Culture
Arts
Tourism
Hospitality
Sport
Sector Education and Training Authority

cathsseta

Culture, Arts, Tourism, Hospitality and Sport
Sector Education and Training Authority (CATHSSETA)

Sector Skills Plan

2014/15 – 2016/17

higher education
& training
Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA

AUTHORISATION OF THE SECTOR SKILLS PLAN: 2014/15 – 2016/17

We, the undersigned, hereby endorse and approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY (CATHSSETA) Board and Management, the contents of the Sector Skills Plan for the period 2014/15-2016/17.

Approved By:

Signature: ______________________________

CATHSSETA CEO

Date: 31/01/2014

Signature: ______________________________

CATHSSETA Chairperson

Date: 31/01/2014

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ABBREVIATIONS and ACRONYMS

APP	- Annual Performance Plan
ATR	- Annual Training Report
CATHSSETA	- Culture Arts Tourism Hospitality & Sport Sector Education & Training Authority
CMASA	- Club Management Association of South Africa
DAC	- Department of Arts & Culture
DBE	- Department of Basic Education
DBSA	- Development Bank of South Africa
DEA	- Department of Environmental Affairs
DHET	- Department of Higher Education & Training
DOL	- Department of Labour
the dti	- Department of Trade and Industry
EE	- Employment Equity
ETQA	- Education & Training Quality Assurance
EU	- European Union
EWSETA	- Energy and Water Sector Education and Training Authority
FASSET	- Financial & Accounting Services Sector Education & Training Authority
FET	- Further Education & Training
GDP	- Gross Domestic Product
HEI	- Higher Education Institution
HICA	- Hotel Investment Conference Africa
HRD	- Human Resource Development
IDC	- Industrial Development Corporation
ILO	- International Labour Organisation
IPAP	- Industrial Policy Action Plan
LGSETA	- Local Government Sector Education & Training Authority
LSM	- Living Standards Measure
MERSETA	- Manufacturing Engineering & Related Services Sector Education & Training Authority
MOU	- Memorandum of Understanding
MTEF	- Medium Term Economic Framework
MTSF	- Medium Term Strategic Framework
NAASA	- National Accommodation Association of South Africa
NAC	- National Arts Council
NAMB	- National Artisan Moderating Body
NDT	- National Department of Tourism
NEDLAC	- National Economic Development & Labour Council
NSDS	- National Skills Development Strategy
NSF	- National Skills Fund
NTSS	- National Tourism Sector Strategy
NQF	- National Qualifications Framework
OFO	- Organising Framework for Occupations
OHS	- Occupational Health & Safety
PIVOTAL	- Professional, Vocational, Occupational, Technical & Academic Learning
PSETA	- Public Sector Education & Training Authority

QCTO	- Quality Council for Trades & Occupations
RPL	- Recognition of Prior Learning
SANBI	- South African National Biodiversity Institute
SANParks	- South African National Parks
SASCOC	- South African Sports Confederation & Olympic Committee
SAQA	- South African Qualifications Authority
SETA	- Sector Education & Training Authority
SIC	- Standard Industrial Classification
SMME	- Small Medium Micro Enterprises
SRSA	- Department of Sports & Recreation South Africa
SP	- Strategic Plan
SSP	- Sector Skills Plan
THETA	- Tourism Hospitality & Sport Education & Training Authority
TSA	- Tourism Satellite Account
UIF	- Unemployment Insurance Fund
UNTWO	- United Nations World Tourism Organisation
UoT	- University of Technology
WRSETA	- Wholesale & Retail Sector Education & Training Authority
WSP	- Workplace Skills Plan
WTTC	- World Travel & Tourism Council
WWF	- World Wildlife Fund

INTRODUCTION

The CATHSSETA Board submits to the Department of Higher Education and Training (DHET) the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority's (CATHSSETA) Sector Skills Plan update for the period 1 April 2014 to 31 March 2017. The Sector Skills Plan (SSP) update has been prepared under the guidance of the Board in accordance with the guidelines included in the National Skills Development Strategy (NSDS) III for the period 2011 to 2016, as well as the DHET guide to the Process and Timeframes for Developing Sector Skills Plans and the NSDS III (issued on 23 June 2010).

The main purpose of the SSP and the annual SSP updates are to describe the sector served by CATHSSETA, to analyse the demand for and supply of skills to the sector and, on the basis of this analysis, to determine the skills needs and the skills development priorities for the sector. Strategies for addressing these skills needs and the skills development priorities of the sector, as well as meeting the NSDS III goals and targets, also form part of the SSP.

The SSP draws extensively on information collected through the Reported and Planned Training Interventions template of the Mandatory Grant application submissions as well various research papers and projects commissioned either by CATHSSETA or sector stakeholders in order to identify skills trends that influence the sector. The SSP is also the result of stakeholder consultative processes led by the CATHSSETA Chairman and Board who conducted a series of Roundtable Discussions between CATHSSETA and Captains of Industry within the sector. Key debates centred around the NSDS III, the National Skills Accord, Revised SETA Funding Regulations and the implementation of Professional, Vocational, Technical & Academic Learning (PIVOTAL) Programmes and the outcomes have been included in this update of the CATHSSETA Sector Skills Plan.

Consultations will be continuously held with stakeholders following the submission of this final SSP to solicit further input and obtain peer review for inclusion in future SSP submissions. These consultations will include focus group discussions with bargaining councils, employers, government departments, industry associations, professional bodies and trade unions in the sector.

SYNOPSIS

The arts, culture, environment, tourism, hospitality, heritage and sport sector has been identified as a priority sector by the Industrial Policy Action Plan, Mzansi's Golden Economy, New Growth Path, National Tourism Sector Strategy and the National Sport and Recreation Plan as one of the sectors in the South African economy with both excellent growth and employment creation opportunities. This potential was further highlighted and prioritised in the State of the Nation Address on the 14th of February 2013.

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority has, since the 1st of April 2011, been implementing the National Skills Development Strategy (NSDS) III in its sector. The Arts, Culture and Heritage sub-sector was combined with the scope of the Tourism, Hospitality and Sport Sector Education and Training Authority (THETA), the reason for this inclusion was to align all the logical sub-sectors that are related to the tourism sector, to allow for improved skills planning over the next 3 years so that the full value of the arts, culture, environment, tourism, hospitality, heritage and sport value-chain could be derived for both the benefit of the South African economy and its citizens.

The nature, scope and size of the CATHSSETA sector are extremely vast and varied and a labour market analysis of the skills requirements of the sector is complex due to the lack of accurate and valid data. This is further compounded by the fact that Workplace Skills Plan and Annual Training Report data for the sector is very limited as the majority of employers are Small and Micro Enterprises (SMEs) and are therefore exempt from this process. To counteract and overcome these challenges, CATHSSETA together with relevant National and Provincial Government Departments in the sector are planning to implement various research projects to ensure that there is sufficient data for the sector to conduct an accurate labour market and skills needs analysis. These projects include Research Grants to Universities to conduct research regarding the size, employment and economic contributions of the sub-sectors in CATHSSETA's scope. A review of sector specific Further Education and Training (FET) Curriculum and more specifically the National Certificate Vocational (NCV) in Hospitality and Tourism is currently in progress through a partnership with UMALUSI. In addition to these research projects and grants, CATHSSETA has also been actively engaging with stakeholders in the sector to ascertain the demand for skills in the sector, understand blockages and delays in skills development implementation and also to engage in robust debate regarding new legislation and regulation in the sector.

Whilst CATHSSETA conducts an analysis of the demand and supply of skills in the sector utilising the data from the Reported and Planned Training Interventions template of the Mandatory Grant application, the SSP is supplemented with chamber consultations and sector research. This analysis was conducted in the following manner (a) data was checked and validated and missing values were identified and addressed; (b) validated data was organised for exploratory analysis; (c) descriptive statistics were produced including mean, standard deviation and minimum and maximum values for identified variables; (d) categorical data was used to conduct qualitative analysis; (e) use of historical data derived from analysis of previous period's Reported and Planned Training Interventions data; (f) Analysed data presented as tables, graphs and summary statistics and (g) trend analysis based on historical data combined with chamber and consultation inputs for comparison across different categories and over various time periods. Demand estimates were calculated through time-series forecasts that use the time-ordered sequence of historical observations on a variable to develop a model for predicting future values of that variable. The simplest time-series forecast was a linear trend forecast where the generating process was assumed to be the linear model: $t_i = t_0 + a\% \times i$ whereby t_i = *future value of skills demand;*
t_0 = *skills demand at time 0;* $i = [1,2]$ and a= *average percentage increase (best fit).*

Growth in the sector appears to have remained constant and is reflected by the fact that the total direct employment in 2009 was 145,695 which in 2010 increased to 177,331. This 22% increase was directly attributed to the increase in employment in the sector as a result of the 2010 FIFA World Cup. However, the number of employees continued to grow in 2011 to 180,972, indicating real growth in the sector and not just a temporary spike in employment due to the staging of a once off mega sports event. This growth in employment has been continuous and 2012 and 2013 has followed the positive trend from both 2010 and 2011, increasing to 195,280 in 2013, representing an approximate 6% increase in employment over the five year period. This increase in the number of people employed in the sector echoes the priority placed on the sector by the New Growth Path and clearly indicates that despite the trying economic climate, this sector has the potential to create employment in the country.

Of the 195,280 employees in the sector 118,837 (61%) employees are youth under 35 years old, 69,649 (36%) are between the ages of 35 and 55 years old and a small proportion 6 794 (3%) are over 55 years old. The gender breakdown of employees in the sector reveals that 58% are female, while 42% are male. In terms of the racial split, African employees constitute 72% of the total number of employees, Coloured 11%, Indian 3% and White 14%. All these splits have remained consistent over the last 5 years. It must be noted that the predominance of female and black employees are by no means indicative of transformation or gender equality in the sector as when occupations where unpacked when the demand and supply of skills were interpreted, the majority of female and black employees held entry and junior level positions within the sector. Therefore the implementation the 7 Key Developmental and Transformational Imperatives are crucial to bring about change and transformation to the sector.

The continual growth in employment in the sector has led to there being a constant demand for skills in all six sub-sectors that constitute the CATHSSETA sector. This demand encompasses a replacement demand of 6,794 employees who will be retiring from the sector, 1,593 current vacancies in the sector as well as 1,508 potential vacancies that will be created in the sector over the next two years. The demand for skills in the sector has been calculated through the incorporation of both quantitative and qualitative demand data and has been captured accordingly in the scarce and critical skills list. CATHSSETA has developed 16 Programmes within its Strategic Plan and Annual Performance Plan that aim to address the skills needs and the skills development priorities of the sector, as well as meeting the NSDS III goals and targets.

1. SECTOR PROFILE

The Department of Higher Education and Training (DHET) utilises the Standard Industrial Classification (SIC) codes to determine the jurisdiction of a SETA. SIC codes describe the employerҳ core business and therefore describe who the stakeholders of each SETA are. The SETA Landscape Process for NSDS III announced by the Minister and confirmed in the Government Gazette[1] of November 2010 placed 62 SIC codes in CATHSSETAҳ scope. CATHSSETA has clustered or grouped the SIC codes in its scope into logical areas of overlap or similarity of business focus that collectively make up a sub-sector. These sub-sectors are Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Tourism and Travel Services and Sport, Recreation and Fitness.[a]

1.1 SCOPE

- The **Arts, Culture and Heritage** sub-sector consists of production of arts, crafts designer goods and souvenirs, casting for film, television and theatre, dramatic arts, entertainment, museum activities, monuments and the preservation of historical sites and buildings, management and operation of museum, cultural and heritage activities, music and theatre, as well as arts councils and their activities.
- The **Conservation** sub-sector includes hunting & trapping, activities of conservation bodies, game parks, reserves, wild life parks, zoological establishments and botanical gardens as well as wildlife conservation.
- The **Gaming and Lotteries** sub-sector consists of gambling, licensed casinos, the National Lottery, operation and management of horse racing events, clubs and academies, totalisators, bookmakers, limited payout machines (LPMs) and bingo operators.
- The **Hospitality** sub-sector comprises hotels, motels, boatels and inns that are either registered or not registered with the South African Tourism, guest houses and guest farms, bed and breakfasts, management and operation of game lodges, caravan parks & camping sites, restaurants and tearooms with or without liquor licenses, fast food establishments, take away restaurants, caterers and catering services, timesharing and bioscope cafes.
- The **Travel and Tourism** sub-sector consists of inbound and outbound tour operators, safaris and sightseeing bus tours and trip operators, inbound international flights, travel agencies, renting of land transport equipment, event and conference management, the operation and management of convention centres, tourist information centres, car hire and tourism authorities as well tourist guides including adventure, mountain, river and tourist.
- The **Sport, Recreation and Fitness** sub-sector includes sporting activities, sport federations, the operation and management of sporting facilities, clubs and sports academies, the promotion and management of sporting events and activities both motorised and non motorised, amusement parks, recreational and cultural activities, operation & management of recreation parks, beaches, fairs, shows and facilities, and the operation and management of health & wellbeing centres including hydros, spas and fitness centres

[a] Full list of SIC per sub-sector list in Appendix A

1.2 Employer profile

The number and size of enterprises registered with CATHSSETA have been sourced utilising the CATHSSETA SETA Management System (SMS) and the figures are presented below in table 1.

Table 1: Number and Size of Enterprises Registered with CATHSSETA

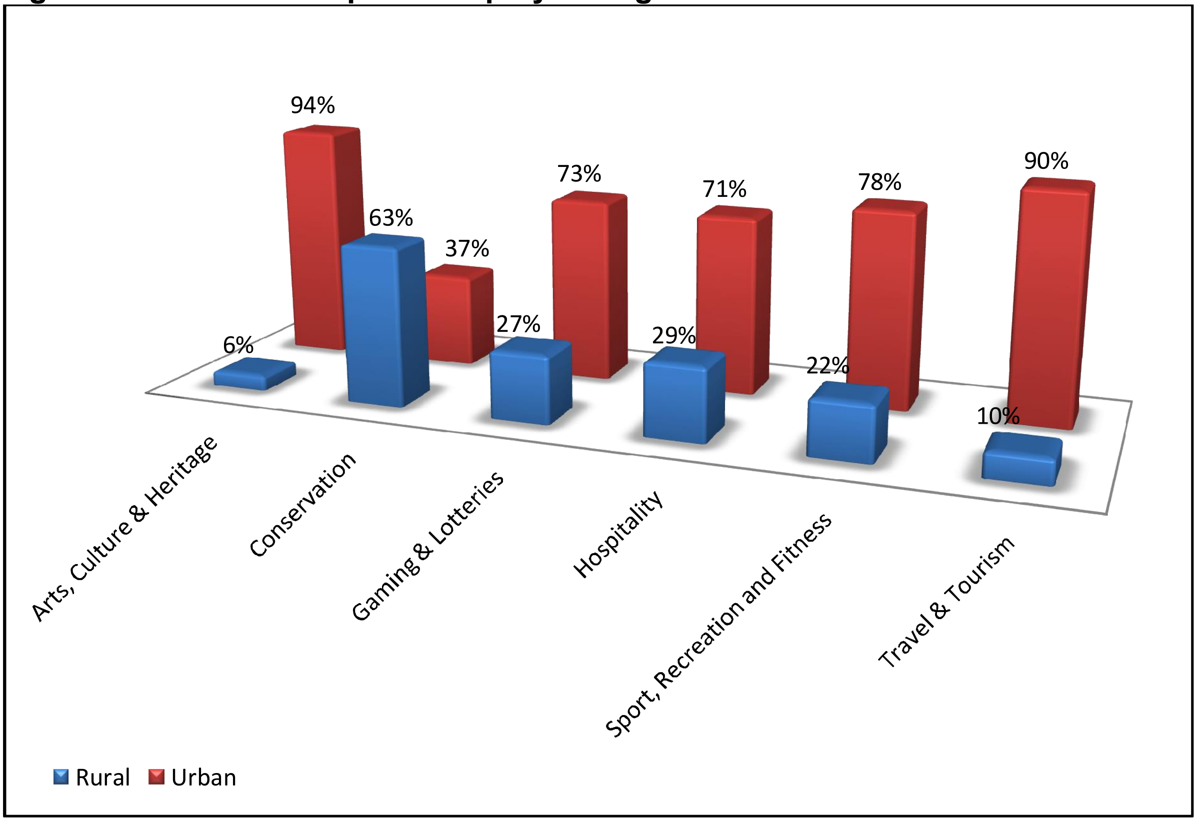
Sub-sector	Size of Enterprise			Number of enterprises registered with CATHSSETA	% in the sector
	0-49	50-149	150+		
Arts, Culture & Heritage	807	19	12	838	3.27%
Conservation	1 096	33	19	1 148	4.48%
Gaming & Lotteries	455	20	49	524	2.04%
Hospitality	17 436	510	212	18 158	70.86%
Sport, Recreation & Fitness	1 969	57	17	2 043	7.97%
Travel & Tourism	2 816	52	47	2 915	11.38%
Total	**24 579**	**691**	**356**	**25 626**	**100%**

Source: CATHSSETA SMS 2013

As seen in Table 1 above, the Arts, Culture and Heritage sub-sector makes up the smallest number of enterprises that are registered with CATHSSETA. Approximately 96% of the enterprises registered fall within the SMME scope, which is typical of the nature of the Hospitality and Arts, Culture and Heritage sub-sectors. The Hospitality sub-sector makes up the largest portion of the sub-sectors in CATHSSETA's scope, encompassing approximately 71% of the sector. The 356 large enterprises in the sector employ a large portion of the workforce, as is the case in the hospitality and gaming & lotteries sub-sectors. The 212 large enterprises in hospitality employ 40% of the workforce in hospitality and the 49 large enterprises in gaming & lotteries employ 93% of the workforce.

Figure 1 that follows provides the urban-rural split of employers registered with CATHSSETA.

Figure 1: Urban-Rural split of employers registered with CATHSSETA



Source: CATHSSETA SMS 2013

1.3 Drivers of Change

National Accords

- The National Skills Accord of 2011, aim is to form a partnership between DHET, Communities, Organised Business and Labour to identify common areas in training & skills development that can be committed to and implemented in order to achieve the broad goals of the New Grow Path. The Accord has 8 commitments and commitments 4, 6 and 7 have specific focus on skills planning and SETAs.
- Commitment 4 ï partners commit to ensure that part of the Mandatory grant (10%) is used for funding workplace training for University of Technology students as well as FET College graduates.
- Commitment 6 ï partners commit to improving the seniority of their delegations to SETA Board meetings and that organised labour must approve Sector Skills Plans and Workplace Skills Plans on the shop floor. Therefore, Workplace Training Committees must ensure that their companies plan properly and address the skills needs of workers. SETAs will not release the Mandatory Grants for Planned and reported training interventions unless it is signed off by organised labour in the particular workplace and protocols will be developed to ensure this process improves the quality of the skills plans.
- Commitment 7 ï partners commit to ensuring that the funding of training through the skills development levy is directed towards the training that meets the skills needs of

the economy, including the training of professionals and training programmes that leads to qualifications.

Government Strategy

- **The National Skills Development Strategy (NSDS) III** for 2011 to 2016 follows the integration of higher and further education and skills development into a single Department of Higher Education and Training. The strategy promotes partnerships between employers, public education institutions (FET colleges, universities, universities of technology), private training providers and SETAs. Priority is given to strengthening the relationship between public colleges and universities and the SETAs, as well as with employers.[2] NSDS III ensures increased access to training and skills development opportunities and achieve the fundamental transformation of inequities linked to class, race, gender, age and disability in our society. It attempts to address the challenges of skills shortages and mismatches in the country and improve productivity in the economy. The strategy consists of 8 goals, 16 outcomes and 38 outputs to be achieved mainly by SETAs in collaboration with the DHET, FET Colleges, Universities and the NSF.[3]

- **The Sector Education and Training Authorities (SETAs) Grant Regulations Regarding Monies Received by a SETA and Related Matters** were published on 3 December 2012 and amended on the 15th of July 2013 by DHET to in order to (a) regulate the proportion of funds available for skills development that is spent on administration; (b) provide for SETAs to contribute to the cost of the work of the Quality Council for Trades and Occupations (QCTO); (c) discourage the accumulation of surpluses and the carry-over of unspent funds at the end of each financial year; (d) improve the quantity and quality of labour market information received by SETAs in the form of Planned Training Interventions and the Training report and PIVOTAL Reports (PR), to inform planning; (e) promote National Qualification Framework (NQF) registered and quality assured PIVOTAL programmes that address priority scarce and critical skills needs identified in SSPs; and (f) create a framework within which expanded use is made of public education and training providers for the provision of skills development programmes.[4]
    - In short the revised SETA Grant Regulations will give the National Skills Accord ñteethò as the commitments of the accord now become enforceable through these regulations. The revisions to the SETA Grant regulations are summarised as follows:
        - **Mandatory Grants**
    - Submission of Mandatory Grant application deadline will be the 30th of April in 2014 and subsequent years.[5]
    - A total of 20 percent Mandatory Grant will be payable to approved Mandatory Grant application submissions on a quarterly bases effective 1st of April 2013.[6]
    - Mandatory Grant application to be signed-off by organized labour where applicable, particularly with those employers who have a recognition agreement with a trade union or unions in place; otherwise SETAs will not be able to approve payment.[7]
    - Before making payments, the SETA must approve the Mandatory Grant application to ensure the levy paying employer meets quality standards set by the SETA.[8]

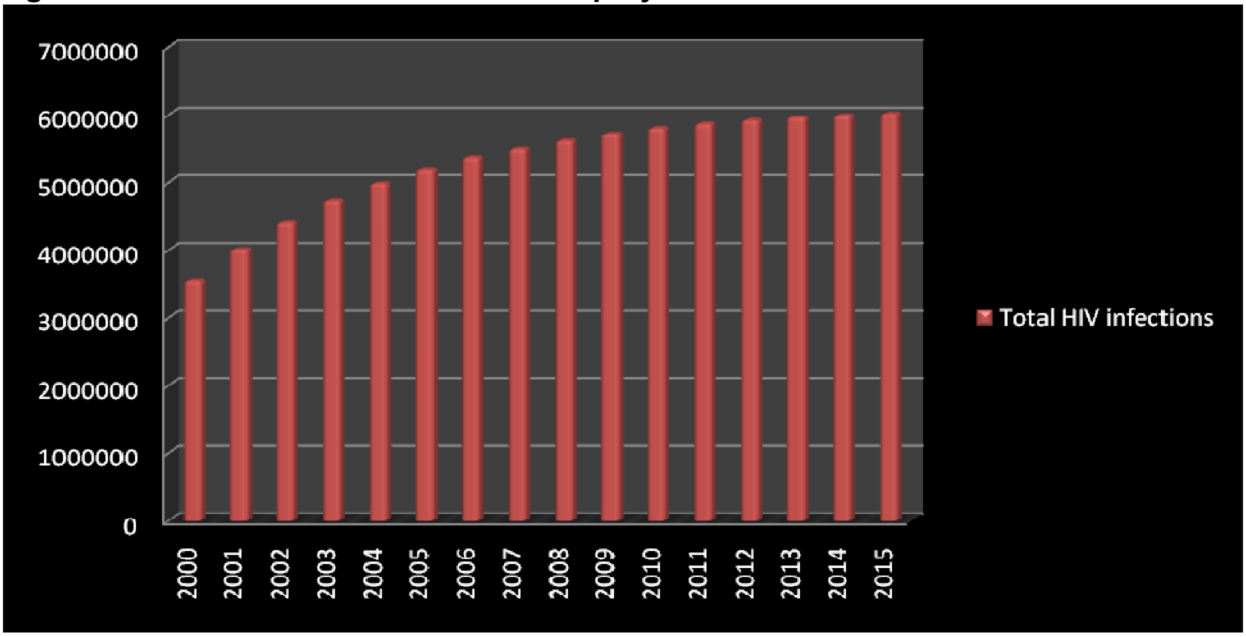
- **Discretionary Grants**
  - Only 10 percent of the levies paid will now be available for Discretionary Grants, which will be used by the SETA to addressed scarce and critical skills stipulated in the SETA Annual Performance Plan. Unclaimed mandatory funds will be transferred to discretionary fund. Unused funds will have to be paid to the NSF by 1st October of each year.[9]
  - Section 6 (1) to (15) stipulates the conditions and requirements for discretionary grants.[10]
- **PIVOTAL Grants**
  - A total of 40 percent of the levies paid will be allocated to Professional, Vocational, Technical and Academic Learning Programmes (PIVOTAL).[11]
  - A PIVOTAL plan and report must be submitted to the SETA by the applicant.[12]
- **Administration Fee**
  - A total of 10.5 percent is allocated to the administration of the SETA and 0.5 percent of that is to be paid to the QCTO.[13]

The Strategic Integrated Projects (SIPs) emanate from the Presidential Infrastructure Coordinating Commission (PICC) and represents a combination of 18 projects which are intended to address the infrastructure needs of specific sectors or geographical areas. The scarce skills required for the delivery of the SIPs have been presented by the DHET and CATHSSETA has identified the following four scarce skills which will be addressed by supporting a total of 60 persons through Work Integrated Learning programmes:

- *Environmental Manager;*
- *Programme or Project Administrators Assistant;*
- *Truck Driver and*
- *Handypersons.*

1.4 HIV and AIDS

Figure 2: Total HIV Infections from 2000 projected to 2015



Source: ASSA2003 model

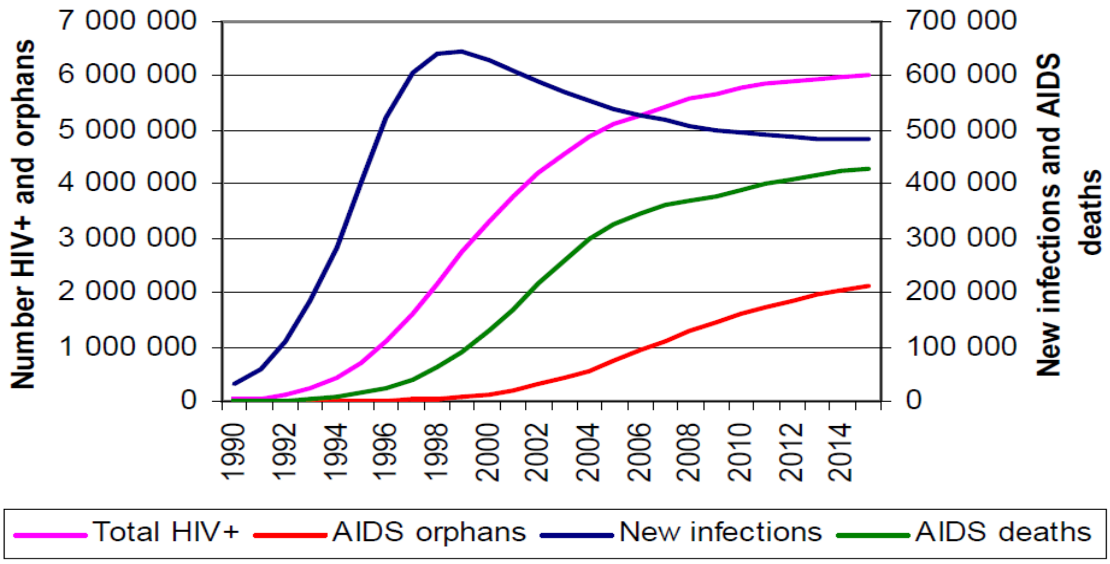
In 2009, the Tourism sector’s global economy created (directly and indirectly) more than 235 million jobs, equivalent to about 8% of the global workforce. Women account for 60 to 70% of the sector’s labour force with half of the sectors’ workers aged 25 or below.[14] The impact of the Tourism sector on the South African economy is evident in its direct contribution of R 67 billion to the country’s GDP in 2010, directly resulting in the creation of 599 412 jobs.[15] As such, government has identified the Tourism sector as a priority sector that plays a vital role in the growth and development of the economy. The threat of the HIV and AIDS pandemic on the future growth and development of the country, particularly on the youth, requires that skills development initiatives of any form incorporate education and information pertaining to this, as highlighted in the National Skills Development Strategy III. It is essential to ensure that youth trained become active and effective members of society.

Nationally, it is projected that the total number of AIDS deaths in South Africa will grow from 399 182 in 2011 to 427 916 in 2015, showing a 7.2% increase over 4 years in AIDS related deaths.[16] As seen in the above figure, it is anticipated that the total HIV infections will reach over 6 million by 2015. It is significant to note, however, that the prevalence of HIV infections have been projected to increase by 0.41% in 2015 compared to the percentage increase in 2011 of 0.88%.

In 2002/2003 a study investigating the impact of HIV/AIDS on the hospitality and tourism sectors was commissioned and conducted by Grant Thornton and Prodigy Business Services. The study found that 17% of the sector’s workforce or 1 in every 8 employees in the sector were HIV positive. The study indicated that the sector was in critical need of practical tools and guidance on developing and putting into place a HIV/AIDS strategy and other interventions that would assist stakeholders in controlling and reducing the impact of HIV/AIDS on their companies.[17] As a result the HIV/AIDS Handbook for South African Tourism and Hospitality Companies was developed and disseminated within the sector in 2004. The HIV/AIDS Handbook provided stakeholders with the tools to: (a) Develop, implement and manage a HIV/AIDS strategy (b) Prevent the spread of HIV/AIDS (c) Treat, care and support employees affected by HIV/AIDS (d) Communicate HIV/AIDS issues to employees and guests (e) Access HIV/AIDS community and government outreach programmes (f) Monitor and evaluate the HIV/AIDS programmes and strategies that the companies had put into place.[18] THETA incentivised the use of the HIV/AIDS Handbook and toolkit by prioritising HIV/AIDS in their Discretionary Grants Applications which allowed companies to claim a portion of their skills development levies back if they designed and implemented an HIV/AIDS strategy, provided assistance to and treated HIV positive employees, prevented the spread of HIV/AIDS amongst their employees and provided HIV/AIDS training to their employees. This discretionary grant window ran from the inception of HIV/AIDS Handbook and Toolkit in 2004 until the last Discretionary Grant Application window in April/May 2009.[19]

The ASSA2003 model from the Actuarial Society of South Africa (ASSA) indicates that the pandemic nationally has entered the mature phase. The below figure illustrates the waves of the epidemic according to the default scenario. The incidence and the number of new infections peaked in 2008 with a steady decline from 2009 in the number of new people infected. Key to note is the steady increase in the number of people dying from AIDS each year, which in turn results in the increase in the number of AIDS orphans. The 2011 year incurred a total of 490 215 new infections and a total incidence rate of 1.1% for the total population in SA.

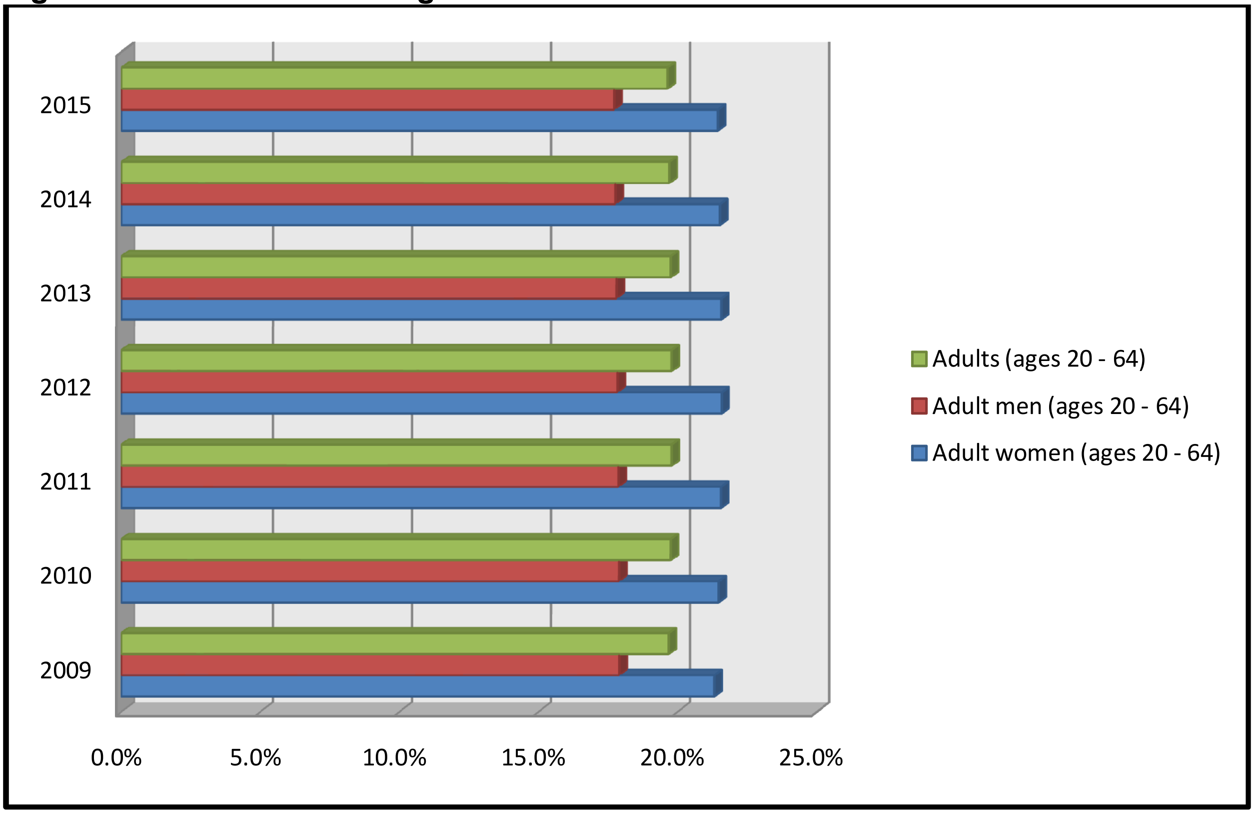
Figure 3: Waves of the Epidemic from 1990 projected to 2014



Source: ASSA2003 model

The impact of AIDS on the South African workforce in 2005 was 1.8% with an increase to 2.9% in 2010. This pandemic usually affects the most productive of the work force and the magnitude of its domino effect is often difficult to measure. The International Labour Organisation (ILO) confirms that HIV/AIDS is reducing labour productivity in the tourism sector and increasing labour costs in tourism globally. The ILO further suggests that the tourism sector offers the opportunity to target a high risk group. The tourism sector may be described as a labour intensive sector, an inter-connected web of multiple sectors comprising of a young and mobile workforce. The sector has a reputation of poor working conditions due to multiple factors. It is a fragmented industry with the majority of employers small and medium sized enterprises with work characterised by low wages, low levels of skills requirement and shift and night work seasonality. The graph below indicates that the highest prevalence of the pandemic has been seen in adult women between the ages of 20 and 64 and is projected to remain at approximately 21% until 2015. The total adult population between 20 and 64 years during the 2011 year reported a 19.8% incidence rate.

Figure 4: Prevalence rates ages 20-64



Source: ASSA2003 model

The effect of the pandemic on the economically active population within the work context is evident in increased costs in terms of medical care, insurance, recruitment, administration, and training. Productivity is hindered due to illness, absenteeism, family responsibilities, and employee turnover.
In line with its organisational objectives, CATHSSETA has identified and is fully conscious of the impact of the HIV/AIDS pandemic has on the CATHSSETA sector. By ensuring that a component of all training programmes imparted contains an element of HIV/AIDS education, CATHSSETA aims to address the challenge posed by this pandemic and to further negate both the social and economic impact within the working environment across the sector. The ultimate objective is to address the impact of HIV and AIDS on skills development and productivity within the country.

1.5 Arts, Culture and Heritage sub-sector

The fragmented manner in which the Creative Industries have been divided amongst the SETAs is problematic, in that it hampers the effective delivery of skills development initiatives as the full value chain of the Creative Industries cannot be leveraged upon. The Arts, Culture and Heritage SIC codes that have been placed in CATHSSETA's scope result in CATHSSETA developing the actors, artists and crafters who are effectively either employed or sell their products with employers or retailers who now fall under other economic sectors and their respective SETAs. Furthermore, the fragmented distribution of the Creative Industries SIC codes has resulted in the already limited skills development levy pool being split and paid to various SETAs, which further inhibits the realisation of the full potential of the Creative Industries value chain. CATHSSETA is researching and updating the South African Creative Industry Value Chain and based on the outcomes of this, will formulate a proposal for the realignment of the SIC codes of the Creative Industries to allow the full potential of this sector to be realised. This proposal will be developed in conjunction with the Department of Arts and Culture (DAC), Department of Trade and Industry (dti), SETAs with Creative Industry SIC codes in their scope and stakeholders from the sector. The final proposal will be submitted to DHET for consideration and implementation.

1.5.1 Economic Contribution

The South African Film and Television industry has been doing fairly well considering the effects of the global financial crises. The film industry managed to grow by 3,1% during the 2008/09 crisis years, but suffered severely 2010/11, with overall growth declining to only 1%. The total spending on film in 2011, comprising both out-of-home and in-home productions, was R2.889 billion. Meanwhile, the television industry performed strongly over the same 2011-12 period, growing by 13.4%, from R20.326 billion to R23.051 billion. The total value of the South African Film and Television industry for 2011 was R25.940 billion.[20] The craft sector contributes R3.32 billion to GDP (0.14%) and provides income and employment to approximately 273,495 people – a small number of whom are employed permanently and a much larger number who are employed as seasonal workers. The sector is mainly characterised by the operations of about 31,800 micro and small enterprises distributed across the entire craft value chain.[21]

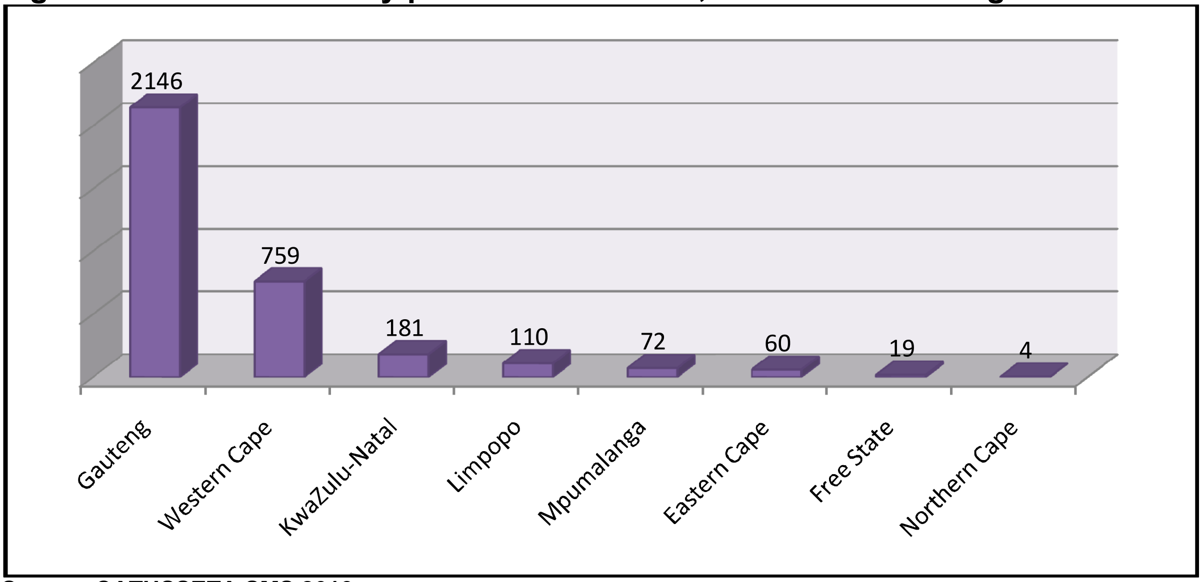
1.5.2 Employee Profile

The Arts, Culture and Heritage sub-sector enterprises registered with the SETA employs a total of 3,351 people, which makes up only 2% of the CATHSSETA sector. This number therefore, does not reflect the sub-sector in its entirety. Due to the variable characteristics of this sub-sector, it is often difficult to measure the exact number of employees. The number of employees reported increased in 2012, indicating an impressive 67% increase. This trend however, was not repeated in the 2013 year, where a reduction in the total number of employees from 3872 in 2012 to 3,351 in 2013, showed a 13% decrease. However, this is not entirely due to a decrease of employees in the sector but is indicative of the nature of employment in this sector which is often on a part time or contractual basis which causes fluctuations in the number of employees reported. Furthermore many organisations were erroneously transferred to MICTSETA, FPMSETA and CATHSSETA during the transfer of SIC codes when MAPPPSETA was dissolved and these organisations have now moved between the three SETAs through the change in SETA jurisdiction process administered by DHET, which further accounts for the decrease in the number of employees reported in this sub-sector. As previously mentioned the fragmented distribution of the Creative

Industries is problematic and will be addressed by CATHSSETA's review of the Creative Industries value chain and realignment of the SIC codes.

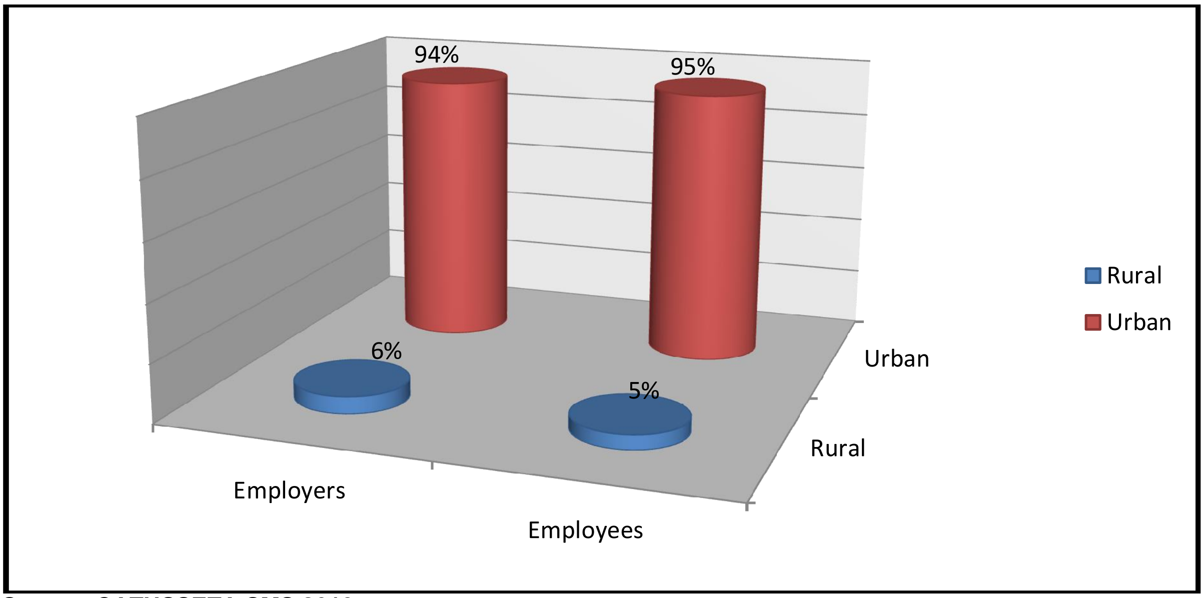
The age profile of the 3,351 reported employees indicates that the majority (54%) of employees fall within the under 35 years bracket, with 42% in the 35-55 years range and 4% within the over 55 range. The racial profile of the sub-sector based on the employees reported by the CATHSSETA registered enterprises shows that majority of employees in the sub-sector are Black encompassing 60% , with the lowest proportion of employees being Indian (4%). Disabled persons in the sub-sector only make up my 0.2%.

Figure 5: Labour Profile by province in the Arts, Culture and Heritage sub-sector



Source: CATHSSETA SMS 2013

Figure 6: Labour profile by Urban-Rural split in the Arts, Culture and Heritage sub-sector



Source: CATHSSETA SMS 2013

Figures 5 and 6 indicates the labour profile of the Arts, Culture and Heritage sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. Approximately 64% of employees are employed in the Gauteng province alone, with the lowest amount of employees seen in the Northern Cape. This sub-sector is dominated with employment in urban areas, with only 5% of the labour force being employed in rural areas.

1.5.3 Drivers of change

- **The Industrial Policy Action Plan (IPAP) 2013/14 – 2015/16** is the fifth version of IPAP II and builds on the National Industrial Policy Framework (NIPF) and the IPAP I. It represents a significant step forward in scaling up efforts to promote long term industrialisation and industrial diversification. Its purpose is to expand production in value-added sectors with high employment and growth multipliers that compete in export markets as well as compete in the domestic market against imports. In so doing, the action plan also places emphasis on more labour absorbing production and services sectors, the increased participation of historically disadvantaged people and regions in our economy and will facilitate, in the medium term, South Africa's contribution to industrial development in the African region.
- It is estimated that the IPAP will result in the creation of 2 477 000 direct and indirect decent jobs over the next ten years. It will diversify and grow exports, improve the trade balance, build long term industrial capability, grow our domestic technology and catalyse skills development.
- The IPAP advances the work of the Economic Sectors and Employment Cluster in a number of respects. In the CATHSSETA sector it calls for strengthening the linkages between Tourism and Creative industries so that the full potential of the Creative Industries value chain may be realised. The IPAP intends to create stronger integration between sector strategies, skills development plans and commercialisation of publicly funded innovation.
- In respect of Creative industries the IPAP identifies that despite the current economic climate, the global market for craft is steadily increasing. To enable the local craft industry to benefit from this increased demand, the DTI's Customised Sector Programme for Craft seeks to address the key challenges facing the sector by providing both immediate and long term support interventions. To increase both market confidence and provide access opportunities for crafters, the DTI has developed the South African Handmade Collection Brand (SAHC). The DTI is also increasing opportunities t to develop programmes that facilitate improved linkages between informal and formal craft production, helping to mainstream female craft producers from the second economy into the first economy.
- The IPAP further identifies the South African music industry as being unique and innovative with numerous SMMEs, who posses abundant potential both to not increase the aggregate growth of the Industry in our country, but also popularize our local genres internationally. Music can be easily distributed and does not have the distribution costs attributed to traditionally manufactured goods. The majority of the music industry's revenue is derived from intellectual property rights. The music industry utilizes the latest digital information and communication technologies which have revolutionised the industry's production processes and consumption modes, which have replaced mass production technologies with niche production and mass

customization through, interactive media and social networking sites such as Facebook, iStore and Twitter. The DTI is developing a music strategy to be implemented by the industry and Government to ensure a collaborative effort towards growing its employment potential, technical capabilities and international reach.

- It is estimated that the IPAP will result in the creation of 2 477 000 direct and indirect decent jobs over the next ten years. It will diversify and grow exports, improve the trade balance, build long term industrial capability, grow our domestic technology and catalyse skills development.
- **DAC Strategy** for 2012/13 and the revised draft White Paper for the arts, culture & heritage in response to the outcome based approach and alignment to the twelve national outcomes has come up with the Cultural & Creative Industries sector strategies that seeks to address and develop skills within the arts, culture & heritage sectors which will be aligned to the vision 2016 of the Mzansi Golden Economy. These include amongst others: (a) to support growth of labour intensive sectors. Specific sectors within the creative & cultural industries sector have been identified as labour absorbing sectors and have been earmarked for specific support under the Industrial Policy Action Plan (IPAPII); (b) the Department contributes to skills development through many arts and culture programmes, including the provision of bursaries as one of its strategic outputs that speaks to establishing a skilled and capable workforce to support inclusive growth; (c) the development of the requisite human capital to develop and manage the resources in the arts, culture and heritage sector is critical to release the potential of the sector with specific focus on rural areas in preserving and protecting the arts, culture & heritage.
- Skills development initiatives to increase the number of heritage professionals need to be rolled out and a range of economic drivers have been identified by the Department and these include the arts and culture sub-sectors. There is also a need to up-skill and increase the professional and technical human resource capacity and abilities in direct Cultural and Creative Industries fields, develop the Cultural & Creative Industries capacity and skills to provide indispensable support functions, and propagate arts, culture & heritage as a viable, sustainable long term career and business choice therefore CATHSSETA's role and partnership in this regard is crucial.
- CATHSSETA's approach to implementing the DAC Strategy is to (a) To collaborate with the Department in conducting research in order to identify pertinent issues and challenges in the sector such as defining the sector and implement projects that will address skills gaps while integrating these skills into higher education and training; (b) to partner with the Department on issues of common interest such as training and development i.e. identification and implementation of relevant training interventions for the sector, including those identified in the department's strategy and the IPAP II; (c) Identify and collaborate on strategic national projects in the sector and (d) to work with the department to implement its own departmental training and capacity building.

1.6 Conservation sub-sector

1.6.1 Economic Contribution

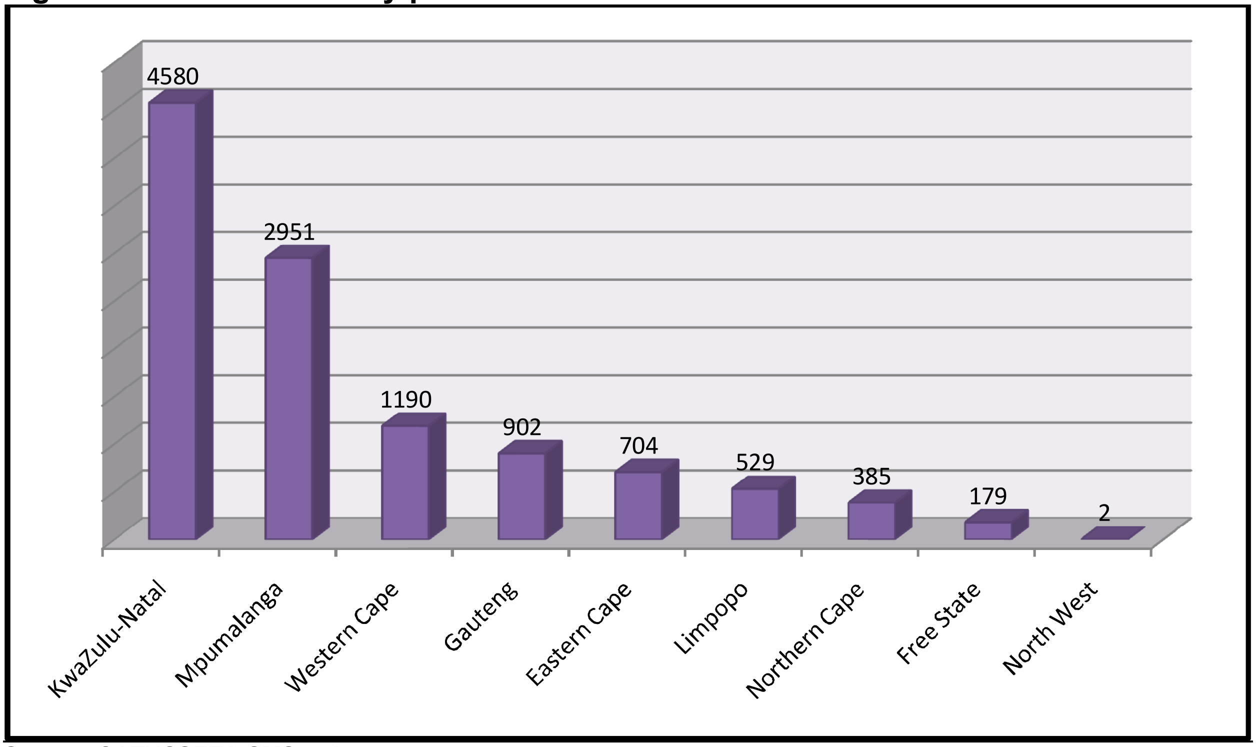
Determining the economic contribution of the conservation sector is problematic as there is a lack of official statistics and where these do exist there is no differentiation between the environmental sector and its conservation component. ñHowever, based on a 2006 report to NEDLAC ï the last available data ï the environmental goods and services sector (more commonly referred to as ñgreen industriesò in government policy) was valued at between ZAR 14.5 billion and ZAR 23.2 billion in 2004, i.e. from 1.0-1.6% of GDP.ó[22] This lack of accurate official statistics regarding the economic contribution of the environmental and conservation sectors, is exacerbated by the fact from a green economy perspective, South Africa does not report green jobs individually in any of its official surveys or statistics. Therefore, accurate figures regarding the number of people employed and size and growth of this sector are unavailable.[23] CATHSSETA has identified this lack of information regarding the economic contribution of the conservation sector as a research priority that it will address through its research partnerships with the Environmental Learning and Research Centre at Rhodes University and GreenMatter.

1.6.2 Employee Profile

The Conservation sub-sector increased from 11 181 employees in 2012 to 11 422 employees in 2013 which represents a 2% increase in employees. This increase can be directly attributed to the increase in ñgreenò jobs in the sector, particularly in natural resource management and is reflective of the potential to create jobs in this sub-sector. This sub-sector employs a relatively low number of employees as a certain amount of staff in the sector are volunteers. This is further compounded by the fact that numerous employees in the sector are employed by provincial and local governments and are therefore reported as government employees to Public Sector Education and Training Authority (PSETA) and Local Government Sector Education and Training Authority (LGSETA), this practice significantly distorts the number of employees reported in this sub-sector. CATHSSETA is in the process of concluding MoUs with both PSETA and LGSETA to obtain the data of the number of conservation employees employed by provincial and local governments.

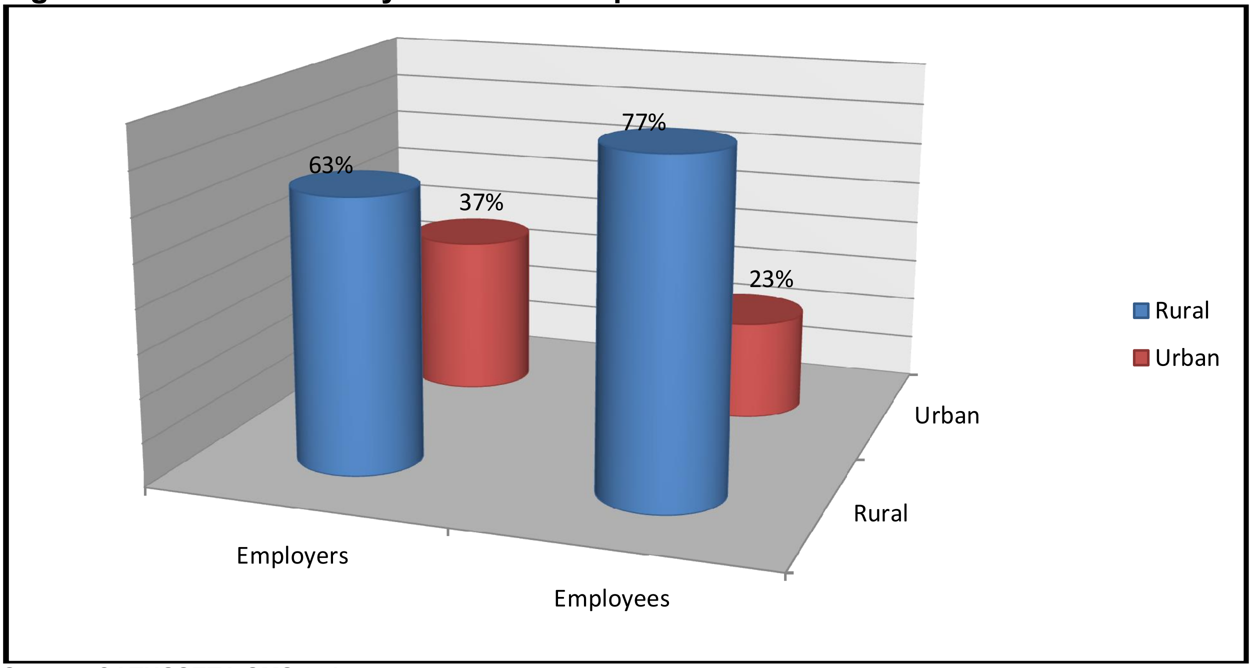
The sub-sector is dominated with 57% of its employees falling within the age category of 35-55 years and the smallest percent of 6% found in the over 55 years age category. The racial analysis of this sub-sector yields that there are 8761 Black employees, 1510 White employees, 1061 Coloured employees and 90 Indian employees. The sub-sector employs only 12 disabled employees.

Figure 7: Labour Profile by province in the Conservation sub-sector



Source: CATHSSETA SMS 2013

Figure 8: Labour Profile by Urban-Rural split in the Conservation sub-sector



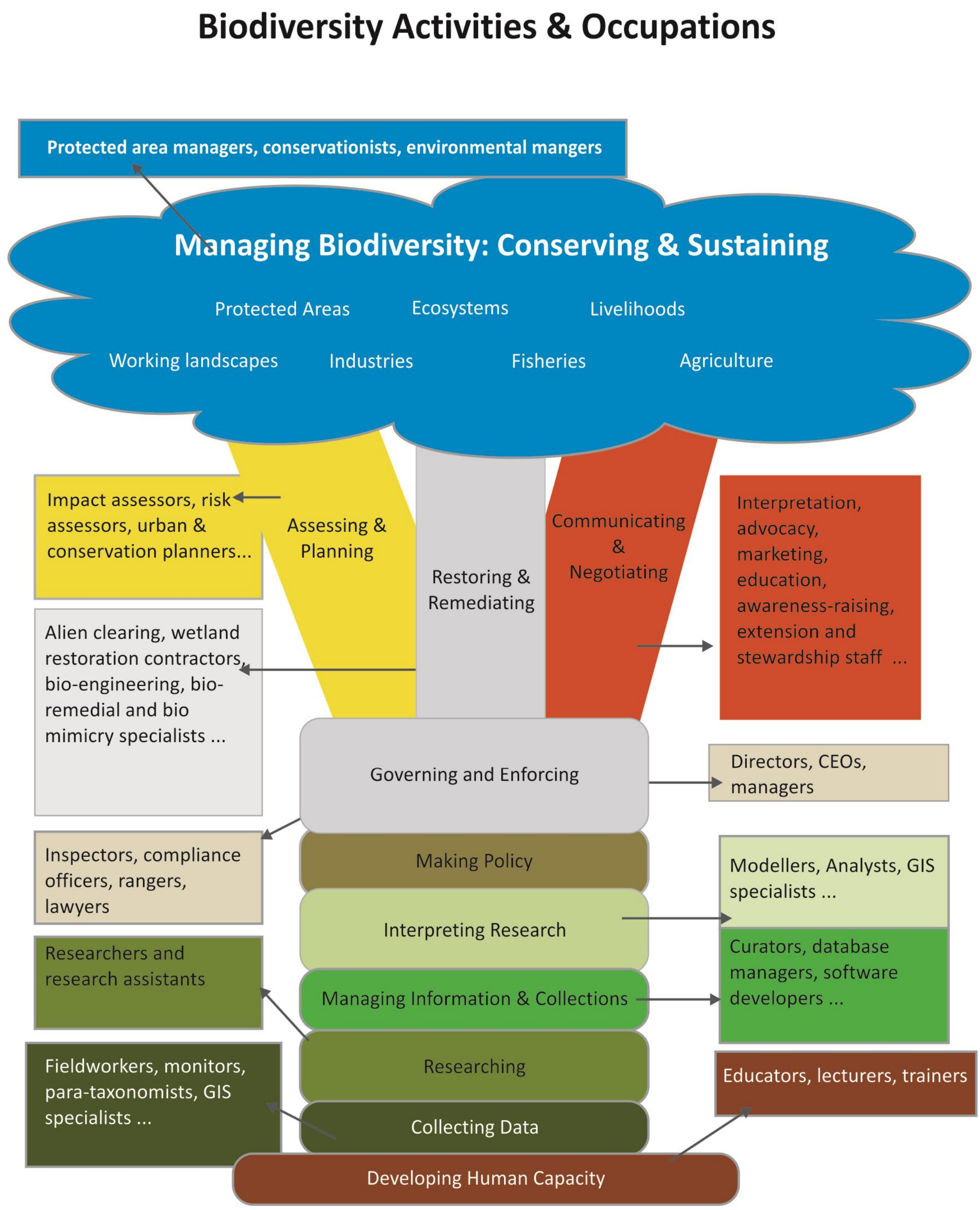
Source: CATHSSETA SMS 2013

Figures 7 and 8 indicate the labour profile of the Conservation sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. Approximately 40% of employees are employed in the KwaZulu Natal province followed by 26% in Mpumalanga and 10% in the Western Cape. This sub-sector is dominated with employment in rural areas, where 77% of the labour profile is engaged in employment in an area under rural classification.

1.6.3 Drivers of Change

- **Outcome 10 of Government's National Outcomes** focuses on the environment and two of the critical problems in the delivery agreement: (a) Proper and better management of our environment and (b) Protection of our biodiversity are linked to CATHSSETA's conservation chamber activities.
    - The outputs of these two critical problems (a) Sustainable environment and (b) Protected biodiversity places emphasis on management of environmental impacts from mining and related activities, expansion of the conservation estate, reduced climate change impacts on biodiversity, protected ecosystems & species and valuing of ecosystem services.
    - In order to implement this outcome, Government has identified coordinating department, core departments and public entities such as DEA, Provincial Environment Departments, and Conservation Agencies.
    - These outputs call for development of human capacity as indicated in Figure 9 below in the national and provincial governments as well as conservation agencies

Figure 9: Biodiversity Activities and Occupations



- **DEA Strategy**[24] places significant emphasis on CATHSSETA, as it is tasked with skills development for conservation bodies and agencies such as the SANBI, SANParks, semi-independent provincial agencies and local government including the Department of Environmental Affairs and provincial departments. These agencies are mandated by the state to conserve biodiversity (wildlife, indigenous plants and ecosystems including those feeding water resources and commercial marine systems) in protected areas and on private land, in terrestrial, freshwater, coastal and marine ecosystems.

- Just less than 50% of biodiversity staff is employed by the state; the remainder is employed in private agencies and in NPOs. All of them operate in a new conservation paradigm in which the protection of biodiversity and development planning must be integrated, yet few have been trained in this new paradigm.
- Other aspects of new approaches include adoption of an ecosystem services approach, an international trend which the South African government is also supporting. These new paradigms are however, slow to make their way into the training systems and there is an urgent need for curriculum innovation and re-skilling of conservation educators and trainers. Conservation agencies are under-staffed; have high levels of vacancies particularly among managers and technicians; with skills levels dropping in recent years; and many agencies, particularly at provincial level, struggling to meet their mandate.
- There are significant new development opportunities associated with green growth and sustainability. Issues such as climate change, energy shortages, natural resource degradation and high energy prices are driving the emergence of a sustainable development paradigm, and in an African context, sustainable development must be tied to poverty alleviation, job creation and new development opportunities, while also ensuring that resources are not over-exploited in ways that undermine future development options and choices.
- South Africa has a good track record of using its protected areas and natural resources for tourism. This important component of the national economy is particularly valuable for creating employment and enterprise opportunities in rural areas, with positive potential for extension, but sufficient management capacity for protected areas is low and requires stepped up skills development. The green economy has made it vital that skills are developed for protected areas and biodiversity management.

The National Protected Area Expansion Strategy for SA 2008

This is one of the key drivers of protected area management and will have significant implications for associated skills over the next five years. Key approaches to implementing this strategy include:

- Expansion of existing protected areas (PAs) and integration of its management into current skills structure.
- New PAs are considered a highly optimistic option for implementing the strategy, due to the limitations of the necessary skills and associated budgets for establishing new PAs. WWF-SA however is working in collaboration with provincial conservation agencies, DEA and SANParks to establish at least one more Grasslands PA over the next five years. It is highly unlikely that the establishment of another / 2nd PA will come to fruition within the next five years.
- The key emerging strategy is Stewardship to bring the targeted biodiversity “hot spots”, ecological corridors and water factories, etc, under protection. Relevant staff implications are Stewardship Officers, Conservation Scientists, Life Sciences Technicians, Rangers.

The National Climate Change Adaptation Strategy

- The *National Climate Change Response White Paper* (RSA 2011) states that the government must do the following with regards to climate change and education and training:
- Ensure that a holistic understanding of climate chan*ge and related issues (specifically the requ*ired response to climate change) is included in all relevant aspects of formal education curricula. This will prepare future generations for a rapidly changing planet and the transition to a lower-carbon society and economy.
- Include climate change elements in the review of the National Skills Development Strategy and ensure that all SETAs add climate change to priority skills development programmes in the formal, informal and non-formal sectors of the education and training system. This will be accompanied by requisite resource reallocation.
- Establish incentives for research and training such as bursaries to encourage students and scholars to research and study climate change.
- Ensure that the building of knowledge and expertise in new and emerging economic sectors is considered in all tertiary education curricula and relevant formal and informal training.
- Establish a robust research agenda that, amongst others, focuses on quantitative research on the labour requirements for the green transition as well as on other societal adaptation strategies and needs.
- Encourage tertiary and research institutions to develop national monitoring, reporting and verification guidelines for a climate-resilient South Africa. These guidelines would focus on mitigation and adaptation actions such as land-use practices and change. SANParks notes that the skills required for conservation in the face of climate change include adaptive management: ñEnsure an understanding of, and practical ability in, dealing with change under circumstances of uncertainty and increased variability, through the principles of adaptive managementò.

1.7 Gaming and Lotteries sub-sector

1.7.1 Economic Contribution

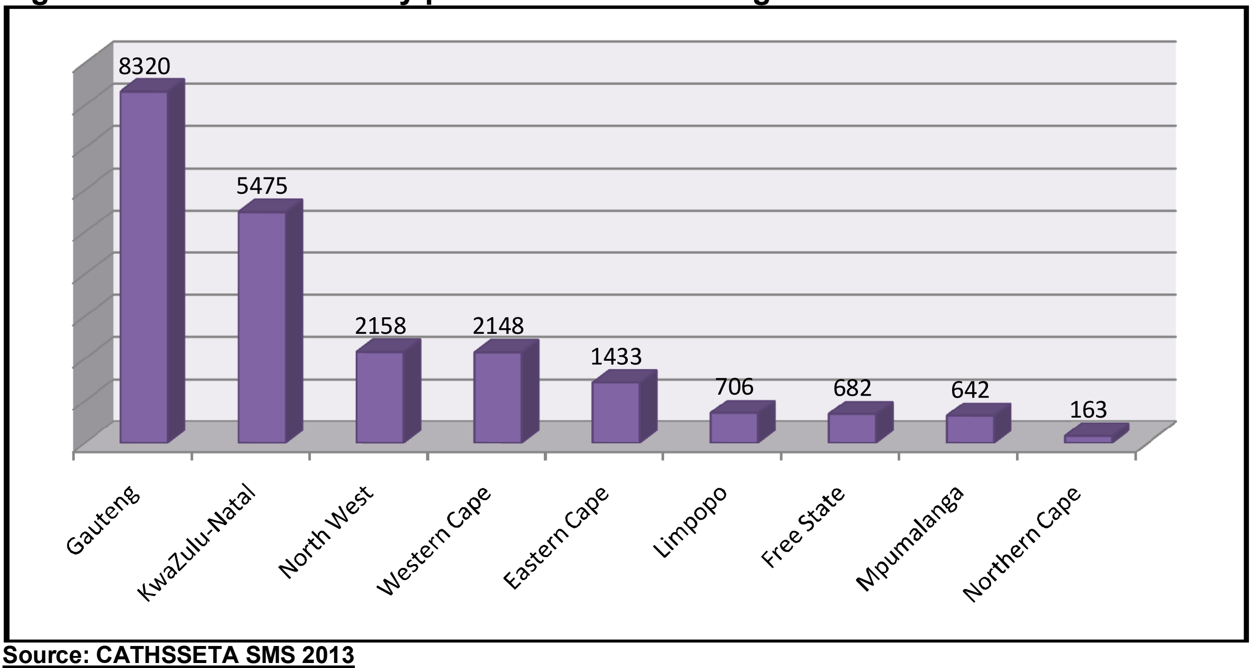
The gross gambling revenue in the 2011/12 fiscal year amounted to R18.4 billion, of which the Casino sub-sector accounted for 81%, which was an increase over the R17.14 billion recorded in 2010/11. This sub-sector employed a total of 34 019 employees in 2012, generated R5 billion in taxes and contributed R83 million to communities through CSI projects.[25] The Horseracing sub-sector in 2009, directly contributed R 2.71 billion to GDP, created 15 685 direct and indirect jobs and generated R 694 million in taxes. Cumulatively the horse racing sub-sector, from 2002 to 2009, directly contributed R 16.8 billion to GDP and generated R 4.3 billion in taxes.[26]

1.7.2 Employee Profile

The Gaming & Lotteries sub-sector is the second largest employer with 21 727 employees. Gaming & Lotteries is a 24-hour 7-day-a-week business operation that requires large numbers of employees due to both the shift nature of the work and the strict legislative requirements. It is interesting to note that employment in this sub-sector is gradually recovering from its decline of 4.7% in 2012 as indicated by the growth of 3.3% from 21 018 in 2012 to 21 727 in 2013, which is indicative of the of increased turnover in all aspects of the sub-sector and more specifically in the thoroughbred horse racing industry which has been recovering steadily from a slight downturn between 2011 and 2012.

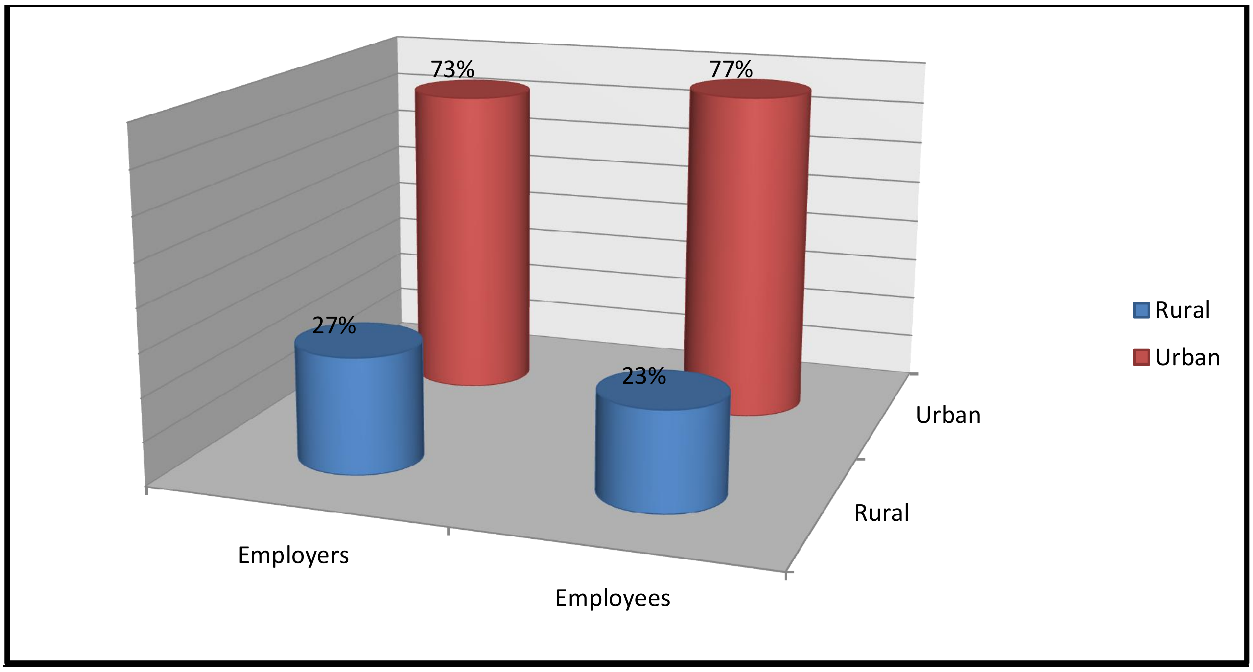
Analysis of the age profile of the CATHSSETA registered enterprises in the Gaming and Lotteries sub-sector shows that 55% of the workforce falls within the under 35 years age category, followed by the 35-55 years age category with 42% and the over 55 years age category with 3%. This sub-sector comprises 15530 Black employees, 2436 White employees, 2198 Coloured employees and 1563 Indian employees. The proportion of disabled persons employed in the sub-sector, as reported remains at 1%.

Figure 10: Labour Profile by province in the Gaming and Lotteries sub-sector



Source: CATHSSETA SMS 2013

Figure 11: Labour Profile by Urban-Rural split in the Gaming and Lotteries sub-sector



Source: CATHSSETA SMS 2013

Figure 10 and 11 indicates the labour profile of the Gaming and Lotteries sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and KwaZulu Natal make up the majority of over 63% of employment in the sub-sector. In the sub-sector, 27% of employers are in rural areas, with 73% falling within urban areas.

1.8 Hospitality sub-sector

1.8.1 Economic Contribution

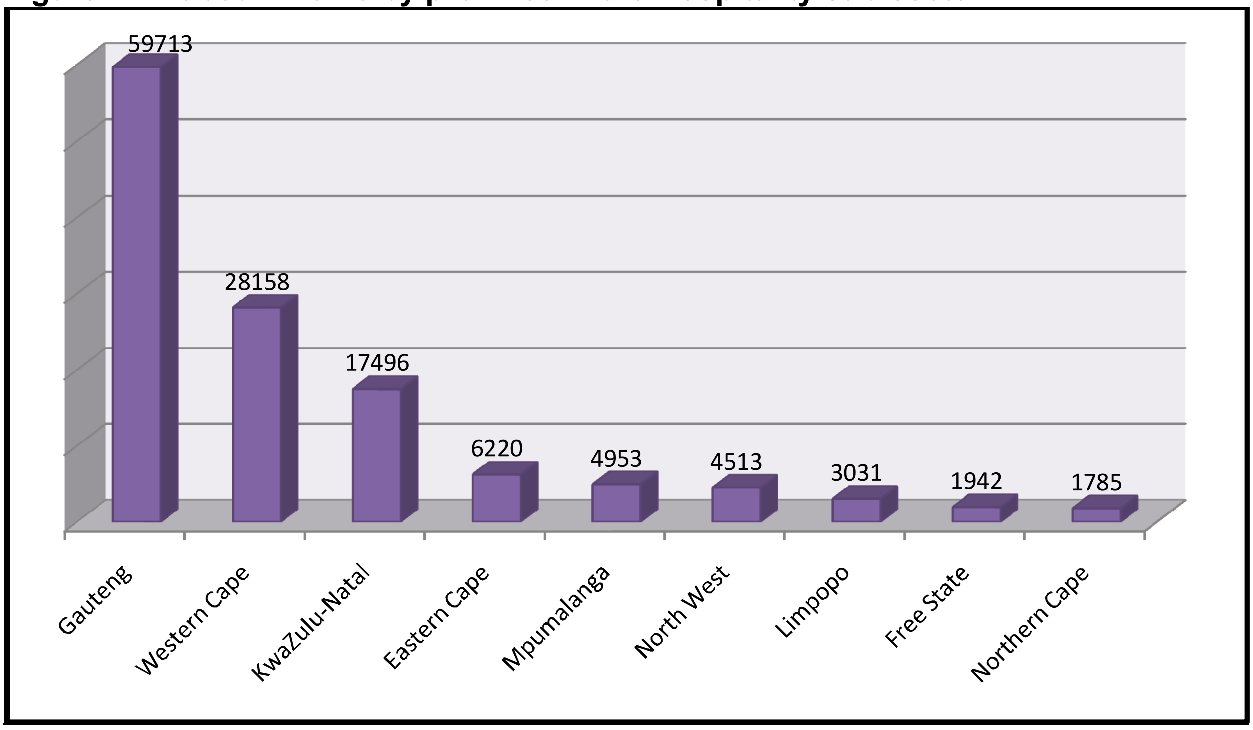
The total room revenue generated by this sub-sector during the 2012 year was R15.1 billion with an expected increase of 11% in 2013 to R16.8 billion. It is projected that by the year 2017 the overall occupancy rate will increase to 55.6% with total room revenue expected to reach R23.5 billion in 2017, a 9.2% compound annual increase from 2012.[27]

1.8.2 Employee Profile

Hospitality is the largest employer, employing 127 811 (65%). The hospitality sub-sector is the largest sub-sector and most labour intensive and therefore the biggest employer. Employment in the Hospitality sub-sector increased by 4.4% from 122 464 in 2012 to 127 811 in 2013 and whilst modest, this growth is encouraging and indicates that the sector is still bouncing back from the impact of the global financial crisis. This sentiment was echoed by all the big hospitality industry players during the 2013 Hospitality Investment Conference Africa (HICA), which formed part of Tourism Indaba, who claimed that the sector was no longer under distress from the effects of the global financial crisis but was rather undergoing a period of re-growth and consolidation as major groups and chains were either expanding or renovating their operations.

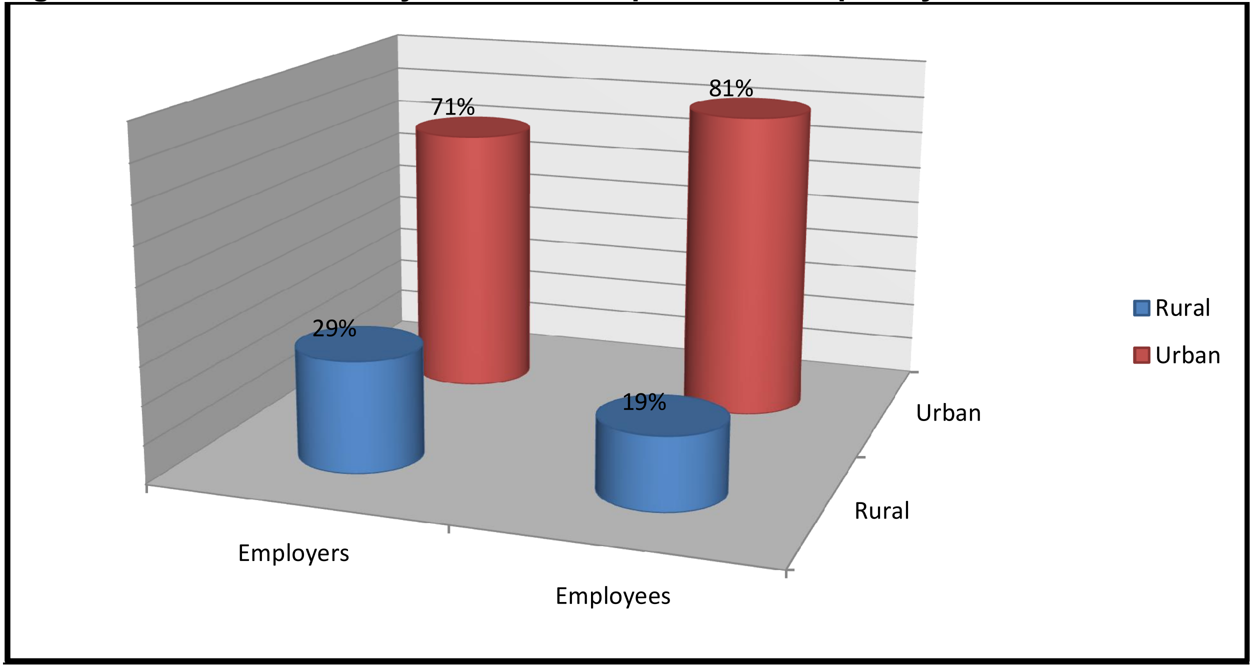
There are approximately 82918 employees that were reported by the CATHSSETA registered enterprises falling within the under 35 years age category. This is representative of 65% of the total sub-sector. There are only a mere 3% of employees within this sub-sector that are in the over 55 years age category. The race profile indicates that the sub-sector employs 78% Black, 11% Coloured, 9% White and 2% Indian employees.

Figure 12: Labour Profile by province in the Hospitality sub-sector



Source: CATHSSETA SMS 2013

Figure 13: Labour Profile by Urban-Rural split in the Hospitality sub-sector



Source: CATHSSETA SMS 2013

Figure 12 and 13 indicates the labour profile of the Hospitality sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and Western Cape make up the majority of over employment in the sub-sector with approximately 47% and 22% respectively. The Free State and Northern Cape provinces show the smallest number of employees in this sub-sector. Despite the presence of 29% of employers in rural areas, the employee profile indicates that only 19% of the total labour in this sub-sector is contained within rural areas.

1.8.3 Drivers of Change

- **Decent Work**
  - South Africa's Decent Work Country Programme was compiled in NEDLAC in consultation with ILO and encompasses 4 priorities with 9 outcomes [28]
  - Priority 1 is to strengthen labour market governance and its 3 outcomes are: (a) ratification and application of international labour standards (b) tri-partism and strengthened labour market governance contribute to both effective and sound industrial relations and social dialogue (c) labour administration institutions apply the latest labour legislation and services.
  - Priority 2 is to promote employment and its 3 outcomes are: (a) more women and men have access to productive and decent jobs through inclusive job-rich growth (b) skills development increases the employability of workers and inclusiveness of growth (c) sustainable and competitive enterprises create productive and decent jobs.
  - Priority 3 is to strengthen and extend social protection coverage and its 2 outcomes are: (a) more people have access to better managed and more gender equitable

social security benefits (b) both enterprises and workers benefit from improved health and safety conditions at work.

- Priority 4 is to strengthen workplace responses to the HIV and Aids epidemic and its single outcome is to ensure that effective policies and programmes are in place to address the epidemic. The capacity of government and its social partners to monitor and evaluate HIV and Aids workplace programmes will also be increased.[29]
- Each outcome also has measurable outputs and of particular significance for the sector is the special attention given to both SMMEs and the informal economy. In particular: (a) the introduction of legislation and policy to upgrade the informal economy (b) enhancing the capacity of trade unions and organised business to extend their scope to workers and employers of SMMEs and the informal economy (c) increasing the number of SMMEs in bargaining councils (d) facilitating market access and competitiveness of SMMEs operating in select labour absorbing priority areas such as cultural tourism (e) strengthen the capacity of rural SMMEs for improved productivity, sustainability and competitiveness especially those operating in or in close proximity of wild life tourism areas and facilities (f) supporting female entrepreneurs to grow their businesses.[30] Clearly the job creation potential of SMMEs in the sector has been identified and further illustrates the need for SMME-specific skills development and training interventions for the SMMEs in the sector.
- The **Labour Relations Amendment Bill**, **Basic Conditions of Employment Amendment Bill**, **Employment Equity Amendment Bill** and **Employment Services Bill of 2010,** intend to amend the Labour Relations Act, 1995 so as to align employment legislation to ensure decent work by regulating sub-contracting, contract work, and outsourcing and also to provide for the prohibition of certain abusive practices to workers.
- A Decent Work Agenda is long overdue in the Hospitality sub-sector, as in the 2010/11 financial year the sector was placed on governmentõs list of high risk and problematic sectors. The reason for this listing was that in 2010 the DOL inspected 2 622 hospitality enterprises in the sector and 56% of these were found not to be complying with legislation. The list of transgressions included employers not adhering to annual increases in minimum wages, irregular deductions or deductions without the employeesô consent, compressed work weeks, work at night, Sundays and Public holidays without compensation and lack of contracts of employment. Employers were also found to be in contravention of the UIF and OHS Acts.[31]
- The underpaying of employees in the sub-sector is not only a South African problem as globally the sector exploits it young employees by subjecting them to low pay and long irregular working hours due to the dominance of SMME and casual, part-time, seasonal or temporary employment.[32]
- This alleged exploitation of its employees is perceived as causing the sector to become unattractive to school leavers and learners. Recent research conducted in the Netherlands indicates that 70% of hospitality graduates leave the sector after working in it for 6 years.[33] The NDT through collaboration with the Department of Basic Education (DBE) and pilot research have reported that locally, school leavers find the sector to be unattractive and associate it with hard work, long hours and low income. This perception needs to be addressed immediately to ensure that talent is still attracted to the sector.

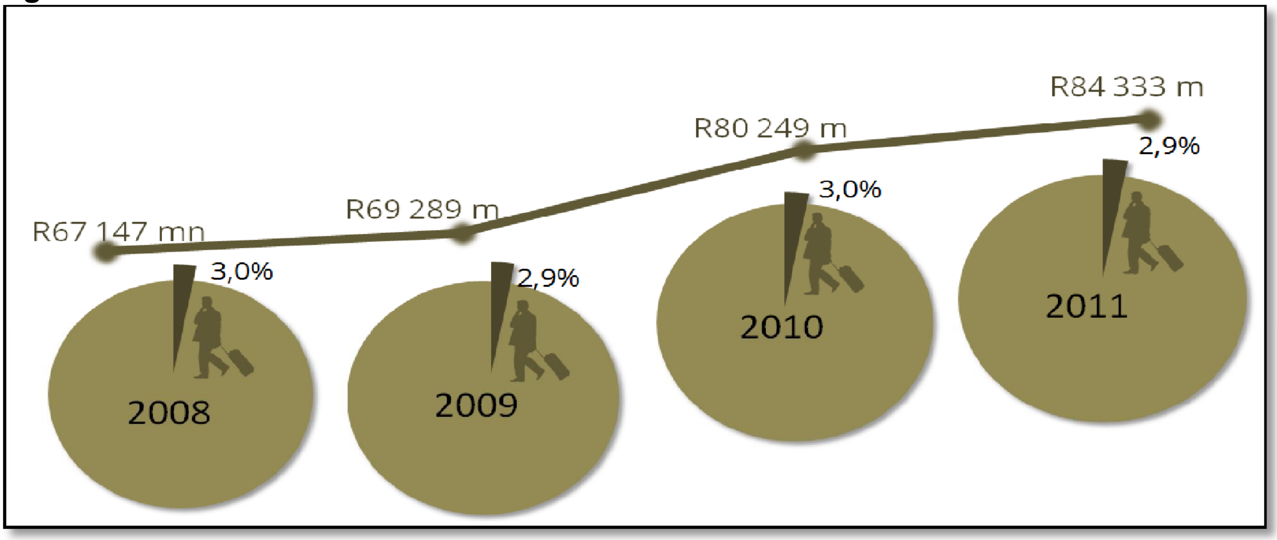
- For various reasons the collaborative decent work project between the NDT, DOL and CATHSSETA has been put on hold in spite of this programme being identified as being crucial for the long term success of the sector. The project is about working in conjunction with the ILO to set up a Decent Work Programme for the sector. The ILO would be assisting by providing an expert in decent work to assist with the development of this programme. This programme needs to be revived to ensure that opportunities are made available to ensure even the most marginalised employees are able obtain qualifications that would allow them to progress up the career path.
- **National Tourism Sector Strategy (NTSS)** aims to address issues of wealth, jobs, ownership, community beneficiation, rural tourism development, stimulating domestic tourism, accelerated job creation and creating a better society where all have an equal chance of success. The strategy is premised on three themes, which define the new way of doing things for our sector. These themes are to grow the tourism economy, to enhance visitor experiences and to strive for sustainability and good governance. More encouraging is the fact that, NTSS sets bold new benchmarks for the sector through unprecedented focus on the facilitation of support for rural tourism development, small medium and macro-enterprises (SMMEs) access to markets and funding.

1.9 Travel and Tourism sub-sector

1.9.1 Economic Contribution

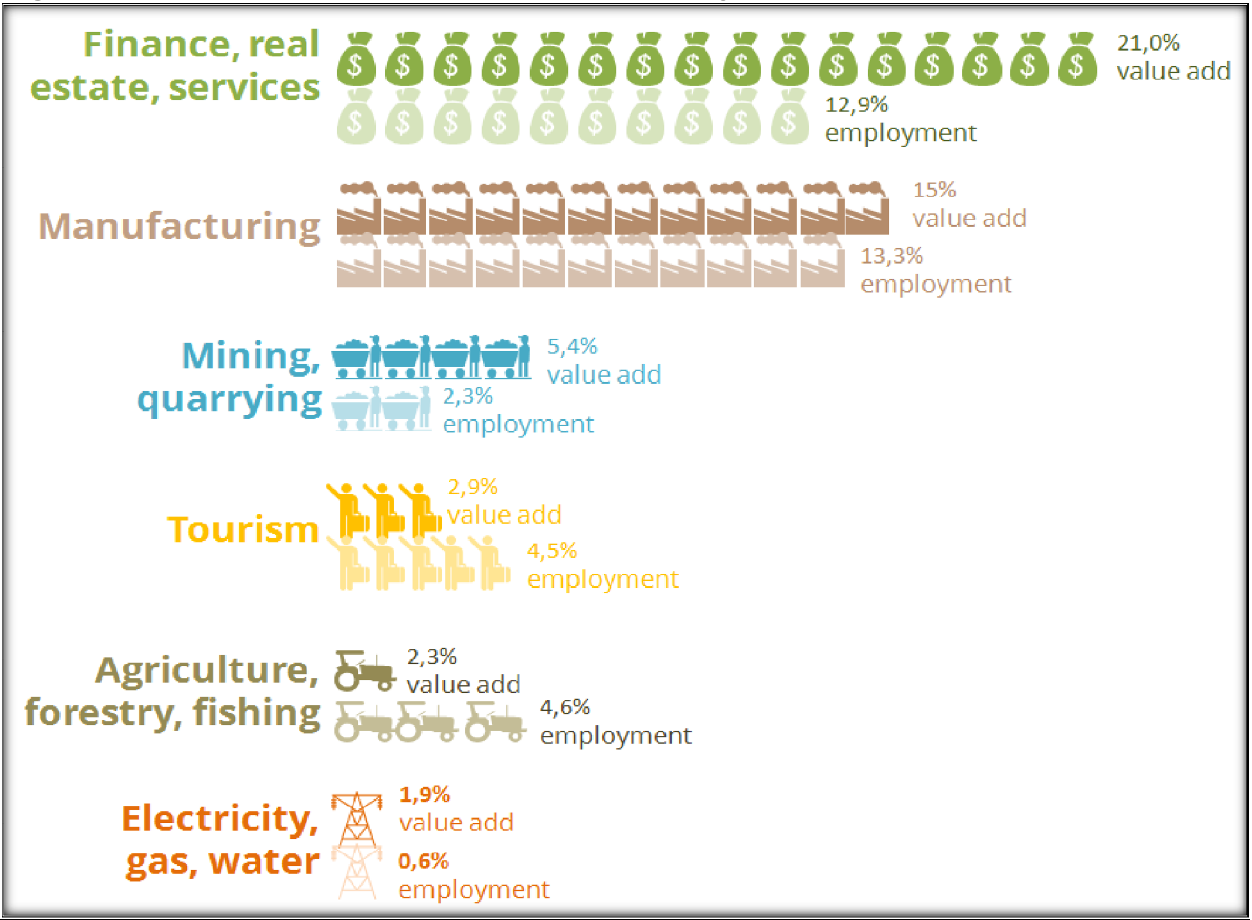
Globally the Travel and Tourism economic sector is one of the fastest growing sectors. South Africa received 13.7 million visitors in 2012, 9.2 million of whom were tourists.[34] An increase of 10.2% in tourist visits was seen in 2012 when 9.2 million international tourists travelled to South Africa, compare to the 8.3 million international tourists seen in 2011. In comparison to the United Nations World Tourism Organisation's estimated average global tourist growth of 4%, South Africa has been able to achieve more than double the estimated rate.[35] The National Department of Tourism (NDT) also predicts an increase in foreign arrivals and expects an increase from 9 933 966 in 2009 to 15 million in 2020. This is a compound annual growth rate of 3.8% and is due to a culmination of both a focused national strategy aiming to increase the number of foreign arrivals and the "knock-on" effect that the country has received due to increased international profiling from the successful staging of the 2010 FIFA World Cup.[36] Domestic tourism also plays a significant role, at any given time; three quarters of all tourists in South Africa are domestic Tourists[37]. In 2011, 13.9 million South Africans took a total of 26.3 million domestic trips. NDT expects a compound annual growth rate of 2% for domestic tourists and 5.4% for domestic trips from 2009 until 2020, which will result in 18 million adult South Africans taking a total of 54 million domestic trips in 2020.[38] The total domestic tourism expenditure increased from 69 billion rand in 2010 to one hundred and one billion rand in 2011, which translates to an increase of over 30 billion rand[39] The national tourism sector strategy seeks to increase tourism's total direct and indirect contribution to the economy from R189.4 billion in 2009 to R318.2 billion in 2015 and R499 billion in 2020. The tourism sub-sector makes a substantial contribution to the South African economy and in 2012 the revenue generated by tourist arrivals increased by 7.6% (R5,4 billion) compared to 2011, with the key drivers of the growth being the increase in foreign arrivals and average spend per tourist.[40] The latest Tourism Satellite Account which has been released by Statistics SA, for the period ending December 2011 confirms direct tourism contribution to the GDP went up by 5% to 84.3 billion rand in 2011. Direct employment in the sector as a percentage of overall employment in the country went up from 4.3% to 4.5% between 2010 and 2011. This resulted from the increase of about thirty one thousand direct jobs in the sector from 2010 to a total direct employment of 598,432 in 2011.[41]

Figure 14: Tourism Contribution to South African GDP



Source: Statistics SA presentation MINMEC Meeting (10 May 2013)

Figure 15: Tourism's contribution to the economy



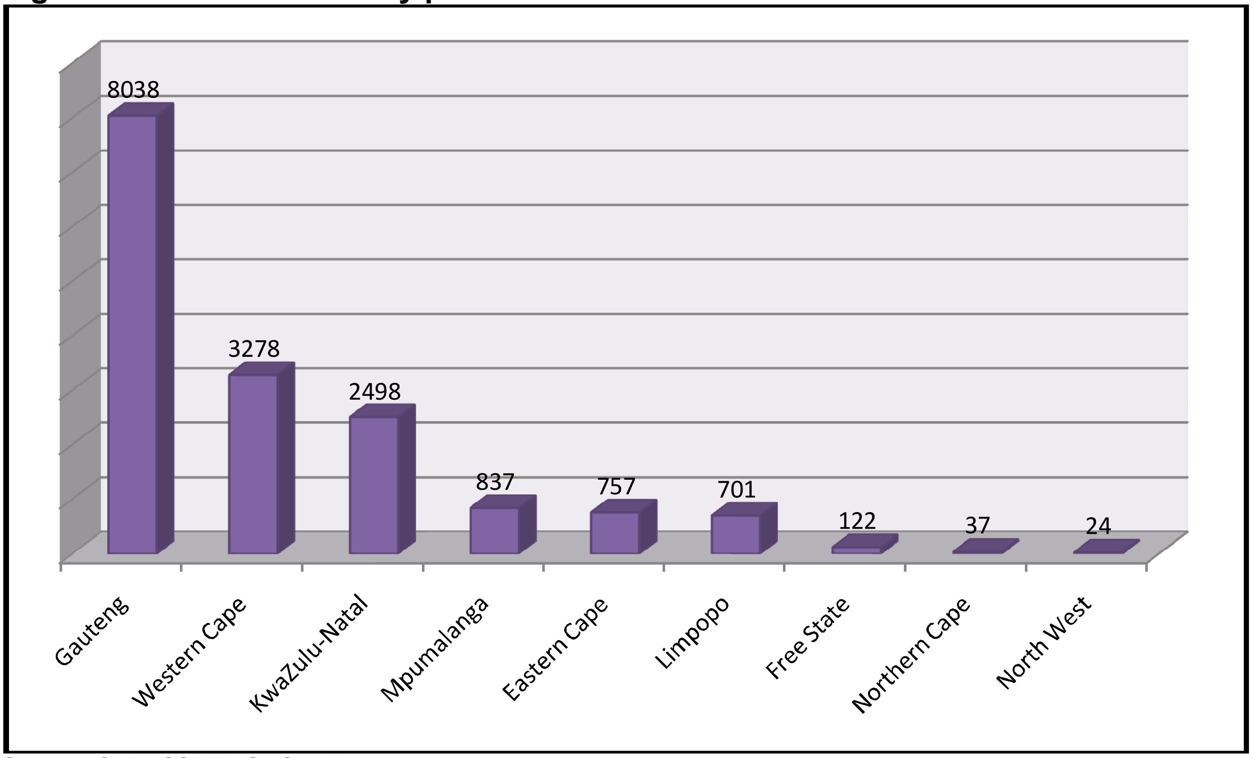
Source: Statistics SA presentation MINMEC Meeting (10 May 2013)

1.9.2 Employee Profile

The Travel & Tourism is the third largest sub-sector with 16,292 employees having been reported by the SETA registered enterprises. This sub-sector, despite the current trying economic climate, is growing steadily with the total number of employees growing by 2,147 in 2013. Numerous mergers and acquisitions took place within this sub-sector during 2011, which initially led to downsizing and staff reductions. However, these mergers and acquisitions has resulted in a degree of stability in the sub-sector which has attributed to the growth in the number of employees employed in the sub-sector. Globally the sector is extremely labour intensive and is a major source of employment, requiring various degrees of skill and often provides women, youth and migrant labour with a relatively easy access point into the workforce. In 2010 the sector globally accounted for 235 million jobs, which is equivalent to 8% of the total employment or 1 in 12.3 jobs.[42]

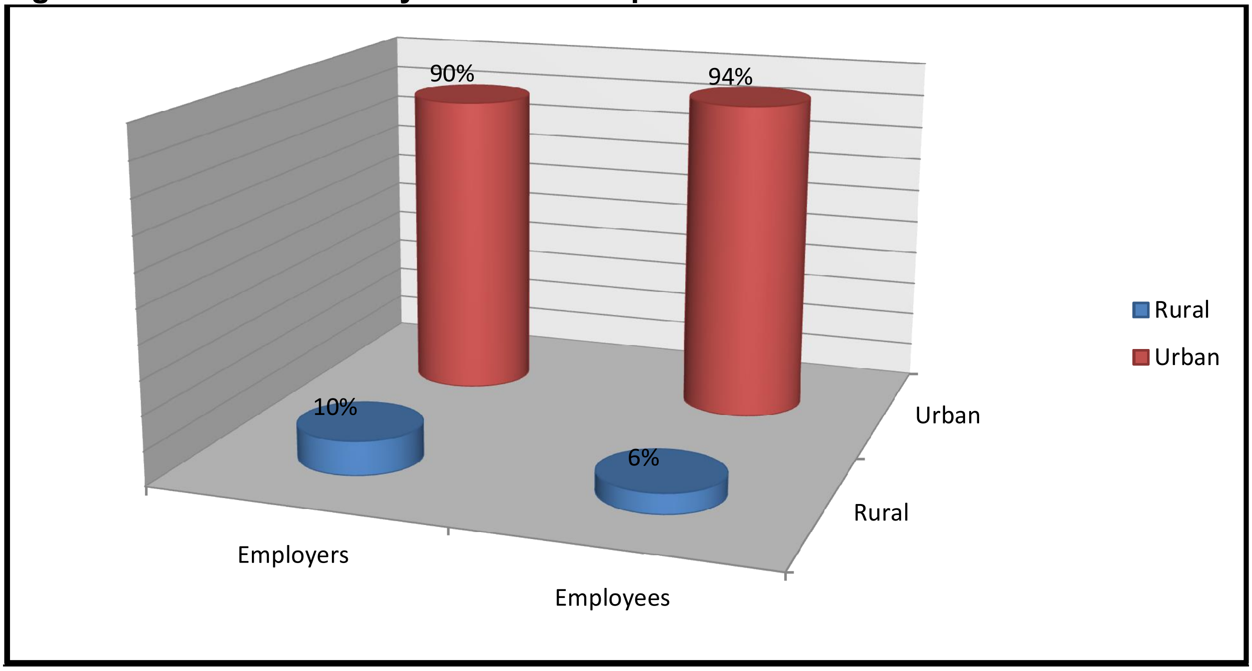
The majority of the 16,292 employees fall within the under 35 years age category with 56%. 39% fall within the 35-55 years age range and 5% fall under the over 55 years age category. 8,125 employees are Black, followed by 4,980 White, 2,106 Coloured and 1,081 Indian employees.

Figure 16: Labour Profile by province in the Travel and Tourism sub-sector



Source: CATHSSETA SMS 2013

Figure 17: Labour Profile by Urban-Rural split in the Travel and Tourism sub-sector



Source: CATHSSETA SMS 2013

Figure 16 and 17 indicates the labour profile of the Travel and Tourism sub-sector per province and illustrates the current urban-rural split of employers and employees in the sub-sector. The provinces of Gauteng and Western Cape make up the majority of over employment in the sub-sector, with the North West and Northern Cape provinces showing the smallest number of employees in this sub-sector. Rural distribution in this sub-sector is limited, with only 6% of employees employed in rural areas.

1.9.3 Drivers of Change

- **National Tourism Sector Strategy (NTSS)** aims to address issues of wealth, jobs, ownership, community beneficiation, rural tourism development, stimulating domestic tourism, accelerated job creation and creating a better society where all have an equal chance of success. The strategy is premised on three themes, which define the new way of doing things for our sector. These themes are to grow the tourism economy, to enhance visitor experiences and to strive for sustainability and good governance. More encouraging is the fact that, NTSS sets bold new benchmarks for the sector through unprecedented focus on the facilitation of support for rural tourism development, small medium and macro-enterprises (SMMEs) access to markets and funding.
- The **Administrative Adjudication of Road Traffic Offences Amendment Act** 1998 and the **AARTO Regulations** of 2008 upon full implementation, is envisaged to have a significant impact on the travel and tourism sub-sector and car and vehicle hire agencies in particular. Employers in the sector may have to change their operating systems in order to comply with the legislation. Employees will require both training in the application of the regulations and in their organisation's revised operating procedures and systems.

1.10 Sport, Recreation and Fitness sub-sector

1.10.1 Economic Contribution

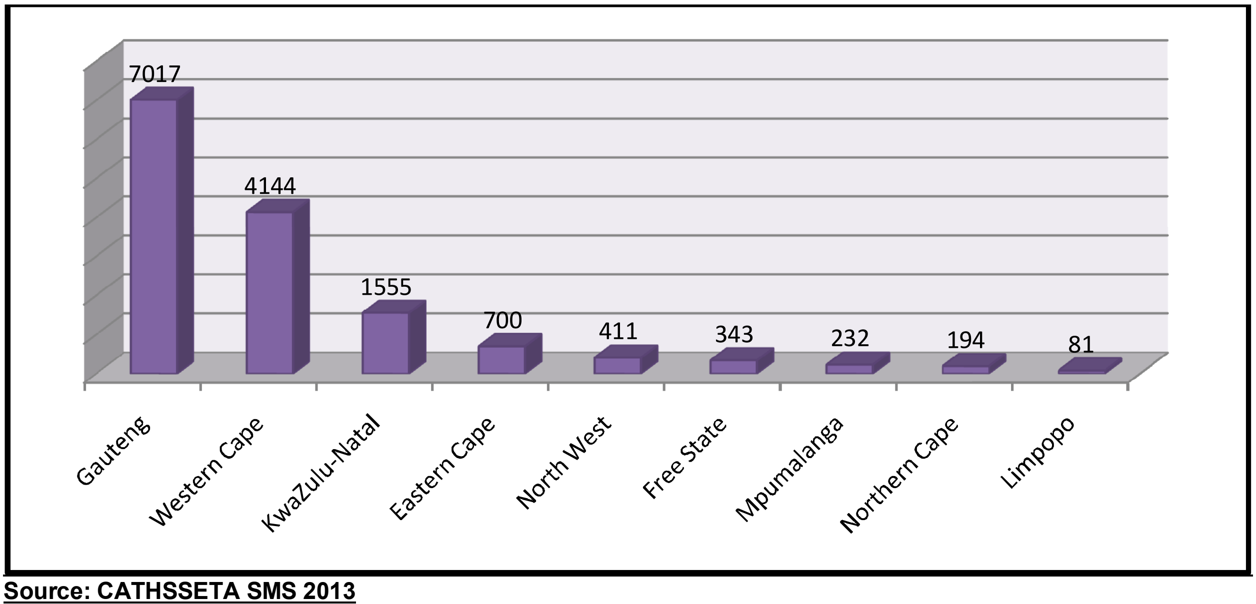
According to last study in 2007, the Sport, Recreation and Fitness sub-sector's direct contribution to GDP, was R 41 billion, which equated to approximately 2%.[43] Sports Tourism currently accounts for approximately 10% (R6.4 billion) of the tourism sector's contribution the South African GDP.[44]

1.10.2 Employee Profile

The Sport, Recreation and Fitness sub-sector has shown a spike in the number of employees and recorded a 29% growth in the number of employees in the sub-sector between 2012 and 2013. A total of 14,677 employees were reported in 2013. This increase is indicative of both growth in this sub-sector and improved capturing and reporting in the Planned Training and Reporting received from employers, which has been a focus area of the Sport, Recreation and Fitness Chamber. It is important to note that the Sport, Recreation and Fitness sub-sector employs a relatively low number of employees as a certain amount of staff in the sector are volunteers. This is further compounded by the fact that numerous employees in the sector are employed by provincial and local governments and are therefore reported as government employees to Public Sector Education and Training Authority (PSETA) and Local Government Sector Education and Training Authority (LGSETA), this practice significantly distorts the number of employees reported in this sub-sector. CATHSSETA is in the process of concluding MoUs with both PSETA and LGSETA to obtain the data of the number of sport, recreation and fitness employees employed by provincial and local governments.

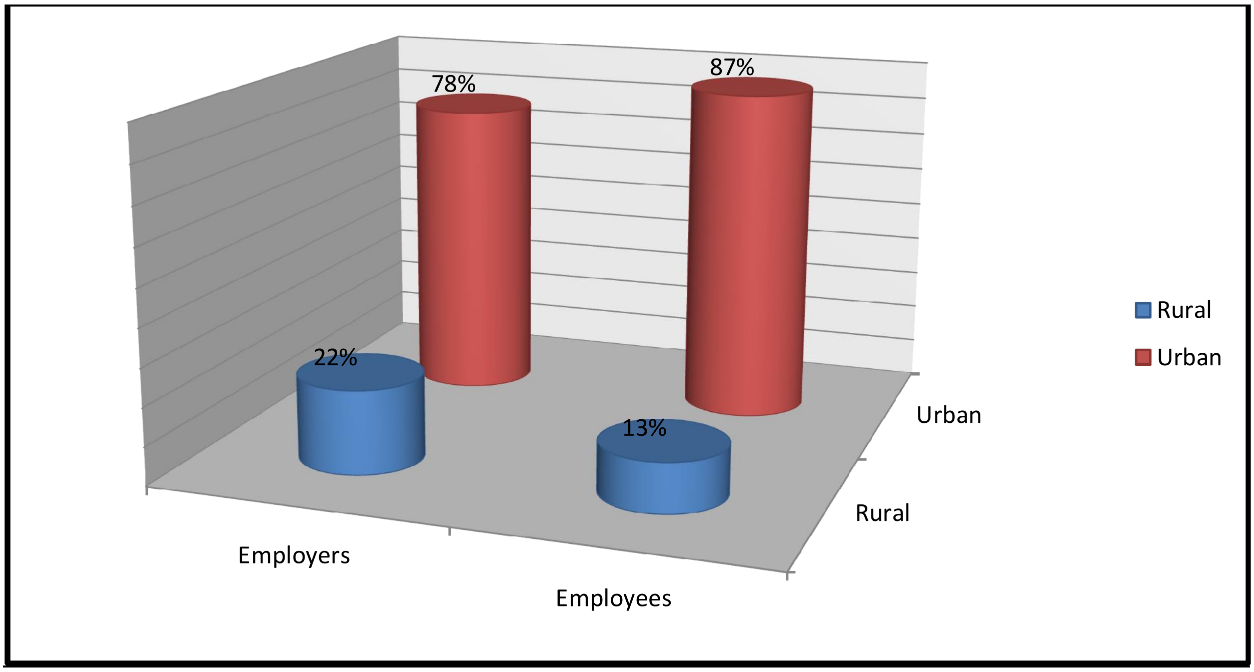
The age profile of the sub-sector reveals that 60% of the employees fall under the under 35 years age grouping, 35% fall within the 35-55 years age category and 5% are in the over 55 years age group. In terms of racial profiling, the sub-sector has 6,930 Black employees, followed by 5,247 White employees, 2,025 Coloured employees and 475 Indian employees. The sub-sector employs approximately 3% of disabled people.

Figure 18: Labour Profile by province in the Sport, Recreation and Fitness sub-sector



Source: CATHSSETA SMS 2013

Figure 19: Labour Profile by Urban-Rural split in the Sport, Recreation and Fitness sub-sector



Source: CATHSSETA SMS 2013

Figures 18 and 19 indicate the labour profile of the Sport, Recreation and Fitness sub-sector per province and illustrate the current urban-rural split of employers and employees in the sub-sector. Gauteng province has the largest number of employees with 7017 employees, followed by the Western Cape with 4144 employees. Urban distribution in this sub-sector is dominates, with 87% of employees employed in urban areas and 78% of employers situated in urban areas.

1.10.3 Drivers of Change

Sport Specific Legislation

- The **Safety at Sports and Recreational Events Act**, of 2010 governs all aspects regarding sport, recreational, religious, cultural, exhibitional, organisational or similar events held at stadiums, venues or along a route.
- The processes and rules that need to be complied with, in terms of the Act, have a significant effect on the training requirements of staff employed in both the Sports & Recreation and Events sub-sector that will require both curriculum review and alignment as well as training for both existing staff and potential job seekers.
- The **National Sport and Recreation Act**, of 1998 and the **Recognition of Sport or Recreation Bodies Regulations** of 2010 determine which sport and recreation associations, federations and organisations maybe officially recognised as sports and recreation bodies and therefore determine who the stakeholders of Sport and Recreation are and therefore speak directly to the mandate of CATHSSETA.
- The **Fitness Regulations** once in place will require staff working in gyms to have industry accredited qualifications.

- Accredited training will be required to ensure that qualifications and skills meet the regulated requirements.
- The **White Paper for Sport and Recreation 2012** (Third Edition) purpose is to pronounce clearly Government's policy regarding sport and recreation in the Republic of South Africa. This White Paper sets out government's vision for sport and recreation and details the impact it would like to achieve by investing in particular outcomes and strategic objectives. It provides clear policy directives for promoting and providing sport and recreation.
- Physical education at schools is identified as a priority in the white paper and when finalised will require extensive training of teachers in both physical education and to become sports coaches.
  The white paper highlights that the majority of administrators, coaches and technical officials in sport are volunteers and need to be trained.

Sports Tourism

- The economic contribution of Sports Tourism has become significantly important. In 2009, the staging of the Confederations Cup, Indian Premier League and British and Irish Lions Rugby Tour in South Africa helped the South African tourism sector buck the global recession to a certain degree.
- The successful staging of the 2010 FIFA World Cup showed that the country has the capacity and infrastructure to host mega sporting events. 309 554 foreign tourists travelled to South Africa to specifically attend the tournament, stayed for an average of 10 nights and had total expenditure while in the country of R 3.46 billion.[45]
- The Sport & Recreation White Paper, currently in its 3rd edition identifies Sports Tourism as a key strategic area to grow both the sector and economy. SRSA together with NDT and SASCOC have developed a National Sports Tourism Strategy that aims to attract and host more international sporting events in South Africa in order to capitalise on the investment made in sports infrastructure for the 2010 FIFA World Cup.
- There is a need to identify the requirements of the Sports Tourism industry which are different and are not addressed by the qualifications currently available. There is no long term strategy or approach to retain the skills of people trained for specific major events. The aim should be to establish a pool of skilled individuals to be made available for all major events that are hosted in the country. The development of a skills development strategy is needed and should focus on identifying the key interventions necessary by government and the private sector to ensure that the skills of employees and trainees within the sports tourism industry are continuously improved to maintain high levels of service excellence when hosting major international events in South Africa.
- To fill the gap of the absence of a proactive skills development strategy aligned to the National Sports Tourism Strategy, CATHSSETA has partnered with Thebe Exhibitions and Projects Group and the University of Pretoria to conduct research into the skills development requirements of sports tourism with the aim of formulating a Sports Tourism Skills Development Strategy, which was launched at the Sports and Events Tourism Exchange Conference held in Durban from the 10 -13 of

September. The findings and outcomes of this research are currently available for public comment prior to finalisation of the report.

SRSA Strategy

All of these are operationalised through sub-programmes outlined below which have implications for skills development.

- Active Recreation delivers programmes to improve the health and well-being of the nation by providing mass participation opportunities in various formats to cater for a spectrum of participants.
- Community Sport delivers sports promotion programmes by focusing on increasing the number of participants in sport and recreation, with an emphasis on disadvantaged communities.
- School Sport supports the delivery of sport programmes to learners in conjunction with the Department of Basic Education. This will be through capacity building of coaches, technical officials and sports administrators.
- Provincial sport support and coordination manages the transfer of the mass participation and sport development conditional grant to provinces.
- Scientific Support aims to provide scientific support to athletes and coaches with the purpose of improving international participation of South African athletes.
- Major Events Support coordinates and manages government's support services for hosting identified major events in South Africa as well as overseeing the national sports tourism strategy.
- Recognition systems provide opportunities to publically acknowledge sporting achievements, both contemporary and past performances.
- International relations coordinates and strengthens bilateral and multilateral sport and recreation relations with international partners to support sport and recreation development in South Africa.
- Sport and Recreation Facility Management provides technical assistance to local authorities and other relevant stakeholders for constructing and effective management of sports facilities to ensure compliance with national norms and standards.

2. DEMAND FOR SKILLS

This section looks at the replacement demand by investigating the expected vacancies due to retirement in sub-sector specific occupations. This is followed by the ďTop 5 vacanciesôper sub-sector. The top vacancies are defined to be the highest number of current and potential vacancies, combined with the degree of scarcity, indicated by the CATHSSETA registered enterprises. These vacancies have been subject to further consultation with the CATHSSETA chambers. Research into replacement pipeline will have to be undertaken to further understand succession planning in the sector.

2.1 Arts, Culture and Heritage sub-sector

2.1.1 Replacement Demand

Table 2: Employees over 55 in the Arts, Culture and Heritage sub-sector

Occupational Class	Occupation	# Employees over 55
Managers	Director (Enterprise / Organisation) - 112101	8
	Operations Manager (Non Manufacturing) - 134915	5
	Finance Manager - 121101	3
Professionals	Heritage Consultant - 263206	3
Technicians And Associate Professionals	Bookkeeper - 331301	3
	Sound Technician - 352103	2
Clerical Support Workers	General Clerk - 411101	3
	Stock Clerk / Officer - 432101	2
Skilled Agricultural, Forestry, Fishery, Craft And Related Trades Workers	Tailor - 683101	3
	Musical Instrument Maker or Repairer - 661201	1
Plant And Machine Operators And Assemblers	Motion Picture Projectionist - 718913	10

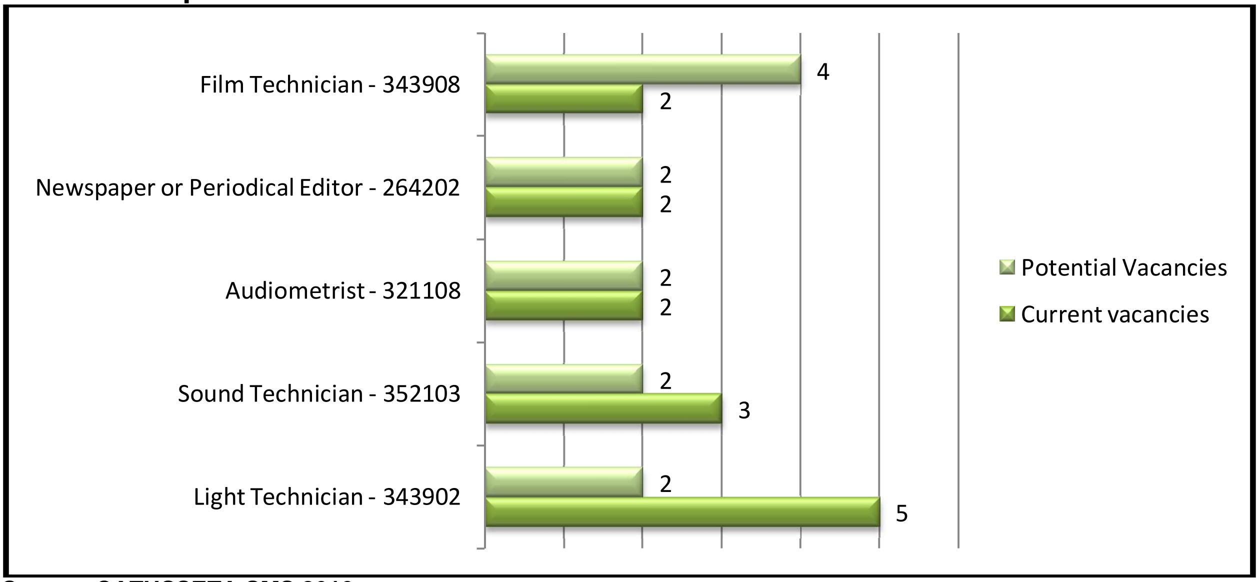
Source: CATHSSETA SMS 2013

Table 2 above indicates that the largest numbers of employees likely to retire in the next 5 years are those in the Motion Picture Projectionist, Director (Enterprise/Organisation) and Operations Manager occupations.

2.1.2 Vacancies in the sub-sector

It is interesting to note that the 80% of the top 5 vacancies in the sector are made up of occupations falling within the Technicians and Associate Professionals major group. This is indicative of the lack of skilled workers in these particular occupations within this sub-sector. The Light Technician and Film Technician occupation numbers show that the highest number of current and potential vacancies exits within these occupations. Figure 20 below illustrates the top 5 vacancies in the sub-sector.

Figure 20: Top 5 vacancies in the Arts, Culture and Heritage sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2013

2.2 Conservation sub-sector

2.2.1 Replacement Demand

Table 3: Employees over 55 in the Conservation sub-sector

Occupational Class	Occupation	#Employees over 55
Managers	Director (Enterprise / Organisation) - 112101	9
	Finance Manager - 121101	7
	Corporate General Manager - 121901	6
Professionals	Park Ranger - 213307	166
	Conservation Scientist - 213301	5
Technicians And Associate Professionals	Environmental Science Technician - 314102	12
Clerical Support Workers	Tourist Information Officer - 422101	11
Service And Sales Workers	Animal Attendant / Groomer - 516401	11
Skilled Agricultural, Forestry, Fishery, Craft And Related Trades Workers	Hunter - 622401	7
Plant And Machine Operators And Assemblers	Charter and Tour Bus Driver - 733102	10

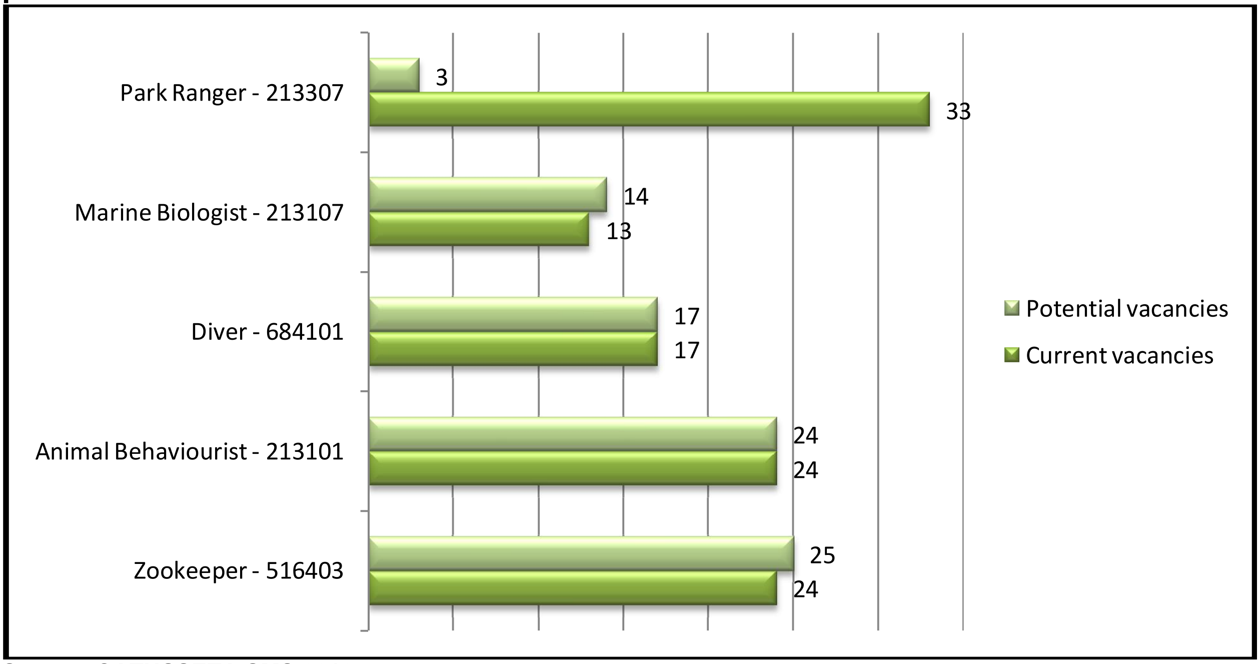
Source: CATHSSETA SMS 2013

The Park Ranger occupation shows the largest number of employees retiring from this sub-sector within the next 5 years. The Park Ranger occupation has continually emerged on the list of Scarce and Critical Skills and can be seen from the next graph that this occupation has one of the highest number of vacancies. As such, this occupation has been listed as a critically scarce occupation. The park ranger occupation has been reviewed by the conservation sector in partnership with CATHSSETA to align its descriptor and tasks to the South African context. The realigned occupation will be submitted by CATHSSETA to DHET as part of the OFO update process in 2014. The replacement demand for this occupation will be addressed through bursaries, learnerships and PIVOTAL grants.

2.2.2 Vacancies in the sub-sector

As per Figure 21 that follows, the Park Ranger, Animal Behaviourist and Marine Biologist occupation vacancies were discussed at length with stakeholders from the Conservation sub-sector. Ezemvelo KZN Wildlife in particular, voiced concern that these vacancies were often not filled due a lack of graduates with the correct specialisation. This often resulted in retired staff being employed on a contract basis until a suitable candidate could be sourced. These finding are also echoed in the findings of the ‚ÄúGreen Jobs: an estimate of the direct employment potential of a greening South African economy‚Äù and fall directly in the potential 232,926 green jobs in natural resource management.

Figure 21: Top 5 vacancies in the Conservation sub-sector in terms of current and potential vacancies



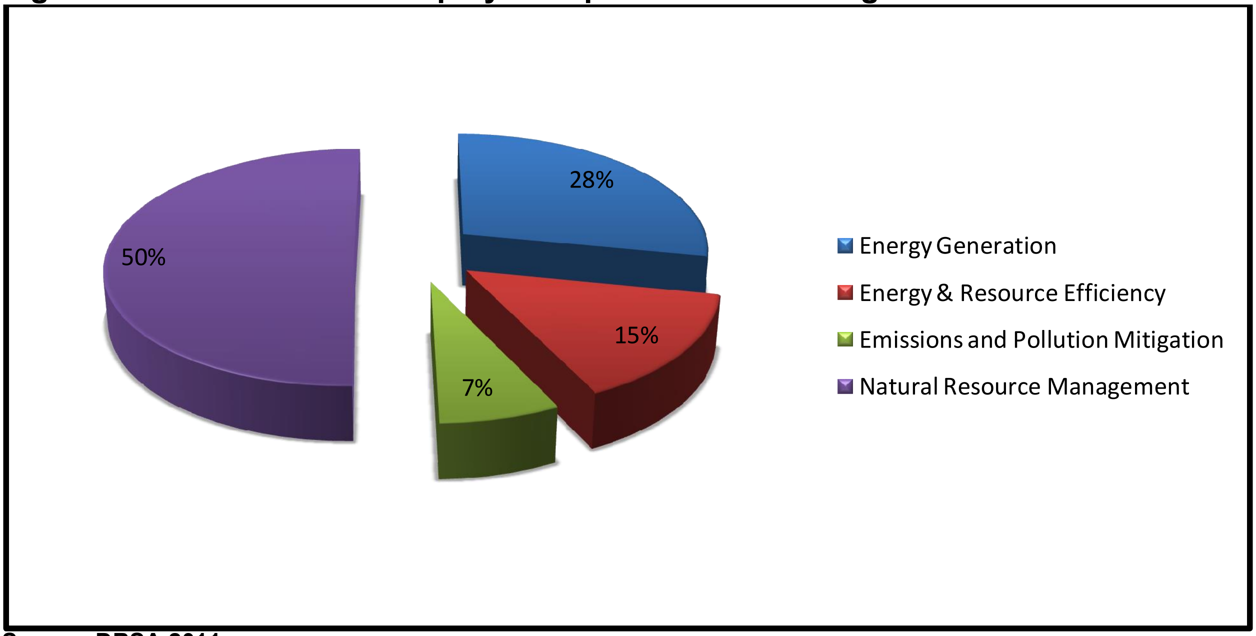
Source: CATHSSETA SMS 2013

2.2.3 Emerging occupations and future skills

- **Sustainability Manager:** Many large companies have employees whose job is to reduce the firmôs ñcarbon footprintò (the amount of carbon dioxide released into the atmosphere by a company through day-to-day activities over a given period). Key sustainable practices include powering plants with renewable energy, using renewable or recycled materials for products and packaging, and reducing waste sent to landfills.
- **Environmental Economist:** These professionals help protect the environment by determining the economic impact of policy decisions relating to air, water, land and renewable-energy resources. These experts require post graduate qualifications and have either a masterôs degree or PhD. Jobs are emerging in the government and professional, scientific and technical services organisations.
- **Biodiversity Stewardship:** Biodiversity Stewardship officers engage, inform and negotiate with private land owners, take them through the contractual process, and support them to manage their land to achieve conservation goals.
- **Wildlife Economy Expansion:** The Wildlife Economy, broadly defined, is expanding and has tremendous potential to expand more, this economy also entails SMMEôs related to natural resources other than wildlife, e.g. medicinal and edible plants (e.g. aloe and marula), mopane worm, reed and wooden crafts, and more. Both FET level skills (such as monitors and community extension workers) and HE skills (such as natural resource economists, fair trade lawyers, researchers and managers for biodiversity benefit sharing and business) are needed.

2.2.4 Potential Demand for Green Jobs in the Environment Sector

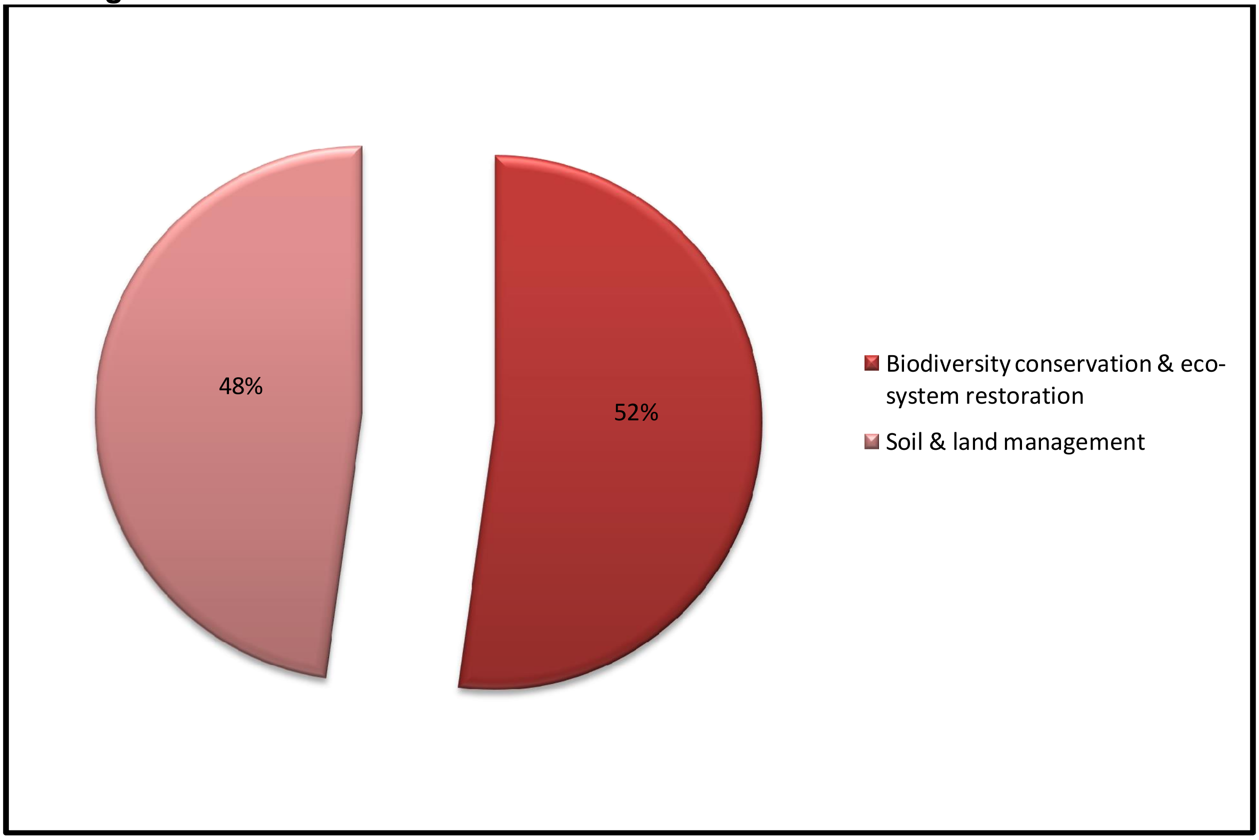
Figure 22: Total net direct employment potential in the long-term



Source: DBSA 2011

Figure 22 indicates that as per the report by the Industrial Development Corporation (IDC) and the Development Bank of South Africa (DBSA) ñGreen Jobs: An Estimate of the direct employment potential of a greening South African economy" the total net direct employment potential to create long terms jobs is 462,567 new jobs in the environmental sector by 2025.[46] The greatest potential to create these ñGreen Jobsò lies in Natural Resource Management, which has the potential to create 232,926 jobs or 50% of the net direct employment potential in the broad green economy category in the long ï term by 2025.[47] The remaining 50% is split amongst Energy Generation 123,023 potential jobs (28%), Energy and Resource Efficiency 67,977 potential jobs (15%) and Emissions and Pollution Mitigation 31,641 potential jobs (7%).[48] The potential 232,926 green jobs in natural resource management will have a huge impact on the Conservation sub-sector, as they will fall directly under the four SIC codes that define this sub-sector that falls within CATHSSETAôs jurisdiction. While the remaining potential jobs fall under other SETAôs jurisdiction as follows Energy Generation under Energy and Water Sector Education and Training Authority (EWSETA), Energy and Resource Efficiency under both EWSETA and Manufacturing Engineering and Related Services Sector Education and Training Authority (MERSETA) and Emissions and Pollution Management under LGSETA.

Figure 23: Natural Resource Management Total net direct employment potential in the long-term



Source: DBSA 2011

Figure 23 further breaks down the potential 232,926 green jobs in natural resource management and indicates that 121,553 green jobs (52%) will be derived from biodiversity conservation and eco-system restoration and 111,373 green jobs (48%) from Soil & land management.[49] However, more important than the large number of potential green jobs in natural resource management is the potential that these green jobs will be realised. The ñGreen Jobs: an estimate of the direct employment potential of a greening South African economy" gives the highest rating possible for both the biodiversity conservation and eco-system restoration and the soil & land management as being very high.[50] Therefore not only are there a large number of potential green jobs in the conservation sub-sector but the likelihood that this potential will be realised is very high. CATHSSETA in conjunction with the DEA, GreenMatter and the South African National Biodiversity Institute (SANBI) will be hosting a National Environmental Skills Summit and the realisation of the potential of these green jobs are one of the topics.

2.2.5 Demand for Skills in the Conservation Sector

The 2009 research report produced by the Human Sciences Research Council (HSRC) for the Lewis Foundation and the South African National Biodiversity Institute indicated (a) sound management of protected areas (b) establishment and strengthening of conservation understanding and competence among policy and decision makers both in the public and private sectors (c) development of capacity to implement conservation legislation at local government and municipal levels and (d) pressing threats to biodiversity would be issues driving the demand for skills development in the sector. The 4th National Report to the Convention on Biological Diversity in 2009 concluded that the issues listed above coupled with lack of capacity had an adverse impact on enforcement, research and monitoring. Therefore, while South Africa may have a laudable set of biodiversity legislation, the potential to realise the relationship between policy intent and policy outcome is closely linked with its human capacity.

The ESSP also listed the following factors that would significant effect on the demand for skills in the conservation sector (a) continued and increased biodiversity losses, in plant and animal species, contributed to an increased demand for protection of these species, especially threatened species. Thus, increased enforcement capacity is fundamental, but also research and monitoring capacity to establish the ongoing changes in the status of various species (b) as the expansion of protected areas increases so does the complex array of skills demanded from conservation managers increase, both from the commercial side in terms of business and operations as well as dealing with communities and landowners which require soft skills such diplomacy and negotiation (c) the use of genetically modified organisms (GMOs) and the development of the biotechnologies requires increased monitoring capacity. Cultural uses of indigenous plant species for primary health among South Africans also require increased protection and monitoring skills (d) reduced funding for scientific research was identified as a contributory factor to skills declines. Poor funding has an adverse effect on research projects at Higher Education level, which in turn reduces the capacity to recruit students into the environmental sciences (e) employment equity, creates the need to transform the sector by employing more black scientists and managers. Despite progress in terms of developing and employing black males, the sector has not met its target in terms of black females, which will be a priority over the next five years, as the sector is male dominated. While there are a large proportion of women in managerial posts, 41%, the majority are white females. The sector will need to address this demand through career guidance initiatives target black females graduates and post graduates. (f) certain environmental subsectors such as conservation, water affairs and agriculture are increasingly becoming highly specialised and this specialisation drives the demand for more highly skilled employees.

Additional scarce skills required in the conservation sector although not yet quantified include:

- **Compliance Officers:** There are not enough compliance officers and with the increase in illegal trade in endangered species, and dwindling natural resources versus increased development pressure, as well as large construction projects like the SIPS, this need will increase.
- **Curators** of plant and animal collections in museums and research institutions e.g. SANBI
- **Geneticists -** particularly important in the fight against the illegal trade in endangered species
- **Taxonomists –** in particular molecular taxonomy (SANBI)
- **Resource economists –** to quantify the value of South Africa's biodiversity and natural resources, and inform development decisions. For example how much is a pristine conservation area worth versus how much is the same area worth as a golf course or housing estate?
- **Community Conservation and Extension Staff** (A new occupation suggested in the OFO, as none found to which these occupations could be mapped).
- **Statistical ecologists and modellers**

- **Biodiversity informatics specialists and biodiversity planners** (SANBI has long-standing vacancies and some post-graduate bursaries but a shortage of mentors)
- **Wildlife veterinarians**

2.3 Gaming and Lotteries sub-sector

2.3.1 Replacement Demand

Table 4: Employees over 55 in the Gaming and Lotteries sub-sector

Occupational Class	Occupation	#Employees over 55
Managers	Gaming Manager - 143102	29
	Director (Enterprise / Organisation) - 112101	19
	Office Manager - 134904	8
Professionals	Accountant (General) - 241101	4
Technicians And Associate Professionals	Office Administrator - 334102	4
Clerical Support Workers	Betting Agency Counter Clerk - 421203	65
	Gaming Worker - 421202	44
	Accounts Clerk - 431101	18
Service And Sales Workers	Security Officer - 541401	23
	Office Cashier - 523102	19

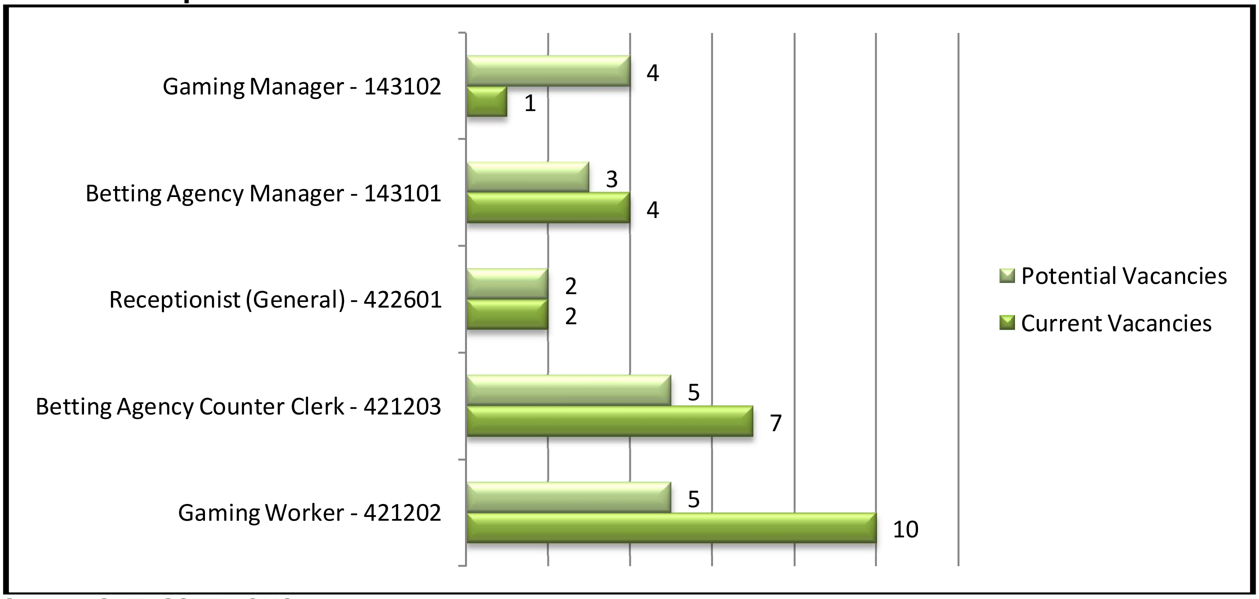
Source: CATHSSETA SMS 2013

Table 4 indicates that 233 employees from 10 occupations in the Gaming and Lotteries sub-sector will need to be replaced in the next 5 years due to retirement. Sub-sector specific occupations like the Gaming Manager, Betting Agency Counter Clerk and Gaming Worker occupations make up approximately 59% of the occupations with potential retirements. The replacement demand for these occupations will be addressed through bursaries, learnerships and skills programmes. CATHSSETA has already initiated engagement with the relevant Chamber Committee to put in place the necessary industry specific skills development projects to address this replacement demand.

2.3.2 Vacancies in the sub-sector

The Gaming Worker occupation constitutes the highest number of the vacancies found in the Top 8 occupations listed in Figure 24 that follows. This is followed closely by the Betting Agency Counter Clerk and Betting Agency Manager.

Figure 24: Top 5 vacancies in the Gaming and Lotteries sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2013

2.3.3 Emerging occupations and future skills

The emerging sport of Harness Racing in South Africa, which is in the process of establishing itself in KwaZulu-Natal, will bring with it many new occupations. Firstly, the sport does not use jockeys as thoroughbred horse racing does. It utilises drivers who steer and race the horse from the back of a sulky (which is pulled by the horse). Since the driver is not subjected to the harsh height and weight restrictions that jockeys are, this new occupation will be far more accessible to potential employees. Once established Harness Racing will also create other new occupations such as local sulky builders, farriers and racing officials, who will all have harness racing specific skills. There is also huge potential to uplift rural communities who already engage in a similar style of riding in rural horse riding events throughout the country.

2.4 Hospitality sub-sector

2.4.1 Replacement Demand

Table 5: Employees over 55 in the Hospitality sub-sector

Occupational Class	Occupation	#Employees over 55
Managers	Director (Enterprise / Organisation) - 112101	112
	Catering Production Manager - 141203	88
	Hotel or Motel Manager - 141101	63
Professionals	Management Consultant - 242101	5
Technicians And Associate Professionals	Chef - 343401	155
	Production / Operations Supervisor (Manufacturing) - 312201	24
	Maintenance Planner - 312202	18
Clerical Support Workers	General Clerk - 411101	33
	Switchboard Operator - 422301	27
Service And Sales Workers	Cook - 512101	253
	Waiter - 513101	214
	Commercial Housekeeper - 515103	133
Skilled Agricultural, Forestry, Fishery, Craft And Related Trades Workers	Pastry Cook - 681202	4
Plant And Machine Operators And Assemblers	Chauffeur - 732201	27
Elementary Occupations	Kitchenhand - 841201	215
	Commercial Cleaner - 811201	209

Source: CATHSSETA SMS 2013

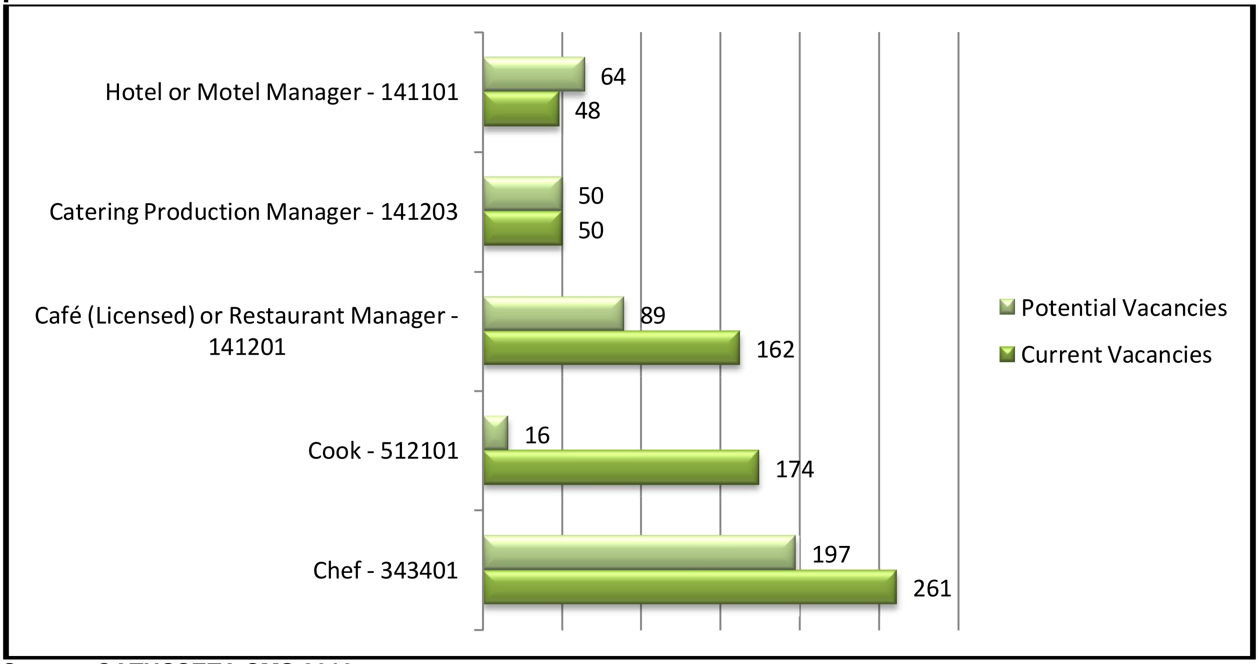
Table 5 above indicates that from 16 occupations in the Hospitality sub-sector, 1,580 employees will need to be replaced in the next 5 years due to retirement. The highest of numbers occurring in the Cook, Waiter, Kitchenhand, Commercial Cleaner and Chef occupations. The Waiter, Cook and Commercial Housekeeper occupations will be extremely difficult to replace the staff retiring from these occupations, as they have accumulated many years of experience. These occupations are often not popular with youth and Internships, Skills Programmes and Workplace Experiential Learning grants will be used to address the replacement demand in these occupations. The Chef occupation which has consistently been highlighted on the list of Scarce and Critical skills for the past 4 years has a high number of employees that will be retiring in the next 5 years. However, simple training interventions will not address the loss of these experienced culinary experts. A combination of both qualifications and experiential learning and mentoring will be required to pass on their experience and expertise to the next generation of chefs.

2.4.2 Vacancies in the sub-sector

Figure 25 indicates that from 5 occupations in the Hospitality sub-sector, the Chef, Cook and Cafe (Licensed) or Restaurant Manager occupations have the highest number of vacancies. The Managerial occupations such as the Cafe (Licensed) or Restaurant Manager, Catering Production

Manager and Hotel or Motel Manager are very common managerial vacancies in the Hospitality sub-sector, which feature consistently among the highest vacancies. Various interventions such as a Management Development Programme or bursaries could be used to address these vacancies in the sector.

Figure 25: Top 5 vacancies in the Hospitality sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2013

Figure 25 indicates that the Chef occupation has returned to containing the highest current and potential in the sector. Chef is a consistent finding and has actually increased from 227 current vacancies and 320 potential vacancies to 261 current vacancies and 197 potential vacancies. It must be noted that these vacancies are often driven by the fact that chefs tend to travel both locally and globally to work in diverse restaurants to gain work experience in preparing various cuisines. Opportunities on cruise ships play a large role in these vacancies as they often provide talented young chefs an opportunity to work in world rated Michelin star restaurants, which would normally take many years to achieve if based in South Africa and require travel to countries with similar restaurants. Cook is similar to chef in that there is a high staff turnover as cooks also tend to travel both locally and globally to work in diverse restaurants to gain work experience in preparing various cuisines. The only difference being that they are seeking additional work experience that will allow them to take up opportunities of being recognised and promoted to become a chef. Therefore as more cooks are promoted to chefs, a similar number of cook vacancies are created.

2.5 Travel and Tourism sub-sector

2.5.1 Replacement Demand

Table 6: Employees over 55 in the Travel and Tourism sub-sector

Occupational Class	Occupation	# Employees over 55
Managers	Director (Enterprise / Organisation) - 112101	44
	Office Manager - 134904	12
Professionals	Park Ranger - 213307	60
Technicians And Associate Professionals	Office Supervisor - 334101	11
Clerical Support Workers	Travel Consultant - 422102	90
	Accounts Clerk - 431101	48
	Receptionist (General) - 422601	17
Service And Sales Workers	Tour Guide - 511302	13
Plant And Machine Operators And Assemblers	Chauffeur - 732201	22
	Charter and Tour Bus Driver - 733102	6

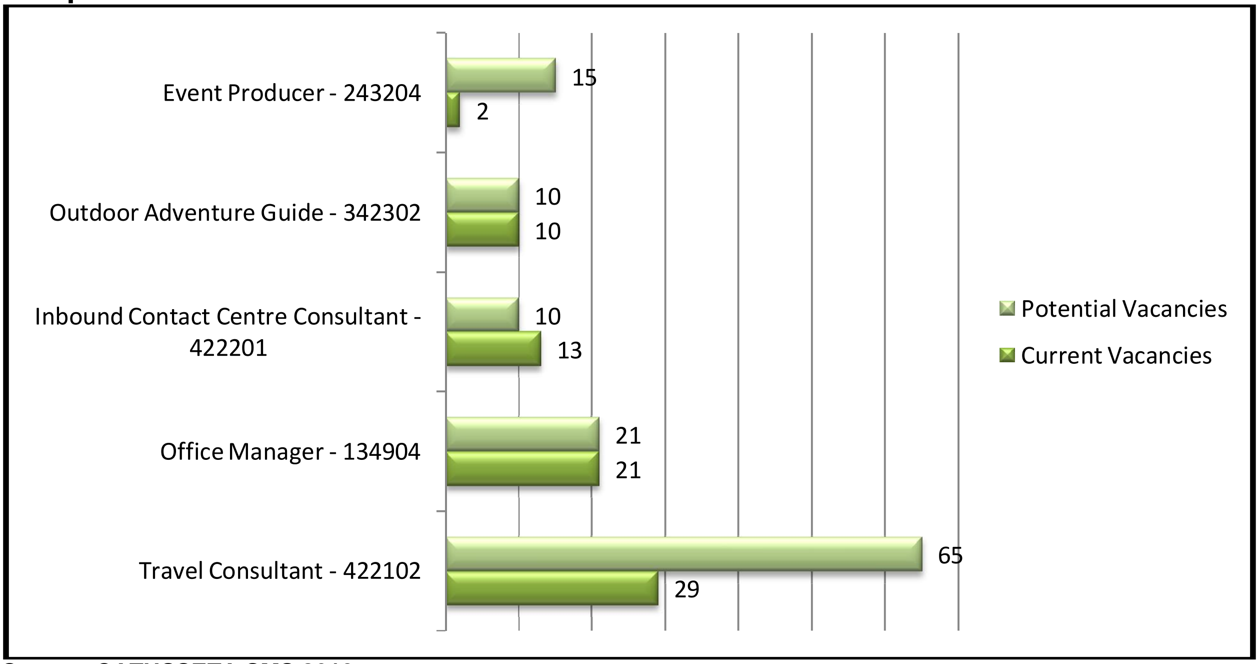
Source: CATHSSETA SMS 2013

A total of 323 employees over the age of 55 years spanning across 10 occupations will be potentially retiring in the next 5 years as per table 6 above. Of these occupations, the Park Ranger and the Travel Consultant occupations reflect the highest replacement demand.

2.5.2 Vacancies in the sub-sector

Figure 26 that follows shows that the Travel Consultant occupation vacancies are indicative of the high staff turnover due to the shift work nature of employment. Employers constantly have vacancies in this occupation and have to plan to recruit and train staff annually. As the global and local economy emerges from recession more people will start travelling for leisure purposes - hence the vacancies for travel consultant. The travel sub-sector contracted during the recession with many staff moving to the business process outsourcing sector. Therefore as the sub-sector bounces back more vacancies will be created. The high number of Travel Consultants occupation vacancies and potential vacancies is also liked to the fact highlighted in the in 2012 SSP update 132 Travel Consultants were identified as being close to retirement as they fell in the over 55 age group and in this update this number has decreased to 90. Despite the 47% decrease in the number of Travel Consultants identified as being close to retirement, the Travel and Tourism sub-sector will need to continuously plan to ensure that these vacancies are filled.

Figure 26: Top 5 vacancies in the Travel and Tourism sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2013

2.5.3 Emerging occupations and future skills

Social Media Manager: As companies increasingly use the Internet to promote and sell their products, many have turned to social media. Social media web sites (Facebook, LinkedIn and Twitter for example) donô just give you information, but also interact with you. Social media managers use their strong communication skills to connect with the billions of people in the expanding global market. They focus on building their companyõs brand and identity by generating publicity and communicating with consumers through social media sites.

2.6 Sport, Recreation and Fitness sub-sector

2.6.1 Replacement Demand

Table 7: Employees over 55 in the Sport, Recreation and Fitness sub-sector

Occupational Class	Occupation	#Employees over 55
Managers	Sports Administrator - 143105	16
	Facilities Manager - 143901	9
	Sports Centre / Facility Manager - 143108	7
Professionals	Sports Scientist - 224102	3
	Event Producer - 243204	3
Technicians And Associate Professionals	Fitness Instructor - 342301	240
	Sports Coach or Instructor - 342204	12
	Sports Official - 342203	11
Service And Sales Workers	Amusement, Fitness or Sport Centre Attendant - 515302	15
Skilled Agricultural, Forestry, Fishery, Craft And Related Trades Workers	Green Keeper - 611303	18
	Landscape Gardener - 611302	22

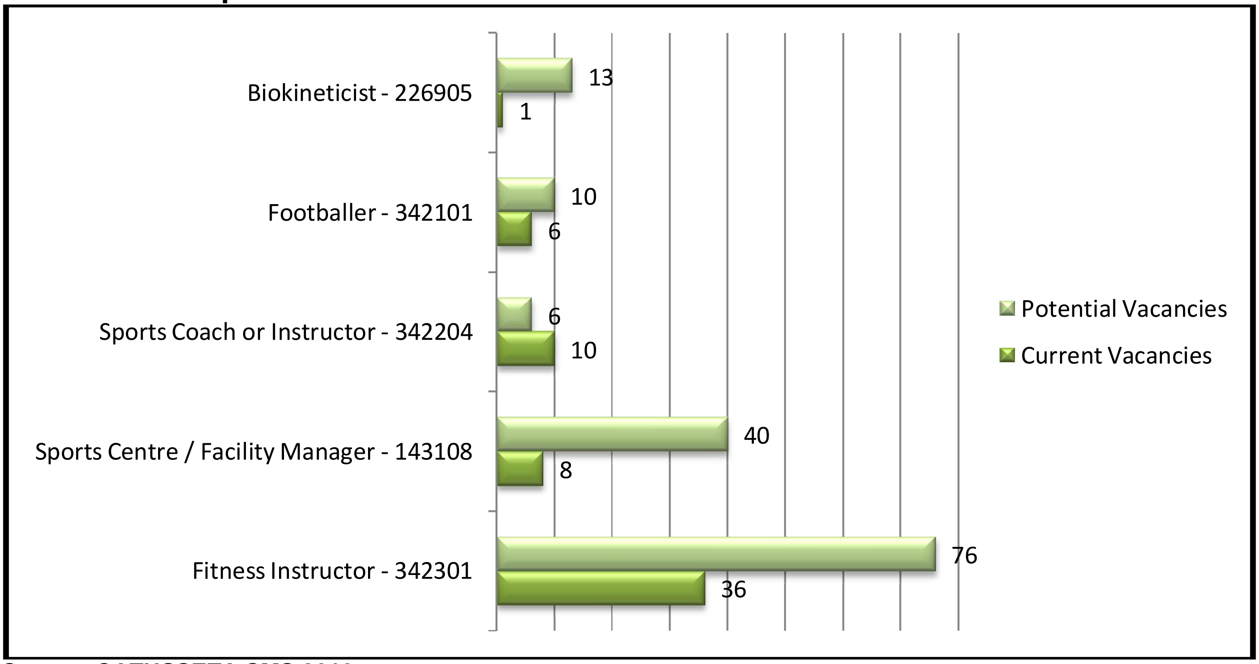
Source: CATHSSETA SMS 2013

In the Sport, Recreation and Fitness sub-sector, the Fitness Instructor occupation has the largest number of employees retiring in the next 5 years of the total 356 occupations reported across 11 occupations in table 7. The occupations of Landscape Gardener and Green Keeper are of particular concern as these occupations require a significant amount of experience in addition to education and training. CATHSSETA has formulated a partnership with the Club Management Association of Southern Africa (CMASA) that will specifically focus on the Golf and Sports Club related occupations and both the Landscape Gardener and Green Keeper occupations will be addressed through a combination of both learnerships, skills programmes and mentoring will be required to pass on their experience and expertise to the next generation. The large number of Fitness Instructors indicated here has been reflected on the list of Scarce and Critical skills as a critical skill.

2.6.2 Vacancies in the sub-sector

As per figure 27 below, the Fitness Instructor occupation features in this sub-sector with the highest number of vacancies. It is encouraging to note that the number of current and potential vacancies for this occupation has reduced from that of 2012. The growth in more South Africans adopting a healthy lifestyle which is linked to financial benefits from medical aid schemes and SRSA's Mass Participation in Sport Initiative has also led to the general increase in vacancies in the fitness. This occupation is listed on the scarce and critical skills list and will be addressed through bursaries, learnerships and skills programmes.

Figure 27: Top 5 vacancies in the Sport, Recreation and Fitness sub-sector in terms of current and potential vacancies



Source: CATHSSETA SMS 2013

2.6.3 Emerging occupations and future skills

Corporate Wellness Consultants and Practitioners are emerging occupations, and while some companies see wellness as a luxury, many others are embracing it as there is a direct correlation between their employeesôwellness and improved productivity and efficiency. Employees are cared for and in good health they are able to deliver optimum performance under pressure.

2.6.4 Demand for Skills in the Sport Sub-sector

Sport in South Africa relies heavily on the services of volunteer administrators, coaches and technical officials, who for the love of their sport code supply their services, skills and manpower to ensure that all managerial and administrative duties are completed, athletes are properly coached, rules are obeyed by officiators and an ethic code of conduct is implemented by all these role players. As these volunteers are not remunerated and the National Federations they belong to are exempted from paying the skills levy, the skills needs of these volunteers are not captured.

From late 2009 to early 2010 SASCOC conducted an audit of its National Federations and their human and physical resources. The results of this audit indicate that there is an urgent need to train these volunteers, and it is recommended that over the next 5 years (a) 11,000 sports coaches go through an RPL process to recognise the skills they already obtained and then, where necessary, receive training in areas they still need to develop; (b) 500 Umpires and 500 Sports Officials either receive short courses, skills programmes or learnerships to enhance their skills when officiating at events. SRSA through its Strategic Plan wishes to support sports at a club and community level. It is envisaged that 1,135 clubs would have been developed by 2016. School sport, being at the centre of discussion of SRSA, is receiving priority to ensure that teachers are trained effectively in code specific coaching, technical officiating and sports administration to support programmes for both increased participation and high performance sport.

3. SUPPLY OF SKILLS

3.1 Arts, Culture and Heritage sub-sector

3.1.1 Education Profile

Table 8: Education profile of employees in the Arts, Culture and Heritage sub-sector

Education Levels	*Employees*
ABET	231
NQF 1,2	446
NQF 3,4,5,6	2037
NQF 7,8,9,10	604
Total	3318

Source: CATHSSETA SMS 2013

Table 9: HEI Enrolments and graduates in the Arts, Culture and Heritage sub-sector

	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
DANCE	333	79	231	44	212	70
DESIGN AND APPLIED ARTS	3 567	880	3 629	752	3 547	862
DRAMA/THEATRE ARTS	2 282	628	2 172	531	1 882	468
FILM/VIDEO AND PHOTOGRAPHIC ARTS	1 216	371	1 305	361	1 258	341
FINE AND STUDIO ART	3 280	730	3 578	730	3 254	667
MUSIC	2 667	448	2 617	465	2 467	432
VISUAL AND PERFORMING ARTS, OTHER	31	17	39	25	49	27
TOTAL	**13 376**	**3 153**	**13 572**	**2 908**	**12 669**	**2 867**

Source: DHET HEMIS data 2010-2012

Table 8 indicates that there are 3,318 employees in total whom have been reported by the CATHSSETA registered enterprises for the 2013 period. Of this figure, the majority of employees have skills at a middle level of NQF levels 3, 4, 5 and 6. This majority makes up 61% of the total employees in the sub-sector. The high occurrence at the middle level skills category is indicative of the various types of occupations in this sub-sector that require such qualifications, which are typically in the middle management and professional OFO major groups.

Table 9 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have increased by 5.6% from 2010 to 2013 and persons graduating from these HEIs have also increased by 10%.

3.1.2 Occupational Profile

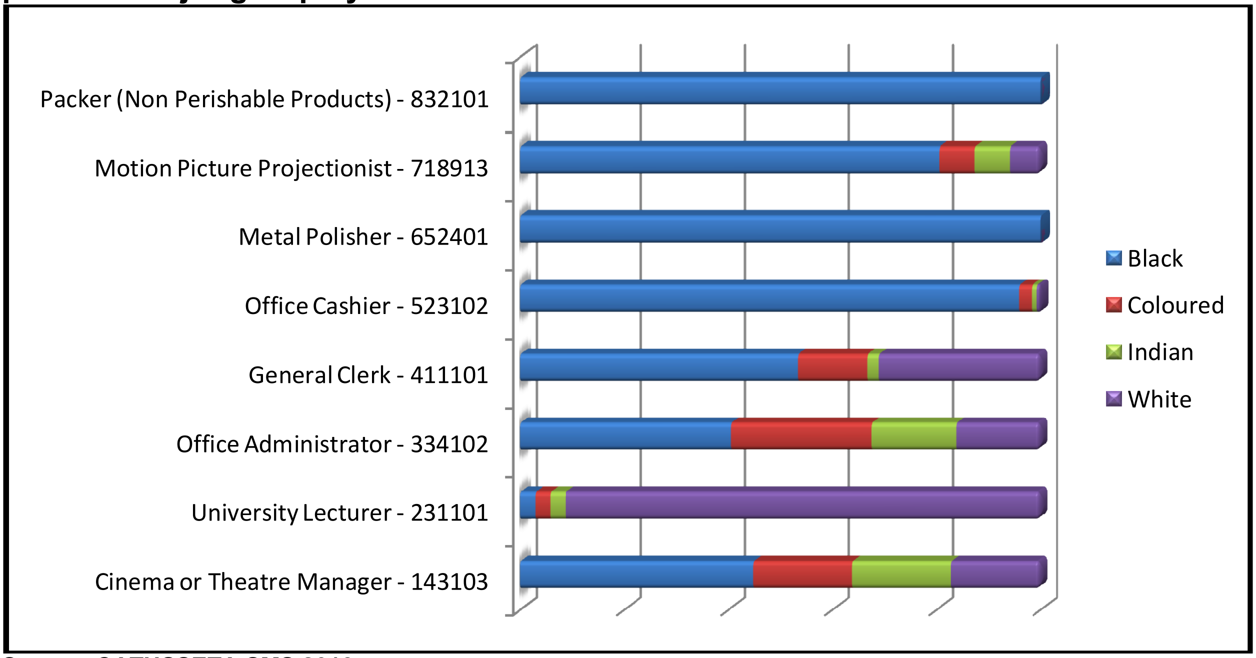
Table 10: Employees by Race, Gender, Disability and OFO Major Group for the Arts, Culture and Heritage sub-sector

Arts	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	66	49	0	115	18	22	0	40	29	9	0	38	132	116	0	248	441
Professionals	64	64	0	128	29	32	0	61	19	18	1	37	160	150	0	310	536
Clerical Support Workers	102	106	1	208	5	44	0	49	1	9	0	10	19	58	0	77	344
Elementary Occupations	94	79	0	173	21	20	0	41	1	0	0	1	4	1	0	5	220
Plant & Machine Operators & Assemblers	145	39	3	184	24	1	0	25	8	0	0	8	7	4	0	11	228
Service and Sales Workers	297	680	1	977	34	46	0	80	6	14	0	20	30	27	0	57	1134
Skilled Agri Forestry Fishery, Craft Trades	63	57	0	120	3	1	0	4	0	0	0	0	5	1	0	6	130
Tech. & Ass. Professionals	62	56	1	118	32	24	0	56	12	17	0	29	59	56	0	115	318
Grand Total	893	1130	6	2023	166	190	0	356	76	67	1	143	416	413	0	829	3351
Percentage	60%				11%				4%				25%				100%

Source: CATHSSETA SMS 2013

Of the 3 351 employees classified according to race, gender and OFO major group, Table 10 illustrates that in this sub-sector, Black employees constitute 60% of the entire workforce, followed by White employees at 25%, Coloured employees at 11% and Indian employees at 4%. Female employees make up the majority of the sub-sector, composing 53%. Disabled persons however are notably scarce with only a 0.2% presence. The 8 OFO major groups have been further explored in order to gain additional insight into the supply of skills in the sub-sector, along with the racial profile of employees occupying these occupations. From Table 10, it is quite apparent that in the Manager OFO Major group, this sub-sector is dominated by White employees. Of the total 441 occupations in this major group, 56% of positions are held by White employees. It is however, pertinent to note that in the Cinema or Theatre Manager occupation, 44% of positions are held by Black employees with the rest being almost equally split across the other race groups.

Figure 28: Most common occupations in the Arts, Culture and Heritage sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 28 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.2 Conservation sub-sector

3.2.1 Education Profile

Table 11: Education profile of employees in the Conservation sub-sector

Education Levels	*Employees*
ABET	2 829
NQF 1,2	3 699
NQF 3,4,5,6	3 509
NQF 7,8,9,10	1 435
Total	11 472

Source: CATHSSETA SMS 2013

Table 12: HEI Enrolments and graduates in the Conservation sub-sector

Conservation	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
BOTANY/PLANT BIOLOGY	1 969	375	1 815	280	1 885	294
ZOOLOGY/ANIMAL BIOLOGY	1 679	356	1 554	318	1 609	343
ECOLOGY, EVOLUTION, SYSTEMATICS AND POPULATION BIOLOGY	1 416	376	1 185	322	1 528	368
TOTAL	**5 064**	**1 107**	**4 554**	**920**	**5 022**	**1 005**

Source: DHET HEMIS data 2010-2012

As per Table 11 above, there are 11,472 employees in total reported for the 2013 period. Of this figure, the majority of employees have skills at a low level of NQF levels 1 and 2, followed closely by employees falling within the middle levels skills category of NQF levels 3, 4, 5 and 6. It must be noted that there is also a scarcity of qualified graduates at NQF levels 7, 8, 9 and 10, particularly in the Conservation and Environment sub-sector where vacancies remain unfilled due to a lack of suitably qualified graduates.[b]

Table 12 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have increased by 0.8% from 2010 to 2013 and persons graduating from these HEIs have also increased by 10%.

[b] Skills concerned identified during stakeholder workshops with the Conservation and Environmental sub-sector and also from the ESSP.

3.2.2 Occupational Profile

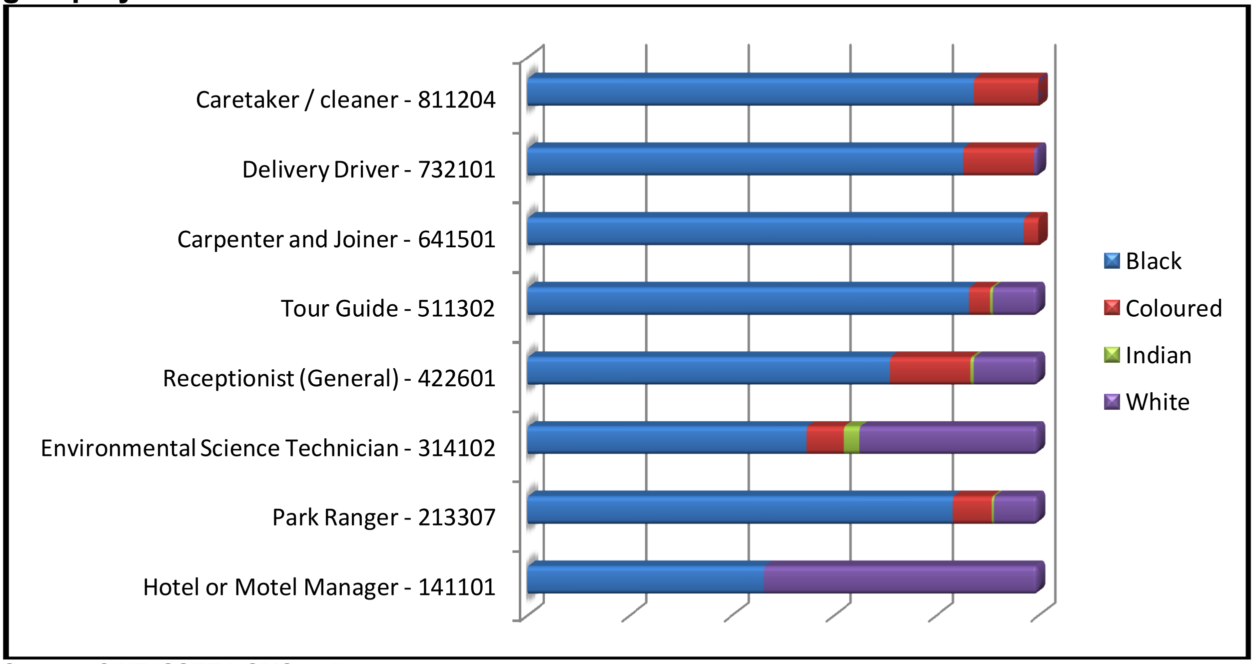
Table 13: Employees by Race, Gender, Disability and OFO Major Group for the Conservation sub-sector

	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	139	90	0	229	14	19	0	33	7	9	0	16	209	193	2	402	680
Professionals	1911	184	0	2095	203	54	0	257	17	15	0	32	295	170	2	465	2849
Clerical Support Workers	170	243	0	413	27	88	0	115	0	12	0	12	24	167	2	191	731
Elementary Occupations	2220	1619	3	3839	134	143	0	277	2	1	0	3	18	3	0	21	4140
Plant & Machine Operators & Assemblers	274	2	0	276	52	0	0	52	0	0	0	0	21	1	0	22	350
Service and Sales Workers	696	517	0	1213	89	94	0	183	1	4	0	5	49	71	0	120	1521
Skilled Agri Forestry Fishery, Craft Trades	235	17	1	252	74	0	0	74	6	1	0	7	37	2	1	39	372
Tech. & Ass. Professionals	246	198	0	444	34	36	1	70	8	7	0	15	117	133	0	250	779
Grand Total	5891	2870	4	8761	627	434	1	1061	41	49	0	90	770	740	7	1510	11422
Percentage	77%				9%				1%				13%				100%

Source: CATHSSETA SMS 2013

Of the 11,422 employees classified according to race, gender and OFO major group, Table 13 illustrates that in this sub-sector, Black employees constitute 77% of the entire workforce, followed by White employees at 13%, Coloured employees at 9% and Indian employees at 1%. The majority of the sub-sector is made up of Male employees, with male employees making up 64%. This is reflective of the fact that this sector has historically been dominated by male employees however the promotion of the Green Economy and Green Jobs is changing this and bringing about a transformation of the sub-sector as more and more female employees are attracted to and employed in the sector. Employees falling into the Elementary Occupations OFO major group dominate the sub-sector with a total of 4 140 employees. Due to the scientific nature of the work in this sub-sector, the second highest number of employees is seen in the Professionals OFO major group, making up 24% of the total number of employees in the Conservation sub-sector.

Figure 29: Most common occupations in the Conservation sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 29 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.3 Gaming and Lotteries sub-sector

3.3.1 Education Profile

Table 14: Education profile of the Gaming and Lotteries sub-sector

Education Levels	*Employees*
ABET	614
NQF 1,2	1 273
NQF 3,4,5,6	18 646
NQF 7,8,9,10	1 194
Total	21 727

Source: CATHSSETA SMS 2013

Table 14 indicates that there are 21,727 employees in total whom have been reported by CATHSSETA registered enterprises for the 2013 period. Of this figure, the majority of employees have skills at a middle level of NQF levels 3, 4, 5 and 6. This majority makes up 86% of the total employees in the sub-sector. The high occurrence at the middle level skills category is indicative of the various types of occupations in the Gaming and Lotteries sub-sector that require such qualifications, which are typically in the middle management and the clerical support workers OFO major groups.

As there are no qualifications currently offered at HEIs that are specific to the Gaming and Lotteries sub-sector, HEMIS data has not been included.

3.3.2 Occupational Profile

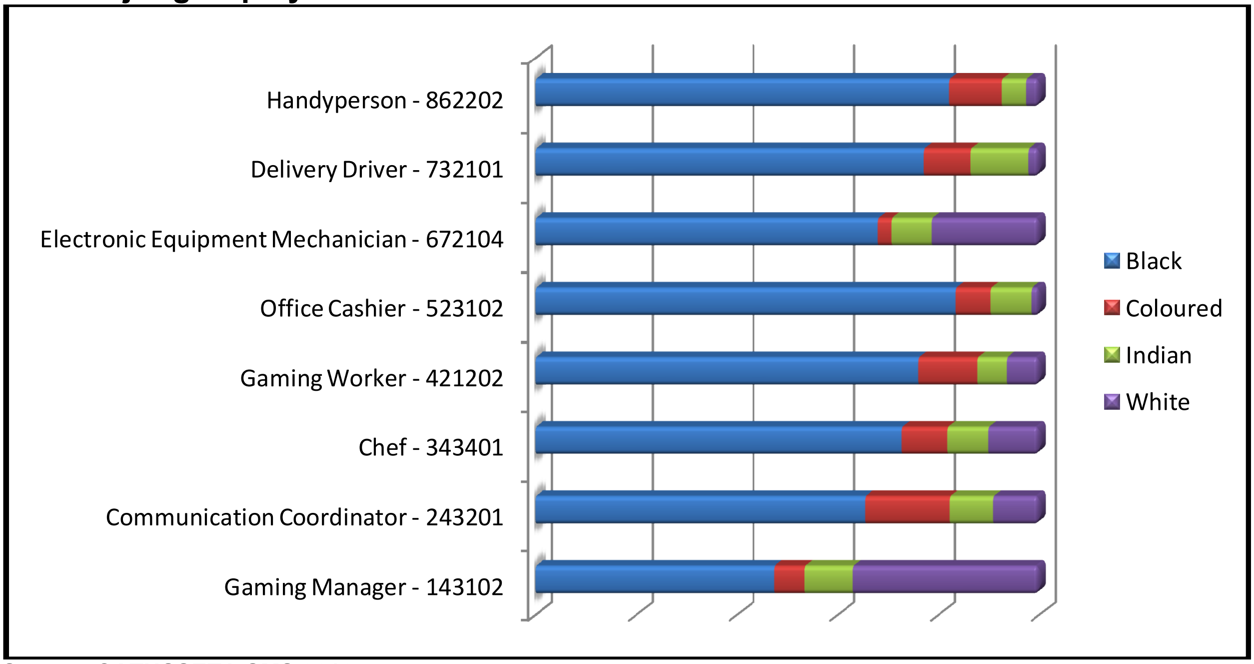
Table 15: Employees by Race, Gender, Disability and OFO Major Group for the Gaming and Lotteries sub-sector

	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	535	532	2	1067	94	68	1	162	148	68	0	216	519	283	8	802	2247
Professionals	318	344	5	662	73	71	2	144	99	71	1	170	178	172	2	350	1326
Clerical Support Workers	3044	5445	100	8489	489	775	22	1264	385	369	12	754	308	387	16	695	11202
Elementary Occupations	742	580	14	1322	93	39	2	132	39	9	0	48	13	13	2	26	1528
Plant & Machine Operators & Assemblers	209	6	0	215	28	2	1	30	18	0	0	18	3	0	0	3	266
Service and Sales Workers	1142	1539	10	2681	85	154	0	239	94	67	0	161	63	64	0	127	3208
Skilled Agri Forestry Fishery, Craft Trades	226	17	1	243	52	3	0	55	24	0	0	24	75	2	0	77	399
Tech. & Ass. Professionals	475	376	5	851	91	81	0	172	93	79	0	172	157	199	2	356	1551
Grand Total	6691	8839	137	15530	1005	1193	28	2198	900	663	13	1563	1316	1120	30	2436	21727
Percentage	71%				10%				7%				11%				100%

Source: CATHSSETA SMS 2013

Table 15 indicates that there are 21 727 employees in total that have been reported in the sub-sector, of these employees classified according to race, gender and OFO major group, African employees constitute 71% of the entire workforce, followed by White employees at 11%, Coloured employees at 10% and Indian employees at 7%. The majority of the sub-sector are made up of Male employees, with male employees making up 64%, which is reflective of both the historical recruitment approach to employment in the sector, as well as the nature of employment in the sector which is on a shift basis which includes work at night and over weekends and public holidays and is often not preferable to female employees. Employees falling into the Elementary Occupations OFO major group dominate the sub-sector with a total of 4 140 employees. As expected, the second highest number of employees is seen in the Professionals OFO major group, making up 24% of the total number of employees in the Gaming and Lotteries sub-sector.

Figure 30: Most common occupations in the Gaming and Lotteries sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 30 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.4 Hospitality sub-sector

3.4.1 Education Profile

Table 16: Education profile of the Hospitality sub-sector

Education Levels	*Employees*
ABET	15 253
NQF 1,2	48 468
NQF 3,4,5,6	58 654
NQF 7,8,9,10	5 388
Total	127 763

Source: CATHSSETA SMS 2013

Table 16 indicates that there are 127 763 employees in total whom have been reported by CATHSSETA registered enterprises for the 2013 period. Of this figure, the majority of employees either have skills at the entry level of NQF levels 1 and 2 (40%) or middle level of NQF levels 3, 4, 5 and 6 (46%). This combined majority makes up 86% of the total employees in the sub-sector and is indicative of the types of occupations employed in the sector, particularly at entry level which typically includes a vast of amount of occupations which form part of the Elementary Occupations OFO major Group. This is also echoed by the fact that 15,253 employees only ABET or AET qualifications.

3.4.2 Occupational Profile

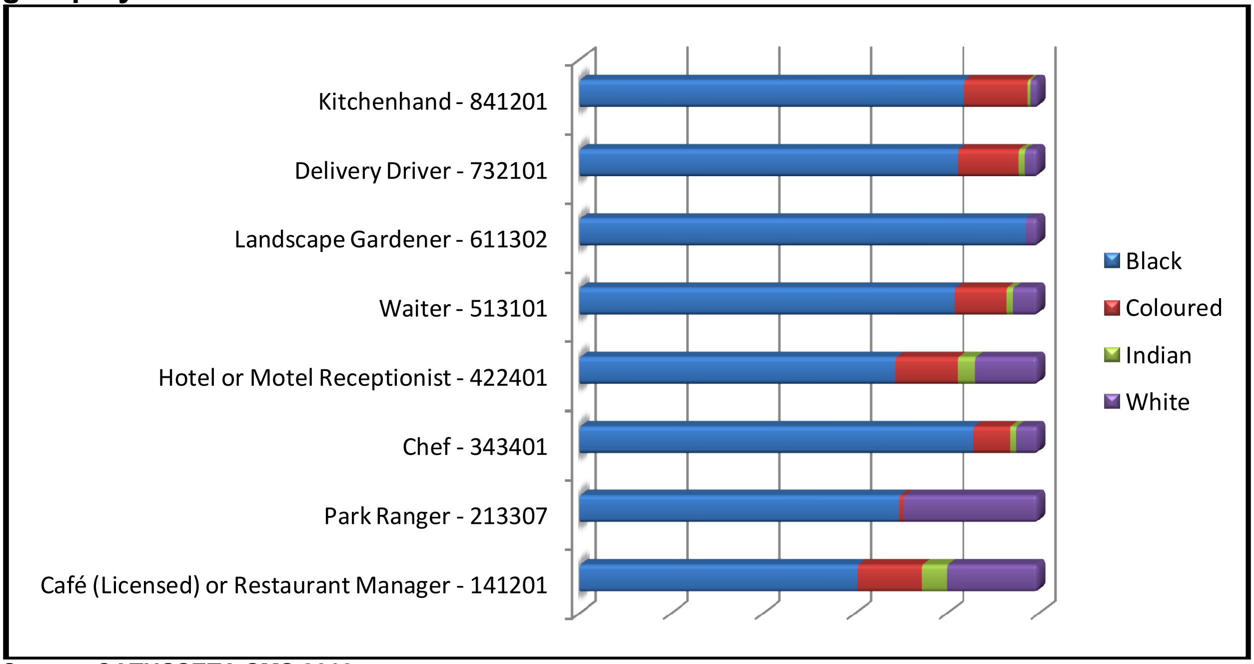
Table 17: Employees by Race, Gender, Disability and OFO Major Group for the Hospitality sub-sector

	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	2522	2691	6	5213	521	1123	3	1644	432	328	3	760	2583	2297	5	4880	12497
Professionals	417	313	3	730	62	111	1	173	63	67	1	130	435	527	6	962	1995
Clerical Support Workers	2415	3210	14	5625	470	1101	3	1571	221	368	1	589	341	1472	6	1813	9598
Elementary Occupations	12435	17228	56	29663	1305	2881	6	4186	105	83	1	188	248	212	2	460	34497
Plant & Machine Operators & Assemblers	1013	96	1	1109	109	18	0	127	11	0	0	11	31	10	0	41	1288
Service and Sales Workers	14423	28040	39	42463	1142	4111	7	5253	324	319	1	643	872	1208	6	2080	50439
Skilled Agri Forestry Fishery, Craft Trades	460	76	8	536	98	32	0	130	5	1	0	6	71	22	0	93	765
Tech. & Ass. Professionals	3710	9743	16	13453	634	835	0	1469	192	145	1	337	725	748	5	1473	16732
Grand Total	37395	61397	14 3	98792	4341	10212	20	14553	1353	1311	8	2664	5306	6496	30	1180 2	12781 1
Percentage	77%				11%				2%				9%				100%

Source: CATHSSETA SMS 2013

Table 17 indicates that there are 127 811 employees in total that have been reported in the Hospitality sub-sector, which is the largest employment of the six sub-sectors in CATHSSETA's scope. When these employees are analysed according to race, gender and OFO major group, Black employees constitute 77% of the entire workforce, followed by Coloured employees at 11%, White employees at 9% and Indian employees at 2%. The majority of employees the sub-sector are made up of Male employees, with male employees making up 64%, which is reflective of both the historical recruitment approach to employment in the sector, as well as the nature of employment in the sector which is on a shift basis which includes work at night and over weekends and public holidays and is often not preferable to female employees. Employees falling into the Service and Sales Workers OFO major group dominate the sub-sector with a total of 50 439 employees, which is indicative of critical role played by these employees in this sub-sector, as either by assisting or selling products to consumers for a living are provided with unique exposure and if patient can find themselves in a very powerful position by understanding how the market operates and what consumer trends are. The second highest number of employees is seen in the Elementary Workers OFO major group, with a total of 34 497 employees, in the Hospitality sub-sector. Elementary Workers play a huge support role in this sub-sector, and while their work is often not seen and supports the back-off-house function in man hospitality establishments, the sector would not be able to function effectively without these employees. However, due to the nature of the work carried out by these employees they are often poorly paid and work in very difficult circumstances.

Figure 31: Most common occupations in the Hospitality sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 31 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.5 Travel and Tourism sub-sector

3.5.1 Education Profile

Table 18: Education profile of the Travel and Tourism sub-sector

Education Levels	***Employees***
ABET	892
NQF 1,2	1 938
NQF 3,4,5,6	11 411
NQF 7,8,9,10	2 082
Total	16 323

Source: CATHSSETA SMS 2013

Table 18 indicates that there are 16 323 employees in total whom have been reported by CATHSSETA registered enterprises for the 2013 period. Of this figure, the majority of employees 11 411 have skills at the middle level of NQF levels 3, 4, 5 and 6. This majority makes up 70% of the total employees in the Travel and Tourism sub-sector and due to the fact that for the majority of occupations that fall within this sub-sector, require at least a Matric certificate combined with a sub-sector specific tertiary level qualification.

3.5.2 Occupational Profile

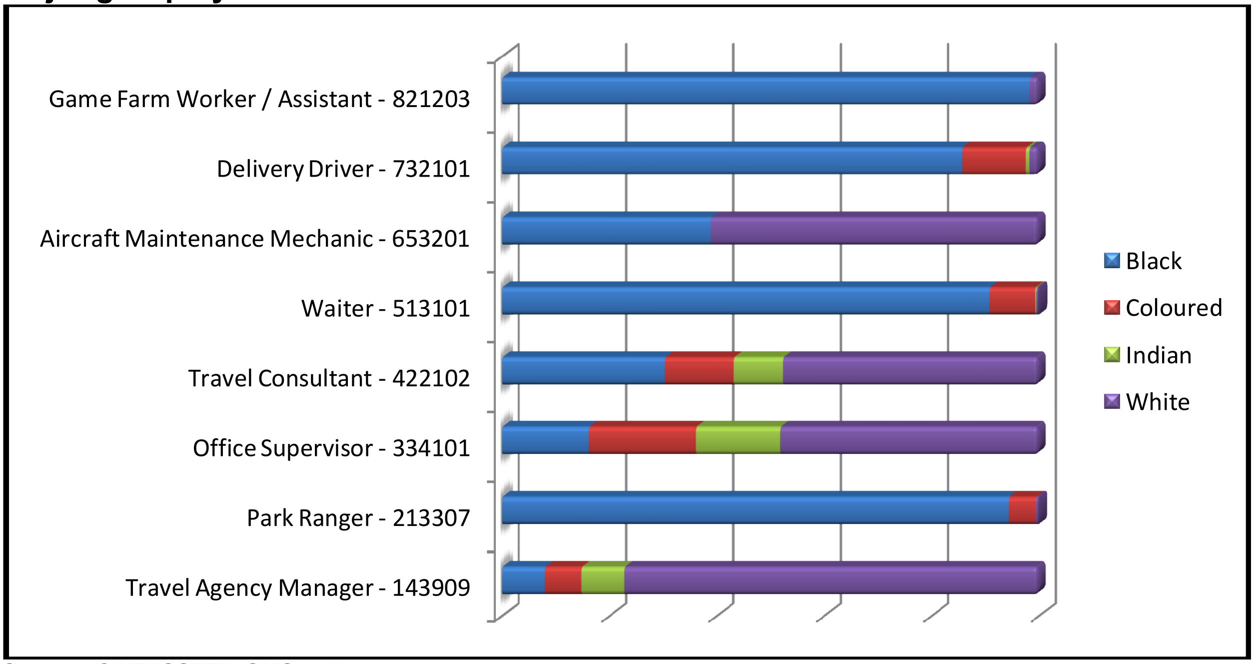
Table 19: Employees by Race, Gender, Disability and OFO Major Group for the Travel and Tourism sub-sector

	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	304	237	2	541	94	117	0	211	116	147	0	263	501	1020	1	1521	2536
Professionals	430	149	1	579	34	52	0	86	28	33	0	61	194	212	0	406	1132
Clerical Support Workers	545	1592	11	2137	157	806	0	963	104	438	0	542	281	1839	3	2120	5762
Elementary Occupations	425	725	0	1150	45	25	0	70	15	2	0	17	27	5	0	32	1269
Plant & Machine Operators & Assemblers	846	42	0	888	171	7	0	178	10	7	0	17	29	18	0	47	1130
Service and Sales Workers	972	1349	5	2321	209	202	2	411	41	29	0	70	163	225	0	388	3190
Skilled Agri Forestry Fishery, Craft Trades	48	1	0	49	11	0	0	11	0	0	0	0	29	1	0	30	90
Tech. & Ass. Professionals	187	273	3	460	81	95	0	176	27	84	0	111	114	322	0	436	1183
Grand Total	3757	4368	22	8125	802	1304	2	2106	341	740	0	1081	1338	3642	4	4980	16292
Percentage	50%				13%				7%				31%				100%

Source: CATHSSETA SMS 2013

Table 19 indicates that there are 16 292 employees in total that have been reported in the Travel and Tourism sub-sector. When these employees are analysed according to race, gender and OFO major group, Black employees constitute 50% of the entire workforce, followed by White employees at 31%, Coloured employees at 13% and Indian employees at 7%. The majority of employees the sub-sector are made up of female employees, with female employees making up 62%, which is reflective of the nature of employment in the sector which has historically recruited female employees. Employees falling into the Clerical Support OFO major group dominate the sub-sector with a total of 5 762 employees, which is indicative of the importance the documentation, payments and processing that is critical to functioning and operations of many enterprises in this sub-sector. The second highest number of employees is seen in the Service and Sales Workers OFO major group, making up 20% of the total number of employees in the Travel and Tourism sub-sector. Service and Sales Workers play a critical role in this sub-sector, by "being at the coal face", and either by assisting or selling product to consumers for a living are provided with unique exposure and if patient can find themselves in a very powerful position by understanding how the market operates and what consumer trends are. There is an excellent opportunity to provide these market experts with sales and marketing skills to allow them to progress to sales and marketing management positions.

Figure 32: Most common occupations in the Travel and Tourism sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 32 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.6 Sport, Recreation and Fitness sub-sector

3.6.1 Education Profile

Table 20: Education profile of the Sport, Recreation and Fitness sub-sector

Education Levels	*Employees*
ABET	627
NQF 1,2	3 949
NQF 3,4,5,6	8 865
NQF 7,8,9,10	1 236
Total	14 677

Source: CATHSSETA SMS 2013

Table 21: HEI Enrolments and graduates in the Sport, Recreation and Fitness sub-sector

Sports, Recreation and Fitness	2012		2011		2010	
	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates	TOTAL Enrolment	TOTAL Graduates
PARKS, RECREATION AND LEISURE FACILITIES MANAGEMENT	3113	648	2942	596	3367	702
MOVEMENT AND MIND-BODY THERAPIES AND EDUCATION	105	26	109	20	57	7
TOTAL	**3218**	**674**	**3051**	**616**	**3424**	**709**

Source: DHET HEMIS data 2010-2012

Table 20 indicates that there are 14 677 employees in total whom have been reported in by CATHSSETA registered enterprises for the 2013 period. Of this figure, the majority of employees 8 8865 have skills at the middle level of NQF levels 3, 4, 5 and 6. This majority makes up 60% of the total employees in the Sport, Recreation and Fitness sub-sector and due to the fact that for many of the occupations that fall within this sub-sector, the employment requirements stipulate that at least a Matric certificate combined with a sub-sector specific tertiary level qualification are required for employment. Furthermore competition for vacancies is high in this sub-sector which often leads to the candidate with the highest qualification and most appropriate experience being hired, which further accounts for the majority of employees having middle level skills and qualifications at NQF levels 3, 4, 5 and 6.

Table 21 illustrates the total enrolments and graduates in sub-sector specific study areas from Higher Education Institutions (HEIs) from 2010 to 2012. Enrolments have decreased by 6% from 2010 to 2013 and persons graduating from these HEIs have also decreased by 5%.

3.6.2 Occupational Profile

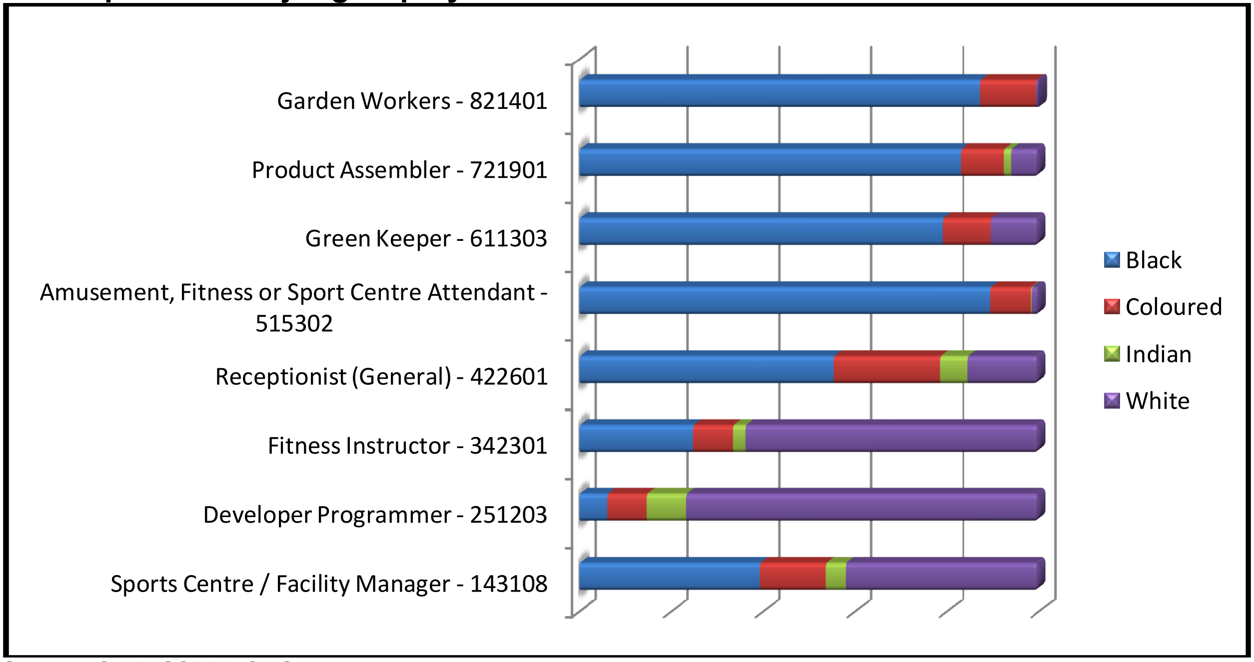
Table 22: Employees by Race, Gender, Disability and OFO Major Group for the Sport, Recreation and Fitness sub-sector

	Black				Coloured				Indian				White				Grand
OFO Major Group	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	Total
Managers	303	153	6	456	156	66	0	222	82	24	4	106	531	301	59	832	1616
Professionals	79	62	4	141	50	27	1	77	21	8	0	29	224	138	17	362	609
Clerical Support Workers	183	628	33	811	71	291	4	362	23	57	0	80	68	238	24	306	1559
Elementary Occupations	731	358	12	1089	142	47	1	189	4	2	0	6	20	4	1	24	1308
Plant & Machine Operators & Assemblers	382	48	4	430	37	5	0	42	4	0	0	4	14	0	0	14	490
Service and Sales Workers	492	972	55	1464	99	179	0	278	14	18	0	32	48	94	2	142	1916
Skilled Agri, Forestry, Fishery, Craft Trades	254	21	50	275	49	0	0	49	4	0	0	4	57	1	5	58	386
Tech. & Ass. Professionals	1505	759	44	2264	565	241	4	806	128	86	2	214	1840	1669	124	3509	6793
Grand Total	3929	3001	208	6930	1169	856	10	2025	280	195	6	475	2802	2445	232	5247	14677
Percentage	47%				14%				3%				36%				100%

Source: CATHSSETA SMS 2013

Table 22 indicates that there are 14, 677 employees in total that have been reported in the travel and tourism sub-sector. When these employees are analysed according to race, gender and OFO major group, Black employees constitute 47% of the entire workforce, followed by White employees at 36%, Coloured employees at 14% and Indian employees at 3%. The majority of employees the sub-sector are made up of male employees, with male employees making up 56%, which is reflective of the nature of employment in the sector whereby the sector employs slightly more males than females, but is also indicative of some of the transformation achieved in this sub-sector. Employees falling into the Technicians and Associate Professionals OFO major group dominate the sub-sector with a total of 6 793 employees, which is due to the fact that the Fitness Instructor occupation falls into this major group and the sub-sector employs a significant amount of these employees. However, three OFO major groups employ a similar amount of employees in the sector, with 1916 employees falling into the Service and Sales Works OFO major group, 1616 in the Managers major group, 1559 employees in the Clerical Support Workers major group and 1308 in the Elementary Occupations major group. This spread of occupations over the various major groups illustrates varied nature of organisations operating within this sub-sector.

Figure 33: Most common occupations in the Sport, Recreation and Fitness sub-sector per OFO major group by race



Source: CATHSSETA SMS 2013

Figure 33 above illustrates the most commonly occurring occupations per OFO major group reported by CATHSSETA registered enterprises in the sub-sector.

3.7 ARTISANS IN THE SECTOR

Table 23: Artisans employed in the sector by Race, Gender and Disability

Trade	Black				Coloured				Indian				White				Grand Total
	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	
Air-conditioning and Refrigeration Mechanic - 642701	18	0	0	18	12	0	0	12	0	0	0	0	9	0	0	9	**39**
Aircraft Maintenance Mechanic - 653201	7	0	0	7	0	0	0	0	0	0	0	0	11	0	0	11	**18**
Aircraft Structures Worker - 653202	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	**1**
Armature Winder - 671207	0	0	0	0	1	0	0	1	0	0	0	0	0	0	0	0	**1**
Automotive Engine Mechanic - 653109	6	0	0	6	0	0	0	0	0	0	0	0	3	0	0	3	**9**
Automotive Motor Mechanic - 653101	24	0	0	24	0	0	0	0	2	0	0	2	11	0	0	11	**37**
Boiler Maker - 651302	1	0	0	1	1	0	0	1	0	0	0	0	0	0	0	0	**2**
Bricklayer - 641201	18	0	0	18	3	0	0	3	1	0	0	1	1	0	0	1	**23**
Butcher - 681103	2	0	0	2	4	1	0	5	0	0	0	0	4	1	0	5	**12**
Carpenter - 641502	31	0	1	31	18	0	0	18	2	0	0	2	4	0	0	4	**55**
Carpenter and Joiner - 641501	77	0	2	77	4	0	0	4	0	0	0	0	4	0	0	4	**85**
Chef - 343401	3287	9226	9	12513	535	663	0	1198	151	74	1	225	535	234	0	769	**14705**
Computer Engineering Mechanic / Service Person - 672203	7	0	0	7	2	0	0	2	0	0	0	0	7	1	0	8	**17**
Confectionary Baker - 681201	42	34	1	76	11	6	0	17	1	0	0	1	2	5	0	7	**101**
Confectionery Maker - 681203	9	4	0	13	3	2	0	5	0	0	0	0	0	0	0	0	**18**
Craft Bookbinding Technician - 662304	2	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	**2**
Data and Telecommunications Cabler - 672201	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	**1**
Diesel Mechanic - 653306	0	0	0	0	2	0	0	2	1	0	0	1	7	0	0	7	**10**
Electrical Equipment Mechanic - 671206	4	0	1	4	7	3	0	10	2	0	0	2	5	0	4	5	**21**
Electrician - 671101	82	2	1	84	28	0	0	28	7	0	0	7	36	1	1	37	**156**

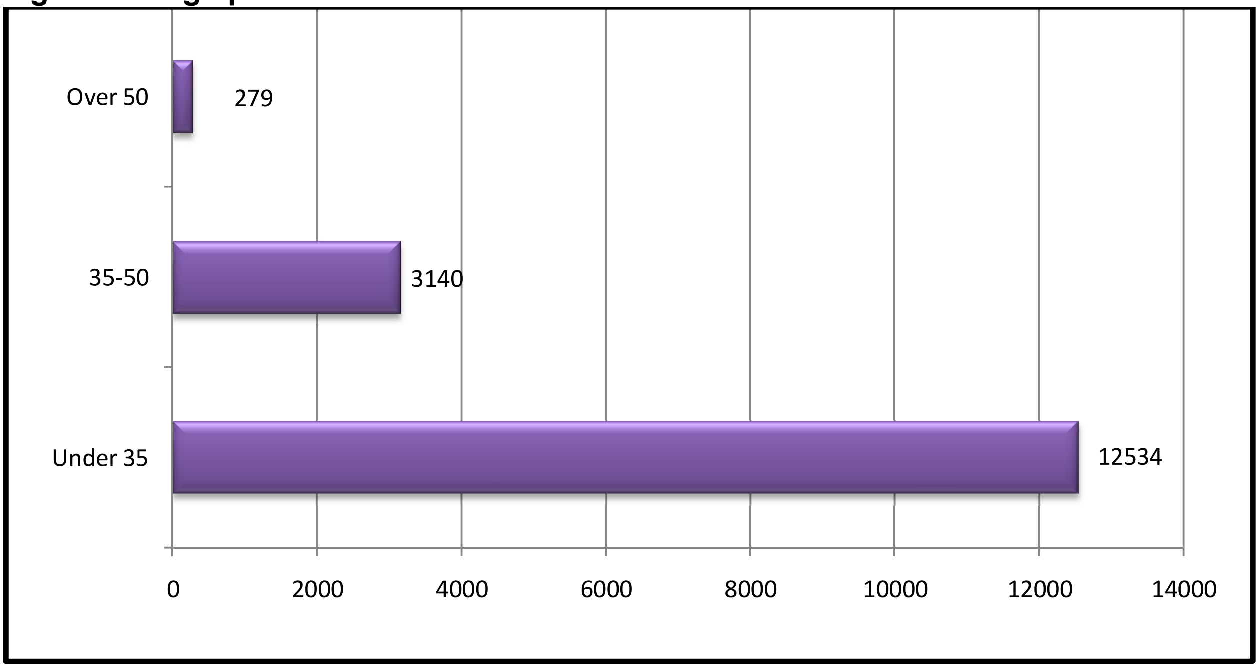
Trade	Black				Coloured				Indian				White				Grand Total
	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	
Electronic Equipment Mechanician - 672104	47	6	0	53	2	0	0	2	6	0	0	6	16	0	0	16	**77**
Electronic Pre-press Technical Worker - 662101	7	1	0	8	0	0	0	0	0	0	0	0	0	0	0	0	**8**
Farrier - 684902	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	2	**2**
Fitter and Turner - 652302	15	0	0	15	3	0	0	3	0	0	0	0	13	0	0	13	**31**
Glazier - 642501	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	**1**
Hairdresser - 514101	0	0	0	0	0	4	0	4	0	0	0	0	0	0	0	0	**4**
Heavy Equipment Mechanic - 653307	0	0	0	0	0	0	0	0	1	0	0	1	1	0	0	1	**2**
Industrial Machinery Mechanic - 653301	6	0	0	6	1	0	0	1	4	0	0	4	4	0	0	4	**15**
Insurance Administrator - 431201	34	15	0	49	0	0	0	0	0	0	0	0	1	1	0	2	**51**
Locksmith - 652203	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	2	**2**
Mechanical Fitter - 653303	2	0	0	2	0	0	0	0	0	0	0	0	3	0	0	3	**5**
Mechatronics Technician - 671203	53	2	0	55	3	0	0	3	1	0	0	1	12	0	0	12	**71**
Millwright - 671202	5	0	0	5	0	0	0	0	0	0	0	0	0	0	0	0	**5**
Musical Instrument Maker or Repairer - 661201	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	2	**2**
Packaging Manufacturing Machine Minder - 718304	4	12	0	16	0	1	0	1	1	0	0	1	0	0	0	0	**18**
Painter - 643101	82	1	0	83	48	0	0	48	3	0	0	3	0	0	0	0	**134**
Panelbeater - 684904	1	0	0	1	0	0	0	0	0	0	0	0	2	0	0	2	**3**
Pastry Cook - 681202	22	17	0	39	3	9	0	12	2	0	0	2	2	7	0	9	**62**
Plumber - 642601	35	1	0	36	7	2	0	9	1	0	0	1	7	0	0	7	**53**
Printing Machinist - 662201	2	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	**2**
Refrigeration Mechanic - 642702	6	0	0	6	2	0	0	2	0	0	0	0	2	0	0	2	**10**
Rigger - 651501	3	0	0	3	0	0	0	0	0	0	0	0	1	0	0	1	**4**
Small Engine Mechanic - 653305	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	**1**
Tailor - 683101	1	5	0	6	0	3	0	3	0	0	0	0	0	0	0	0	**9**

Trade	Black				Coloured				Indian				White				Grand Total
	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	M	F	D	Tot.	
Telecommunications Technician - 672205	13	1	0	14	0	0	0	0	1	0	0	1	6	0	0	6	**21**
Toolmaker - 652201	0	0	0	0	1	0	0	1	0	0	0	0	2	0	0	2	**3**
Tractor Mechanic - 653308	3	14	0	17	0	0	0	0	0	0	0	0	0	0	0	0	**17**
Transportation Electrician - 671208	10	0	0	10	0	0	0	0	0	0	0	0	1	0	0	1	**11**
Upholsterer - 683401	0	1	0	1	0	0	0	0	0	0	0	0	1	0	0	1	**2**
Weapon Systems Mechanic - 671205	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	**1**
Welder - 651202	9	0	1	9	2	0	0	2	0	0	0	0	2	0	0	2	**13**
Grand Total	**3980**	**9342**	**16**	**13322**	**703**	**694**	**0**	**1397**	**187**	**74**	**1**	**261**	**723**	**250**	**5**	**973**	**15953**
Percentage	***83%***				***9%***				***2%***				***6%***				***100%***

Source: CATHSSETA SMS 2013

Table 23 illustrates that 15 953 artisans are employed in the sector and that Black artisans hold 83% of the artisans in the sector, Coloured artisans 9%, Indian artisans 2% and White artisans 6%. It is interesting to note that during the implementation of NSDS I and NSDS II CATHSSETA was exempted from the training of artisans in the sector as it was felt by the sector that it did not employ artisans. However, CATHSSETA has embraced the training of artisans as a priority of NSDS III and has worked closely with the National Artisan Moderating Body (NAMB) to revive artisan training and development in the sector. The 15 953 artisans constitute 8% of the total employees employed in the sector. CATHSSETA through its partnership with the dti will also be investigating how it can revive artisans in the craft sub-sector, particularly in terms of woodwork and carpentry, wire work and pottery. These key areas in the craft sub-sector where potential exists to create employment and form and SMMEs through the provision of skills development and education. CATHSSETA will work together with the dti and the NAMB to unlock this potential through provision of artisan training.

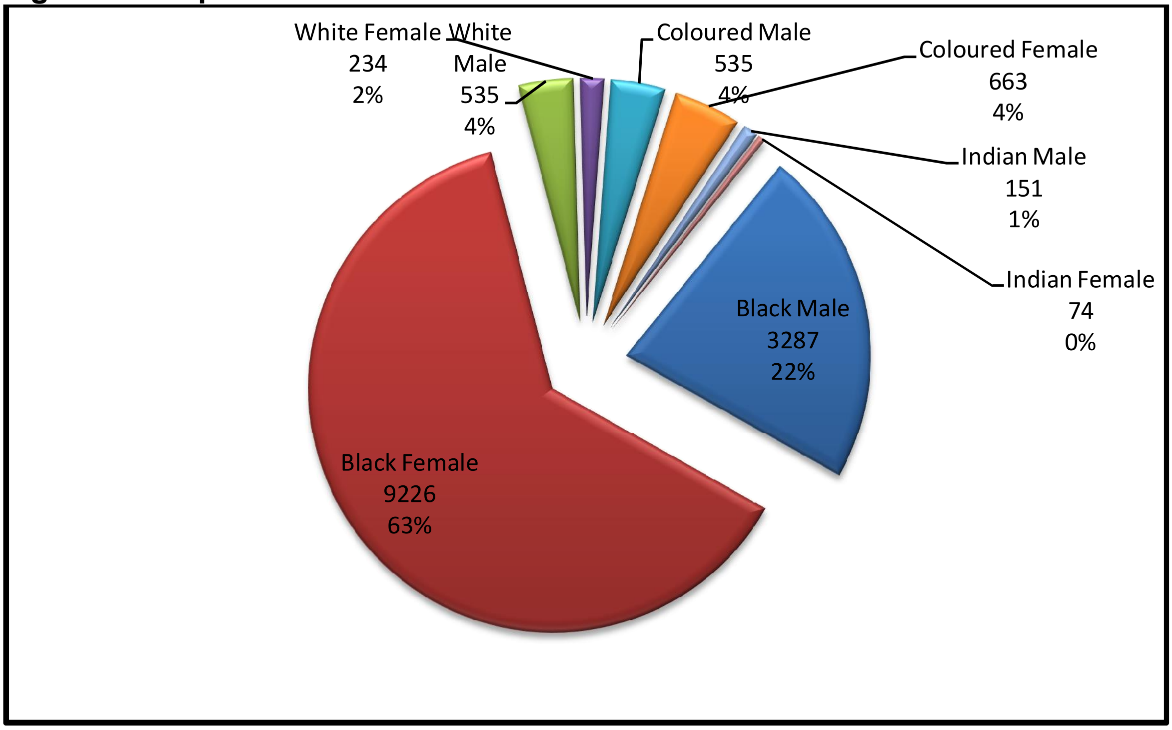
Figure 34: Age profile of Artisans in the sector



Source: CATHSSETA SMS 2013

Figure 34 indicates that 12 534 (79%) artisans in the sector are youth under 35 years old, 3 140 (20%) are between the ages of 35 and 55 years old and a small percentage 279 (2%) are over 55 years old.

Figure 35: Top Trade in the sector - Chef



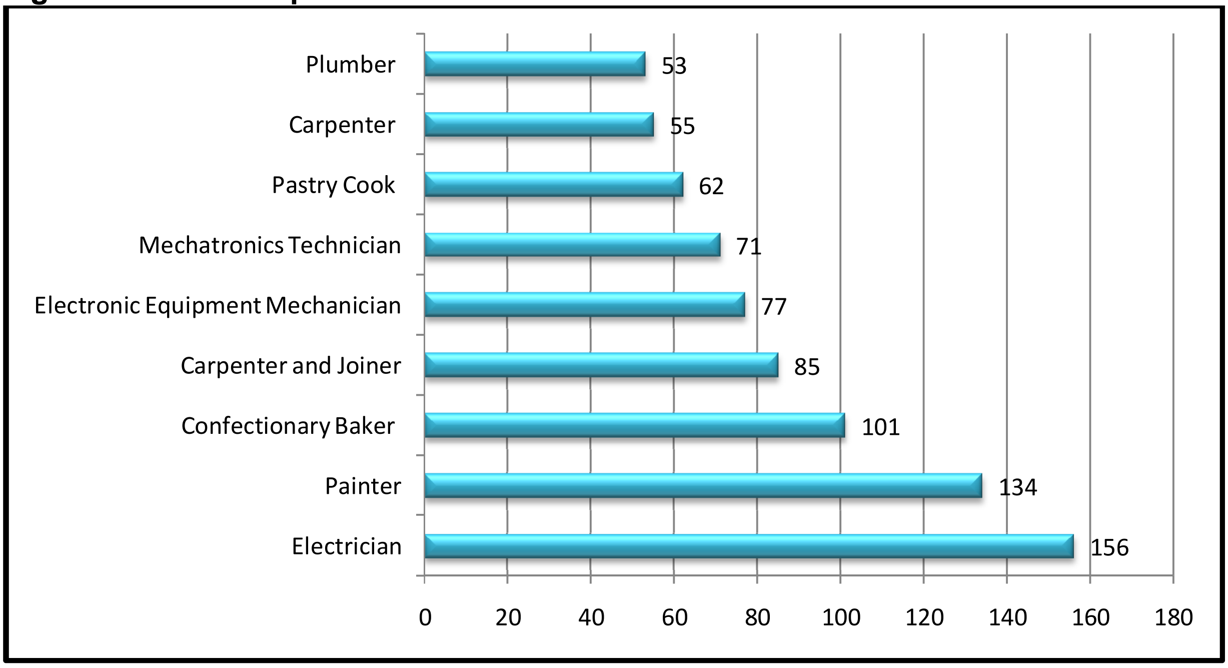
Source: CATHSSETA SMS 2013

As per Figure 35 the Chef Trade dominates the number of artisans employed in the sector with 14 705 chefs employed in the sector. This equates to 92% of the 15 953 artisans employed in the sector being chefs. Black Females make up 63% of this trade and Black Males 22%. Therefore Black chefs constitute 85% of this trade, this is indicative of the transformation in the sub-sector. It is interesting to note that disabled persons are not excluded from this trade and 10 disabled chefs are employed in this trade and spread across the race groups with 9 being Black, 0 Coloured, 1 Indian and 0 White. These 10 disabled chefs constitute 1% of the total disabled employees employed it the sector.

CATHSSETA has partnered with the South African Chefs Association (SACA) and embarked on reviewing the chef qualification through the Development Quality Partner (DQP) process of the Quality Council for Trades and Occupations (QCTO). The DQP has made significant progress in reviewing the chef qualification and have completed the knowledge module which has been put out for public comment and once the comments have been reviewed and incorporated the part of the curricula that covers the theoretical knowledge will have been completed.

Another major challenge faced by CATHSSETA and the sector is that there is currently no trade test for Chefs and also no established apprenticeship. CATHSSETA has liaised with stakeholders in the hospitality sub-sector and initial feedback suggests that there is strong support to revive apprenticeships for chefs and formalise and setup a trade test. The SACA has indicated that they would like to work with CATHSSETA through the chef DQP process in this regard and would like to register as the professional body for chefs with SAQA. There is also an opportunity benchmark the Australian model where all chefs have to serve an apprenticeship before being able to qualify. Once the apprenticeship has been revived and a trade test established this will allow more aspirant chefs to qualify as currently the majority of training is either via learnerships, skills programmes or non-accredited training. There is also a need to develop qualifications for the arts, culture and heritage sub-sector. Qualifications for the arts sub-sector are predominately at NQF levels 1 & 2 and a qualification at NQF level 4 is required. Likewise a Craft Enterprise qualification at NQF level 5 is needed by practitioners in the sector and needs to include elements such as quality control and enterprise development. The South African Heritage Resource Agency has signed a MoU with CATHSSETA and one of the outcomes of this partnership is to develop two qualifications for the heritage sub-sector. Curriculum and material for these qualifications are being developed through a partnership with Rhodes University and CATHSSETA will assist to develop these two qualifications through the DQP process.

Figure 36: Other Top Trades in the sector



Source: CATHSSETA SMS 2013

As per Figure 36 there are nine other trades that have significant numbers of artisans employed in the sector. These are Electrician Trade with 156 artisans employed in the sector, Painting Trades Worker with 134, Confectionary Baker with 101, Carpenter and Joiner with 85, Electronic Equipment Mechanician with 77, Mechatronics Technician with 71 and Pastry Cook with 62. Many of these trades are employed at large resorts, game parks, horseracing courses and casinos in the sector who need these artisans to ensure their operations are able to run on a twenty four basis for seven days a week. Trades that fall under this category are Electrician, Painting Trades Worker, Electronic Equipment Mechanician, Computer Engineering Mechanic, Carpenter and Joiner, Automotive Motor Mechanic and Carpenter. These types of trades are seen as critical and cannot be outsourced to due to their specialised skill that is often viewed as mission critical. Pastry Cook and Confectionary Baker are linked to the Chef trade and employed in the hospitality sub-sector mainly in either 5 star hotels or resorts where either due to exclusivity or need due to their isolated location need these artisans to produce pastries and confectionaries for their guests consumption. These trades are often highly prized for those artisans who are able to produce high end pastries and confectionaries as this is an extremely specialised skill requiring many years of experience.

3.8 Education and Training Providers

3.8.1 Public Providers

- The public providers in the sector are Universities, Universities of Technology (UoT) and Further Education and Training (FET) Colleges. These public providers are accredited and quality assured by either the Council for Higher Education and Training or Umalusi, and by CATHSSETA. There are 22 Universities and Universities of Technology across multiple campuses throughout 8 provinces, offering approximately 63 degrees and diplomas that are relevant to the sector.
- There are 43 FET Colleges across 55 campuses offering the National Certificate Vocational (NCV) in Hospitality and Tourism at Levels 2, 3 and 4. Some of the FET Colleges have also obtained programme approval from the CATHSSETA to offer the CATHSSETA accredited NQF aligned qualifications. CATHSSETA has signed a MoU with each of the FET Colleges to offer both bursaries and learnerships, experiential learning as well as participate in the review of the NCV Hospitality and Tourism qualifications.
- The quality of training provided by the public providers is generally of a high standard. However, some public providers do face facility challenges, especially some of the FET Colleges who are not given sufficient budget to upgrade their training facilities.[c]
- CATHSSETA has partnered with 17 public Higher Education Institutions (HEI) comprising 9 Universities, 5 UoTs and 3 FETs, namely in the Eastern Cape ï King Hintsa FET College, Fort Hare University and Nelson Mandela Metropolitan University; Free State ï Central University of Technology and University of Free State; Gauteng ï Ekuruleni West FET College, University of Johannesburg, University of Pretoria and Tshwane University Technology; Kwa-Zulu Natal ï Durban University Technology, Mangosuthu University of Technology, University of KwaZulu Natal and University Zululand; Northern Cape ï Northern Cape Rural FET College, Western Cape- Cape Peninsula University of Technology and North West ï North West University to provide bursaries to 299 deserving unemployed learners completing either an Undergraduate or Postgraduate programme. MoUs have been entered into with these HEIs and FETs and the bursaries form a component of the MoU.
- The HEIs have been tasked with the selection of these learners, taking into consideration CATHSSETAs prescribed guidelines and alignment to the 7 Key Transformation and Developmental Imperatives. Other components of the MoU include Career guidance, curriculum review, knowledge sharing, research and work integrated learning opportunities CATHSSETA has also identified that Work Integrated Learning (WIL) is critical in addressing itôs scarce and critical skills as it assists undergraduates to obtain the required WIL to complete their qualifications and at the same time provides them with the necessary workplace experience required to become employable once they have completed their qualifications.
- To facilitate this CATHSSETA has embarked on signing of MoUs with the key employer organisations in the sector to facilitate both the implementation of the

[c] Feedback received from both employers and faculty from public providers during various Skills Planning stakeholder workshops.

National Skills Accord and the Sector Skills Plan. The placement of students in industry is a key deliverable of these MoUs and to date a number MoUs have been concluded with key employer organisations and 125 students have been placed in organisations such as Ezemvelo KZN Wildlife, Peermont Global, South African National Parks, Tsogo Sun Hotels. CATHSSETA is in the process of concluding MoUs with additional key employers.

- CATHSSETA through its MoU with the University of Zululand is piloting a model of bringing the university together with the employers in the surrounding area to place students requiring WIL. To date this pilot has been successful this model will be replicated with other institutions so their students requiring WIL can be placed with employers in the vicinity of the university.
- CATHSSETA have also finalised Research Grants for Universities for Masters, PhD and Post Doctoral research into the Conservation and Environment; Travel and Tourism and Sport, Recreations and Fitness sub-sectors. These Research Partnerships are implemented through a MoU signed between CATHSSETA the Universities. Rhodes University is the research partner for the Conservation and Environment sub-sector and the partnership is for 3 years to a value of two Million Rand, the University of Zululand is the research partner for Rural Travel and Tourism sub-sector and the partnership is for 3 years to a value of one and a half Million Rand.
- CATHSSETA has partnered with the Department of Sport and Recreation South Africa to make bursary opportunities available to 10 PhD and 20 Masters students at various universities and the value of this partnership is nine Million Rand over 3 years. The reason this approach was adopted for the Sport, Recreation and Fitness sub-sector is that due to the specialisation of research in the sector and the limited number of supervisors available it was necessary to offer the opportunity to a number of universities instead of partnering with a single university.
- Under the guidance of DHET, all SETAs have been tasked with the opening of offices at FET Colleges, to fast track this process each SETA has been appointed as lead SETA to FET Colleges in a particular area. Each Lead SETA is expected to facilitate the opening of these offices in that area and all other SETAs will support the lead SETA by making an additional information and material available. CATHSSETA has been appointed Lead SETA for the FET colleges in Northern Region of KwaZulu-Natal; the assigned FET Colleges are Mthashana College in Abaqulusi Municipality and Mnambithi College in Emnambithi Ladysmith Municipality. The Ezakheni and Kwa-Qgikazi campuses have been identified as being suitable sites to target rural learners. These offices have been staffed with both SETA Liaisons Officers and Administrators whose key tasks are to provide career guidance, assist with the procurement of financial aid and funding opportunities for learners as well as providing placement with employers. As part of the opening of these offices CATHSSETA will be investing an estimated two million rand in improving the infrastructure of these two campuses.
- In addition to the opening of offices at FET Colleges in Northern KwaZulu Natal, CATHSSETA will also be opening offices in three phases; Phase 1 will see offices being opened in KwaZulu Natal at Durban, the Eastern Cape in East London and the Western Cape in Cape Town in 2013. Phase 2 will see offices being opened in the Free State at Bloemfontein, the Northern Cape in Kimberley and Mpumalanga in

Mbombela. Phase 3 will see offices being opened in North West at Mahikeng and Limpopo at Polokwane.

- There is also an urgent need for a curriculum review across the spectrum. Some Universities and Universities of Technology are producing large volumes of students, with degrees at various levels, but there is no market for these skills. Sports Management is a classic example of such a qualification, where the number of students being produced with this degree far exceeds the demand, which is virtually non-existent due to the volunteer nature of sports in South Africa.[d]
- The NCV qualifications need to be reviewed and updated to align them to industry specifications. CATHSSETA has partnered with Umalusi, the National Department of Tourism and various industry stakeholders to review the National Certificate Vocational (NCV) for both Hospitality and Tourism. This project critically examined supply issues in the labour market and has yielded significant findings that will allow for these qualifications to be realigned and scoped to industry expectations and ensure FET College Graduates are readily absorbed by the labour market. The NCV review has produced a research report entitled ñAt Your Service - Towards an informed understanding of the NC (V) Tourism and Hospitality programmesò. This report documents the exact curricular changes required for the NCV qualifications and the review task team has begun with the actually revising of the curriculum.
- Coupled with this review is exposure of FET faculties to industry, as most lecturers are classroom based and have therefore lost touch with how industry operates and conducts its daily operations. CATHSSETA through its MoUs with Umalusi, the 43 FET Colleges and the Peermont Global put in place a Professional Endorsement project that provided 177 FET College Lecturers with workplace exposure to the latest operational procedures at Emperors Palace, which is one of the countryøs largest resorts, incorporating the operating procedures of a multitude business aspects such as conferencing, gaming and hospitality. In addition to the workplace exposure these FET College lecturers were also trained in the latest computer software and packages such as the Galileo global distribution software. This was an extremely successful project and will be replicated in 2014.
- As part of the NCV review CATHSSETA is developing a Recognition of Prior Learning (RPL) Toolkit to assist with the measurement of prior learning so that it can be formally recognised in terms of registered qualifications and unit standards. The development of this toolkit is essential as feedback from both public and private providers indicated that such a tool would make ñRPLingò both easier and more cost effective. CATHSSETA has partnered with both SASCOC and SRSA to develop ñThe South African Coaching Frameworkò, which will result in new coaching qualifications being developed and the RPL Toolkit will be piloted in the process of ñRPLingò sports coaches against these new qualifications. Once successfully piloted, the toolkit will be made available to both public and private providers in all CATHSSETA sub-sectors, as it is hoped that this toolkit will reduce the cost of assessment as this is often prevents many employers ñRPLingò suitable candidates in their workforce as it is seen and a difficult, expensive and time consuming process.

[d] Feedback from SASCOC and other sports stakeholders during various skills planning stakeholder workshops.

3.8.2 Private Providers

- The private providers in the sector are CATHSSETA Accredited Training Providers, Private FET Colleges, Hotel Schools and private training providers.
- It must be noted that not all of these private providers are accredited by recognised South African quality assurance bodies and many private training providers offer courses and qualifications that are quality assured by international quality assurance bodies.
- The City & Guilds qualifications have now been added to the NQF by SAQA and CATHSSETA has signed a MOU with City & Guilds to finalise the quality assurance arrangements, as CATHSSETA will now be quality assuring the qualifications.
- There are 312 training providers that are accredited by CATHSSETA. There are 42 more training providers who have programme approval to offer CATHSSETA qualifications but are accredited by other quality assurance bodies. These providers have programme approval to offer a range of 95 qualifications and 145 skills programmes covering the scope of the sector.
- The majority of CATHSSETA Accredited Training Providers offer Arts, Culture, Heritage, Hospitality, Conservation and Sport, Recreation & Fitness qualifications. Only a few providers offer Gaming & Lotteries and Travel & Tourism qualifications as these are niche markets with limited demand.
- The quality of training provided by the private providers is generally of a high standard, including both accredited and non-accredited training offered in the sector. Employers are often not concerned with certification, but are both budget and results driven and therefore often use private providers who provide their employees with the skills required, but who are not accredited. Short industry specific courses fall into this category and are extremely popular amongst stakeholders.[e]
- During stakeholder workshops, private providers have also expressed both concern and frustration at the slow progress of the setting up of the QCTO and the subsequent progress in the development of occupationally directed qualifications.
- Some private training providers are threatened by NSDS III and the priority it places on the use of public providers for skills development. However, many of these threatened providers have become over reliant on SETA funded learnerships to sustain their businesses.
- While NSDS III does prioritise the use of public providers in skills development, at the same time it encourages the forging of private and public partnerships. Therefore there is an excellent opportunity for private providers to partner with FET Colleges to both help align the qualifications to industry specifications and provide their lecturers with the necessary workplace experiential component as the private providers have the experience of training provision in the workplace.

[e] Feedback from stakeholders from all sub-sectors during various skills planning stakeholder workshops.

4. SCARCE AND CRITICAL SKILLS

SCARCE SKILLS

Refer to those *occupations* where there is a scarcity of qualified and experienced people, currently or anticipated in the future, either because:

(a) such skilled people are not available (**absolute scarcity**); or

(b) they are available but do not meet employment criteria (**relative scarcity**).

This scarcity can arise from one or a combination of the following, grouped as relative or absolute:

Absolute scarcity: suitably skilled people are not available, for example:

- A new or emerging occupation, i.e. there are few, if any, people in the country with the requisite skills (qualification and experience) and education and training providers have yet to develop learning programmes to meet the skills requirements.
- Firms, sectors and even the country are unable to implement planned growth strategies and are experiencing productivity, service delivery and quality problems directly attributable to a lack of skilled people.
- Replacement demand would reflect an absolute scarcity where there are no people enrolled or engaged in the process of acquiring the skills that need to be replaced.

Relative scarcity: suitably skilled people are available but do not meet other employment criteria, for example:

- Geographical location, i.e. people are unwilling to work outside of urban areas.
- Equity considerations, i.e. there are few if any candidates with the requisite skills (qualifications and experience) from specific groups available to meet the skills requirements of firms and enterprises.
- Replacement demand would reflect a relative scarcity if there are people in education and training (formal and work-place) who are in the process of acquiring the necessary skills (qualification and experience) but where the lead time will mean that they are not available in the short term to meet replacement demand.

CRITICAL SKILLS

Critical Skills will refer to specific key or generic and ‟top upˮ skills within an occupation.

In the South African context there are two groups of critical skills:

- **Key or generic skills**, including (in SAQA-NQF terminology) critical cross-field outcomes. These would include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and working in teams.
- **Particular occupationally specific "top-up" skills** required for performance within that occupation to fill a ‟skills gapˮ that might have arisen as a result of changing technology or new forms of work organisation.

A shortage of skills and talent is not a uniquely South African problem. Globally there is a shortage of skilled employees. The World Economic Forum acknowledges that the current talent gap is a challenge for employers globally and to sustain economic growth, by 2030 the United States will need to add more than 25 million workers and Europe 45 million workers.[51] If South Africa wishes to remain competitive globally it will need to address the skills shortages in all economic sectors. By effectively addressing the skills shortages in the sector, the potential to increase both the volume of foreign tourists and the direct spend by these tourists can be realised throughout the value chain of the sector. Critical skills such as customer service and tourism product development are key to unlocking this potential as they will allow South Africa to be competitive in the global market.

To both monitor and determine the scarce and critical skills in the sector, CATHSSETA utilises a combination of data and labour market signals. Some of the data and signals used and observed are:

(a) all enterprises submitting Mandatory Grant applications (which comprise of the Planned training interventions and Reported training) completed a section on scarce and critical skills in their sub-sectors
(b) the number of vacancies and difficult to fill positions in the sector
(c) the pool of unemployed skilled people

To supplement the scarce and critical skills data and signals above, consultations were also held with stakeholders in the sector and feedback from these stakeholders has been extremely useful, especially in terms of validating the scarce and critical skills findings and including scarce and critical skills needs from SMMEs whose data is not currently captured by Planned Training and Reporting template of the Mandatory Grant application.

- Table 21 below provides the Scarce and Critical skills identified for the entire sector. The Scarce skills refer to occupations in which there is a scarcity of qualified and experienced people, current or anticipated, either because such skilled people are not available or they are available but do not meet the employment criteria.
- From the list outlined in Table 21, the following occupations: Sports Coach or Instructor, Dancer or Choreographer, Waiter, Commercial Housekeeper, Caddie, Laundry Worker and Commercial Cleaner are further highlighted as critical skills
- The SIPs Scarce skills that CATHSSETA will be supporting are also listed in the table below. These occupations are as follows:
    - Environmental Manager;
    - Programme or Project Administrators Assistant;
    - Truck Driver and
    - Handyperson

Table 24: Scarce and Critical Skills

Occupational Cluster	***Critically Scarce (50-100%)***	***Significantly Scarce (20-50%)***	***Scarcity Minor (0-20%)***
MANAGERS	112101: Director (Enterprise / Organisation) (~145)	121101: Finance Manager (~15)	121206: Health and Safety Manager (~11)
	121901: Corporate General Manager (~43)	121201: Personnel / Human Resource Manager (~10)	121902: Corporate Services Manager (~2)
	134904: Office Manager (~124)	121904: Contract Manager (~12)	121906: Franchise Manager (~6)
	134915: Operations Manager (Non Manufacturing) (~10)	121905: Programme or Project Manager (~67)	122102: Sales Manager (~9)
	141101: Hotel or Motel Manager (~278)	134901: Environmental Manager (~35)	122103: Director of Marketing (~5)
	141103: Reception Manager (~15)	141204: Reservations Manager (~15)	122104: Interactive and Direct Marketing Strategist (~4)
	141201: Café (Licensed) or Restaurant Manager (~325)	143101: Betting Agency Manager (~14)	132404: Warehouse Manager (~4)
	141203: Catering Production Manager (~77)	143102: Gaming Manager (~11)	134206: Sport Science Manager (~6)
	143108: Sports Centre / Facility Manager (~326)	143109: Club Membership Manager (~10)	134909: Museum Manager (~10)
	134903: Small Business Manager (~342)	143901: Facilities Manager (~15)	134916: Operations Foreman (Non Manufacturing) (~5)
		143909: Travel Agency Manager (~13)	141102: Guest House Manager (~10)
			141202: Licensed Club Manager (~62)
			143104: Arts / Culture Manager (~52)
PROFESSIONALS	213302: Environmental Scientist (~49)	213301: Conservation Scientist (~987)	262102: Gallery or Museum Curator (~113)

Occupational Cluster	*Critically Scarce (50-100%)*	*Significantly Scarce (20-50%)*	*Scarcity Minor (0-20%)*
	213107: Marine Biologist (~13)	226905: Biokineticist (~11)	243201: Communication Coordinator (~8)
	213307: Park Ranger (~461)	213102: Biologist (General) (~9)	243204: Event Producer (~17)
	213101: Animal Behaviourist (~24)	242207: Compliance Officer (~11)	226302: Safety, Health, Environment and Quality (SHE&Q) Practitioner (~11)
		264102: Book or Script Editor (~7)	213106: Botanist (~19)
		265301: Dancer or Choreographer (~62) [*Critical Skill]*	265202: Music Director (~138)
		265203: Musician (Instrumental) (~78)	
		265101: Painter (Visual Arts) (~54)	
		265401: Director (Film, Television, Radio or Stage) (~31)	
TECHNICIANS AND ASSOCIATE PROFESSIONALS	342302: Outdoor Adventure Guide (~16)	333201: Events Manager (~17)	331301: Bookkeeper (~14)
	342204: Sports Coach or Instructor (~11255) [*Critical Skill]*	314102: Environmental Science Technician (~11)	341202: Disabilities Services Officer (~5)
	333903: Sales Representative (Business Services) (~28)	343902: Light Technician (~15)	342101: Footballer (~11)
	343401: Chef (~261)	342103: Jockey (Skill Level 3) (~15)	312202: Maintenance Planner (~7)
	342301: Fitness Instructor (~175)		333908: Marketing Coordinator (~10)
			352103: Sound Technician (~128)
			342201: Sports Development Officer (~218)
			342203: Sports Official (~246)

Occupational Cluster	***Critically Scarce (50-100%)***	***Significantly Scarce (20-50%)***	***Scarcity Minor (0-20%)***
CLERICAL SUPPORT WORKERS	421203: Betting Agency Counter Clerk (~69)	422401: Hotel or Motel Receptionist (~114)	411102: Back Office Process Consultant (~3)
	422201: Inbound Contact Centre Consultant (~13)	411101: General Clerk (~55)	422101: Tourist Information Officer (~17)
	422102: Travel Consultant (~90)	441903: Programme or Project Administrators Assistants (~10)	
	421202: Gaming Worker (~79)		
	431101: Accounts Clerk (~100)		
SERVICE AND SALES WORKERS	513101: Waiter (~280) [*Critical Skill]*	516401: Animal Attendant/ Groomer (~320)	513201: Bar Attendant (~26)
	516403: Zookeeper (~24)	524902: Rental Salesperson (~15)	515102: Housekeeping Service Manager (~5)
	515101: Hotel Service Manager (~14)		524601: Food Service Counter Attendant (~10)
	513202: Barista (~12)		514202: Body Therapist (~7)
	512101: Cook (~237)		
SKILLED AGRICULTURAL, FORESTRY, FISHERY, CRAFT AND RELATED TRADES WORKERS	681201: Confectionary Baker (~20)	611303: Green Keeper (~35)	681103: Butcher (~6)
	684101: Diver (~17)	611302: Landscape Gardener (~12)	
PLANT AND			721201: Electrical and Electronic

Occupational Cluster	*Critically Scarce (50-100%)*	*Significantly Scarce (20-50%)*	*Scarcity Minor (0-20%)*
MACHINE OPERATORS AND ASSEMBLERS			Equipment Assembler (~10)
			733201: Truck Driver (General) (~30)
			732201: Chauffeur (~15)
			733102: Charter and Tour Bus Driver (~5)
ELEMENTARY OCCUPATIONS		862925: Caddie (~150) [*Critical Skill]*	821203: Game Farm Worker / Assistant (~75)
		862202: Handyperson (~327) [*Critical Skill]*	812101: Laundry Worker (General) (~100) [*Critical Skill]*
		841101: Fast Food Cook (~182)	811201: Commercial Cleaner (~105) [*Critical Skill]*
			841201: Kitchenhand (~97)
			841202: Food Trade Assistant (~25)

Table 25: Top 10 Scarce Skills

Occupation Code	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Total Number required
141101	Hotel or Motel Manager	Backpackers Manager; Boarding House Manager; Duty Manager (Hotel); Hostel Manager; Hotelier; Innkeeper; Lodge Manager; Resort Manager	Funding of bursaries towards the study of Management Development Programme (10) and Hospitality Management Diploma/ Degree(10)	6	278
141201	Café (Licensed) or Restaurant Manager	Bistro Manager; Cafeteria Manager; Canteen Manager; Caterer; Catering Manager; Food and Beverage Manager; Food Services Manager; Internet Cafe Manager	Funding of bursaries for Food and Beverage studies Diploma (5)	6	325
143108	Sports Centre / Facility Manager	Aquatic Centre Manager; Golf Course Manager; Gymnasium Manager; Indoor Sports Centre Manager (Squash, Tennis, Ten Pin Bowling etc); Leisure Centre Manager; Riding School Manager; Sport Stadium Manager	Funding for the development of qualification; Funding of facilities management project (40)	5	326
134903	Small Business Manager	Entrepreneurial Business Manager; Owner Manager	Funding of Business Administration Bursary (15); Funding of Generic Management Learnership (15)	4-5	342
213307	Park Ranger	Beach and Estuary Warden; Fish Warden; Game / Park Warden; Wildlife Conservationist; Wildlife Officer / Warden	Funding for National Certificate: Nature Conservation Guardianship (NQF Level 2), FETC Nature Conservation - Natural Resource Management (Terrestrial) (NQF Level 4), and National Certificate: Nature Conservation - Natural Resource Management (Terrestrial) (NQF Level 5) and funding for various CATHSSETA Skills Programmes; Employed learnerships (125), employed skills programme (88), unemployed learnerships (83) and unemployed skills programme (83).	2-5	461
213301	Conservation Scientist	Animal Ecologist; Conservancy Advisory Scientist; Conservation Officer; Ecological Researcher; Ecologist; Fish and Games Officer; Fisheries Advisor; Forestry Conservationist; Soil Conservationist; Species Protection Officer; Water Conservation Scientist	Funding for Bursaries and Research Grants at Higher Education instituions offering environment/biodiversity and conservation degrees; employed bursaries (16), unemployed bursaries (40), internship and workplace	8	987

Occupation Code	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Total Number required
			experience (25)		
352103	Sound Technician	Audio Operator; Audio Technician; Dubbing Machine Operator; Dubbing Projectionist (Sound Mixing); Re-recording Mixer; Sound Editor / Mixer / Recordist / Operator / Specialist; Sound Effects Person; Video and Sound Recorder	Funding of Sound Technology/ Live event and Technical Productions Learnership (30); Funding of Event Producer/ Live Event Technical Production Level 5 qualification development	4-5	128
343401	Chef	Chef De Partie; Commis Chef; Demi Chef; Executive Chef; Head Chef; Pastry Chef; Saucier; Second Chef; Sous Chef	Funding of Professional Cookery Learnership project (204)	4	261
342203	Sports Official	Dog or Horse Racing Official; Handicapper (Racing); Racecourse Official; Racecourse Starter; Racecourse Steward; Racecourse Timekeeper; Stipendiary Steward; Timekeeper	Funding of Sports Technical Officiating Learnership project (43)	4	246
512101	Cook	n/a	Funding of Cook Convenience skills programme and the Assistant Chef skills programme (237)	2-3	237

5. Strategic Plan

5.1 Strategic Outcomes and Goals

All CATHSSETA targets takes into consideration the following developmental and transformation imperatives this is applied during various project plans.

No	Development and Transformation imperatives	Target Description	Allocation
1	Age	Youth – under 35years old	60%
2	Disability	All forms of disabilities	1%
3	Gender	Female	65%
4	Race	Black	85%
5	HIV/AIDS	HIV/AIDS awareness and prevention component to be included in most of training programme	100%
6	Geography	Rural and Informal settlements	45%
7	Class	Income – Less than R60k per annum (as per SARS)	55%

The table below then reflects the six CATHSSETA strategic goals and further unpacks them in terms of a broader description of the goal, the programmatic focus of the goal and the linkages of the goal to the National Outcomes, NSDS3 Goals and the obligations of the CATHSSETA Service Level Agreement with DHET.

1. Demand led sector skills development programmes informed by sector research and intelligence.	To position CATHSSETA as a credible and authoritative voice on skills demand and on interventions and solutions that are required to address skills needs within the sector. To build CATHSSETAs understanding of labour market issues in the sector and to document and communicate recent and emerging trends, as well as to develop solid baseline indicators for the sector so as to inform planning and guide decision making on investment in	▪ Sound sector knowledge informing sectoral strategy and plans. ▪ Support the sector through conducted research to addressing skilling needs - Needs in relation to skills development are researched, documented and communicated. ▪ Scarce and critical skills are escalated to Chamber Strategies, which are sub-sector specific and form the basis from which discretionary grant projects are developed and implemented. ▪ Qualifications identified to address sector needs and sources of education and training supply identified. ▪ Enhanced data, information and knowledge management systems – Collection, Compilation, Storage, Analysis, Reporting – CREDIBILITY requires VERIFICATION. ▪ Establish MoU's to fund and capacitate research projects by Masters, PhD and post-

	education and training provision.	doctoral students.
	SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b. **SUPPORTING NSDS3 GOAL 1:** Establishing a credible institutional mechanism for skills planning.	
	SUPPORTING SLA OBLIGATION: **Strategic Driver 1:** Assessment of skills required for each sector and the identification of scarce skills. **Strategic Driver 5:** Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved.	
2. Informed, empowered and actively engaged CATHSSETA stakeholders increase the capacity and capability of the SETA to meet sectoral skills needs.	Effective stakeholder management and partnering initiatives between the SETA, employers, private providers, government, other SETAs and sectoral bodies and relevant institutions are resulting in increased capacity to meet industry skills needs throughout the country.	▪ Interacting and partnering with stakeholders to address sector needs. ▪ Oversight and coordination of effective Chamber structures. ▪ Strategic partnerships with other SETAs and Government Entities to monitor and evaluate all learning interventions within the scope of the CATHSSETA. ▪ Enhance the experience of stakeholders and customers interacting with CATHSSETA. ▪ Effectively communicate and promote the work and programmes of CATHSSETA.
	SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b. **SUPPORTING NSDS3 GOALS:** Stakeholder engagement and partnership in support of all 8 NSDS3 goals**.**	
	SUPPORTING SLA OBLIGATION: **Strategic Driver 3:** Partnerships between CATHSSETA and Public FET Colleges. **Strategic Driver 6:** Number of agreements signed with Public FET Colleges, Universities and other Training Providers as well as the amount approved for each agreement which should also reflect the number of learners to be trained, types of training programmes and the programmes that are in place for the current financial year. **Strategic Driver 8:** Placement of students in industry as part of the agreement between CATHSSETA and companies. **Strategic Driver 12:** Presence of CATHSSETA in rural areas and townships, and how and by when will it be implemented.	

3. Employers participating in the Mandatory Grant process provide quality information regarding the training of employed workers.	Assess the quality and consistency of plans and reports received so as to enhance the effectiveness of the mandatory grant processing, payment and reporting process.	▪ Capacitating employers for an increase in the quality of labour market information submitted, received and analysed through the Mandatory Grant process. ▪ Evaluate and verify to ensure plans and reports meet CATHSSETA requirements. ▪ Effective management of the Mandatory Grant process.
	SUPPORTING NATIONAL OUTCOME 5. **SUPPORTING NSDS3 GOAL 5:** Encouraging better use of workplace-based skills development.	
	SUPPORTING SLA OBLIGATION: **Strategic Driver 5:** Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved. **Strategic Driver 9:** Placement of students in industry as part of the agreement between CATHSSETA and companies.	
4. **Appropriately targeted programmes and funding that address current and emerging skills requirements and improved learner employability.**	To ensure the effective management of four-party agreements resulting in the disbursement of Discretionary Grants for learning interventions and PIVOTAL programmes, with a specific focus on SMMEs, Cooperatives and Rural development.	▪ PIVOTAL Programme Implementation. ▪ Discretionary Grant disbursements to be managed effectively and informed by the critical and scarce needs of the industry. ▪ Quality career guidance and learner support programmes implemented. ▪ Effective contract and four party management. ▪ Effective Skills Development Facilitators support. ▪ Effective management of Inter-SETA transfers. ▪ Use Skills Development as a tool to advance and transform the small business sector (SMMEơs, NGOơs and Cooperatives).
	SUPPORTING NATIONAL OUTCOME 5; and SECTORAL SUPPORT TO OUTCOMES 4, 10, 12b. **SUPPORTING NSDS3 GOALS:** ▪ **Goal 2:** Increasing access to occupationally-directed programmes. ▪ **Goal 3:** Promoting the growth of a public FET college system that is responsive to sector, local, regional and national skills needs and priorities. ▪ **Goal 4:** Addressing the low level of youth and adult language and numeracy skills to enable additional training. ▪ **Goal 6:** Encouraging and supporting cooperatives, small enterprises, worker initiated, NGO and community training initiatives.	

	▪ **Goal 7:** Increasing public sector capacity for improved service delivery and supporting the building of a developmental state. ▪ **Goal 8:** Building career and vocational guidance.	
	SUPPORTING SLA OBLIGATION: **Strategic Driver 2:** Improving and addressing the levels of education in the sector. **Strategic Driver 3:** Partnerships between CATHSSETA and Public FET Colleges. **Strategic Driver 4:** The number of bursaries awarded/to be awarded to deserving SA citizens in critical skills at the 23 Universities and 50 FET colleges. **Strategic Driver 5:** Scarce and critical skills needed in the sector, how it will be addressed, the number of learners that will be trained and placed as well as the companies that will be involved. **Strategic Driver 8:** Placement of students in industry as part of the agreement between CATHSSETA and companies. **Strategic Driver 9:** A comprehensive plan on making the public service a training space should be developed, with targets per annum to change the lives of the youth. **Strategic Driver 10:** Rural Development Programmes and how it will be implemented. **Strategic Driver 11:** Progress in the implementation of Recognition of Prior Learning. **Strategic Driver 13:** Number of Public FET Colleges and University students placed in companies to obtain work experience. **Strategic Driver 14:** Facilitating the exposure and placement of FET College lecturers to industry.	
5. CATHSSETA programmes and interventions are continuously assessed and enhanced in terms of their relevance, quality and effectiveness	Stakeholder confidence in the SETA is enhanced through effective full value-chain analysis and evaluation of the quality and soundness of the implementation of learning interventions, and transparent benchmarking with applicable norms and standards.	▪ Education and Training Quality Assurance provided to qualifications under CATHSSETA scope to both public and private training providers. ▪ Monitoring and Evaluation strengthens the contract management capabilities of CATHSSETA. ▪ Full-value chain monitoring and evaluation informs the continuous enhancement of CATHSSETA programmes and interventions.
	SUPPORTING NATIONAL OUTCOME 5. **SUPPORTING NSDS3 GOALS:** **Goal 1:** Establishing a credible institutional mechanism for skills planning.	

	Goal 7: Increasing public sector capacity for improved service delivery and supporting the building of a developmental state.	
	SUPPORTING SLA OBLIGATION: **Strategic Driver 7:** Targets as reflected in the Strategic Plan and Annual Performance Plan must be credible and linked to a ñBaselineò	
6. An accountable, well governed and optimally resourced organisation	To promote public accountability and achieve high standards of corporate governance and efficient resource utilisation so as to ensure optimal organizational performance and service delivery.	▪ Financial management, control and reporting and master budget management. ▪ A transparent, cost effective and efficient supply chain management and procurement system. ▪ Adherence to policies and legislative frameworks and compliance with relevant statutory requirements. ▪ Governance, risk management and compliance. ▪ Accountability and reporting. ▪ Internal business excellence and system and process optimisation. ▪ Effective knowledge management systems and institutional memory. ▪ An optimally capacitated and capable organisation. ▪ A high performance culture underpinned by an effective performance management and development system and approach.
	SUPPORTING NATIONAL OUTCOME 5; and Outcome 12: Good Governance and an Effective Public Service. **SUPPORTING NSDS3 GOALS:** Governance and corporate services in support of all 8 NSDS3 goals.	
	SUPPORTING SLA OBLIGATION: Governance and corporate services in support of all obligations of the Service Level Agreement.	

In turn, the six strategic goals have been unpacked into Strategic Objectives which define the key result areas or elements which constitute that strategic goal. The focus is on ensuring that the specified goals are therefore specific and measurable; and implementation programmes can be delivered and reported upon.

5.2 Strategic Objectives

The CATHSSETA tactical scorecard reflects a continued focus on the alignment and integration of the business of CATHSSETA with its mandate, vision, mission and values. The Organisation's planning architecture, as well as the execution and reporting cycle are progressing towards maturity and through leveraging the synergistic relationship between mandatory grant and discretionary grant focused services, the CATHSSETA will progress towards becoming a centre of excellence that services effectively the needs of all its stakeholders.

The ongoing strengthening of the management team and the utilisation of flagship projects to enhance the impact and visibility of the organisation is a key short and medium-term intervention that has already started to yield value. It is anticipated that within the period of this Strategic Plan, the CATHSSETA service offerings, human capital, organisational culture as well as processes and systems will place the organisation in a position to perform fully on its mandate, thus supporting its continued relevance and sustainability.

The following table reflects the tactical framework of CATHSSETA for the period to 2018/19 and sketches the strategic objectives (Outputs or Key Performance Areas) and reflects the performance metrics and 5-year targets for each strategic goal and programmatic focus area. These will be further unpacked into indicators, milestones, baselines and annual and quarterly targets in the aligned CATHSSETA Annual Performance Plans for 2014/15 and beyond.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
GOAL 1: Establishing a credible institutional mechanism for skills planning.	SSP Programme 1: Research and Skills Planning. SSP Programme 2: Address Sector Middle Level Skills. SSP Programme 3: Development of Artisans.	1. Demand led sector skills development programmes informed by sector research and intelligence.	▪ Sound sector knowledge informing sectoral strategy and plans. ▪ Support the sector through conducted research to addressing skilling needs - Needs in relation to skills development are researched, documented and communicated.	1.1 A sound institutional framework for Sector Skills Planning and aligned CATHSSETA Strategic and Annual Performance Planning.	▪ Annually updated SSP that drives the strategy for the sector, and is a culmination of evidenced based chamber and sub-sector strategies. ▪ An APP that identifies aligned programmes, targets and budget for CATHSSETA support to the chambers as reflected

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
	SSP Programme 5: Address Sector High Levels Skills. SSP Programme 6: Research, Development and Generation of New Knowledge. SSP Programme 7: NCV & N-Courses Review. SSP Programme 8: Quality Assurance. SSP Programme 10: Skills Development for Low Level Literacy and Numeracy. SSP Programme 12: Cooperatives Skills Development. SSP Programme 13: Skills Development Support for Small		▪ Scarce and critical skills are escalated to Chamber Strategies, which are sub-sector specific and form the basis from which discretionary grant projects are developed and implemented. ▪ Qualifications identified to address sector needs and sources of education and training supply identified. ▪ Enhanced data, information and knowledge management systems ï Collection, Compilation, Storage, Analysis, Reporting ï CREDIBILITY requires VERIFICATION. ▪ Establish MoUȇs to fund and capacitate research projects by Masters, PhD and post-doctoral students.		in the SSP.
				1.2 Appropriate sectoral plans and strategies responding to identifies high, middle and low level scarce skills.	▪ Mandatory grant application forms inform scarce and critical skills list. ▪ Sub-sector strategies and programmes informed by critical skills research. ▪ CATHSSETA Artisan Training Strategy developed according to NAMB Artisan Policy. ▪ CATHSSETA Rural Development Strategy implemented.
				1.3 Promotion of Sector driven Research and cited research publications.	Research Papers published and uploaded on the CATHSSETA research portal.
				1.4 Relevant courses and	▪ Career paths researched

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET - INFORMING PERFORMANCE METRICS IN APP
	and Emerging Businesses. SSP Programme 14: Trade Unions, NGOs and CBOs Skills Development Support.			qualifications that provide a sound foundational basis for building targeted labour market skills.	and developed. ▪ Career and vocational guidance to employees and prospective learners. ▪ Updated CATHSSETA qualifications under the QCTO process. ▪ NCV and N - Courses and curriculum revised to ensure that they provide a sound foundational basis for building labour market relevant skills.
				1.5 Enhanced information and knowledge management systems - integrated with other departments.	▪ Auditable and verifiable learner records. ▪ Reliable and credible data to identify and address sector needs captured on CATHSSETA databases.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
GOALS:	SSP Programme	2. Informed,	▪ Interacting and partnering	2.1 Broad-based partnerships	▪ Alignment and relevance of

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
Stakeholder engagement and partnership in support of all 8 NSDS3 goals.	1: Research and Skills Planning. SSP Programme 2: Address Sector Middle Level Skills. SSP Programme 3: Development of Artisans. SSP Programme 4: Marketing, Communication and Stakeholder Management. SSP Programme 6: Research, Development and Generation of New Knowledge. SSP Programme 9: FET Capacity Building. SSP Programme 15: Public Sector Education and Training.	empowered and actively engaged CATHSSETA stakeholders increase the capacity and capability of the SETA to meet sectoral skills needs.	with stakeholders to address sector needs. ▪ Oversight and coordination of effective Chamber structures. ▪ Strategic partnerships with other SETAs and Government Entities to monitor and evaluate all learning interventions within the scope of the CATHSSETA. ▪ Enhance the experience of stakeholders and customers interacting with CATHSSETA. ▪ Effectively communicate and promote the work and programmes of CATHSSETA.	that increase CATHSSETA's capacity and capability to meet industry needs.	all institutional MOU's to the Labour Market Analysis and sector research expected outcomes. ▪ Partnerships with employers, public FET colleges and Universities of Technology to place middle level skills learners in Work Integrated Learning. ▪ Partnerships with PSETA and Government departments to develop programmes to capacitate public servants and improve service delivery to the sector.
				2.2 Enhanced visibility and credibility of CATHSSETA through effective marketing, communication and stakeholder management.	▪ Optimal marketing campaigns and initiatives implemented. ▪ Optimal stakeholder communication. ▪ Improved levels of customer satisfaction. ▪ Effective resolution of stakeholder queries.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
				2.3 Stakeholders informed and educated on skills development benefits and the policies and processes of the SETA.	Sectoral institutions and bodies actively engaged in relevant CATHSSETA programmes.
GOAL 5: Encouraging better use of workplace-based skills development.	SSP Programme 11: Employer Grants.	3. Employers participating in the Mandatory Grant process provide quality information regarding the training of employed workers.	▪ Capacitating employers for an increase in the quality of labour market information submitted, received and analysed through the Mandatory Grant process. ▪ Evaluate and verify to ensure plans and reports meet CATHSSETA requirements. ▪ Effective management of the Mandatory Grant process.	3.1 CATHSSETA receives accurate information on the labour market for inclusion in the Sector Skills Plan.	▪ Received and submitted electronic submissions of Mandatory Grant Applications. ▪ Mandatory Grant Applications meet CATHSSETA requirements.
				3.2 Enhanced Mandatory Grant processing, payment and reporting processes.	▪ Employers participating in the Mandatory Grant applications process are capacitated. ▪ A seamless Mandatory grant application process for employers.
Goal 2: Increasing access to occupationally-directed programmes	SSP Programme 2: Address Sector Middle Level Skills. SSP Programme	4. Appropriately targeted programmes and funding that address current	▪ PIVOTAL Programme Implementation. ▪ Discretionary Grant disbursements to be managed effectively and	4.1 Enhanced implementation of targeted learning interventions and PIVOTAL programmes for employed and unemployed workers.	▪ Approved sector specific PIVOTAL projects. ▪ Employed middle level Learners completing PIVOTAL programmes.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
Goal 3: Promoting the growth of a public FET college system that is responsive to sector, local, regional and national skills needs and priorities. Goal 4: Addressing the low level of youth and adult language and numeracy skills to enable additional training. Goal 6: Encouraging and supporting cooperatives, small enterprises, worker initiated, NGO and community training initiatives. Goal 7: Increasing public sector	3: Development of Artisans. SSP Programme 5: Address Sector High Levels Skills. SSP Programme 9: FET Capacity Building. SSP Programme 10: Skills Development for Low Level Literacy and Numeracy. SSP Programme 11: Employer Grants. SSP Programme 12: Cooperatives Skills Development. SSP Programme 13: Skills Development Support for Small and Emerging Businesses. SSP Programme	and emerging skills requirements and improved learner employability.	informed by the critical and scarce needs of the industry. ▪ Quality career guidance and learner support programmes implemented. ▪ Effective contract and four party management. ▪ Effective Skills Development Facilitators support. ▪ Effective management of Inter-SETA transfers. ▪ Use Skills Development as a tool to advance and transform the small business sector (SMMEʼs, NGOʼs and Cooperatives).		▪ Employed learners trained through PIVOTAL Programmes. ▪ Unemployed middle level Learners completing PIVOTAL programmes.
				4.2 Bursaries, internships and experiential learning programmes for learners and graduates.	▪ Unemployed middle level Learners completing bursary programmes. ▪ Unemployed learners completing Bursaries at Higher Education Institutions. ▪ Employed learners completing Bursaries at Higher Education Institutions. ▪ Middle level Learners benefiting from Work-Integrated Learning. ▪ Qualified learners placed in work experience / internship opportunities. ▪ Bursaries to Masters, PhD and post-doctoral students in the sector.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
capacity for improved service delivery and supporting the building of a developmental state. Goal 8: Building career and vocational guidance.	14: Trade Unions, NGOs and CBOs Skills Development Support. SSP Programme 16: Career Guidance.			4.3 Implemented Artisan strategy, aligned with the Generic National Artisan Learner Grant Funding strategy.	▪ Employed Artisans completing training programmes. ▪ Unemployed Artisans completing training programmes.
				4.4 ETDPSETA to fund and collaborate with CATHSSETA in assisting identified FET colleges.	FET staff completing training programmes.
				4.5 Targeted interventions supporting sectoral SMMEs, cooperatives, NGO's, CBO's and Trade Unions.	▪ Direct support to sectoral Cooperatives. ▪ Direct support to sectoral SMMEs. ▪ Direct support to sectoral Trade Unions, NGOs and CBOs.
Goal 1: Establishing a credible institutional mechanism for skills planning. Goal 7: Increasing	SSP Programme 1: Research and Skills Planning. SSP Programme 6: Research, Development and Generation of New	5. CATHSSETA programmes and interventions are continuously assessed and enhanced in	▪ Education and Training Quality Assurance provided to qualifications under CATHSSETA scope to both public and private training providers. ▪ Monitoring and Evaluation	5.1 Education and Training Quality Assurance provided to qualifications under CATHSSETA scope, to both public and private training providers.	▪ Quality Assurance of training provision by CATHSSETA accredited providers.

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
public sector capacity for improved service delivery and supporting the building of a developmental state.	Knowledge. SSP Programme 8: Quality Assurance.	terms of their relevance, quality and effectiveness.	strengthens the contract management capabilities of CATHSSETA. ▪ Full-value chain monitoring and evaluation informs the continuous enhancement of CATHSSETA programmes and interventions.	5.2 Full-value chain monitoring and evaluation informing the continuous enhancement of CATHSSETA programmes and interventions.	▪ Quality workplace and provider evaluations conducted. ▪ The outcomes and impact of CATHSSETA learning interventions tracked and assessed.
GOALS: Governance and corporate services in support of all 8 NSDS3 goals.	SSP Programme 17: SETA Administration.	6. An accountable, well governed and optimally resourced organisation.	▪ Financial management, control and reporting and master budget management. ▪ A transparent, cost effective and efficient supply chain management and procurement system. ▪ Adherence to policies and legislative frameworks and compliance with relevant statutory requirements. ▪ Governance, risk management and compliance. ▪ Accountability and reporting. ▪ Internal business excellence and system and	6.1 An effective, efficient and transparent system of financial management and internal control.	▪ Enhanced financial management control and performance. ▪ A transparent, cost effective and efficient procurement system.
				5.3 Compliance and sound corporate governance.	Unqualified audit opinion for previous year - Both Financial and Performance information).
				5.4 Enhanced business integration and organisational effectiveness.	Relevant and aligned organisational policies and procedures
				5.5 A high performing and optimally capacitated organisation.	▪ An optimally capacitated, capable and sustainable organisation. ▪ A high performance culture

NSDS3 GOAL SUPPORTED	LINK TO SSP PROGRAMME	CATHSSETA STRATEGIC GOAL	PROGRAMMATIC FOCUS AREA	STRATEGIC OBJECTIVES PER STRATEGIC GOAL	INDICATIVE 5-YEAR TARGET INFORMING PERFORMANCE METRICS
			process optimisation. ▪ Effective knowledge management systems and institutional memory. ▪ An optimally capacitated and capable organisation. ▪ A high performance culture underpinned by an effective performance management and development system and approach.		underpinned by an effective performance management and development approach. ▪ A healthy and productive work force.

The above Strategic Objectives and indicative 5-Year Targets have then informed the resource considerations, CATHHSETA budget and MTEF projections outlined in the aligned CATHSSETA 2014/15 Annual Performance Plan.

BUDGETS PER PROGRAMME	**2013/2014**	**2014/2015**	**2015/2016**	**2016/2017**
Programme 1: Coordinate Research and Skills Planning for the Sector				
Administration Expenses	831 123	148 741	309 678	102 485
Salaries and staff related costs	863 205	1 131 300	1 076 068	1 442 960
Direct Salary Expenses	681 968	657 305	705 151	559 546
Direct Project Expenses	20 214 747	15 136 398	16 390 160	18 495 396
Committed Surplus Funds Expenses	4 312 875			
Total	**26 903 919**	**17 073 744**	**18 481 056**	**20 600 386**
Admin %	6.30%	7.50%	7.50%	7.50%
Programme 2 : Address Sector Middle Level Skills				
Administration Expenses	1 462 118	2 006 342	1 749 395	3 044 989
Salaries and staff related costs	2 864 112	3 383 931	3 509 136	3 518 423
Direct Salary Expenses	454 886	513 576	470 349	417 398
Direct Project Expenses	52 901 949	67 232 151	70 250 825	76 473 403
Committed Surplus Funds Expenses	51 636 404			
Total	**109 319 468**	**73 136 000**	**75 979 706**	**83 454 212**
Admin %	3.96%	7.37%	6.92%	7.86%

Programme 3: Artisan Development				
Administration Expenses	101 698	243 915	101 739	194 106
Salaries and staff related costs	193 842	612 952	363 855	368 909
Direct Salary Expenses	118 347	310 936	122 370	110 596
Direct Project Expenses	3 526 652	10 256 198	5 619 962	6 833 255
Committed Surplus Funds Expenses	1 067 500			
Total	**5 008 040**	**11 424 001**	**6 207 926**	**7 506 866**
Admin %	5.90%	7.50%	7.50%	7.50%
Programme 4: Communications				
Administration Expenses	179 742	133 363	211 573	211 658
Salaries and staff related costs	0	0	0	0
Direct Salary Expenses	0	0	0	0
Direct Project Expenses	2 216 820	1 644 806	2 609 401	2 610 453
Total	**2 396 562**	**1 778 168**	**2 820 974**	**2 822 111**
Admin %	7.50%	7.50%	7.50%	7.50%
Programme 5 : Addressing High Level Scarce Skills				
Administration Expenses	546 515	355 398	254 559	316 111
Salaries and staff related costs	536 948	812 131	887 293	813 328
Direct Salary Expenses	400 242	529 537	413 847	382 224
Direct Project Expenses	12 962 463	13 870 935	13 670 062	13 547 369
Total	**14 446 168**	**15 568 000**	**15 225 761**	**15 059 033**
Admin %	7.50%	7.50%	7.50%	7.50%

Programme 6 : Research for Innovation and Development				
Administration Expenses	412 025	505 656	330 435	485 563
Salaries and staff related costs	311 694	338 544	572 373	358 910
Direct Salary Expenses	157 924	177 372	163 293	150 938
Direct Project Expenses	8 767 950	10 234 428	10 971 342	10 264 236
Total	**9 649 593**	**11 256 000**	**12 037 444**	**11 259 648**
Admin %	7.50%	7.50%	7.50%	7.50%
Programme 7 : NCV Review				
Administration Expenses	78 334	68 631	97 981	68 298
Salaries and staff related costs	76 101	65 169	85 328	115 078
Direct Salary Expenses	69 687	60 143	72 056	71 233
Direct Project Expenses	1 835 009	1 590 065	2 188 752	2 190 394
Total	**2 059 131**	**1 784 008**	**2 444 116**	**2 445 004**
Admin %	7.50%	7.50%	7.50%	7.50%
Programme 8 : Quality Assurance				
Administration Expenses	469 161	481 086	586 559	704 191
Salaries and staff related costs	0	0	0	0
Direct Salary Expenses	1 450 000	1 354 792	1 463 175	1 580 229
Direct Project Expenses	4 336 320	4 578 599	5 542 950	6 858 437
Total	**6 255 481**	**6 414 477**	**7 592 684**	**9 142 857**
Admin %	7.50%	7.50%	7.73%	7.70%

Programme 9 : FET Capacity Building				
Administration Expenses	114 838	1 021 088	1 026 393	1 014 220
Salaries and staff related costs	147 047	151 648	152 502	282 784
Direct Salary Expenses	48 661	53 767	50 314	69 557
Direct Project Expenses	3 181 258	14 409 946	14 490 356	15 920 236
Committed Surplus Funds Expenses	966 000			
Total	**4 457 804**	**15 636 449**	**15 719 565**	**17 286 797**
Admin %	5.87%	7.50%	7.50%	7.50%
Programme 10 : Provision for the low level unemployed language and numeracy skills				
Administration Expenses	281 741	126 507	100 263	114 424
Salaries and staff related costs	549 398	543 971	685 519	612 828
Direct Salary Expenses	662 264	655 875	684 777	634 143
Direct Project Expenses	9 588 449	7 314 597	9 006 247	8 337 562
Committed Surplus Funds Expenses	6 453 076			
Total	**17 534 928**	**8 640 950**	**10 476 805**	**9 698 958**
Admin %	4.74%	7.76%	7.50%	7.50%
Programme 11 : Provision of Quality Training for Employed Workers				
Total	**41 448 000**	**46 332 000**	**48 567 000**	**50 995 000**

Programme 12 : Support for Cooperatives through skills development				
Administration Expenses	67 869	74 831	88 456	107 442
Salaries and staff related costs	93 997	103 380	116 923	98 011
Direct Salary Expenses	145 141	160 371	150 075	148 362
Direct Project Expenses	1 851 204	2 037 566	2 382 932	2 385 558
Committed Surplus Funds Expenses	400 000			
Total	**2 558 211**	**2 376 147**	**2 738 385**	**2 739 373**
Admin %	6.33%	7.50%	7.50%	7.50%
Programme 13 : Support for Small and Emerging Businesses through skills development				
Administration Expenses	868 458	599 914	616 777	370 951
Salaries and staff related costs	1 387 323	1 031 792	1 185 331	1 273 780
Direct Salary Expenses	1 237 107	1 137 963	1 279 160	1 205 181
Direct Project Expenses	26 584 185	18 978 097	20 934 769	19 084 733
Committed Surplus Funds Expenses	14 073 500			
Total	**44 150 573**	**21 747 766**	**24 016 037**	**21 934 646**
Admin %	5.11%	7.50%	7.50%	7.50%

Programme 14 : Support for Trade Unions, NGOs and CBOs through skills development				
Administration Expenses	57 889	69 201	78 745	62 714
Salaries and staff related costs	154 227	164 330	217 571	374 225
Direct Salary Expenses	86 508	95 585	89 449	82 862
Direct Project Expenses	2 529 588	2 784 635	3 565 112	5 306 047
Committed Surplus Funds Expenses	1 060 000			
Total	**3 888 212**	**3 113 751**	**3 950 877**	**5 825 848**
Admin %	5.46%	7.50%	7.50%	7.50%
Programme 15: Public Sector Education and Training				
Administration Expenses	68 793	54 598	75 211	130 111
Salaries and staff related costs	100 000	75 814	100 000	100 000
Direct Salary Expenses	0	0	0	0
Direct Project Expenses	2 081 660	1 608 406	2 160 937	2 838 035
Total	**2 250 453**	**1 738 818**	**2 336 148**	**3 068 146**
Admin %	7.50%	7.50%	7.50%	7.50%

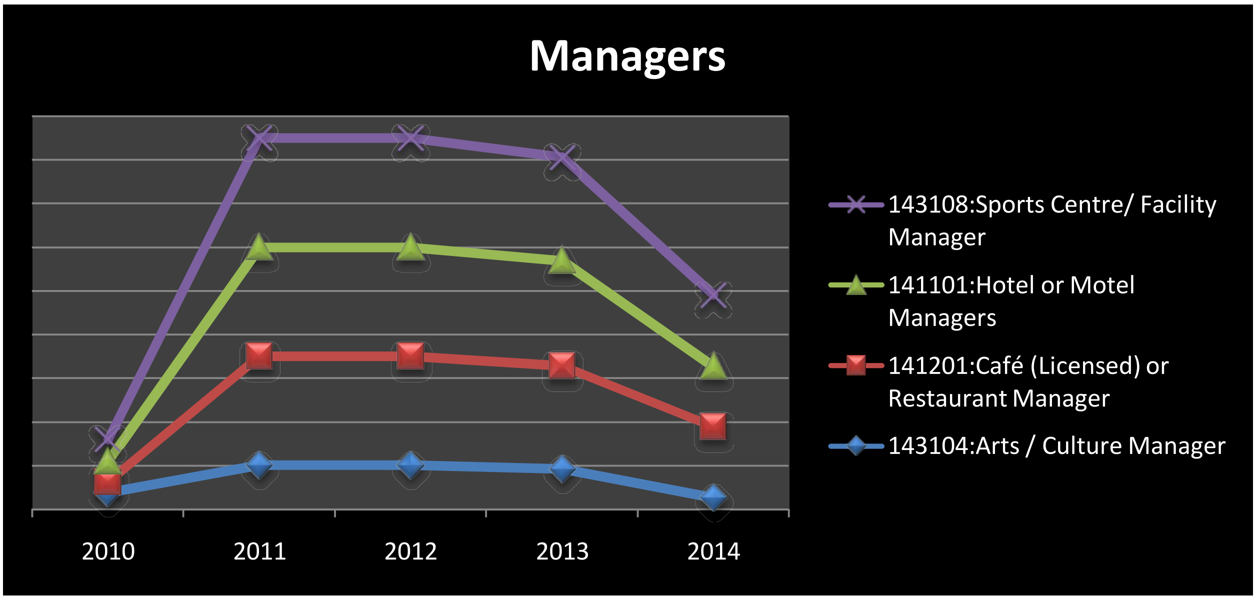
Programme 16 : Career Guidance for Sector Stakeholders				
Administration Expenses	225 069	88 841	0	0
Salaries and staff related costs	657 434	845 537	1 033 713	898 125
Direct Salary Expenses	547 642	605 107	566 257	1 722 937
Direct Project Expenses	10 972 667	11 241 237	12 690 202	9 350 000
Committed Surplus Funds Expenses	10 552 645			
Total	**22 955 457**	**12 780 722**	**14 290 172**	**11 971 062**
Admin %	3.84%	7.31%	7.23%	7.50%
TOTAL	**315 282 000**	**250 801 000**	**262 884 656**	**275 809 946**
Programme 17 : SETA Administration				
Administration Expenses	12 858 000	13 509 000	13 395 423	10 803 576
Salaries and staff related costs	20 112 000	23 346 000	25 035 577	29 760 024
Total	**32 970 000**	**36 855 000**	**38 431 000**	**40 563 600**
Grand Total	**348 252 000**	**287 656 000**	**301 315 656**	**316 373 546**

Annexure A: Organisation of SIC Codes per Sub-sector

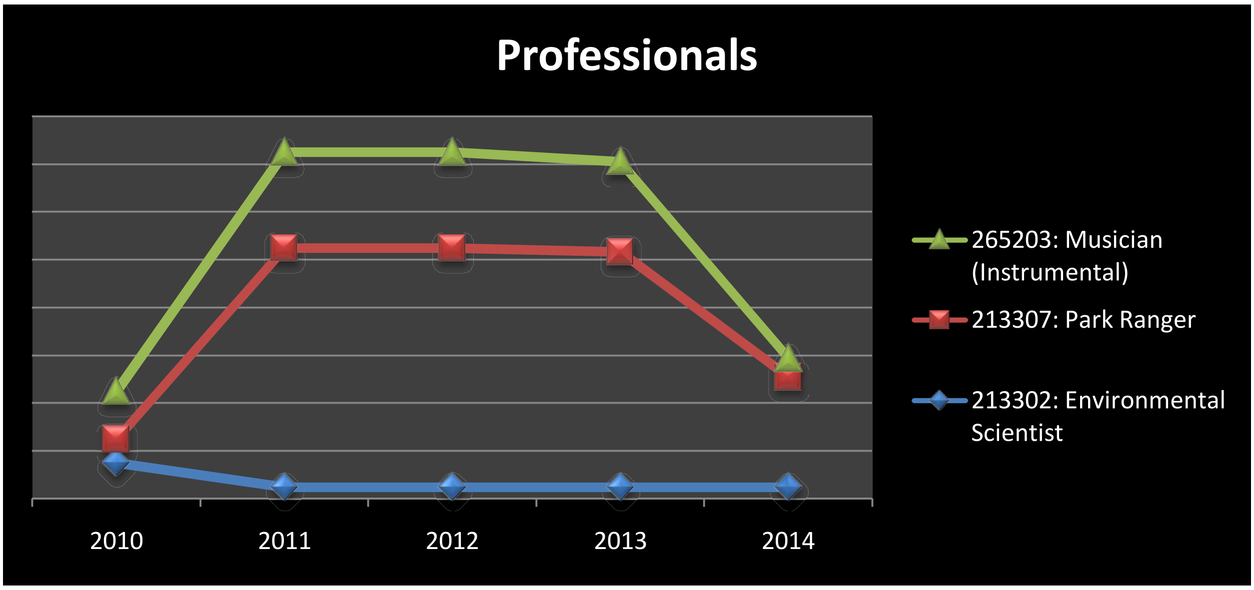
Group	SIC Code	Standard Category
Conservation and Tourism Guiding		
(4 SIC Codes)	11520	Hunting and Trapping including related services
	96333	Game parks, reserves incl. but not limited to wildlife, parks, zoological or animal parks and botanical gardens
	96334	Activities of conservation bodies
	96335	Wildlife conservation incl. wildlife, game, parks, game reserves, zoological establishments, botanical gardens etc
Arts, Culture and Heritage		
(15 SIC Codes)	9003	Production of Craft Art
	9004	Production of Traditional Art
	9005	Production of Designer Goods
	9006	Production of Functional Wares
	9007	Production of Souvenirs
	96140	Dramatic Arts, Music and other Arts Activities
	96141	Activities of Artists and Entertainers
	96142	Activities of Theatre and Entertainment Technicians
	96143	Production of ‘Live’ Theatrical and Artistic Events
	96144	Activities of Arts Councils and other Related Institutions
	96190	Other Entertainment Activities N.E.C.
	96320	Museum Activities and Preservation of Historical Sites and Buildings
	96322	Provision for management and operation of Monuments, Historical Sites and Buildings
	96323	Management and operation of museum, cultural and heritage activities
	96492	The Activities of Casting for Motion Pictures, Television and Theatre Productions
Gaming and Lotteries		
(2 SIC Codes)	96419	Operation and management of Horse Racing Events and Clubs and Academies
	96494	Gambling, licensed Casinos & the National Lottery and but not limited to Bookmakers, Totalisators, Casinos, Bingo Operators
Hospitality		
(16 SIC Codes)	64101	Hotels, motels, boatels and inns registered with the SA Tourism Board
	64102	Caravan Parks and Camping Sites
	64103	Guest Houses and Guest Farms
	64104	Hotels, motels, boatels and inns not registered with the SA Tourism Board
	64105	Bed and Breakfast
	64106	Management and operation of game lodges
	64201	Restaurants or tearooms with liquor license
	64202	Restaurants or tearooms without liquor license
	64203	Take-Away Counters
	64204	Caterers
	64205	Take-Away Restaurants
	64206	Fast Food Establishments
	64207	Other Catering Services n.e.c. including Pubs, Taverns, Night Clubs
	64209	Other Catering Services N.E.C
	84111	Timesharing

	88994	Bioscope Cafes
Sport, Recreation and Fitness		
(12 SIC Codes)	93195	Operation and management of Health and Well-Being Centres including but not limited to Hydros, Spas, Fitness Centres etc.
	96000	Recreational, Cultural and Sporting activities
	96002	Recreational, leisure and outdoor adventure activities including management and operation of facilities, Government departments
	96196	Amusement Parks
	96410	Sporting activities
	96411	Operation and management of sporting facilities and clubs
	96412	Operation and management of sport academies
	96413	Promotion and management of sporting events and activities
	96415	Management and operation of non-motorized sporting activities
	96417	Sporting activities incl. but not limited to Sport Federations etc.
	96418	Management and operation of motorized sporting activities
	96491	The Operation and Management of recreation parks & beaches, fairs and shows of a recreational nature and recreational transport activities
Tourism and Travel Services		
(13 SIC Codes)	71214	Tour operators (Inbound and Outbound Tour Operators)
	71222	Safaris and Sight Seeing Bus Tours
	71223	Safaris and Sightseeing Trip Operators
	73002	Inbound International Flights
	74140	Travel agency and related activities
	85110	Renting of Land Transport Equipment
	85111	Renting of Land Transport Equipment including Car Rentals
	8899A	Event and Conference Management
	96195	Operation and Management of Convention Centres
	96336	Tourist Info Centres
	99028	Car Hire
	99048	Tourism Authorities incl. but not limited to Tourism Marketing, Tourist Information Centres, Publicity Associations
	99049	Guides incl. tourist river, mountain etc.

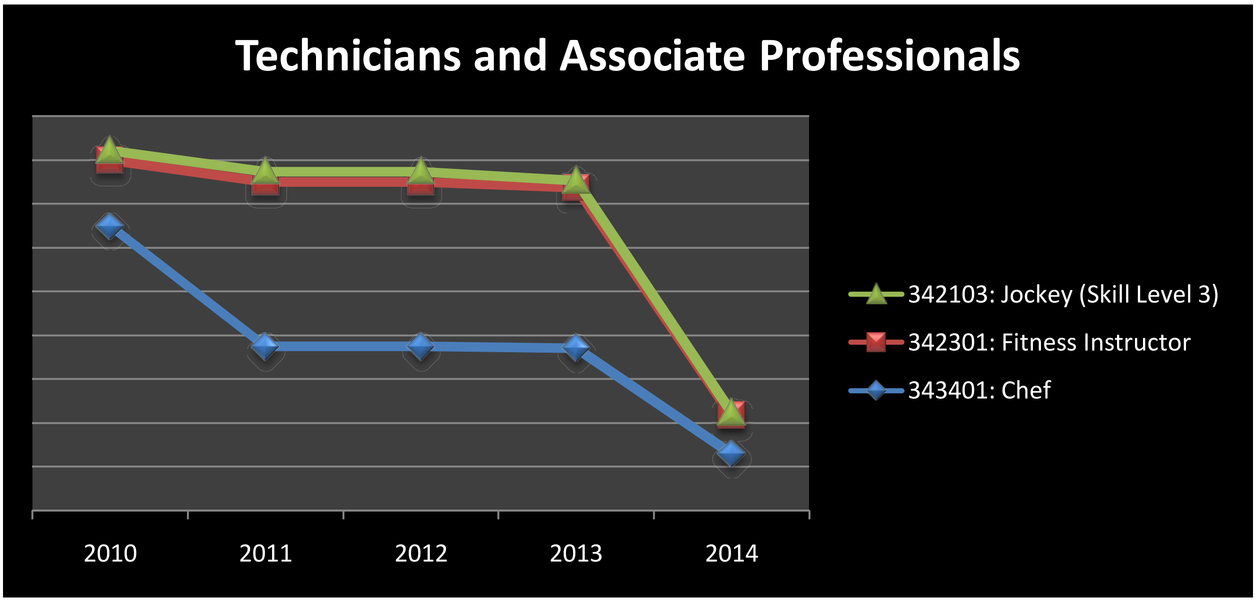
Annexure B: Trend Analysis of Key Scarce and Critical Occupations per OFO Major Group



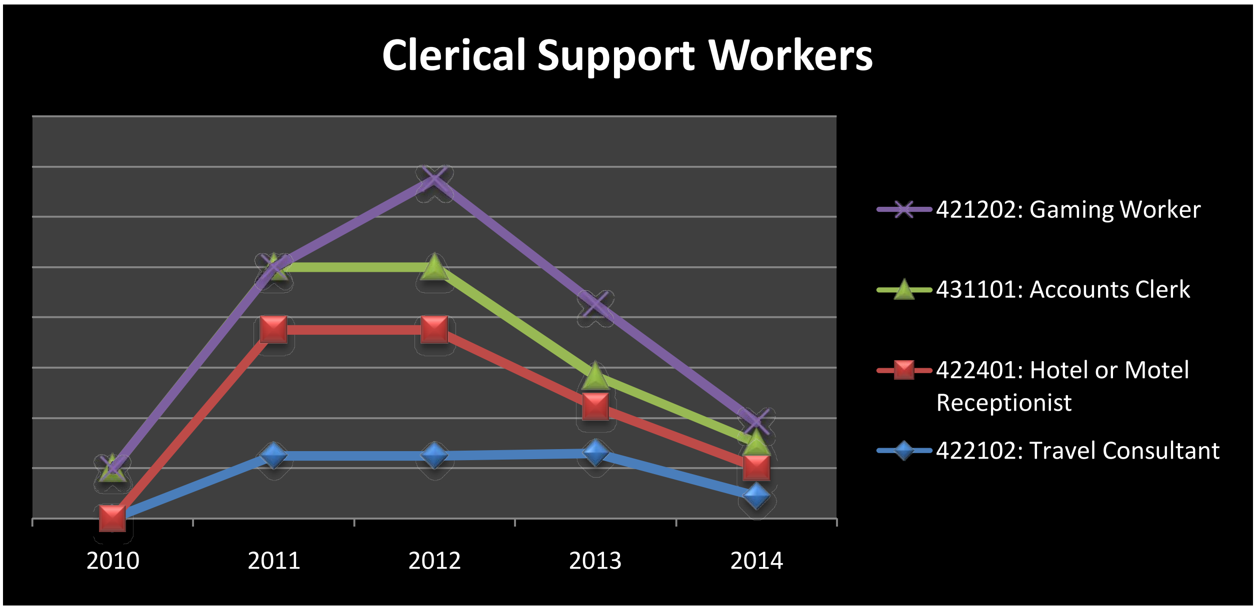
- As seen in the figure above, the Sports Centre/Facility Manager, Hotel or Motel Manager, Cafe (licensed) or Restaurant Manager and Arts/Culture Manager have been identified as key occupations across the CATHSSETA sector, which fall under the Manager OFO major group. The analysis of these 4 occupations shows that they have been listed on the list of Scarce and Critical skills from 2010 and the demand for these skills remains apparent for the 2014 period. It is encouraging to note however, that the demand for these skills follow a declining trend with an overall 44% average decrease in demand, which is indicative of the success of skills development initiatives in the sector to address these scarce and critical skills.



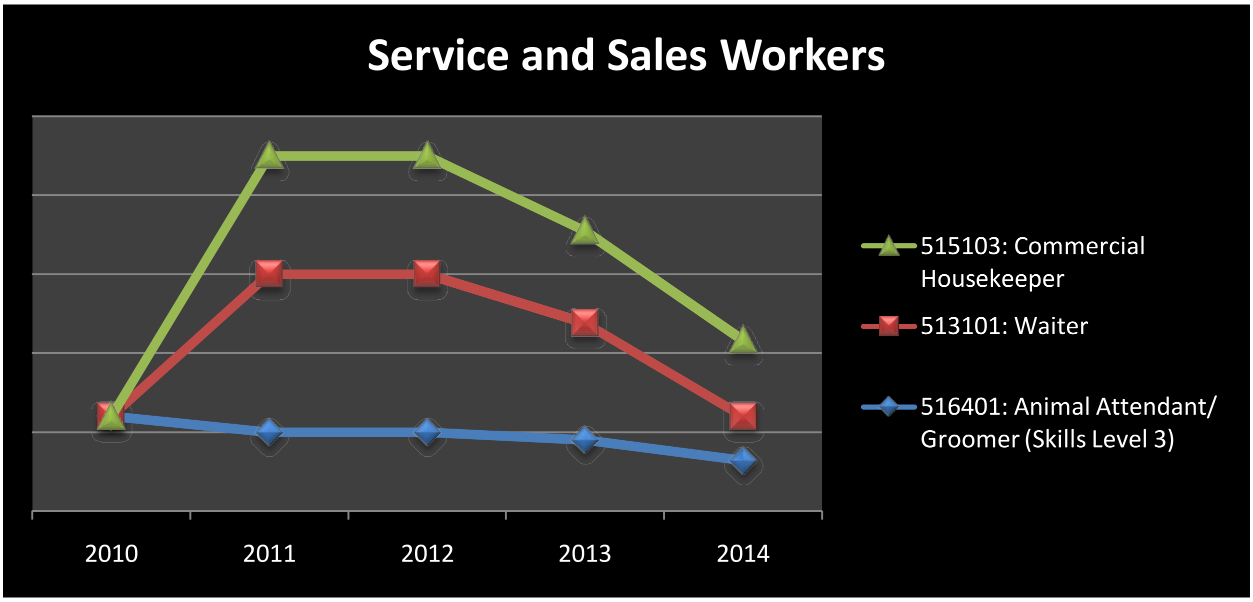
- The main occupations in the Professionals OFO major group that have been identified across the 5 year trend are Environmental Scientist, Park Ranger and Musician (Instrumental). With the exception of the Environmental Scientist, the scarcity of the Park Ranger and Musician occupations has declined by almost half for the 2014 period. The Environmental Scientist occupation has had consistent demand over the past 4 years and continues to remain a key occupation in this major group and is being addressed by CATHSSETA in partnership with stakeholders such as the Department of Environmental Affairs, GreenMatter and South African National Parks.



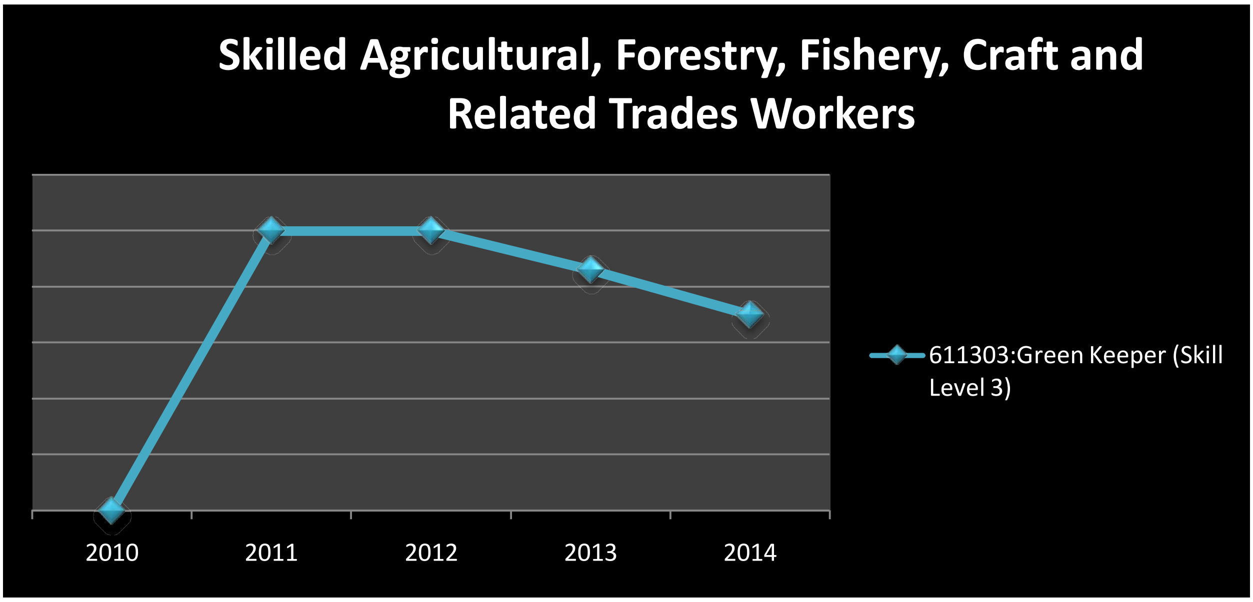
- In the Technicians and Associate Professionals OFO major group, the Chef, Fitness Instructor and Jockey occupations have been identified as the key occupations. It is positive to note that the demand for these occupations in the 2014 period shows a declining trend from the previous years, which is once again indicative of the success of skills development initiatives within the sector to address these scarce and critical skills.



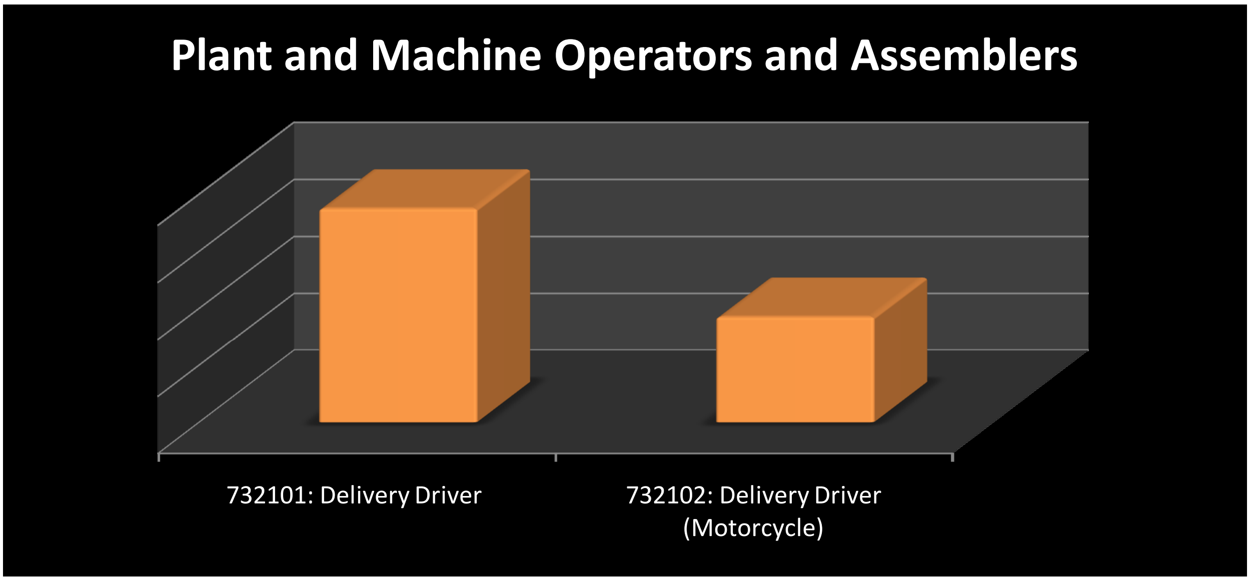
- The Accounts Clerk occupation in the Clerical Support Workers OFO major group has been the only occupation that has consistently been listed as a key occupation from 2010. It is pertinent to note that the demand for the Hotel or Motel receptionist occupation remains at double that of the demand for the Travel Consultant occupation. The Gaming Worker occupation had a hike in demand for the 2011, 2012 and 2013 period, with a steady decline for the 2014 year.



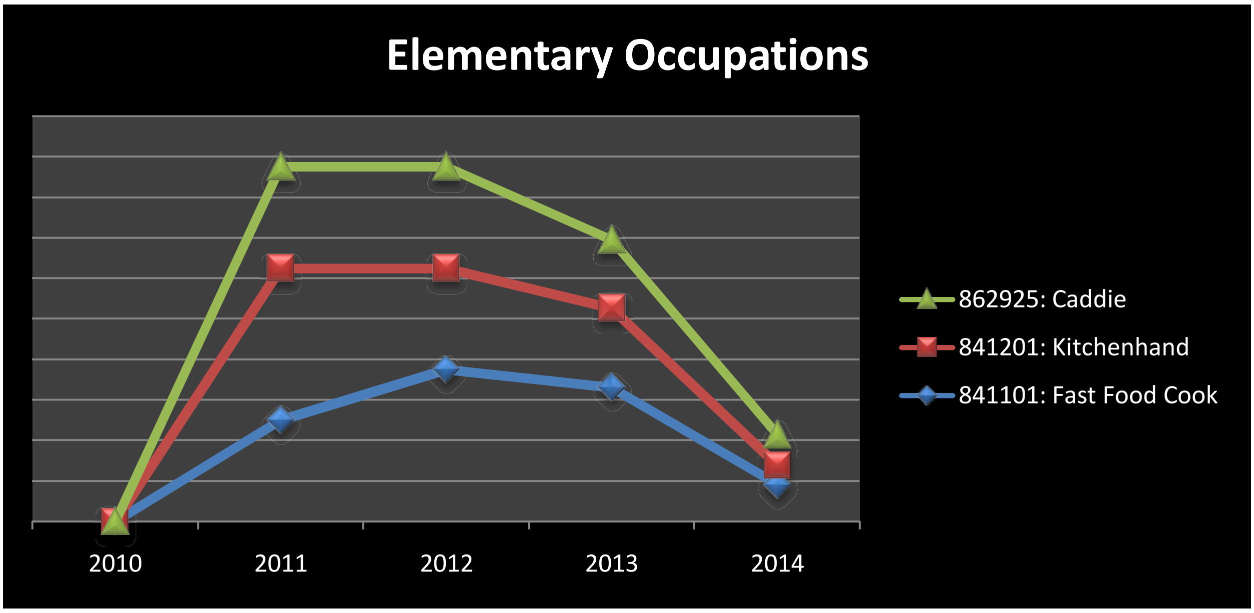
- Evaluation of the occupations in the Service and Sales OFO major group show that the central occupation that has constantly emerged from the 2010 period as key is that of the Commercial Housekeeper. The Waiter and Animal Attendant/Groomer occupations have emerged from 2011 and it is important to note that the demand in numbers required of the Waiter occupation far exceed that of both the Commercial Housekeeper and Animal Attendant/Groomer occupations.



- In the Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers OFO major group, only the Green Keeper occupation has appeared consistently over the 5 year period of analysis. The demand however, for this occupation lies in the Green category of 0-20% scarcity as stakeholders have indicated that it is not immediately required and potential incumbents for these positions need to be developed over a period of time to gain the experience required to become a green keeper.



- There have been no occupations listed under the Plant and Machine Operators and Assemblers OFO major group for the past 4 years. The 2 occupations, Delivery Driver and Motorcycle Delivery Driver have for the first time been listed as key occupations for the 2014 period. The growth and demand for these occupations is reflective of current lifestyles in South Africa, where people are more inclined to order food and take away to be delivered to than houses than either go to a restaurant to eat or collect food themselves from a take away.



- Analysis of the Elementary Occupations OFO major group reveals that the key occupations that have emerged are that of the Caddie, Kitchenhand and Fast Food Cook. It must noted that there were no occupations listed on the Scarce and Critical skills list that fell into this OFO major group for the 2010 period.

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