192	32 424	22 468	22 533	23 355	14 025

SOURCE 4: STATISTICS ON POST-SCHOOL EDUCATION AND TRAINING IN SOUTH AFRICA, 2019 (DHET, 2019)

The number of students enrolled in TVET colleges reached 673 490 which was a 2,49% increase from the total number of students enrolled in TVET Colleges in 2018. During this period, 73,75% students enrolled for Report 191 programmes, and 20,74% enrolled for NC(V) programmes. Fewer students enrolled for occupational qualifications (3,42%) and 'other' qualifications (2,1%). Majority of enrolments were for Report 191 programmes and fewer enrolments were for other qualifications throughout the period under review. The TVET curriculum also needs to be extended to include wholesale and retail related courses and programmes, which can be done through the establishment of Centres of Specialisation (CoS). Of the 17 colleges interviewed on Centres CoS, more than half have approved CoS campuses and 16 already offer retail programmes, mainly with respect to wholesale and retail operations (W&RSETA, 2020).

A total of 113 663 students completed key exit levels N6 in TVET colleges in 2019, translating to a completion rate of 97,97%. Of all the N6 courses above, four had a completion rate of 100%.

Table 17: TVET Colleges Registration and Completion in N6 Qualifications

Qualification	Total Registered	Total Wrote	Total Completed	Completion[8] Rate (%)	Adjusted[9] Completion Rate (%)
N6: Art and Design	343	336	336	100	98
N6: Business Management	12 249	11 950	11 535	96,5	94,2
N6: Clothing Production	352	337	334	99,1	94,9
N6: Educare	4 220	4 118	4 114	99,9	97,5
N6: Engineering Studies	30 482	27 656	27 343	92,2	89,7
N6: Farming Management	1 598	1 574	1 567	99,6	98
N6: Financial Management	9 998	9 791	9 573	97,8	95,7
N6: Hospitality and Catering Services	2 399	2 335	2 293	98,2	95,6
N6: Human Resources Management	13 369	13 124	12 777	97,4	95,6
N6: Interior Decorating	3	3	3	100	100
N6: Legal Secretary	922	910	904	99,3	98
N6: Management Assistant	22 941	22 623	22 368	98,9	97,5
N6: Marketing Management	5 822	5 633	5 252	93,2	90,2
N6: Medical Secretary	69	69	63	91,3	91,3
N6: Popular Music: Composition	3	3	3	100	100
N6: Popular Music: Performance	126	117	117	100	92,9
N6: Popular Music: Studio Work	153	143	143	100	93,5
N6: Public Management	11 168	10 949	10 745	98,1	96,2
N6: Public Relations	1 072	1 057	1 047	99,1	97,7
N6: Tourism	2 972	2 913	2 876	98,7	96,8

[8] The completion rate (%) according to the DHET's Statistics on Post-School Education and Training in South Africa (2019) is calculated by dividing the total completions by total wrote and multiplying by 100.

[9] The adjusted completion rate (%) as calculated by the authors of this document, is calculated by dividing the total registered by total completions and multiplying by 100.

Source: DHET: Statistics for PSET (2019)

Overall, TVET colleges in 2019, 25 767 (17,1% less than in 2018) students registered for the NC(V) Level 4 qualification examinations of which 18 449 students were female. In 2019, the number of students who wrote examinations for NC(V) Level 4 programmes was 22 126.

TABLE 18: TVET COLLEGE NCV LEVEL 4 REGISTRATION AND COMPLETION 2019

Programme	Total Registered	Total Wrote	Total Completed	Completion[10] Rate (%)	Adjusted[11] Completion Rate (%)
L4: Civil Engineering and Building Construction	1 409	1 131	474	41,9	33,6
L4: Drawing Office Practice	24	16	6	37,5	25
L4: Education and Development	767	681	444	65,2	57,9
L4: Electrical Infrastructure Construction	2 703	2 448	727	29,7	26,9
L4: Engineering and Related Design	2 581	2 070	826	39,9	32
L4: Finance Economics and Accounting	1 797	1 589	762	48,0	42,4
L4: Hospitality	1 774	1 503	762	50,7	43
L4: Information Technology and Computer Science	1 074	930	301	32,4	28
L4: Management	1 128	977	623	63,8	55,2
L4: Marketing	1 380	1 176	454	38,6	32,9
L4: Mechatronics	157	129	61	47,3	38,9
L4: Office Administration	6 372	5 499	3 170	57,6	49,7
L4: Primary Agriculture	898	789	409	51,8	45,5
L4: Primary Health	321	284	137	48,2	42,7
L4: Process Plant Operations	97	82	25	30,5	25,8
L4: Safety in society	1 033	923	452	49,0	43,8
L4: Tourism	1 596	1 329	909	68,4	57
L4: Transport and Logistics	656	570	378	66,3	57,6

Source: DHET: Statistics for PSET (2019)

Universities have seen a gradual increase in undergraduate enrolments from 2013 to 2019. On the other hand, there has been a decrease in postgraduate enrolments from 2017 to 2019.

Below are the number of students enrolled in Universities from 2013 – 2019.

[10] The completion rate (%) according to the DHET's Statistics on Post-School Education and Training in South Africa (2019) is calculated by dividing the total completions by total wrote and multiplying by 100.

[11] The adjusted completion rate (%) as calculated by the authors of this document, is calculated by dividing the total registered by total completions and multiplying by 100.

Qualification Category	2013	2014	2015	2016	2017	2018	2019
Undergraduate	154 404	155 595	155 890	165 778	169 326	172 844	182 492
Postgraduate	57 445	57 967	58 140	58 323	57 549	56 615	55 061
Other	3 506	3 377	3 508	3 474	2 648	2 719	2 989

The enrolments for university undergraduates for 2019 are as follows:

Qualification	Enrolment	Completions
Business Management	46 239	10 349
Education	56 285	13 131
Other Humanities	79 969	15 386
Science, Engineering and Technology (SET)	99 641	17 402

Completions of postgraduate qualifications are much lower than the yearly enrolments. Education postgraduate qualifications only saw a total of 3 630 completions, while enrolments for that year were 11 816. The highest enrolments and completions were for SET qualifications, as it is said that many entry occupations in this field require more than an undergraduate qualification.

The table below shows enrolments and completions for Postgraduate students in universities in 2019.

Qualification	Enrolment	Completions
Business Management	20 113	9 861
Education	11 816	3 630
Other Humanities	23 132	8 096
Science, Engineering and Technology (SET)	40 570	12 870

3.5.2 W&RSETA Supported Programmes

The enrolments and graduates for the W&RSETA for 2019/20 were as follows:

TABLE 19: W&R SETA ENROLMENTS AND CERTIFICATION (2019/20)

Institutional Type	Learner-Ships	Skills Programmes	Intern-Ships	Recognition of Prior Learning (RPL)	Apprentice-Ship	Total
Number of workers enrolled for programmes	3990	3227	n/a	345	n/a	**7217**
Number of workers certified for programmes	1569	1999	n/a	165	n/a	**3568**
Number of unemployed learners enrolled for programmes	7902	1711	n/a	n/a	n/a	**9613**

Number of unemployed learners certified for programmes	2291	419	69	n/a	n/a	**2779**
Number of Apprenticeship registered	n/a	n/a	n/a	n/a	n/a	**0**
Number of Apprenticeship completions	n/a	n/a	n/a	n/a	206	**206**

Source: W&RSETA Annual Report (2019/20)

The number of workers that enrolled for programmes was 7 217. The number of completions was 3 568. The number of unemployed learners that enrolled for programmes was 9 613. The number of completions was 2 779. The W&RSETA's completions for apprenticeships were 206.

3.5.3 Annual Training Reports

A total of 1 845 867 employees in the sector received training in various occupational classes.

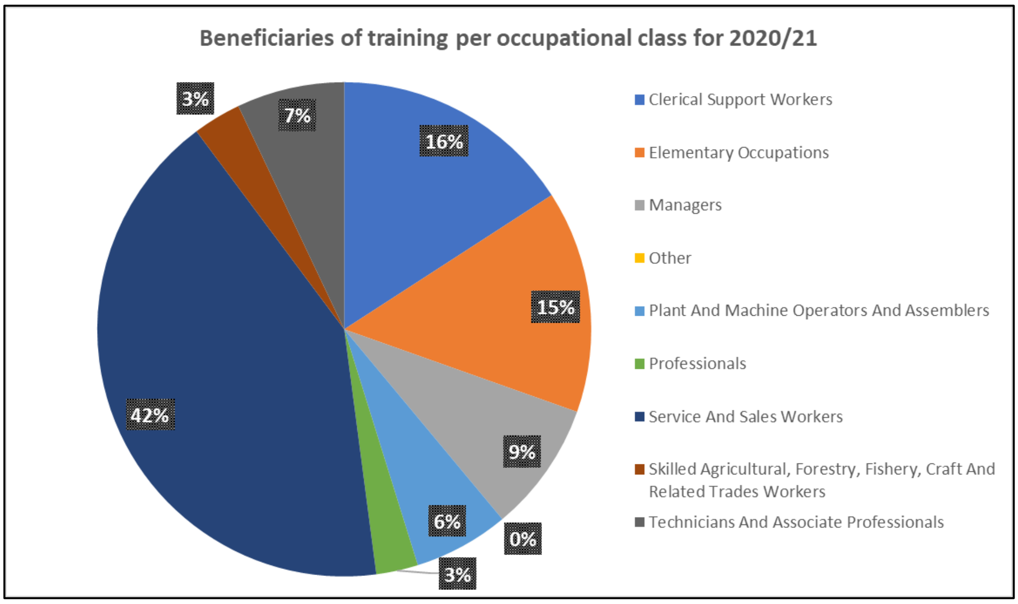


FIGURE 27: BENEFICIARIES OF TRAINING PER OCCUPATIONAL CLASS FOR 2018/19
Source: WSP Data 2020/21; SSP Survey; Employer Interviews; SSP Provincial Engagements

The largest numbers of trainees were in the service and sales worker's category.

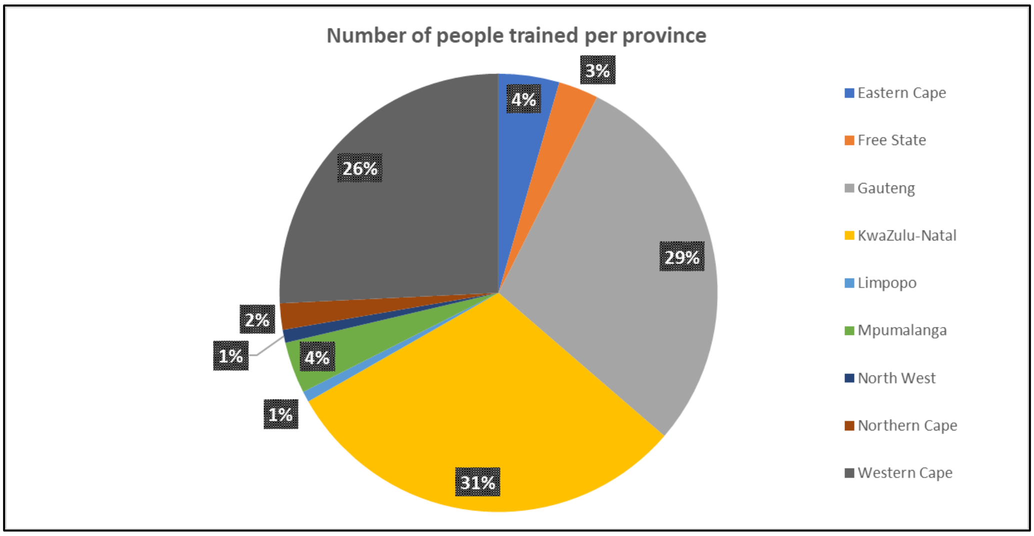


FIGURE 28: BENEFICIARIES OF TRAINING BY PROVINCE 2018/19

Source: (W&RSETA, 2019/20)

Most training occurred in KZN, followed by Gauteng and Western Cape.

3.6 Sectoral Priority Occupations and Interventions (PIVOTAL)

Based on the research activities (literature review, surveys, WSP/ATR analysis, online recruiting data, interviews and workshops), the following Sectoral Priority Occupations and occupational shortages are identified.

TABLE 20: SECTORIAL PRIORITY OCCUPATIONS

Occupation (2020)	OFO Code	Quantity Required
Retail General Manager	2019-142103	406
Retail Buyer	2019-332301	134
Software Developer	2019-251201	132
Butcher (Blockman)	2019-681103	132
Visual Merchandiser	2019-343203	114
Sales Manager	2019-122102	111
Retail Supervisor	2019-522201	82
Retail Store Manager	2019-142103-2	76
Safety, Health, Environment and Quality (SHE&Q) Practitioner	2019-226302	53
Merchandiser	2019-524201-1	38

Source: WSP ATR submission 2021; SSP Survey; Employer Interviews; SSP Provincial Engagements

The method to establish the Sectoral Priority Occupations was as follows (refer to research design and methods in earlier section):

- **Methods to identify occupations in the Sectoral Priority Occupations:** The following methods were used – literature review, workshops, HTFV survey and WSP/ATR analysis.

- **Main findings that informed the Sectoral Priority Occupations:** Occupations that were most consistently identified in these 4 studies were included in the Sectoral Priority Occupations. This occurred through a process of elimination of occupations.
- **Quantities indicated in the SETA Sectoral Priority Occupations:** The quantities were informed by additional questions inserted into the WSP template: What occupations are HTFVs? How many did you require in the previous 12 months?
- **Ranking:** The **Sectoral Priority Occupations** are ranked in descending order in terms of the highest number of HTFVs.
- **Consultative Processes:** 9 workshops were held – one in each province
- **Interventions:** The interventions are informed by feedback received by workshop participants and approved by the Board.
- **Outcomes:** The outcome is demand-led skills planning by the W&RSETA.

3.7 Conclusion

Chapter 3 is primarily focused on the identification of skills gaps and hard-to-fill vacancies in the W&R sector. The primary methods used to determine HTFVs and skills gaps are interviews with key informants, regional workshops with stakeholders, literature reviews and analysis of WSP/ATRs.

A primary means for identifying and anticipating skills training are workplace skills plans (WSPs) and annual training reports (ATRs). These are submitted by member companies to qualify for mandatory grant rebates from the skills development levies paid to the South African Revenue Services. The WSPs and ATRs provide a representative sample of the training planned for the next 12 months and training that occurred in the previous 12 months.

It is interesting to note that most training is being done at the lower levels of the occupational class structure. This is due to most of the workers in the sector being at the lower end of the occupational structure.

4 CHAPTER FOUR: SETA PARTNERSHIPS

4.1 Introduction

Stakeholder partnerships are increasingly becoming the adopted approach to meeting industry needs for skilled workers and workers' need for better jobs. Partnerships provide a means for the W&RSETA to engage directly with industry across traditional boundaries better aligning training programmes and resources.

The purpose of this chapter is to assess the effectiveness of existing SETA partnerships in the sector with reference to value-add partnerships. The chapter presents an analysis of existing partnerships, including the successes and limitations thereof. In addition, planned partnerships intended to further promote skills development are also explored. In producing this chapter available literature (including past SSPs and Strategic Plans) and internal stakeholders were consulted.

4.2 Key Questions

This chapter will respond to:

An analysis of existing SETA Partnerships

- What institutions/organizations is the SETA partnering with?
- What is the nature of each of the partnerships? (Term and duration)
- What are the objectives of each of the partnerships?
- What value is each of the partnerships adding to the SETA? (gaps)
- Which partnerships are working successfully and why?
- Which partnerships are not working successfully and why?
- What should be done to strengthen partnerships that are not working well?
- What new partnerships are needed for the SETA?
- What gaps/objectives will these partnerships be addressing?
- What is the SETA's most successful partnership approach/ model?

4.3 An Analysis of Existing SETA Partnerships

The SETA partnered with following training providers and other key stakeholders in the past year:

TABLE 21: EXISTING PARTNERSHIPS

#	Name of Partner	Objective	Value of Partnership	Term and Duration (Start and End Date)
1.	Bureau of Market Research (BMR)	• To conduct research for the sector and assist with the implementation of W&RSETA research agenda	Increased economic and labour market data	20 Apr 2016 to 31 Mar 2020

#	Name of Partner	Objective	Value of Partnership	Term and Duration (Start and End Date)
2.	Nelson Mandela University (NMU)	• Joint Research focusing on innovation • Joint special project partnership with TVET colleges.	• Joint Research Focus on Innovation	28 Oct 2019 to 31 March 2023
3.	Buffalo City College	• Research capacity development. • Lecture capacity and development. • Joint special project partnership with other institutions of learning.	• Joint Research Focus on Innovation • Lecture capacity and development	21 Aug 2019 to March 2020
4.	Mthashana TVET College	• Research capacity development. • Lecture capacity and development. • Joint special project partnership with other institutions of learning.	• Joint Research Focus on Innovation • Lecture capacity and development	21 Aug 2019 to 31March 2022
5.	Council for Scientific and Industrial Research (CSIR)	• Promote industry collaborative research around evidence-based skills planning and innovation	• Joint Research Focus on Innovation	23 May 2019 (Automatically renewed annually)
6.	Association of Private Providers of Education, Training and Development (APPETD)	• Promote industry collaborative research around evidence-based skills planning and innovation. • Improve access to training in rural areas.	• Joint Research Focus on Innovation	23 May 2019 (Automatically renewed annually)
7.	Namibia Training Authority (NTA)	• Planning collaborative research, educational and training projects. • Training of TVET Practitioners (Capacity Building). • Sharing or experiences and enabling contracts in Work-Integrated Learning (WIL).	• Joint research on retail innovation, 4th industrial revolution retail trends and curriculum development. • Information sharing on the planning tools	06 Dec 2019 to 31 March 2022
8.	University of the Western Cape (UWC)	• Joint Research and projects focusing on innovation, employability and entrepreneurship.	• Work Integrated Learning projects for the youth. • Joint Research Focus on Innovation	06 Dec 2019 to 31 March 2023

#	Name of Partner	Objective	Value of Partnership	Term and Duration (Start and End Date)
		• Joint special project partnership implementation.		
9.	University of Pretoria	• Joint research on sector specific projects. • Implementation of post-graduate programmes.	• Joint Research Focus on Innovation	01 April 2020 to 31 March 2023
10.	Moses Kotane Institute	• Entrepreneurship and innovation related projects. • Promote industry specific collaborative research	• Joint Research Focus on Innovation	01 April 2020 to 31 March 2023
11.	Small Enterprise Development Agency (Seda)	• SME and informal business support projects • Promote industry specific collaborative research	• Assist and grow the SMME sector	01 April 2020 to 31 March 2023

4.3.1 Successes and Failures

The below presents the key successful partnerships that have been put in place, the reasons for this success, challenges, and identified measures to strengthen partnerships going forward.

- Successful partnerships.
  - Moses Kotane Institute (MKI)
  - Namibia Training Authority (NTA)
  - University of Pretoria (UP)
  - Association of Private Providers of Education, Training and Development (APPETD)
- Reasons for successful
  - Regular communications on sector priorities
  - Finalised implementation plan
  - Active participation on the research agenda update and development
- Challenges.
  - Delays in finalising implementation plan
  - Limited participation in the update of the Research Agenda
  - No dedicated official to respond to matters related to the MOU
- Measures to strengthen partnerships.
  - Signed implementation plan for all finalised MOUs
  - Established regular communication and discussion channels through the committees

The table below presents the general successes and failures experienced from partnerships.

TABLE 22: SUCCESSES AND FAILURES

Successes	Failures
• Signed seven MoU's signed with National institutions and one International Institution. • Nomination of research partners to form part the Research Syndicate. • Funded Diploma, BTech, Master's and PhD Students through Research Chair. • Improved industry consultation. • Conducted cutting edge industry research • Wholesale & Retail Leadership Chair successfully launch.	• Delays in implementing the Research Syndicate. • Not enough time allocated for the implementation of Wholesale and Retail Leadership Chairs. • Delays in finalising implementation plan • Travel restrictions frustrated partnership delivery • Limited participation in the update of the Research Agenda

4.4 Planned Partnerships

TABLE 23: PLANNED PARTNERSHIPS POST COVID-19

	Name of institution	Objective	Duration
1.	Suranaree University of Technology (SUT, (Thailand)	• Information sharing on sector research • Joint Research on innovation	Planning Phase
2.	Ravensburg University (Germany)	• Information sharing on skills demand and supply best practices • Joint Research and innovation on entrepreneurships and employability.	Planning Phase
3.	Skills Development Fund (SDF, Rwanda)	• Information sharing on ICT innovation and entrepreneurship development.	Planning Phase

The following are planned Memoranda of Understanding with private and public skills development organisations.

TABLE 24: PLANNED PARTNERSHIPS (OTHER KEY ROLE PLAYERS)

#	Name of institution	Objective	Duration
1.	Statistics South Africa (SSA)	• To improve the quality of the data used in the development of the SSP. • Promote industry specific collaborative research.	Initiation Phase
2.	Media, Information and Communication Technologies Sector Education and Training Authority (MICT SETA)	• The implementation of cross-sectoral occupations and skills. • Joint research projects. • Promote industry specific collaborative research	Initiation Phase
3.	University of Venda	• Information sharing. • Joint research. • Implementation of post-graduate programmes.	Initiation Phase

#	Name of institution	Objective	Duration
4.	Small Enterprise Development Agency (Seda)	• SME and informal business support projects • Promote industry specific collaborative research	Initiation Phase

The W&RSETA partnership model is stakeholder driven and allows stakeholders to initiate special projects which respond to the sector strategic objectives. The adopted partnership model is also based around strategic objectives alignment with potential partners. This model has contributed significantly into ensuring that sector stakeholders are part of the W&RSETA skills development interventions and implementation.

The challenge that has been identified with regard to international partnerships has been delays in finalization of some of the agreements, however; the W&RSETA has made significant progress with regard to ensuring effective engagements with potential partners as part of value chain analysis. The commitment level within a partnership does also contribute towards the failures or successes of a project.

To ensure higher commitment level and active participation, W&RSETA continues to prioritize effective stakeholder engage and sector partnership value chain analysis to identify key relevant institutions for partnerships.

4.5 Conclusion

The existing partnerships appear to be working very well. However, there will be a better monitoring, evaluation and impact assessments of these partnerships. The sector partnership value chain analysis will contribute towards ensuring that new partnerships with potential partners serve sector priorities and respond to National imperatives.

5 CHAPTER FIVE: MONITORING AND EVALUATION (M&E)

5.1 Introduction

Chapter five provides a reflection on W&RSETA Monitoring and Evaluation (M&E) data and performance on strategic priorities. This chapter also provides an action plan and mechanisms to address strategic skills priorities that were not achieved. It is important that impact and tracer studies on W&RSETA funded projects be conducted on a regular basis, as part of improving the effectiveness of sector skills development interventions. On annual basis the W&RSETA performance evaluation is conducted as part of ensuring that the strategic priorities are achieved.

The quarterly monitoring and reporting tools are used as part of ensuring that relevant mechanisms are implemented to achieve strategic objectives. The W&RSETA is also currently undergoing Organizational Development (OD) as part of aligning the structural and strategic priorities to ensure improved performance and sector impact. The OD process will also contribute towards improving M&E processes.

5.2 Key Questions

This chapter will respond to:

Sector Skills Planning Reflections:

- What is the SETA's approach to Monitoring and Evaluation? (Status quo currently)
- How does the SETA use information from previous year's Annual Report and Reports from Tracer Studies to inform research and planning?
- Which Strategic priorities in the previous SSP were captured in the Strategic Plan and Annual Performance Plan?
- What Strategic priorities were not achieved, if any, and why? (those outlined in the previous year's SSP)

Plan of Action:

- What mechanisms should be employed to address strategic skills priorities that were not achieved previously?
- What measures should be initiated to ensure that currently set strategic skills priorities are achieved?

5.3 W&RSETA approach to M&E

The W&RSETA Monitoring and Evaluation (M&E) policy, (June 2019) approved by the SETA Board, sets out M&E practices within the W&RSETA. The aim of the policy is to document the approach, standards and minimum requirements that shall be adopted and implemented by the W&RSETA to ensure institutionalization of M&E within the SETA. The scope of M&E across the SETA to achieve the following: coordinated planning and reporting efforts between plans; regional and departmental plans and performance; increased accountability across all performance levels; credible, accurate, useful and verifiable performance information and alignment between input records and output records. Following the recent policy review, W&RSETA applies M&E as per an M&E Framework within which the SETA outlines the context of the W&RSETA, the approach and implementation of M&E. (M&E Framework, 2016). The framework addresses the requirements for a successful M&E approach. It emphasizes the 'why' and 'what' of M&E and roles and responsibilities in relation to the framework.

An outcomes approach, a foundation for meaningful M&E, is designed to ensure that the SETA is focused on achieving the expected real improvements in the sector, clarifies what we expect to achieve, how we expect to achieve it and how we will know whether we are achieving it. The SETA adopted an outcomes-based approach to Monitoring and Evaluation in 2014. The aim was to move away from past practices of setting quantitative targets and monitoring outputs in relation to these targets. Since then, our performance information has been used to inform the SETA on the progress towards achievement of our strategic objectives as well as our outcomes-oriented goals.

This shift in terms of our M&E approach resulted in changes to our Strategic Plan in 2016/17 to address the challenges identified through our research initiatives. In 2018/19 the SETA reviewed its M&E policy and subsequent strategy (June 2019). The outcomes approach forms the basis of W&RSETA monitoring and evaluation process. It enables the W&RSETA, throughout the results chain, to keep sight of the improvements it aims to achieve as articulated in W&RSETA's outcomes orientated goals (W&RSETA M&E Policy, 2019). The intention of an outcomes approach is to enable the W&RSETA to draw causal links between its outcomes orientated goals and objectives, programme outputs, skills planning and development activities as well as the resources allocated for the implementation and achievements of the objectives. Such causal links can also be ascertained at programme and project levels.

The W&RSETA has revised the M&E framework to ensure the following:

- The Theory of Change (ToC) is employed through the planning process as recommended by Department of Planning, Monitoring and Evaluation (DPME) and National Treasury guidelines.
    - Ensures that the focus is not just on outputs – it includes the outcomes and effecting change and impact within the sector
    - There is a focus on causal linkages – a set of activities in the operational plan and APP must lead to the achievement of outputs [every year], which in turn lead to outcomes [3 to 5 years] and the stated impact (the SETA is currently reviewing and will revise its impact statement)
    - Included in this process is testing the ToC – if the ToC says the plan will result in the following outcomes, one needs to check if this held true or not – or would that result have been achieved regardless of SETA intervention (externalities)
    - This will provide the answer to whether our plans are responsive, effective, do they address the national imperatives, if not, why not – then check to see if they can be replicated again
- Alignment to the decentralized model that is currently being implemented
    - The SETA is currently introducing the Provincial Skills Plan which will create plans that will be flexible enough to account for provincial differences, for example, if the SETA wants to offer skills programmes for the employed, the employers in the Western Cape may have different needs to those in the Northern Cape.

5.4 Use of M&E Data

Information forms the basis of our plans as we use performance reports as well as evaluation findings to inform all our plans. Strategic Changes e.g., changes to the SETA's plans, delivery models as well as interventions are motivated by performance information as well as findings from our evaluation and tracer studies. The W&RSETA will also be conducting Workplace Based Learning (WBL) tracer studies, focusing on SETA funded bursaries, internships and learnerships. This is part of monitoring the return on investment and improve on future implementation of similar programmes.

The following reflect the use of M&E data as part of improving W&RSETA performance and programme implementation:

- To assess the effectiveness and relevance and impact of W&RSETA interventions in responding to transformational imperatives.
- To evaluate the implementation of learning programmes targeted at sector occupational shortages list.
- To analyse why intended results not achieved; thus, gather lessons learnt; leading to recommendations for improvement.
- To provide data for policy development and qualification development.
- To provide data for planning and implementation of future projects.
- To provide reports used to assess the outcomes and impact of NSDS and W&RSETA strategic objectives.
- To guard against unintended consequences – well-resourced institutions participating on the programmes thus achieving results and making impact; however, creating further disparities.

There are plans to develop a data management governance framework

5.5 Plan of Action

The M&E plan provides information on how performance against set objectives is measured. It details expected input, activities and outputs; as well as how data will be collected and analysed to provide information as to targets. The plan further ensures the following:

- To enable implementation of Outcomes Approach and Theory of Change (as per the revised Framework for Strategic Planning and Annual Performance Plans -Guidelines for Implementation (DPME and National Treasury 2019) - Move Away from Focus on Activities and Move Towards Outcomes And Impact
- To ensure that planning and implementation addresses national priorities as specified through aggregated targets in APP, and SLA targets
- To ensure there is an alignment between AOP (activities), APP (Outputs) and Strategic Plan (Outcomes and Impact)

TABLE 25: PLAN OF ACTION

Strategic Priorities	SSP Priority Aligned: Y/N	Achievements	Reasons for Non-achievement	Plan of action to achieve the priorities
Programme 1:	Yes	3/7 Targets	• Reprioritised APP resulted in decreased spend on Intermediate level intervention • Cost per learner were lower resulting in the total commitment being low. • Some employees (10%) had not yet been placed in terms of the new W&RSETA structure. Planned for completion in the next financial year. • The audit opinion has not been finalised yet	• Strengthen the M&E function to ensure closer tracking of project implementation to allow for corrective measures to be taken. • Targets amended for 21/22, Discretionary Grant (DG) Advert published accordingly per level. • Focus on placement of remaining employees.

Strategic Priorities	SSP Priority Aligned: Y/N	Achievements	Reasons for Non-achievement	Plan of action to achieve the priorities
Programme 2: • Research agenda implementation to improve SSP data. • Conduct impact studies. • Establish research partnerships addressing needs for the sector. • Increase the number of stakeholders submitting Annexure II.	Yes	6 /6 Targets achieved	• N/A	• N/A
Programme 3 • Youth unemployment and sector training: Learnerships, Internships and Bursaries for both employed and unemployed addressing Hard-To-Fill-Vacancies (HTFV) and support sector transformation. • Sector capacity building to enhance planning and implementation of training in the workplace. • Identify and implement sector special projects focusing on youth, gender and racial equity. • Small Medium Enterprise and Cooperative development through sustainable projects.	Yes	22/25 Targets achieved	• Disruptions to the academic year by COIVD-19, • employers opting for non-credit bearing courses, to address covid 19 and food hygiene legislative requirements	• Revised Bursary strategy. • Target reduced for 2021/2022 (responding to the sector)
Programme 4 • A responsive, qualified and transformed skills development provider base. • To develop a new growth and niche areas through the development and updating of qualifications in the sector. • A sufficient and sustainable Assessment Centre base is established for W&R occupational qualifications.	Yes	7/7 Targets achieved	N/A	• N/A

5.6 Conclusion

The W&RSETA is committed to improving M&E data as part of a process towards creating a platform to enable the achievement of the strategic objectives. In the current financial year, 4 impact studies will be conducted and tracer study focusing on Workplace Based Learning (WBL) programmes.

The primary objective of these studies is to ensure effective monitoring of return on investment and impact of National Skills Development Strategy III (NSDS) SETA funded projects. This is part of transition towards first year implementation of the National Skills Development Plan (NSDP) and to ensure that the SETA skills development interventions are responsive to the sector strategic priorities. The completion of OD process will contribute to building and improving capacity for M&E data within the SETA, which will result in improved performance.

6 CHAPTER SIX: SKILLS PRIORITY ACTIONS

This chapter consolidates the findings of previous chapters and reflects on priority actions for the sector. The previous chapters provided the information and analysis and thus enable a response in the form of recommended actions that are realistic, consistent, and achievable. The purpose of this chapter is to provide a set of priority actions and not a detailed strategic or operational plan.

6.1 Key Questions

This chapter will respond to the following key questions:

- What the key findings of previous chapters?
- What are the skills priorities for the sector?
- What measures should be initiated to support national strategies and plans?

6.2 Key Findings from Previous Chapters

This section draws insights from previous chapters on skills priorities.

Findings from Chapter 1

Chapter 1 highlights that the wholesale and retail sector is a major contributor to national employment - the job creation opportunities in the sector are enormous. It also requires elevated levels of training and skills to succeed in an increasingly competitive global market. W&RSETA should play a more active role in supporting job creation and skills development efforts, especially when considering the increase in unemployment.

Given the difficult economic conditions currently being faced, with the latest GDP statistics indicating a 7% decline in for 2020 it is likely that all retailers and wholesalers, specifically SMMEs, will require strong managerial skills to withstand the economic decline. The difficult economic climate can be seen in food, beverages & tobacco, pharmaceuticals and medical goods, cosmetics & toiletries; textiles, clothing, footwear & leather goods, and hardware, paint and glass, and reporting little to no growth for the last quarter. Furthermore, the impact of COVID-19 is expected to last for more than 2 years, with the sector expecting depressed demand, and health concerns necessitating all employers to adopt different approaches to conducting business. The W&RSETA is expected to play a pivotal role in equipping employers with the necessary skills to adapt to revised business and operating models.

The following are the key findings from Chapter 1:

- The sector is a major contributor to employment.
- SMMEs make up most levy-paying enterprises but are under-represented in terms of skills development initiatives. Informal retailers have a great need for skills development such as business management, change management during Covid-19, business expansion and marketing.
- Black people constitute most of the workforce but are under-represented at management levels. This is more acute for females.

Findings from Chapter 2

Chapter 2 highlighted the fact that the COVID-19 pandemic has put severe strain on retailers and wholesalers' ability to remain viable. This applies to all sizes of employers but is likely to be more acutely felt by smaller employers with less cash reserves and less ability to raise loans. Going forward, these retailers will require skills relating to health and safety to comply with COVID-19 regulations, as well as skills and support required to pivot their business and operating models to account for the "new normal."

Furthermore, a large part of the retail sector is made up of SMMEs. It has been indicated that many SMME owners require management skills to maintain a sustainable business.

Chapter 2 further highlighted the fact there is a shift in the way retail businesses interact with their consumers, with businesses expected to be more responsive to client needs. This shift is being enabled through the use of technology in the sector. As a result, retail store owners and employees need to be equipped with relevant customer management/relationship skills as well as the ability to work on IT powered systems.

Findings from Chapter 3

The most common HTFVs across the wholesale and retail sector include: Retail store manager/ Retail general manager/ Butcher/ Confectionery baker/ Visual merchandiser/ Sales Assistant/ Safety, Health, Environment and Quality (SHE&Q) Practitioner/ Retail buyer/ Retail supervisor / System Developer.

There are overlaps with the identified occupations here with the occupations identified within the ERRP – for example, system developer and SHEQ practitioners. Below are future skills, new and emerging top-up skills and findings drawn from Chapter 3.

The following are emerging occupations that may be in demand (these are not official occupations in existence yet):

- Electronic Payment System Developer
- Mobile Application Designer
- System Architect
- Data Scientist
- Sensor Installation and Repair Technician

Addressing skills levels across occupational levels is something employers may need assistance with, to promote the transformation agenda envisioned by the Employment Equity Amendment Bill.

Findings from Chapter 4

The SETA has initiated several very successful projects: ILDP and RMDP; business simulation centres; and a range of programmes geared towards the SMME sector.

The challenge for the SETA is to improve monitoring, evaluation, and impact assessments of these projects to determine a return-on-investment.

The following new projects should be initiated going forward:

- Building organisational and individual capacities of trade union movement cadres at all levels, along a similar prototype as the ILDP and RMDP.

- Career guidance and counselling projects to inform teachers and TVET staff on career opportunities in the sector.
- A green skills project aligned to the sector focussing on awareness, supply chain efficiencies, critical and occupational shortages.
- A project on training and employment of the disabled for entry into the sector.
- Reintroduction of a robust plan of action on stakeholder engagement on a regular basis such as "how to" workshops that were a regular event in the past.
- Research partnerships to be established with 4 local and 2 International Universities.

<u>Findings from Chapter 5</u>
The tracer and impact studies need to be prioritised to ensure quality M&E data to be used for planning and implementation of skills development interventions.
The completion of OD process will contribute towards creating a platform for M&E data collection within the SETA, which will also result in improved performance.
The successful achievement of sector strategic objectives is dependent on early submission and approval of Annual Performance Plan (APP) projects.

6.3 Recommended Actions

There are a multitude of recommended actions needed in the sector. In this section, we identify 7 key skills priorities that the W&RSETA should consider. These align both to national priorities and sectoral needs, and link clearly to skills issues and skills gaps identified:

TABLE 26: RECOMMENDED ACTIONS

Key Skills Priority Area	Recommended Actions
Priority Skills Plan (PSP)	• Conduct industry consultations to identify and develop priority skills necessary for economic growth and job creation within the digital economy. • Compile list of skills required per sub-sector, delineated by employer size and location. • Conduct research study to determine the level of demand vs supply in occupational areas. • Work with DHET to formalise new occupations in terms of the OFO framework in order to facilitate the funding of these new occupations. • Conduct ROI assessments to determine where the most impact is being made through W&RSETA interventions. • Drive the 4IR transition within the sector and assist businesses, especially SMMEs to adapt.
SMME, Cooperatives, and Informal Traders Development	**New Training Delivery Models**: Implement blended learning models to account for COVID-19 challenges. Training can be focused on the following: • COVID-19 Safety training • Digital and 4IR Skills development • Financial Management Training • Entrepreneurial training **Encourage More Active Engagement from SMMEs** • Simplify and streamline the DG and MG processes for SMMEs. • Set aside a funding pool ringfenced for SMME skills interventions. • Recognise internal training conducted by SMMEs for MG & DG purposes. **SSP SME and Research Reports Recommendations**

Key Skills Priority Area	Recommended Actions
	• Set up small business incubators • Train retired retailers as Mentors and Coaches to assist small businesses. • Provide training on access to finance, and the development of business plans. • Conduct health and Safety training
Youth Unemployment	• Host annual W&R Sector career and open days, including support material, exhibitions, and classroom talks. • Provide students with helpful information about how to align their academics and extracurricular activities to careers within the sector. • Create awareness by partnering with businesses to educate learners on career trajectories and opportunities. • Develop an online career guidance system. • Partner with educational institutions to develop the school curriculum. • Partner with other SETAs and companies to research and open the market for 4IR/Digital related careers and functions across the economy. • Conduct quarterly roadshows at schools to promote entrepreneurial based careers in retail and wholesale. • Incorporate entrepreneurship into existing W&R modules. • Provide mentors and coaches to small and emerging businesses. • Expose small business owners to new product and retail opportunities. • Expand existing projects for youth into rural areas. • Provide work readiness programmes that include courses and training on relevant content such as how to make the best use of digitisation/ technology in the sector, entrepreneurship and soft skills
Hard-To-Fill Vacancies (HTFVS) and Skills Gaps	• Provide more work integrated learning opportunities. This will address the lack of relevant experience. • Provide targeted training for identified HTFVs. This will address the lack of relevant qualifications. • Provide targeted training for previously disadvantaged people. This will address the lack of HTFVs due to equity considerations.
Stakeholder Engagement	• Initiate regional stakeholder forums regarding SETA activities. • Develop the Research Desk Platform to ensure that stakeholder queries are addressed timeously. • Regularly conduct Stakeholder satisfaction surveys.
Sector Transformation, including Training and Employment of People with Disabilities (PWD)	• Provide courses for existing employees focussing on soft skills required for effective leadership. • Conduct research to determine why previously disadvantaged individuals are not adequately represented in top and senior management. • Implement mentorship programme to identified employees who show potential for leadership in senior management positions. • Improve access to training for SMMEs and individuals in more rural areas • Conduct monthly site visits to training providers to ensure adherence to development plans. • Conduct entrepreneurial courses for employed and unemployed people. • Host business skills workshops with employees and SME owners. • Negotiate distribution agreements with retailers on behalf of SMMEs. • Implement a customised bursary scheme for PWD to access the sector. • Establish internship programme specifically for PWD. • Encourage companies to employ graduates with disabilities.

Key Skills Priority Area	Recommended Actions
	• Increase (on-time) completion rates of people with disabilities, youth and women through effective and relevant training and necessary support such as coaching and mentoring, workplace exposure, paying stipends on time • Providing other types of support such as study leave and psychosocial support • Ensure accreditation of previously disadvantaged training providers to support township and rural communities • Conduct research to establish if the SETA is currently prepared to employ people living with varying disabilities • Provide incentives for employees that employ PWD and other marginalised groups • Provide training and courses in local languages for employees that work in rural areas
Economic Recovery and Reconstruction and Recovery Plan	• Capacitation Workshops and Trading Vouchers: ITAMED (Informal Traders and Micro Enterprises Development) (Completed) • ITAMED (Informal Traders and Micro Enterprises Development) • Entrepreneurship Development Programme • SME Grant (Small and Micro Enterprise Grant) • Unemployed Graduates (Degree and Diploma) are placed in the sector to gain workplace experience • Unemployed Interns are placed in the sector to gain workplace experience in order to obtain their diplomas • University SA Bursary funding awarded to cover student debt for 'missing middle' youth to be able to continue with their studies • Expand the RMDP curriculum to cover content on transformation and upcoming/ future skills gaps and occupations • Include employees that fall within marginalised and minority groups in the ILDP and RMDP programmes.

6.4 Conclusion

This chapter constitutes a summation of the findings of the previous chapters. It concludes with the identification of six key skills priorities that should inform skills planning in the W&RSETA, including:

- Priority Skills Plan (PSP)
- SMME, Cooperatives and Informal Traders Development
- Youth Unemployment
- Hard-To-Fill Vacancies (HTFVS) and Skills Gaps
- Stakeholder Engagement
- Sector Transformation, including Training and Employment of People with Disabilities (PWD)
- Economic Recovery and Reconstruction and Recovery Plan

We have confined interventions to a limited number of major skills priorities that can make a difference to skills formation in the sector. The surveys and interview data analysis provided additional action items for the sector and strengthened alignment to sector skills priorities.

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