



Culture, Arts, Tourism, Hospitality and  
Sport Sector Education and Training  
Authority

# **SECTOR SKILLS PLAN**

## **2020/21 – 2024/25**

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## FOREWORD

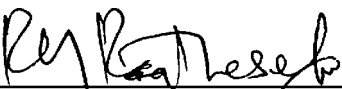
I have the pleasure of presenting the Sector Skills Plan (SSP) for the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) for the 2020/21 – 2024/25 financial year. April 2019 marks the first year of the new board that was appointed in April 2018 by the Department of Higher Education and Training (DHET). The CATHSSETA board appointed Ms Keitumetse Lebaka in January 2019 as Chief Executive Officer (CEO), this will bring stability to the organisation. The CATHSSETA Board is working very closely with the CEO and her team for the organisation to deliver on its mandate, which includes the development of an SSP aligned to the revised SSP Framework.

In the past year, CATHSSETA completed various research studies, the outputs of which will be incorporated into the final SSP 2020/21 – 2024/25 to be submitted in August 2019. An extensive consultation process with various stakeholders took place, this includes the mandatory grant workshops held across the country and key informant interviews with role-players in the sector were also carried out in all provinces across the country. Outcomes of some of the stakeholder engagements have been incorporated into this version of the SSP.

This Sector Skills Plan is prepared in anticipation of the implementation of the National Skills Development Plan in 2020 going forward. It is envisaged that, whilst the country is undergoing political changes, policy and economic uncertainties, the need to address skills development will continue to be a priority.

Skills planning seeks to identify opportunities and platforms in the sector within which meaningful skills development can take place. This SSP will form the basis for all CATHSSETA plans including the Strategic Plan, the Annual Performance Plan and the funding framework that will guide the use of skills development grants.

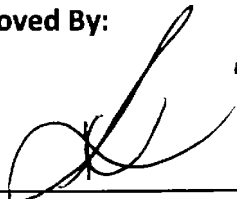
In conclusion, I would like to thank our stakeholders for their valuable participation and contribution to the SSP development process. I would also like to encourage and congratulate the CEO and the management team on the work they have done in the past financial year. We look forward to improving on how we can best implement our mandate and build on our successes to contribute positively to society.

  
\_\_\_\_\_  
Victor Ramathesele (Dr)  
Chairperson of the Board: CATHSSETA

## **AUTHORISATION OF THE SECTOR SKILLS PLAN**

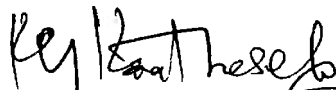
We, the undersigned, hereby approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY (CATHSSETA), the contents of the Sector Skills Plan for the period 2020/21 – 2024/25

**Approved By:**



\_\_\_\_\_  
Chief Executive Officer  
Keitumetse Lebaka (Ms)

Date: 30/07/2019



\_\_\_\_\_  
Chairperson of the Board  
Victor Ramathesele (Dr)

Date: 30/07/2019

## ABBREVIATIONS AND ACRONYMS

4IR	Fourth Industrial Revolution	PIVOTAL	Professional, Vocational, Occupational, Technical and Academic Learning
AET	Adult Education and Training		
	Culture, Arts, Tourism, Hospitality & Sport Sector Education & Training Authority	QCTO	Quality Council for Trades and Occupations
CATHSSETA		QMR	Quarterly Monitoring Report
CET	Community Education Training	RPL	Recognition of Prior Learning
CHE	Council of Higher Education	SACPO	South African College Principals Organisation
DAC	Department of Arts and Culture	SALGA	South African Local Government Association
DEA	Department of Environmental Affairs	SAMSA	South African Maritime Safety Authority
DG	Discretionary Grant		
DHET	Department of Higher Education and Training	SANBI	South African National Biodiversity Institute
GDP	Gross Domestic Product	SANParks	South African National Parks
GGR	Gross Gambling Revenue	SARS	South African Revenue Services
HTFV	Hard-to-fill-vacancies	SASCOC	South African Sports Confederation and Olympic Committee
HEI	Higher Education Institution	SAT	South African Tourism
HEMIS	Higher Education Management Information System	SETA	Sector Education and Training Authority
HRD	Human Resource Development	SIC	Standard Industrial Classification
ICT	Information and Communication Technology	SIPs	Strategic Integrated Projects
KZN	KwaZulu-Natal	SEs	Small Enterprises
MTSF	Medium Term Strategic Framework	SMS	SETA Management System
MOU	Memorandum of Understanding	SPOL	Sectoral Priority Occupations List
NCV	National Certificate Vocational	SRSA	Sports and Recreation South Africa
NDP	National Development Plan	SSP	Sector Skills Plan
NDT	National Department of Tourism	Stats SA	Statistics South Africa
NGB	National Gambling Board	TSA	Tourism Satellite Account
NGO	Non-Governmental Organisation	THRD	Tourism Human Resource Development Strategy
NHEIPE	National Higher Education Institute for Physical Education	TVET	Technical and Vocational Education and Training
NPO	Non-Profit Organisation	UoT	University of Technology
NQF	National Qualifications Framework	WIL	Work Integrated Learning
NSDP	National Skills Development Plan	WRP	Work Readiness Programme
NSDS	National Skills Development Strategy	WTTC	World Travel and Tourism Council
NSRP	National Sport and Recreation Plan		
NTSS	National Tourism Sector Strategy		
OFO	Organising Framework for Occupations		

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## EXECUTIVE SUMMARY

The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) has compiled the five year plan of the Sector Skills Plan (SSP) for the period 2020/21-2024/25. This SSP has been prepared in accordance with section 10 (1) (a) of the Skills Development Act of 1998 which mandates the SETA to develop an SSP within the framework and guidelines included in the National Skills Development Strategy (NSDS) III for the period 2011 to 2016 (extended to 2020), as well as the requirements set out by the Department of Higher Education and Training (DHET) SSP Framework. The key policy drivers that have been identified and considered in this SSP are the National Development Plan, the White Paper for Post-School Education and Training, the Sector Education and Training (SETA) Grant Regulations and NSDS III and the National Skills Development Plan (NSDP). Further sub-sectoral specific plans considered include the Department of Arts and Culture (DAC) Strategy, the National Sport and Recreation Plan (NSRP), the National Tourism Sector Strategy (NTSS), the Tourism Human Resources Development Strategy (THRD), the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy.

Overall, CATHSSETA is organised into six sub-sectors which include Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Travel and Tourism, representing an extremely vast and varied sector in terms of nature, scope and size. The geographical profile of the sector indicates a greater concentration of employers and employees in the Gauteng, Western Cape and KwaZulu-Natal provinces. Racial and gender disparities remain in the demographic composition of the overall sector; indicating that there is need for further transformation in the sector. The majority of employees in the sector are classified as youth (less than 35); indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors.

Change drivers are factors driving change in the sector influencing skills demand and supply of skills either positively or negatively. CATHSSETA takes into consideration these drivers of change and their inevitable implications on skills development on the sector by directing relevant programmes and learning interventions to support and/or mitigate the effects of the identified change drivers on the sector. The change drivers identified are technology and the Fourth Industrial Revolution (4IR).

The analysis of the demand and supply of skills within the sector has been assessed utilising the Mandatory Grant application data and inputs from in-depth interviews and focus group sessions with relevant stakeholders in the sector. The analysis and interpretation of these consolidated inputs are augmented by research conducted by CATHSSETA and its partners. The data analysis was conducted in the following manner (a) data was checked, validated and missing values were identified and addressed; (b) validated data was organised for exploratory analysis; (c) descriptive statistics were produced including mean, minimum and maximum values for identified variables; (d) categorical data was used to conduct qualitative analysis; (e) historical data, derived from the analysis of previous periods' Reported and Planned Training Interventions data was used; (f) analysed data was presented as tables, graphs and summary statistics and (g) trend analysis, based on historical data combined with consultation inputs for comparison across different categories and over various time periods, was conducted.

The recognition of priority skills is based on the occupations identified as occupational shortages. The identified occupational shortages are a function of two determinants: the number of vacancies in the sector; and the degree of scarcity of the identified vacancies. This function was developed on the basis of the behavioural relationship between vacancies and scarcity, to occupational shortages.


The sub-sectors within CATHSSETA are forecast to experience continued strong growth in the years to come. To support the industry's success, and facilitate this projected growth, industry partners must work together to ensure access to suitably skilled labour. In response to this, this SSP will contribute to the following skills development priorities in the sector:

1. Fourth Industrial Revolution  
Training provision (Skills Supply, Quality Assurance: Accreditation, Assessment, Certification, and Training Providers)
2. Analysis of skills needs (Qualification Review)
3. Workplace-based learning and experiential learning
4. Increased partnerships to include worker initiated interventions
5. Transformation (Mentoring and coaching ,TVET and CET capacity building)
6. SMME Interventions and Green Economy (Resource Efficiency)
7. Monitoring and Evaluation
8. Addressing Occupational Shortages and Skills gaps (Skills Demand: Learning Programmes delivery)

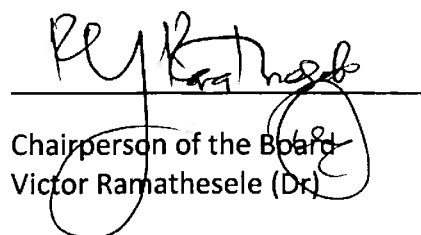
A continuous challenge faced by the SETA, however is promoting research at post-graduate level in the relevant CATHSSETA research programmes. The research agenda has purposefully prioritised partnering with Higher Education Institutions (HEIs) by providing funding for Masters and PhD level students to do research in our different sub-sectors.

The SSP contains six chapters. Chapter 1 presents the profile of the sector and examines the six sub-sectors in terms of scope, economic performance, and labour market profile. Chapter 2 identifies change drivers in the sector and their implications for skills planning. Chapter 3 considers the demand and supply of skills and concludes with the identification of occupational shortages and skills gaps in the sector. Chapter 4 provides an outline of the partnerships that CATHSSETA currently has in place and the new partnerships needed. Chapter 5 aims to reflect on the SETA's achievements of its strategic priorities based on its performance in the previous financial year. Finally, Chapter 6 summarises the key findings from the previous chapters and identifies the development priorities.

**Approved By:**

  
Chief Executive Officer  
Keitumetse Lebaka (Ms)

Date: 30/07/2019

  
Chairperson of the Board  
Victor Ramathesele (Dr)

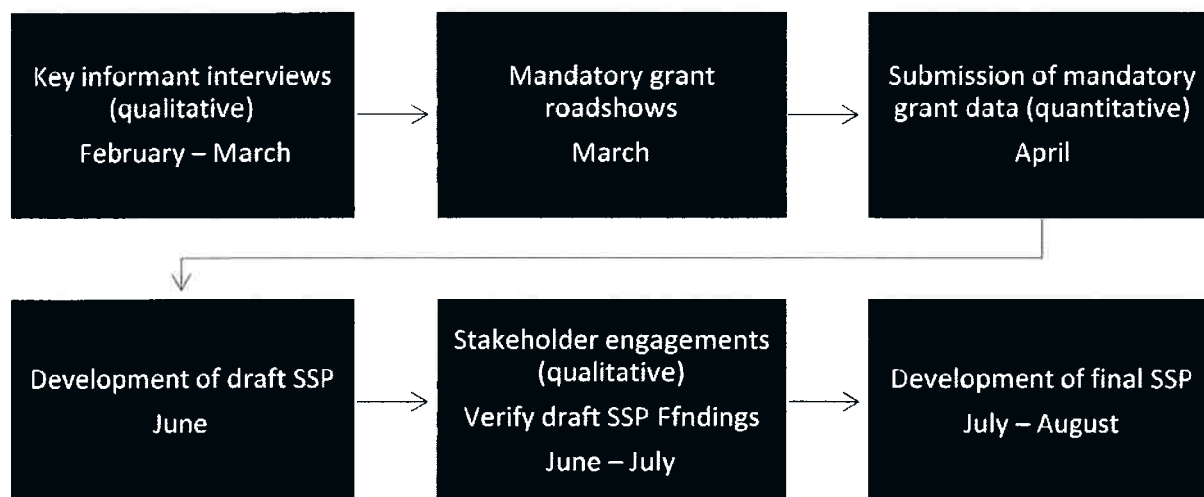
Date: 30/07/2019

## RESEARCH PROCESS AND METHODS

This section details the research process and methods CATHSSETA has utilised; the findings inform the update of the SSP. The process entailed conducting primary and secondary research to collect data. The methodology employed for this SSP included both qualitative and quantitative research methods. Secondary desktop research was conducted on economic, social and development status of the sector utilising the Tourism Satellite Account (TSA) compiled by Stats SA. The data and publications from the Higher Education Management Information System (HEMIS) and industry regulators and entities such as the National Gambling Board (NGB) and South African Tourism (SAT) were also used. Primary sources of data included mandatory grant application data (which was previously the Workplace Skills Plan and Annual Training Report), the SETA Management System (SMS) as well as internal and external stakeholder consultative sessions to elicit further input into the plan.

The process outlined by the figure below is followed on annual basis, starting with conducting interviews with key roleplayers in February/March and then hosting mandatory grants roadshows throughout the provinces. Qualifying employers submit their mandatory grants applications (MGA) by 30 April online. The MGA requires applicants supply the SETA with specified data in order to be eligible for the grant. The updating of the SSP begins in February of every year and continues to the first submission in June. After that, stakeholder engagements are conducted in all nine provinces in June/July in order to validate the initial findings. The final SSP is submitted to DHET on 1 August each year.

FIGURE 1: SECTOR SKILLS PLAN UPDATE AND DATA COLLECTION CYCLE



The SETA conducted the research studies detailed in the table below during the 2018/19 period.

**TABLE 1: CATHSSETA RESEARCH STUDIES**

<b>TOPIC</b>	<b>TYPE OF STUDY</b>	<b>OBJECTIVES OF STUDY</b>	<b>DATA COLLECTION TOOL</b>	<b>SAMPLE SIZE AND SCOPE OF THE STUDY</b>	<b>LIST OF DATA SOURCES</b>	<b>TIME FRAME OF STUDY</b>
Tracking and tracing beneficiaries of CATHSSETA learning programmes	Qualitative and quantitative methods	To develop a database of learners who have successfully completed learning programmes during the 2014/15 to 2015/16 period to provide employers with a pool of skilled potential employees	Quantitative: Survey qualitative: interviews	Scope: Learners who have completed learning programmes during the 2014/15 to 2015/16 period.	Quarterly monitoring report (QMR) for the 2014/15 to 2015/16 period. Mandatory grant data	May 2017 – September 2018
Number of employed and unemployed learners trained in occupations in high demand	Quantitative study	Determine and track the number of employed and unemployed learners trained in occupations in high demand and PIVOTAL programmes	Quantitative: Survey	Learners entered into training interventions during the 2018/19 period	Quarterly monitoring report (QMR) for Q1–Q4 2018/19 period	March 2018 – March 2019
Number of planned training achieved	Quantitative study	Provide an analysis of training achieved by the sector through a comparison of training planned in the previous reporting	Quantitative: Survey	Mandatory grant application data – planned training 2016/17 versus 2017/18 achieved training	Mandatory grant data for period 2016/17 planned training and 2017/18 achieved training	March 2017 – June 2018
Feasibility study on Work Readiness Programme (WRP)	Qualitative and quantitative methods	To establish whether there is a need for a WRP based on the number of learners not completing Work Integrated Learning programmes	Quantitative: Survey Qualitative: Interviews	100 levy and non-levy paying employers 670 learners 6 Regional Managers 79 HEI/TVET colleges	Mandatory Grant Data Quarterly Monitoring Report (QMR) for the 2014/15 to 2016/17 period	December 2017 – August 2018

A range of data sources have therefore been used in developing this SSP. These sources are:

1. The SMS is an electronic data management tool used for processing mandatory grants, certification, and registration of qualifications, learners and skills development facilitators. The SMS is also a data storage and reporting facility.
2. The SMS has a discretionary grant portal used to receive all discretionary grants online. This approach also requires that applicants register with CATHSSETA and provide information necessary for profiling the sector.
3. MGA provide data on sector employment as well as the demographic and occupational profiles of employees per sub-sector. The total MGAs submitted in the 2018/19 period amounted to 1 185. Data for the mandatory grant was collected based on the organising framework for occupations (OFO) version 2017.
4. National data sources include the HEMIS maintained by DHET, publications and reports by the World Travel and Tourism Council (WTTC), the NGB and SAT, as well as research conducted by other government departments, national research institutions and industry publications.
5. Another newly developed and useful dataset is the TSA by Stats SA. The TSA is an accounting framework adopted by the United Nations (UN) and designed to measure goods and services associated with tourism according to international standards, concepts, classifications and definitions. The TSA provides stakeholders with reliable data to assist them in the design of public policies and business strategies for tourism and for the evaluation of their efficiency. Descriptive analyses (frequencies, cross-tabulations, percentage distributions and median ages) are used to summarise the data. The results are presented in table and graph formats. It is noted though that the TSA for South Africa report does not provide any indication of the skills levels of the employees it reports, and this is where CATHSSETA comes in and should be creating a partnership with TSA in order to assist Stats SA in capturing the skills component.
6. CATHSSETA, with relevant national and provincial government departments in the sector, conducts research to ensure there is sufficient data to accurately analyse the labour market and skills needs of the sector. In the past, CATHSSETA has awarded grants to universities for research into better understanding the size, employment and economic contributions of the six sub-sectors. The SETA intends to carry on with this practice as we implement the NSDP 2030 as reflected in the research agenda.
7. Findings from consultations with key sector stakeholders has been incorporated into this SSP update. Internal stakeholders (regional managers, relevant governance structures) also provided input.



## CHAPTER 1: SECTOR PROFILE

### 1.1. INTRODUCTION

This chapter focuses on the composition of the sector with the aim of providing a profile in terms of size, coverage and economic performance. Key data sources include SMS, MGA, Stats SA and sub-sector strategies. The chapter is organised into five main sub-sections:

- Scope of coverage
- Key roleplayers
- Economic performance
- Employer profile
- Labour market profile

### 1.2. SCOPE OF COVERAGE

CATHSSETA has clustered the standard industrial classification (SIC) codes into six sub-sectors, namely the Arts, Culture and Heritage; Conservation; Gaming and Lotteries; Hospitality; Sport, Recreation and Fitness; and Tourism and Travel Services. All of these sub-sectors fall within the broader services sector of the economy.

It must be noted that the tourism sector is not measured as an industry in its own right in the national accounts, because tourism is not a clearly defined industry in the international standard industrial classification (ISIC) of all economic activities but rather an amalgamation of industries such as transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies, cultural industry, etc. (Stats SA, 2018:4). Stats SA explains that the tourism industries are classified according to the goods and services they produce, while tourism is a consumption-based concept depending on the status of the consumer.

Stats SA (2018:4) cites major reason for the difficulties in measuring the size of tourism as the fact that in the ISIC, industries are created on the basis of their activity or output, rather than on data of their customers, whereas tourism is defined by the characteristics of visitors. Furthermore, tourism consumption includes both 'tourism-characteristic' goods and services (i.e. accommodation, travel services, cable cars, etc.) and 'non-tourism-connected' goods and services (i.e. retail trade), which are consumed largely by non-visitors. The key factor in measuring tourism is to relate purchases by tourists to the total supply of these goods and services within a country.

The scope of a SETA is based on the standard industrial classification of all economic activities as defined by the South African Revenue Services (SARS). The SETA landscape for NSDS III is described in the Government Gazette of November 2010 which placed 62 SIC codes in CATHSSETA's scope listed in Table 2. Most importantly is that almost all the CATHSSETA SIC codes are now to a greater extent covered by the TSA, which brings great relief in measuring economic performance of the entire CATHSSETA scope of coverage.

TABLE 2: SIC CODES

CONSERVATION	
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
<b>ARTS, CULTURE AND HERITAGE</b>	
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
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
<b>GAMING AND LOTTERIES</b>	
96419	Operation and management of horse racing events and clubs and academies
96494	Gambling, licensed casinos and the national lottery but not limited to bookmakers, totalisators, casinos, bingo operators
<b>HOSPITALITY</b>	
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
64105	Bed and breakfasts
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
96195	Operation and management of convention centres
<b>SPORT, RECREATION AND FITNESS</b>	
93195	Operation and management of health and well-being centres including but not limited to hydros, spas, fitness centres.
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-motorised sporting activities
96417	Sporting activities incl. but not limited to sport federations
96418	Management & operation of motorized sporting activities
96491	The Operation and Management of recreation parks & beaches, fairs & shows of a recreational nature & recreational transport activities
<b>TOURISM AND TRAVEL SERVICES</b>	
71214	Tour operators (inbound and outbound tour operators)
71222	Safaris and sightseeing 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 incl. 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.

### 1.3. KEY ROLEPLAYERS

The sector is a regulated industry and has several key roleplayers, ranging from government regulatory institutions, employer representatives to organised labour organisations. Table 3 indicates the broad contributions each is making to the sector.

Their contributions range from paying skills levies, supporting SETA partnerships, representing the interests of the state, supporting skills development through various learning interventions such as providing workplace, mentorship and coaching. The key roleplayers provide the CATHSSETA with data and strategic information necessary for planning skills development interventions.

A number of self-regulatory bodies advance and advocate industry professional standards that provide training requirements for skills development providers, educational practitioners and learners. Two key roleplayers are the employers' associations and organised labour. Most important are accredited skills development providers including institutions of higher learning.

The key national government departments, public entities stakeholders involved in skills development practices, promotion and other industry skills development initiatives are listed, as are some of the key organised employers' stakeholders involved in advocacy, promotion and other industry skills development initiatives. Organised labour is involved in various ways in skills development and for this reason they are important roleplayers to be considered in skills planning processes.



**TABLE 3: CATHSSETA KEY STAKEHOLDERS**

Department	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> <li>Department of Higher Education and Training, Department of Sports, Arts and Culture</li> <li>Department of Tourism</li> <li>Department of Environment, Forestry and Fisheries</li> <li>Department of Employment and Labour</li> <li>The Department of Trade and Industry</li> </ul>	<ul style="list-style-type: none"> <li>Higher education and training, skills development</li> <li>Policy and regulation within the sports, arts and culture sectors</li> <li>Policy and regulation, which is, among others, a national tourism sector strategy</li> <li>Policy and regulation</li> <li>Policy and regulation</li> <li>Policy and regulation, the custodian of the Industrial Policy Action Plan (IPAP)</li> </ul>	<ul style="list-style-type: none"> <li>Skills development policy and regulation, planning for higher education and training, Co-operation and resources; research development and support; and socio-economic innovation</li> <li>Contributes to the SETA administration fee; National Cultural Industries Skills Academy, NaCISA, is a special-purpose vehicle of the department to support the Mzansi Golden Economy (MGE) strategy through skills development. The National Sports and Recreation Plan (NSRP 2030) advocates for accredited education and training programmes</li> <li>Contributes to the SETA administration fee; and through the National Tourism Sector Strategy (NTSS) advocates for tourism human development strategy</li> <li>Instrumental in driving the environment sector skills plan since 2010.</li> <li>Through sectoral determination and all labour matters in the SETA workplace</li> <li>Trade policy regulation and industry development, responsible for the gaming sector</li> </ul>
Public entity	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> <li>National Skills Authority</li> <li>National Skills Fund</li> <li>South African Qualification's Authority</li> <li>Quality Council for Trades and Occupations</li> <li>Sector Education and Training Authorities</li> </ul>	<ul style="list-style-type: none"> <li>Provides oversight</li> <li>Funding responsibility</li> <li>Registers and maintains standards for qualifications</li> <li>SETA qualifications authority</li> <li>Facilitation of Skills development and funding</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring and accountability</li> <li>Funding support to the sector</li> <li>CATHSSETA registered qualifications</li> <li>Occupational qualifications; accreditation of skills development providers</li> <li>SETA partnerships, cross-SETA MOAs for qualifications and accreditation</li> </ul>
Employer stakeholder	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> <li>Federated Hospitality Association of Southern Africa (FEDHASA)</li> <li>South African Football Association (SAFA)</li> <li>Tourism Business Council South Africa (TBCSA)</li> <li>Visual Arts Network of South Africa (VANSA)</li> <li>South African Chef Association (SACA)</li> </ul>	<ul style="list-style-type: none"> <li>Employer Interest, regulations, professional standards and training</li> <li>Single major sport in the country regulating national professional football</li> <li>Promotes interests of the private sector within tourism industry</li> <li>A national network of artists and arts organisations</li> <li>A network of chefs, cooks and culinary professionals</li> </ul>	<ul style="list-style-type: none"> <li>Industry representation and partnerships within the hospitality sub-sectors</li> <li>Football Industry representation and promotes skills development</li> <li>Watchdog for the private sector within tourism and promotes skills development</li> <li>Develops industry knowledge, resources and networks including skills development and professional standards.</li> <li>Promotes the art &amp; science of cooking by sharing knowledge and teaching skills development</li> </ul>
Employee stakeholder	Role	Role in CATHSSETA & NSDP outcomes
<ul style="list-style-type: none"> <li>South African Commercial, Catering and Allied Workers Union (SACCAWU)</li> </ul>	<ul style="list-style-type: none"> <li>Employees' interest lobbying labour matters in the</li> </ul>	<ul style="list-style-type: none"> <li>Sector employee representation on the CATHSSETA Board</li> </ul>

- Hospitality Industries and Allied Workers Union (HIAWU)
- Hotel, Liquor, Catering, Commercial and Allied Workers Union of South Africa (HOTELLICA)
- Creative Workers Union of South Africa (CWUSA)
- South African Football Players Union (SAFPU)
- commercial and catering sectors
- Employees' interest lobbying labour matters in the hospitality sector
- Employees' interest lobbying labour matters in the hotels and catering sectors
- Employees' interest lobbying labour matters in the creative arts sectors
- Employees' interest lobbying labour matters in the football sector
- Sector employee representation on the CATHSSETA Board
- Sector employee representation on the CATHSSETA Board
- Sector employee representation
- Sector employee representation

Employee Stakeholder	Role	Role in CATHSSETA & NSDP outcomes
• Universities	• Provide higher education and training	• Offer training services to CATHSSETA stakeholders particularly in higher National Qualifications Framework (NQF) levels. Service delivery vehicle for the SETA
• TVET colleges	• Provide technical, vocational and occupational skills	• Offer training services to CATHSSETA stakeholders for technical and vocational skills. Service delivery vehicle for the SETA
• SETA accredited providers	• Provide occupational skills training	• Offer full and part occupational qualifications to employed and unemployed learners particularly learnerships, including workplaces. Service delivery vehicle for the SETA

#### 1.4. ECONOMIC PERFORMANCE

Skills development has many dependencies, such as the people, the economy, the environment, political context, technology and legal frameworks. The South African economic and policy outlook are critical in providing a conducive environment to deliver high quality, world-class education and training. This section presents the CATHSSETA's contribution to the South African economy, and its comparison to the rest of the country's economy. Current and future economic performance and competitiveness are closely examined.

##### World economic growth prospects

The balance of risks for economic growth has become more negative, notably in the short term. The tariff increases by the United States and retaliatory measures by trading partners are threatening global and local economies. Possible triggers also include rising conflicts and geopolitical concerns, and political uncertainty leading to the probability of a trade war. This could derail recovery, and depress medium-term growth prospects by raising uncertainty and taking a toll on investments. In every respect, the CATHSSETA sub-sectors are strongly linked to the global economy, from tourism, sports and performance arts to conservation and greening of businesses, to technological revolution.

##### Macroeconomic outlook of current and future SA economy

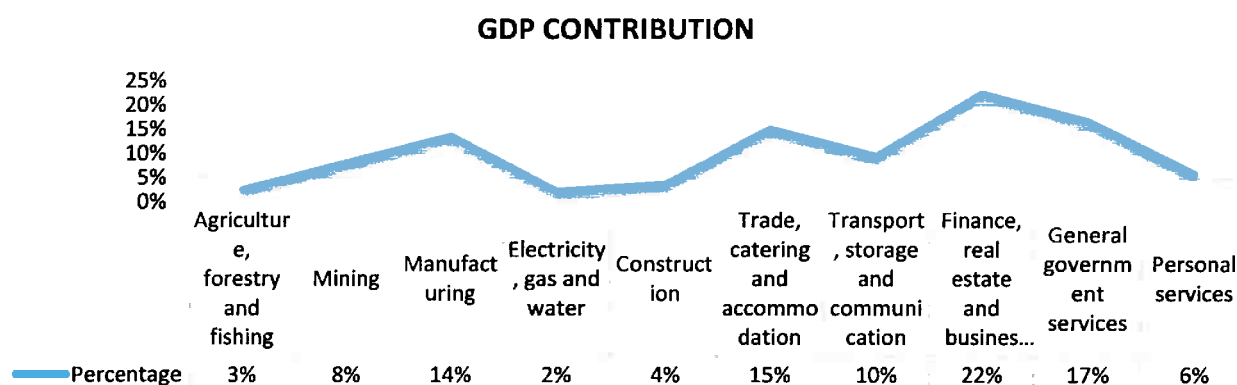
Total gross domestic product of South Africa (GDP) was reported at 0.8% in 2018, down from 1.4% reported in the previous year. This is largely attributed to the 2018 economic recession, the second in South Africa since the early 1990s. The 2018 recession spanned over the first

two quarters of the year, however positive growth in the third and fourth quarter of the year was enough to push overall growth for the year into a positive territory (StatsSA, 2019). The largest contributors to GDP reported in 2018 were the finance, real estate, and business services industries followed by government. The most notable GDP performances in 2018 were:

- General government services expanded by R51 billion to R785 billion;
- Finance, real estate and business services expanded by R28 billion to R854 billion;
- The wholesale, retail and motor trade; catering and accommodation industry expanded by R28 billion to R653 billion;
- The transport, storage and communication industry expanded by R16 billion to R427 billion; and
- The manufacturing industry expanded by R14 billion to R573 billion.

Figure 1 below outlines the StatsSA (2019) fourth quarter GDP report by percentage contribution. Consistent with the figures above, finance, real estate and business (22%) contributed the highest percentage, followed by government services (17%). While economic activity continues to firm in the country, the economic performance of the sector as a whole is difficult to assess due to the lack of a single comprehensive sector database encompassing the six CATHSSETA sub-sectors.

FIGURE 2: INDUSTRY VALUE ADDED AND GDP 2018:



*Source: StatsSA (2019)*

The travel and tourism sub-sector is widely recognised as an important economic activity in South Africa. In addition to its direct economic impact, the sub-sector has significant indirect and induced impact on other sectors of the economy. Travel and tourism in South Africa contributed 2.9% to total GDP in 2017. The World Travel and Tourism Council (WTTC) forecasts this will rise to 3.3% of total GDP in 2028. In 2016, WTTC estimates that the travel and tourism sector contributed R402 billion and R412 billion in 2017. This is largely owing to domestic spending, business domestic spending and visitor exports. The lifting of visa requirements in China and India in 2016 made it much easier for people from those countries to visit South Africa. After jumping 38.0% in 2016, visitors from China fell 17.0% in 2017. Travellers from India rose a modest 2.7% in 2017, well below the 21.7% increase recorded in 2016.

The travel and tourism sub-sector shares strong linkages to hospitality, thus growth in the sub-sector is likely to boost the economic contribution and development of that sub-sector

too. Growth in travel and tourism is expected to boost the accommodation industry across the African continent over the next five years. However, current statistics on the hospitality sub-sector mostly focus on the accommodation segment. Foreign tourism rose 2.4% in 2017, building on its 12.8% increase in 2016. Overall, room revenue in South Africa rose 4.6% in 2017. This is expected to expand at a 5.6% compound annual rate to R21.8 billion in 2022. The accommodation market in South Africa enjoyed its third consecutive year of strong growth with a 9.1% advance following two years of double-digit gains (PwC, 2018).

According to the South African Maritime Safety Authority (SAMSA) (2015), marine tourism ranks in the top four sub-sectors of South Africa's maritime economy, with enormous growth projected for the next two decades. Marine and coastal tourism is at the forefront of the NDT's strategy to boost domestic and international tourism in South Africa, while contributing to job creation and the economy. The SA maritime economy contributed R19 billion to the country's GDP in 2013, with projections currently indicating that this is likely to rise to around R44 billion in 2020, and grow to as much as R134 billion by 2033. The economic potential should be fostered and encouraged by government and private sector (SAMSA, 2015).

Assessment of the conservation sub-sector indicates that there is a lack of recent official statistics. The sub-sector contributed R20 billion to South Africa's GDP in 2015 (Dry, 2015). The Department of Environmental Affairs has estimated the conservation sub-sector contributes a total income generation of R9.1 billion a year (0.27% of GDP) while live sale auction contributed R1.7 billion into the economy in the year 2016. Consumptive hunting contributed R8.6 billion into the economy in the year 2015 (35% growth 2013-2015), meanwhile wildlife products contributed R4.5 billion into the GDP in the year 2014 (Department of Environmental Affairs, 2018). No estimates have been made for eco-tourism wildlife ranching which is a thriving industry in South Africa and potentially contributes significantly to economic and social development in the country. The green economy is also recognised to be on a growth path across a variety of industries in South Africa.

Total GDP contribution of the Creative Culture Industry was reported that the Creative Culture Industry generated a GDP of R233 billion in 2016; this contributed about 5.7% of the national GDP (SACO 2017). Cultural and Natural Heritage sites generated approximately R5 billion in 2016, 38% of which is reportedly generated indirectly according to the South African Cultural Observatory (2017). The Department of Trade and Industry (DTI) estimates that the craft sector contributes R1, 1 billion to GDP through the economic activity of about 7 028 micro-and small enterprises operating across the value chain. Over the last five years, the sector has shown an average growth of 8%, which is attributed to growth in tourism and the impact of interventions in the sector (DAC).

The initial GDP (value added) generated by the gambling sector amounted to an estimated R19 728.1 million in 2016. Indirect and induced effects to a total GDP contribution of R32 156.9 million multiply this amount. This represents an initial GDP contribution of 0.50% with a further 0.31% indirect and induced contribution. Therefore, the total GDP contribution was 0.81%. The GDP multiplier was 1.63, meaning that for every R100 output or value added created by the gambling sector itself, another R63 was generated in other sectors of the economy (National Gambling Board, 2018). Relative to other gambling modes, casinos accounted for the highest proportion of GGR (66.4%) in 2017. Overall, the gambling sub-

sector contributes significantly towards the country's economy through tax revenues collected and job creation (National Gambling Statistics, 2017).

Interest in sport for development has increased in the past decade as organisations recognise its social, health and economic values (Barry & Marshall, 2015). For instance, the Cape Town Cycle Tour event injects R500 million into the Western Cape economy every year, while raising millions for charitable undertakings and cycling development in the country (Fin24, 2017). In addition to participants and supporting staff, spectators travelling to watch sporting events contribute millions to the sport economy. Global sports sponsorship spend was forecast to reach over US\$62 billion and global sporting media rights spend were expected to contribute US\$5 billion in 2017.

**The SMME Sector:** The CATHSSETA sector is almost 95% SMME and economic growth is strongly linked to small business development. South Africa is estimated to have 2.25 million SMMEs, of which over 785 000 are located in Gauteng, 373 000 in KwaZulu-Natal and 250 000 in Limpopo. As a whole, SMMEs account for 42% of the national GDP. The Small Enterprise Development Agency (SEDA) in 2017 reported that over 40% of the SMMEs in South Africa operate within the trade and accommodation sectors, i.e. over 900 000 enterprises. Small businesses are renowned for their agility and ability to respond quickly to the technologies and trends shaping and reshaping our marketplace. In the light of national economic priorities and the prevalence of small businesses in CATHSSETA's scope, it is critical to consider the role of SMMEs and their contribution to economic and skills development.

## 1.5. EMPLOYER PROFILE

Information on the number and size of entities registered with CATHSSETA was sourced utilising the CATHSSETA's SETA management system (SMS). The figures are presented in Table 4 below.

**TABLE 4: NUMBER AND SIZE OF ENTITIES REGISTERED WITH CATHSSETA**

SUB-SECTOR	SIZE OF ENTITY			NUMBER OF ENTITIES REGISTERED WITH CATHSSETA	% IN THE SECTOR
	SMALL (1-49)	MEDIUM (50-149)	LARGE (150+)		
Hospitality	27 575	768	391	28 734	72%
Tourism and travel services	3 237	102	92	3 431	9%
Sport, recreation and fitness	2 625	96	86	2 807	7%
Arts, culture and heritage	2 462	85	83	2 630	7%
Conservation	1 647	41	38	1 726	4%
Gaming and lotteries	382	50	64	496	1%
<b>Total</b>	<b>37 928</b>	<b>1 142</b>	<b>754</b>	<b>39 824</b>	<b>100%</b>

*Source: CATHSSETA SMS 2018/2019*

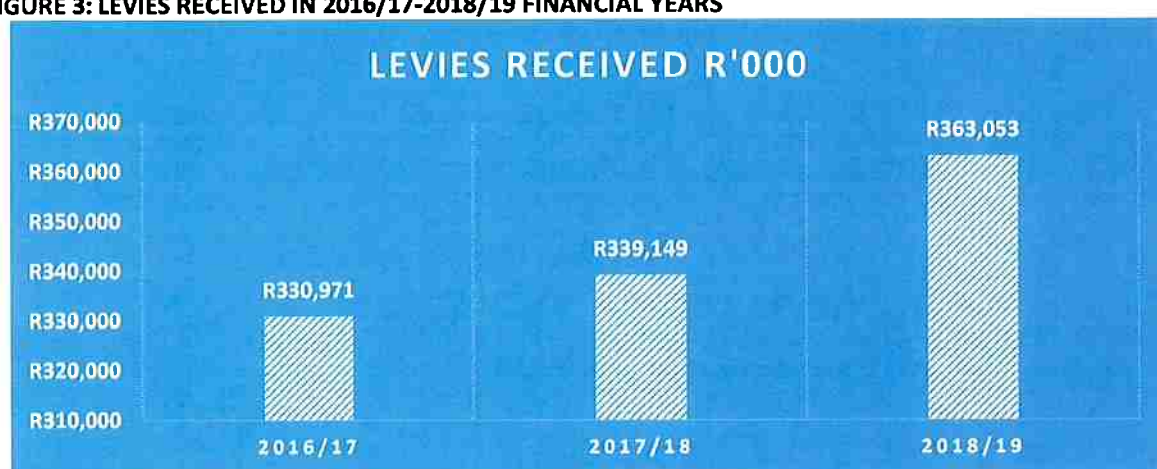
The number of entities shows a substantial increase, from 30 752 in 2017/18 to 39 824 in 2018/19, amounting to 9 072 (23%). The increase is mainly in the hospitality sub-sector which increased by 7 933 entities (27%). This is attributed to the CATHSSETA discretionary grant online system that required all applicants to register first, prior to submitting their applications online. The increase was also made possible by the efforts of the CATHSSETA regional offices. Similar to previous years, out of the 39 824 employers, the hospitality sub-



sector accounts for the vast majority of employers in the sector: 72%, followed by 9% employers in travel and tourism. The least represented sub-sector is gaming and lotteries (1%). Overall, 95% of the sector comprises small enterprises (SEs), which have increased by 1% from the previous year. These SEs are predominantly exempt from the payment of the skills development levy (SDL). Taking into account the large size of the overall sector, combined with the fact that SEs make up 95% of it, the allocation of resources becomes a challenging task.

To examine the levy income from organisations within the sector, Figure 2 compares the total levies received over the past three-year period from the 2016/17 financial year, 2017/18 and 2018/19. The total levies received from employers have increased by 6% from R330 million in 2016/17 to R339 million in 2017/18, and R363 million in 2018/19.

**FIGURE 3: LEVIES RECEIVED IN 2016/17-2018/19 FINANCIAL YEARS**

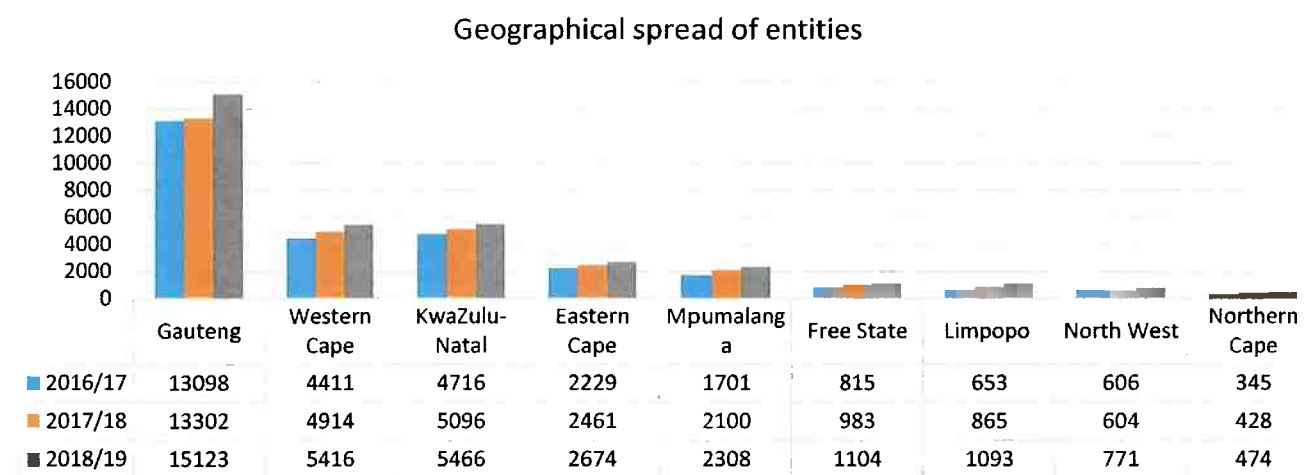


*Source: CATHSSETA Unaudited Annual Financial Statements 2018/19*

The total number of levy payers increased by 7% from 6 717 in 2016/17 to 7 246 in 2017/18. Out of the total 30 752 entities that registered within the sector, only 24% contribute to skills levies. Almost 50% of the levy income received, as regulated, is directed to sectoral priority occupations training interventions in the sector.

The geographical spread of entities in the sector is illustrated in Figure 3 below. Their distribution follows a similar pattern to previous years with the majority (44%) located in Gauteng followed by the Western Cape and KwaZulu-Natal. The least represented provinces include North West (2%) and Northern Cape (1%).

**FIGURE 4: GEOGRAPHICAL LOCATION OF ENTITIES REGISTERED WITH CATHSSETA**



Source: CATHSSETA SMS 2018/19

## 1.6. LABOUR MARKET PROFILE

The labour market profile provides an outline of the number of people employed in the sector; demographics of employees – including race, gender, age and disability; and geographic and sectoral spread of the employees. This information was sourced utilising the CATHSSETA's SETA management system (SMS).

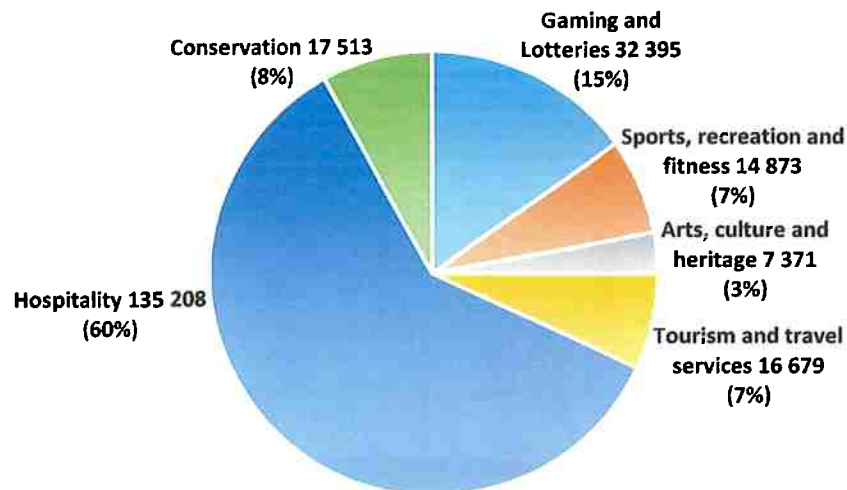
**TABLE 5: NUMBER EMPLOYEES IN THE SECTOR**

Sub-sector	2016/17	2017/18	Growth/ decline	% Increase per year	2018/19	Growth/ decline	% Increase per year
Arts, culture and heritage	4 668	5 489	821	15%	7 371	1882	26%
Conservation	12 835	16 072	3 237	20%	17 513	1441	8%
Gaming and lotteries	30 702	31 014	312	1%	32 395	1381	4%
Hospitality	143 757	129 797	-13 960	-11%	135 208	5411	4%
Sports, recreation and fitness	14 644	29 487	14 843	50%	14 873	-14614	-98%
Tourism and travel services	16 670	16 987	317	2%	16 679	-308	-2%
<b>Total</b>	<b>223 276</b>	<b>228 846</b>	<b>5 570</b>	<b>2%</b>	<b>224 039</b>	<b>-4807</b>	<b>-2%</b>

Source: CATHSSETA SMS 2018/19

A total of 224 039 employees are employed in the sector. Table 5 shows a 2% decline from the 2017/18 employment figure of 228 846.

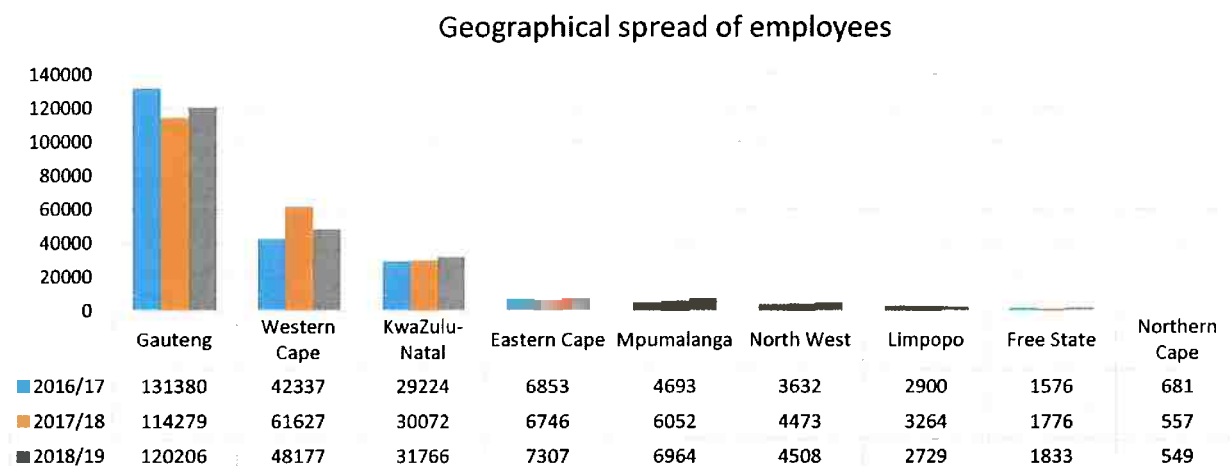
FIGURE 5: EMPLOYEES PER SUB-SECTOR



Source: CATHSSETA SMS 2019

The geographical spread of employees in the sector is shown in Figure 4 above. The largest number of employees are situated in Gauteng, Western Cape and KwaZulu-Natal, which is in line with the distribution of entities. Gauteng and KwaZulu-Natal show a slight increase in the number of employees from 114 279 to 120 206 (4.9%) in 2018/19, 30 072 to 31 766 (5.3%) respectively. Western Cape indicates a substantial drop in the number of employees from 61 627 in 2017/18 to 48 177 (27.9%) in 2018/19. The employment figures for KwaZulu-Natal, Mpumalanga, Eastern Cape, North West and Free State have been steadily increasing over the past three years, as in Figure 5 above.

FIGURE 6: EMPLOYEES IN THE SECTOR PER PROVINCE



Source: CATHSSETA SMS 2018/19

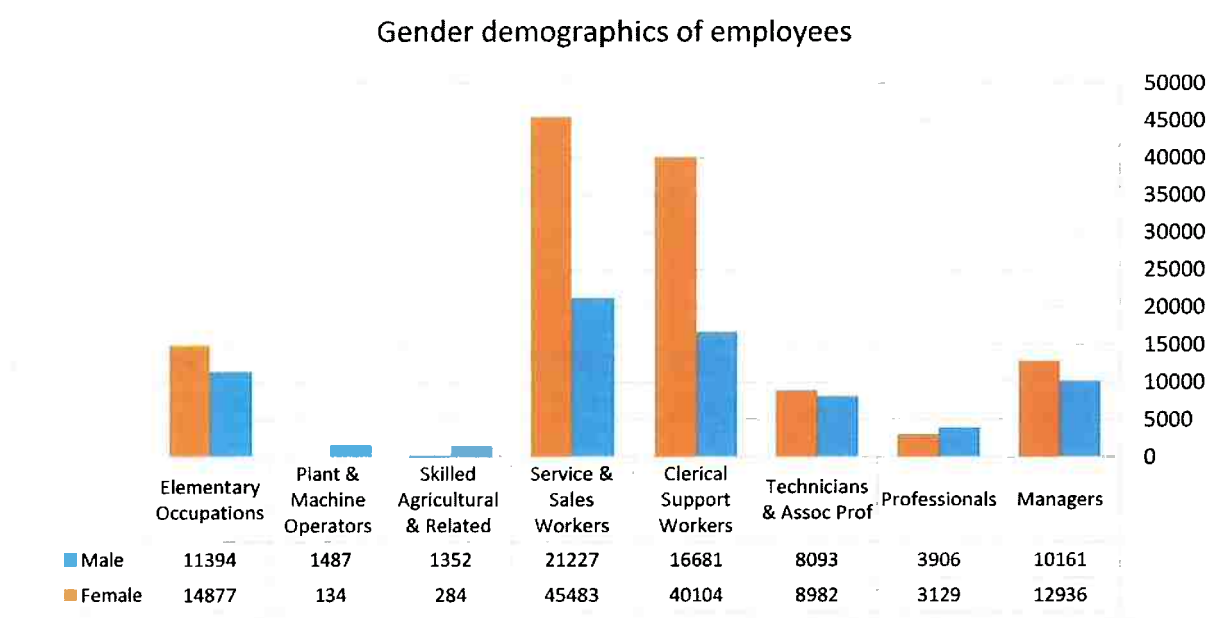
The gender and race demographics are provided in Figures 6. An analysis of employees based on these demographics per sub-sector indicates the following:

- **Arts, culture and heritage:** Female employees represent 53% of the sub-sector, showing a decrease of 2% in 2017. The number of employees in this sector from all races has increased in the current year.



- **Conservation:** This sub-sector still employs more males than females, with men representing 59% of total employees. This could possibly be attributed to the nature of the jobs (hunting, trapping, park rangers, etc.). Black employees make up 78% of the sub-sector.
- **Gaming and lotteries:** This sub-sector is dominated by black employees (79%) with coloured and Indian numbering the fewest. Females represent 58% of total employment in the sub-sector.
- **Hospitality:** The number of employees is skewed towards females, who represent 62% of the sub-sector. The racial distribution is similar to that of the conservation sub-sector in which black employees make up the majority (78%) and Indians are least represented.
- **Sports, recreation and fitness:** This sub-sector was previously dominated by male employees (60%), but now the 2018/19 data shows that females constitute 52%.
- **Travel and tourism:** Female employees comprise the majority of this sub-sector at 61%, with blacks accounting for over 65% of employees.

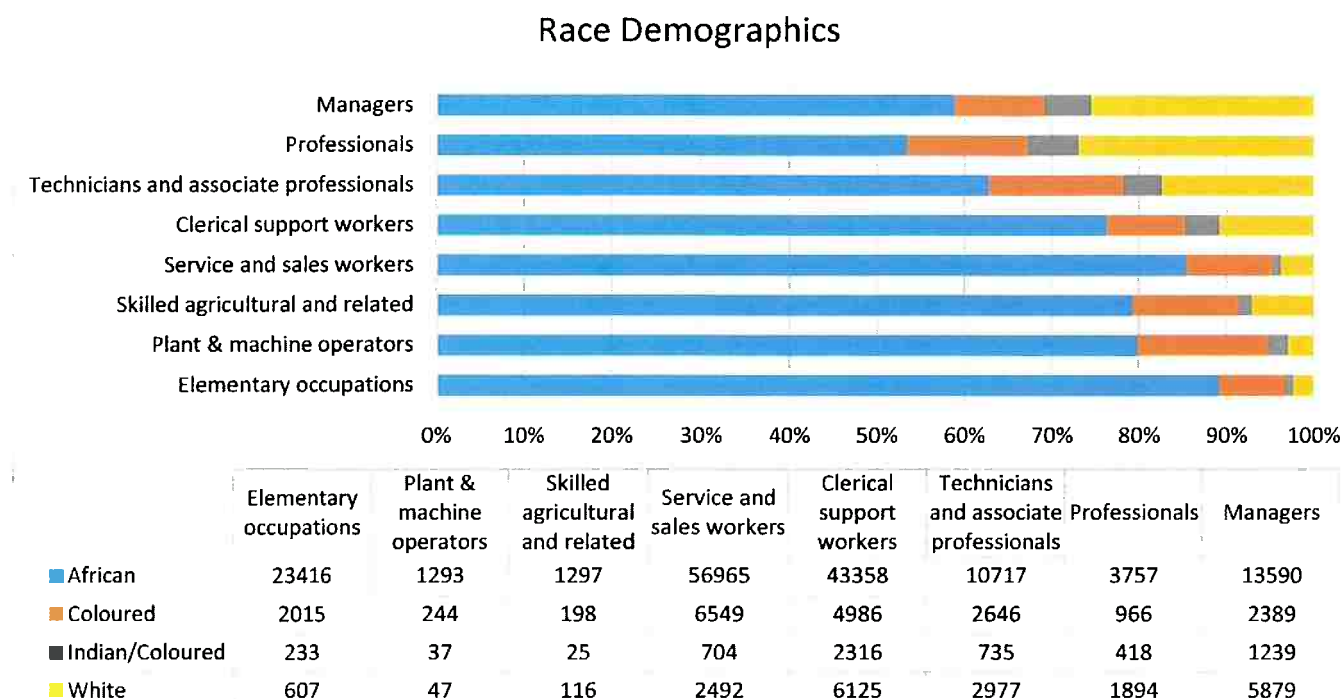
FIGURE 7: GENDER DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA MGA 2018/19

The race demographics of the sector are presented per sub-sector in Figure 7 below. Similarly to previous years, the majority of employees are black, at 72%, followed by whites at 13%, coloureds at 12%, and finally Indians at 3%.

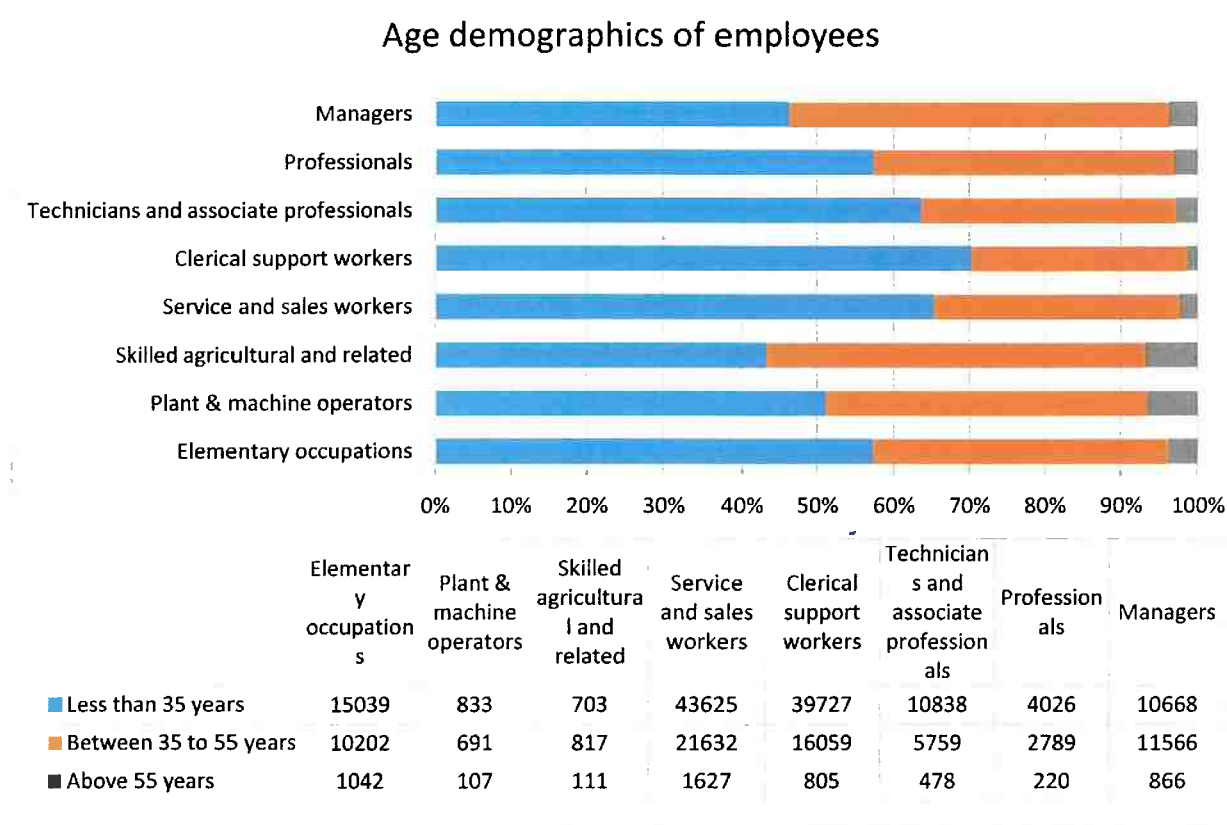
**FIGURE 8: RACE DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP**



*Source: CATHSSETA MGA 2018/19*

The age demographics illustrated in Figure below show that the majority of employees in the sector (56%) are classified as youth (less than 35 years); followed by employees above 55 years. With the exception of employees above 55 years, the majority of employees less than 35 years (47 076) and between 35 and 55 years (21 405) are employed as service and sales workers; while the majority of employees above 55 years are employed in elementary occupations. Out of the 27 436 employees that occupy management positions, 53% of them are between the ages 35 and 55.

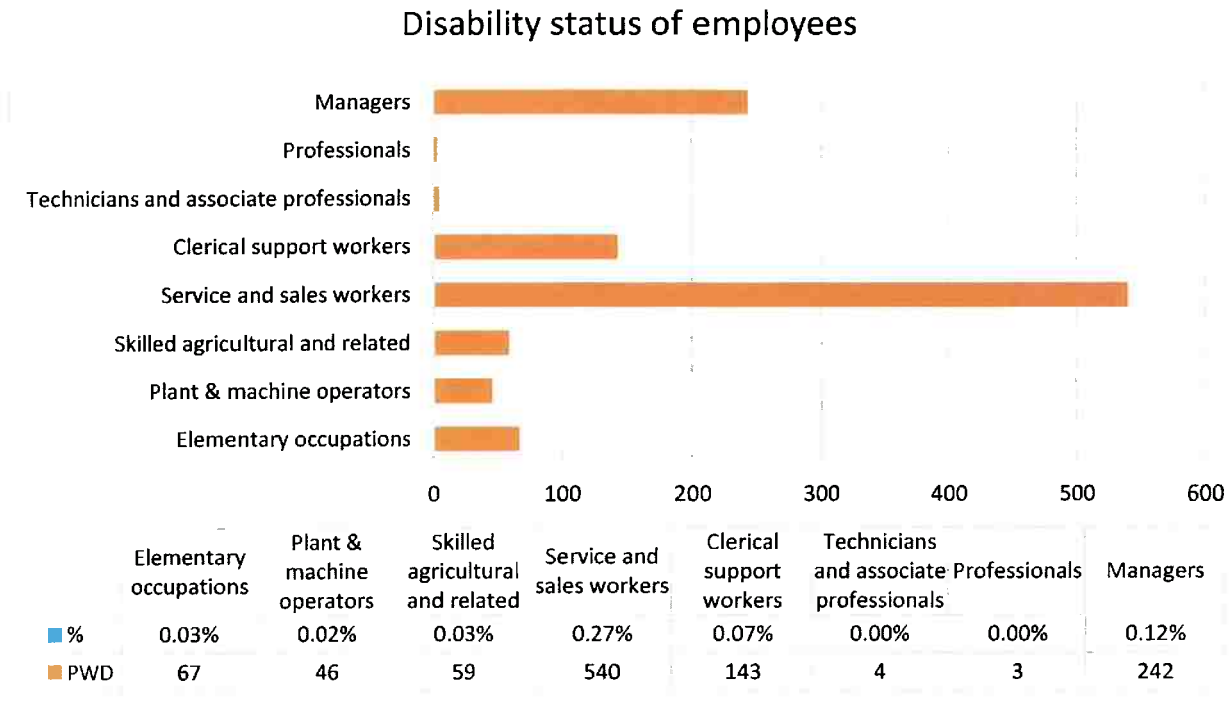
**FIGURE 9: AGE DEMOGRAPHICS**



*Source: CATHSSETA MGA 2018/19*

Figure 9 outlines the disability status of employees in the sector. Out of 224 0396 employees in the sector, there are only 1 147 people with disabilities, representing less than 1% of total employment in the sector. This falls short of the 2% target government set to achieve. The hospitality sub-sector still employs the largest percentage of people with disabilities, but this decreased to 600 in 2018/19 from 776 in 2017/18. This is followed by 279 employees with disabilities in the gaming and lotteries sub-sector, up from 274 in 2017/18. The travel and tourism sub-sector increased to 150 from 77 employees. The SRF sub-sector reported an increase from seven in the previous year to 52 in the current year. The conservation sector has the least number of employees with disabilities.

**FIGURE 10: DISABILITY STATUS OF EMPLOYEES WITHIN THE SECTOR**



Source: CATHSSETA SMS MGA 2018/19

### 1.7. IMPLICATIONS FOR SKILLS PLANNING

The key skills implications based on the sector profile can be summarised: The composition of the sector shows that the vast majority of entities (95%) are small (0-49), indicating a need to support and prioritise SE development in the sector. Racial and gender disparities remain in the demographic composition of the overall sector, illustrating the need for further transformation to address employment equality disparities, especially for black females. The majority of employees in the sector (56%) are classified as youth (less than 35); indicating the SETA needs to prioritise and support the development of youth in the various sub-sectors. Lastly, overall the percentage of employees with disabilities falls short of the 2% target set by government. Out of the six sub-sectors, hospitality accounts for 52% of total employees with disabilities, indicating a need to increase the number of people with disabilities employed across the sub-sectors.

### 1.8. CONCLUSION

This chapter has outlined the scope of the sector including a description of the key roleplayers, an analysis of the economic performance of the sector and its competitive position. Furthermore, it analysed employer and employee profiles, reflecting trends and patterns of employment. The key skills implications drawn from the findings in the chapter have also been highlighted.

## **CHAPTER 2: KEY SKILLS CHANGE DRIVERS**

### **2.1. INTRODUCTION**

This chapter focuses on how occupational patterns and skills have changed in the sector in response to shifts in industrial composition, technological advances and other labour market changes. Identifying factors affecting skills demand and supply in the sector will achieve this. The aim of the chapter is to identify the skills change drivers and national policies that may impact skills demand and supply. An analysis and the implications in terms of skills planning are discussed related to interventions offered by the SETA. Data sources used include mandatory grants applications, stakeholder consultation sessions and literature review.

### **2.2. FACTORS AFFECTING SKILLS DEMAND AND SUPPLY**

A change driver is a factor changing the sector and causing it to develop in a certain way. CATHSSETA has identified the following change drivers within its six sub-sectors related to the way work is being done in relation to the Fourth Industrial Revolution (4IR), globalisation, legislative considerations and the green economy.

#### **2.2.1 Fourth Industrial Revolution (4IR)**

The evolution of industries is about advanced technological development. As a result, many industries will begin reshaping the way they function to keep up. Industrialisation was born in the 18<sup>th</sup> Century, with the First Industrial Revolution, which was mainly characterised by the invention of mechanical systems, e.g. steam locomotives and weaving looms. The late 19<sup>th</sup> Century saw a shift into a Second Industrial Revolution characterised by electrification and the novel installation of assembly lines to implement mass production chains and division of labour. The Third Industrial Revolution came into play in the late 20<sup>th</sup> Century, introducing automation, micro-electronics and computer technology to the manufacturing world (4IR SONA Workshop, Patrick Shields, 2019).

In the present day, convergence of the various technologies and the subsequent interconnectedness has ushered in the Fourth Industrial Revolution. Most industrial sectors, in the public and private domain, are gearing themselves in preparation for 4IR. Current industrial activities are dominated by automation, robotics, interconnectedness, the internet of things (IoTs), machine-to-machine (M2M) communication, 5G, and artificial intelligence (AI) to mention a few. Information communication technology (ICT) is a major driver in conducting business and a critical factor for all sectors and industries in this 4IR.

In a South African context, skills challenges are a combination of simple low-end to complex high-end skills. South Africa has an opportunity to address all while bringing low-end skills onboard the 4IR. Indications are that the 4IR requires high-end skills in data management and computer programming and would drive a reduction in low-skills jobs or repetitive tasks, (SSP stakeholders' consultations, 2019).

Technology is transforming sector operations, thus constant reskilling of employees is required to keep abreast with the new technologies that cut across all sub-sectors. An example of this within the gaming industry is the increase in online betting which has led to operators widening their offerings and attracting new types of customers.

In the *tourism and hospitality sub-sectors* for instance, technological advances have resulted in the use of electronic tourist passes, global IT booking systems, accommodation booking sites and applications (Trivago, Airbnb, TripAdvisor, etc.), food hygiene control systems for hotels and restaurants, the equipment and systems to improve accessibility for people with disabilities. The travel and tourism industry has seen the use of remote access technology for tourist guides to easily access information on key points of interest, and the use of remote listening devices that tourist guides use to guide visitors.

In the *hospitality sector*, hotels are experiencing a sharp increase in web-based bookings. The first implication of this is that established hotel companies are facing relentless competition from facilities that cannot be regulated, particularly for leisure travellers. The impact of the Fourth Industrial Revolution on the CATHSSETA sector, and its related skills implications, requires a deliberate intervention as part of the research agenda.

The *sport, recreation and fitness sub-sector* has also become more technologically driven, with advances in gym equipment, fitness and health mobile applications, electronic media and the manner in which sports events are covered. Wearable technology is becoming ingrained in professional sports, allowing adverse metrics to be taken into account and utilised within training and allowing for real-time decisions. The use of virtual fitness instructors within the recreation field will likely see a decrease in the use of fitness instructors and fitness facilities. The implications of these technological advancements in the sport, recreation and fitness sub-sector is the need for new skills sets for traditional occupations. The type and level of skill required is starting to change.

In the *conservation sub-sector*, curators and conservation biologists require innovative solutions for information management. As a result, there is a growing demand for cross-cutting trans-disciplinary skills. This calls for tailored professional development programmes and information and communication technology (ICT) strategies and plans to support the traditional higher education curricula, which should also offer programmes of specialisation at post-graduate level. According to an article by Dr Debbie Jewitt and Luke Wijnberg published by EE Publishers, drones, or unmanned aerial vehicles (UAVs), are rapidly changing the face of the conservation industry. They have the potential to revolutionise conservation and spatial ecology. The report emphasises that at the core of conservation is the monitoring of species populations and their habitats.

In the *arts, culture and heritage* industry there is a move towards increased use of digital communication in editing and post-production tasks, which will likely impact the human resources required. The impact of music and film streaming, YouTube channels and the emergence of apps has threatened the sustainability of the music industry.

Optimistic predictions, based on trends already measured, suggest that the next three years will see half a million more jobs created than those lost. As the global economy moves towards the widespread adoption of artificial intelligence (AI) solutions, competition will grow for employees who have the skills to implement, manage and work alongside the new technology (Butler, 2018). What is certain is that the future workforce will need to align its skillset to keep up with pace of the Fourth Industrial Revolution.

### **2.2.2 Globalisation**

Environmental challenges such as global warming, air pollution, waste management and recycling are linked to globalisation. Globalising processes affect and are affected by business and work organisation such as trade, telecommunications and cultural activities. Globalisation has facilitated the emergence of a more 'sophisticated tourism market', which has implications for skills and training. A more discerning and experienced consumer demands higher quality products and services, raising the demand for skills such as customer service.

In terms of providing a better service to international visitors, skills needing improvement include the ability to be able to communicate clearly in simple English, cultural awareness, intercultural skills, language skills and local knowledge. In addition, language training in Mandarin, Japanese, Spanish and German has been recognised as vital to ensuring service excellence when dealing with visitors from some of the country's source markets.

The music industry, film, television, live events and technical production industries are evolving and changing fast to adapt to new occupational patterns and skills demands. These were brought about by fast-changing market conditions, competition, economic restructuring, advancing technologies and process and product improvements.

Globalisation leaves developing countries lagging due to global advances in technology and the high turnover rate of skilled professionals due to better prospects in more developed countries. As a result, smaller countries have a hard time trying to recoup their skills investments. While many artists anecdotally do not have formal qualifications and require recognition of prior learning (RPL), they need to be developed in a more holistic manner encompassing business skills and how to expand their markets to a global level. There is a great need to develop new skills in line with this transformation.

### **2.2.3 Legislative considerations**

The recently enacted National Minimum Wage Act of 2018 will have some impact on wages and on employment, particularly within those groups (ages 15 to 35) who have less experience. South Africa's official unemployment rate is very high. While the Act is expected to improve the living conditions of millions of South Africans and help foster economic growth, service sub-sectors such as the hospitality and travel and tourism remain uncertain about the effects of the Act on their sub-sectors. Stakeholder engagements revealed concerns on how companies would implement the national minimum wage increase without losing profits, while taking into consideration their respective staffing needs and costs.

The majority of the workers within CATHSSETA sub-sectors are at the lower occupational skills levels. Some segments of the economy are likely to cut jobs when the provisions of the national minimum wage come into full force. Thus, there is need to plan for the effects on staffing and costs, and the sector needs to look into skills, especially at management level, on how to facilitate the increase in a strategic and compliant manner.



#### **2.2.4 Green economy**

There have been increased efforts to control the effects of climate change by creating environmental awareness and promoting sustainable development through the green economy. The NDP 2030 vision states that by 2030 South Africa will transition to become more environmentally sustainable, climate change resilient, and will become a low carbon economy and just society (NDP, 2012). South Africa is well known for its rich biodiversity and abundant wildlife; but climate change poses a risk to these natural treasures, as well as to the people who live in the country.

Healthy ecosystems are the foundation for clean air and water, fertile soil and food. All South Africans depend on healthy ecosystems for economic and livelihood activities, including tourism and a number of income generating and subsistence level activities (SANBI, 2013). The medium term strategic framework (MTSF) focuses on the implementation of and transition to an environmentally sustainable green economy. Through the green economy, South Africa can benefit from the opportunities opened up by global and local green economic activity, eco-innovations and green jobs. For instance, the greening of sports events has most notably reduced waste and energy use, reduced for carbon emissions and helped in public education (MTSF, 2014). In addition, there are substantial job creation opportunities in programmes contributing to biodiversity conservation.

CATHSSETA can contribute to the green economy by focusing on the environmental science training interventions to produce environmental scientists, plant engineers, sustainability managers, industrial efficiency managers, environmental sustainability/energy consultants, (SSP Consultation Sessions, 2019) These are some of the substantial occupations supporting the green economy.

### **2.3. IMPLICATIONS FOR SKILLS PLANNING IN THE SECTOR**

There is a need to develop entrepreneurial, ICT skills and managerial skills across the sector, particularly among previously disadvantaged groups, to enable transformation in the sector. All sub-sectors need to invest more on succession planning to mitigate the low retention rate of young employees; this can be done through mentorship programmes to upskill youth in the sector and collaboration between HEIs, TVET colleges and industry to facilitate a pipeline for the supply and demand of skills in the sector.

Given the political and economic uncertainties, organisations within the sector need to re-skill employees on strategic marketing and public relations interventions to plan and mitigate the effects of instability on the sector. The SETA in partnership with the sector stakeholders need to embark on career guidance initiatives including career exhibitions to ensure that the youth is guided to the new and emerging careers in the sector.

Based on the factors outlined above and stakeholder consultations, the following emerging occupations have been identified per-subsector.



**TABLE 6 EMERGING OCCUPATIONS:**

Subsector	Emerging Occupations
<b>Arts, culture and heritage</b>	Audio-visual 3D technicians; application development practitioners; social media specialist; heritage multimedia specialists, repatriation artists, marketing practitioners, digital lighting practitioners
<b>Conservation</b>	Chief information officer; brownfield redeveloper; ecological rehabilitation professional; social media specialist; business development specialist; technologist, environmental scientist, bio technician, wildlife rancher, animal attendant, biodiversity planner, conservation scientist
<b>Gaming and Lotteries</b>	Application development Manager; customer relations, data analyst and marketing data analyst; social media specialist; website designer; customer relations specialist; industrial psychologist; CCTV technician; data feeds manager
<b>Hospitality</b>	Social media specialist; dieticians; operations manager; trends/market analyst; health and safety auditors; food safety assurance; information technology; administrative maintenance; industrial relation; bar manager; food and beverage scientist, online bookings specialist, dietician
<b>Sports, recreation and fitness</b>	Risk manager, payroll manager; sports psychologists; sports agents; event and project management; sports lawyer, media coordinator; fitness management; exercise physiology
<b>Travel and Tourism</b>	Business development manager, guest relations officer; communication strategist; legal tourism consultant; marketing practitioners, travel accommodation inspector, travel agency manager

*Source: CATHSSETA Stakeholders consultations, 2019*

Based on the factors outlined above and stakeholder consultation, the following emerging occupations have been identified per sub-sector, and the list will need to be reviewed with the findings from the research on Fourth Industrial Revolution in particular.

The technology advancement trend is critical for both skills supply and demand and for CATHSSETA to precisely identify skills requirements for qualification review, and priority skills identification across the sub-sectors. The implications for future skills planning is that the skills that will be in demand will be high level for computing technology, software development, artificial intelligence, robotics, etc. In addition, the soft skills required are changing to include skills such as agility, innovation, creativity, problem solving, etc. Proper planning requires sub-sector specific skills demand and supply (identified in Table 6) and prioritised for funding.

## **2.4. POLICY FRAMEWORKS AFFECTING SKILLS DEMAND AND SUPPLY**

The next section outlines the national strategies and plans relevant to CATHSSETA's sub-sectors and details the alignment of these to skills planning within the SETA.

### **2.4.1. White Paper on post-school education and training**

The white paper sets out strategies for an improved post-school education and training system that will meet the needs of South Africa by 2030. A sharpened focus on SETAs is proposed, limiting the scope of a SETA to training of employees within the relevant sector and unemployed persons wishing to enter the sector. It is proposed that SETAs will provide supply-side data towards the development of a national skills planning system. The focus of the SETA mandatory grant will be exclusively on gathering accurate data on sector skills needs. The main emphasis of the white paper is towards SETA's focusing on their role as intermediaries for skills development.

### **2.4.2. National Development Plan**

In keeping up with the vision of the NDP, and to promote the drive for accredited training supported by the grant regulations, 80% of all discretionary grants are spent on sectoral priority occupations programmes. These have been allocated through bursaries to employed

as well as unemployed learners pursuing sector-related qualifications. In addition to this, CATHSSETA supports work integrated learning (WIL) interventions, learnerships for both employed and unemployed persons and skills programmes that cater for the acquisition of critical skills for the employed.

#### **2.4.3. National Skills Development Plan (NSDP)**

The aim of the NSDP is to ensure South Africa has adequate and high quality skills that contribute towards economic growth, employment creation and social development. The plan will be effective from April 2020 and has outlined key objectives for skills development. The plan provides elements of the performance indicators that SETAs must start planning against for 2020 and beyond. It is clear from the planned indicators that SETAs will need to use 2019/20 to lay a foundation for the expected work beyond 2020. The CATHSSETA Board held a workshop in March 2019 in anticipation of the implementation of the NSDP and made recommendations about CATHSSETA Readiness Plan ahead of 2020.

The NSDP anticipates achieving a total of eight outcomes: (1) Identify and increase production of occupations in demand; (2) Linking education and workplace; (3) Improving the level of skills in the South African workforce; (4) Increase access to occupationally directed programmes; (5) Support the growth of the public college system; (6) Skills development support for entrepreneurship and cooperative development; (7) Encourage and support worker initiated training; and (8) Support career development services (DHET, 2018).

#### **2.4.4. National Skills Accord**

Since the inception of the National Skills Accord of 2011, and in response to it, CATHSSETA has negotiated partnerships with employers and learning institutions. CATHSSETA strives to ensure that the submission of training plans and reports are subject to consultation with organised labour within a specific organisation.

#### **2.4.5. The National Skills Development Strategy (NSDS) III**

The NSDS III strategy consists of eight goals, 16 outcomes and 38 outputs to be achieved by SETAs in collaboration with the DHET, TVET colleges, universities and the national skills fund (NSF). Rural economic development and the provision of skills for rural development, as outlined in the NSDS III, remain a key priority for CATHSSETA. In order to ensure effective service delivery throughout the country, CATHSSETA established regional offices. It is anticipated that the NSDS III will be replaced with the NSDP 2030 effective 1 April 2020. The strategy replacement with the NSDP will require some redesign in skills planning to align with the plan.

#### **2.4.6. The strategic integrated projects (SIPs)**

CATHSSETA's approach to SIPs funding has been integrated into the discretionary grant framework. The skills required for the delivery of the SIPs are presented by the DHET. CATHSSETA has identified the following four occupations which will be addressed by supporting learners through work integrated learning (WIL) and internship programmes: (1) Environmental manager; (2) Programme or project administrator's assistant; and (3) Truck driver and handymen (persons).

### 2.4.7. New growth path

The vision was to create five million jobs by 2020. The plan sets out the key jobs drivers (areas that have the potential to create employment) and the priority sectors that will receive focus over the next few years. Tourism is one such sector identified as a potential growth area. In order to develop these sectors, focus is on improving education and skills development, enterprise development, promoting small business and encouraging entrepreneurship. CATHSSETA will play an important role in developing skills through developing and improving qualifications relevant to the sector as well as supporting the development and sustainability of small business in the sector.

The sub-sectoral specific national strategies and plans are outlined in the table below:

**TABLE 7: SUB-SECTORAL STRATEGIES AND PLANS**

Sub-sector	National Plans or Strategies	Implications for skills planning
Arts, Culture and Heritage	National Policy on South African Living Heritage	The policy stresses the importance of training courses in leadership and management having their fundamentals based on ubuntu, which will in turn be promoted by various stakeholders. CATHSSETA focuses on programmes such as management development programmes to assist in this drive to train leaders and managers.
	Department of Arts and Culture Strategy 2012/13 (Mzansi Golden Economy)	DAC and CATHSSETA have identified a need for the provision of a co-ordinated skills development and training initiative as part of up-skilling local art organisations to host events, as well as training in the development of quality products and services for tourism consumption. The continuous process of creation, production, dissemination, exhibition and consumption of the cultural and creative industries requires education and skills development at each stage of the cycle and in all stages of the education system. The heritage sector requires the development of skills for the conservation and protection of heritage estates and assets as well as skills to do with the management of cultural heritage tourism. It is therefore imperative for CATHSSETA and DAC to work towards developing the required skills in Heritage Resource Management, among other interventions.
	National Heritage and Cultural Tourism Strategy 2012	The strategy clearly illustrates the significant deficiencies of skills and qualifications available in heritage conservation and management. It calls for skills development and training in heritage and tourism to be matched with the availability of employment opportunities to absorb the skilled labour force. Through the QCTO process, CATHSSETA is making a concerted effort to ensure the relevance of qualifications that cater for its sub-sectors. These efforts are also aimed at encompassing elements of tourism to deepen the understanding of the relationship between the arts, culture and heritage and the tourism sectors.
Conservation	The National Protected Area Expansion Strategy (2016)	This strategy aims to achieve cost-effective protected area expansion to encourage ecological sustainability and increased resilience to climate change. The implications of this for CATHSSETA is a need to focus on capacity building through skills development programmes and initiatives to meet the needs of the sector. CATHSSETA has identified some of the occupational requirements within the conservation and biodiversity sectors as occupational shortages and these are therefore prioritised in skill development initiatives.
	National Climate Change Adaptation Strategy	The National Climate Change Response White Paper (RSA 2011) stipulates government must, among other things, ensure a holistic understanding of climate change and related issues are included in all relevant aspects of formal education curricula. This will enable all SETAs to add climate change to priority skills development programmes in the formal, informal and non-formal sectors of the education and training system, and establish incentives for research and training such as bursaries to encourage students and scholars to research and study climate change. The role that CATHSSETA can play is in the development and review of relevant qualifications as well as the funding of post-graduate scholars who will conduct research into the sub-sector.

Sub-sector	National Plans or Strategies	Implications for skills planning
	Department of Environmental Affairs Strategy	The strategy places significant emphasis on CATHSSETA, which is tasked with skills development for conservation bodies and agencies such as the South African National Biodiversity Institute (SANBI), South African National Parks (SANParks), semi-independent provincial agencies and local government, including the Department of Environmental Affairs and provincial departments. These and other entities operate under a new conservation paradigm in which the protection of biodiversity and development planning must be integrated. However, few have been trained in this new paradigm and thus CATHSSETA's role is developing training initiatives.
Hospitality	National Development Plan	The plan sets a target of training 30 000 artisans by 2030. This falls directly into CATHSSETA's mandate of artisan development. To address this need, CATHSSETA, with the QCTO, has completed the review and registration of the chef qualification as a trade. Successful registration and upgrade of the chef trade with QCTO from NQF level 4 to NQF level 5. This new qualification is a three-year qualification with both a theoretical and practical component. At the end of the three years, the learner is required to complete a trade test in order to be classified an artisan.
	Immigrations Act and Regulations	The amendments to the Immigrations Regulations Act of 2002 resulted in new visa regulations being implemented in 2015. This brought about the repeal of the quota for exceptional skills work permits and the introduction of a category of critical skills work visa, which assists in attracting critical skills to the country. The critical skills work visa allows the sector to attract professionals to the country with critical skills that are likely to advance national interest.
	Sectoral Determination 14: Hospitality	The sectoral determination for the hospitality sector requires the minimum wage offered by employers with 10 or less employees to be R2 959.35 and for employers with more than 10 employees to be R3 298.52. For CATHSSETA, this translates into the need to ensure that the funding criteria is in line with the Department of Labour in terms of the regulated minimum wage for the sector.
Gaming and Lotteries	Lotteries Act 32 of 2013	The Lotteries Act regulates lottery activities and provides the basic framework for the management and operation of the national lottery. The priorities for distributing funds include the provision of educational facilities designed to enhance literacy, vocational training and mentoring for skills development that include people with disabilities. All of these are specific areas of focus in the NSDS III.
Sport, Recreation and Fitness	National Sport and Recreation Plan (NSRP)	The overarching focus of the three values of the NSRP is to improve access to and participation in sports as well as to develop talent for the sport and recreation sector. For CATHSSETA, this translates into developing training and education initiatives aimed at developing sports and recreation personnel, particularly coaches and administrative and technical officials. The focus also encompasses developing financial, marketing and media skills. This can be achieved through accredited education and training programmes.
	South African Coaching Framework	The focus will be on recognition of prior learning (RPL) of coaches, accreditation support for the national Federations and also on training coach-developers as facilitators, assessors and moderators.
	Sports Tourism Strategy	The aim is to broaden the capacity building initiatives within the sporting industry to encompass elements of tourism so as to deepen the understanding of the sports tourism element of sports development. CATHSSETA will work with its partners such as HEIs to ensure that there are Sports Tourism qualifications at all levels. CATHSSETA will also develop a database of volunteers as required in the NSRP and ensure that these volunteers are trained for the success of international sports events in South Africa.
Travel and Tourism	National Tourism Sector Strategy	The strategic objectives are organised into three themes, namely, to grow the tourism sector and economy, to enhance visitor experience and to achieve sustainability and governance. Some of the key focus areas within these themes include people development and relevant capacity building. The role of CATHSSETA is therefore to identify training needs and offer training programmes that are aligned to the needs in the sector, with the emphasis on developing and improving skills within the sector.



Sub-sector	National Plans or Strategies	Implications for skills planning
	Tourism Human Resource Development Strategy (THRD) Strategy 2017- 2027	The THRDS was first launched in 2008 by the then Department of Environmental Affairs and Tourism (DEAT). The THRD Strategy is aligned to both the National Tourism Sector Strategy 2020 (NTSS) and NSDS III (DHET, 2015). CATHSSETA's role is to be part of the working groups that will ensure engagement of the tourism, hospitality and conservation sectors concerning THRD matters. The role of CATHSSETA is to further assist in addressing workplace skills gaps, particularly strengthening soft skills in collaboration with other actors such as Umalusi, TVET colleges and others.
	National Rural Tourism Strategy	Informed by the National Tourism Sector Strategy and the Domestic Tourism Growth Strategy, this strategy prioritises tourism development in rural economies by supporting enterprise development, skills development and training initiatives in the tourism sector. CATHSSETA, through its partnerships and strategic alignments, offers positive support to rural development initiatives through special projects as well as extending its operational presence across various regions.
	Tourism Act, 2014	The Act regulates the tourist guide profession, and acknowledges the value and importance of the tourist guiding sector. It also provides for the registering of tourist guides, thereby recognising it as a profession with a defined career path. CATHSSETA, together with relevant partners, is responsible for identifying the training needs as well as the certification and registration needs of the tourist guides sector. CATHSSETA can also assist in developing curricula and implementing RPL pilot projects, especially on tourist guides as outlined by the THRD strategy.

## 2.5. CONCLUSION

This chapter has identified factors that are driving change in the sector such as 4IR, globalisation, legislative considerations, and green economy and the influence these have on skills demand and supply. Changes in occupational patterns and structures are reflected in the profile of skills required by employers in the sector. This reveals a need for human resources with increased proficiency in using technology and greater cross-industry skills and knowledge. The 4IR is anticipated to reshape skills with the creation of new jobs as well as losses. CATHSSETA needs to review future skills in view of this revolution.

## CHAPTER 3: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

### 3.1. INTRODUCTION

This chapter focuses on the occupational shortages and skills gaps as well as the supply of skills within the CATHSSETA sector. The main aim is to establish an understanding of occupational shortages and skills gaps. The chapter comprises three sections:

- Occupational shortages and skills gaps
- Extent and nature of supply
- Sectoral priority occupations and interventions list (PIVOTAL)

The methodology employed draws on a combination of both quantitative and qualitative research techniques. The quantitative approach includes the collection and analysis of data submitted by employers through the mandatory grant application process, data sourced from the Department of Higher Education and Training as well as data from the CATHSSETA quarterly monitoring reports. Cross sectional analysis has been conducted to establish vacancies and occupations that are hard to fill, numbers of enrolments and graduations as well as other supply-side information. Qualitative methods employed include focus group sessions, consultative sessions with industry stakeholders and key informant responses from all sub-sectors. The relevant qualitative findings, where available, have been compared to the quantitative results and the results are presented in the sections that follow.

### 3.2. SECTORAL OCCUPATIONAL DEMAND

#### 3.2.1. Hard-to-fill vacancies

Hard-to-fill-vacancies (HTFVs) are defined as occupations that take longer than a year to find suitably experienced and qualified candidates. Analysis of the mandatory grant applications identified the hard-to-fill-vacancies presented in Table 8 below. The HTFVs listed are classified 1 to 3 degree of scarcity by employers who submitted the information. These are presented by sub-sector and indicate the number identified through the analysis.

TABLE 8: HARD-TO-FILL-VACANCIES (HTFVS) PER SUB-SECTOR

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Arts, culture, and heritage	2017-235502	Private tuition dance teacher	20	Budgetary constraints
	2017-651501	Rigger	6	Lack of suitable qualified candidates
	2015-263206	Heritage consultants	2	Lack of candidates with required experience
	2017-352103	Sound technician	3	Applicants do not meet equity requirement Budgetary constraints
Conservation	2017-213307	Park ranger	13	Lack of suitable qualified candidates
	2017-324101	Conservation scientist	5	Lack of suitable qualified candidates
	2017-213109	Zoologist	2	Lack of suitable qualified candidates
	2017-226302	Health and safety officer	2	Lack of suitable qualified candidates
Gaming and lotteries	2017-122101	Sales and marketing manager	2	Lack of suitable qualified candidates
	2017-335916		2	Lack of suitable qualified candidates

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
		Gaming operations Compliance Officer		Lack of candidates with required experience
				Lack of candidates with required experience
Hospitality	2017-343401	Chef	12	Geographical position of the location is not favourable/remote
				High staff turnover
	2017-141201	Catering managers	5	Lack of candidates with required experience
	2017-642601	Plumber	4	Lack of suitable qualified candidates
	2017-671101	Electrician	4	Lack of candidates with required experience
	2017-141201	Café (Licenced) or restaurant manager	3	Applicants do not meet equity requirements
				Lack of candidates with required experience
				Lack of suitable qualified candidates
	2017-313907	Food and beverage manufacturing process controller	3	Lack of suitable qualified candidates
Sport, recreation and fitness	2017-226905	Biokineticist	7	Lack of suitable qualified candidates
	2017-143105	Sport administrator	4	Budgetary constraints
				Lack of suitably qualified candidates
	2017-263406	Sport psychologist	3	Lack of suitably qualified candidates
	2017-342204	Sport coach	3	Lack of suitably qualified candidates
				Lack of suitably qualified candidates
Travel and tourism	2017-524401	Customer contact centre salesperson	6	Lack of candidates with required experience
	2017-422102	Travel consultant	2	Lack of candidates with required experience
				Language barriers
	2017-511302	Tourist guide	10	Lack of suitably qualified in foreign languages
	2017-243103	Marketing practitioner	2	Lack of candidates with required experience
				Lack of suitably qualified candidates

\*Number of HTFVs are in the process of being finalised in line with LMI

Source: CATHSSETA SMS 2018/19

**Arts, culture and heritage:** Private tuition dance teacher occupation was listed as the top HTFV followed by rigger as well as the sound technician and heritage consultants. Budgetary constraints and lack of suitably qualified candidates were cited as the reasons for these remaining unfilled.

**Conservation:** Park ranger has the highest number of vacancies due to a lack of suitably qualified candidates, followed by conservation scientist, zoologist, and health and safety officer.

**Gaming and lotteries:** Gaming operations compliance officer occupation is reported as hard to fill, with a vacancy period of over 18 months. The reason for the vacancy is lack of suitably

qualified candidates and lack of candidates with required experience as employers require candidates to have between one to three years' experience.

**Hospitality:** The chef, plumber, electrician and café (licenced) or restaurant manager and catering manager occupations have the highest degree of scarcity. Stakeholder consultations also listed the chef as one hard to fill occupation. These occupations remain unfilled for over 18 months. Lack of suitably experienced candidates, geographical position of the location not favourable/remote as well as high staff turnover is cited as the reason for the chef vacancies while applicants do not meet equity requirements as well as lack of suitably qualified people are the reasons for the lengthy vacancy period for the café/restaurant manager occupations. Lack of suitably qualified candidates is the main reason for hard to fill for a plumber whilst lack of candidates with required experience is the reason to fill in for the electrician. With the exception of the dietician occupation, which requires a Bachelor's degree, employers seek candidates who have a certificate or diploma for these occupations and five to eight years' working experience. Baristas were also identified as a hard to fill vacancy, mainly owing to the fact that currently there is no accredited qualification for training of baristas in the country.

**Sports, recreation and fitness:** The biokineticist, sport administrator, sport coach, and sport psychologist occupations have been identified as hard-to-fill occupations, while stakeholders listed the accountant, digital administrator and risk manager as the top three. These occupations have a vacancy period of over a year. The reasons these occupations are hard to fill are due to the lack of candidates with required qualifications and budgetary constraints.

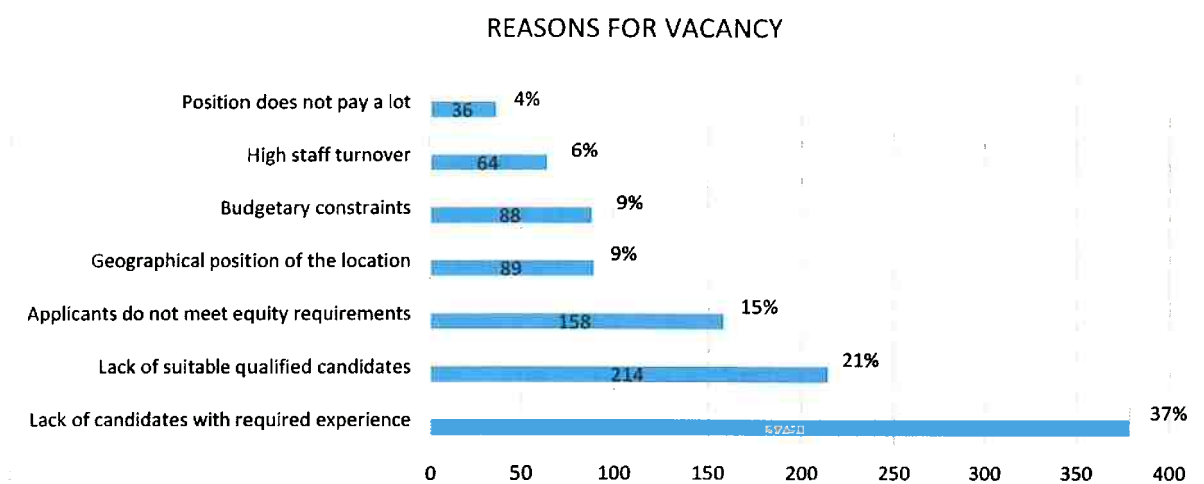
**Travel and tourism:** Of the occupations reported as hard to fill, the customer contact centre salesperson hasp the highest degree of scarcity and the lack of required qualifications is mentioned as the main reason for this. Travel consultants and sales and marketing manager and marketing practitioner are also hard to fill occupations due to the position not paying a lot as well budgetary constraints and language barriers. Stakeholder consultations indicated the dolphin trainers and IT technicians as vacancies that remain unfilled. Tourist guide emerges due to lack of suitably qualified guides in foreign languages.

### **3.2.2. Reasons for hard-to-fill-vacancies**

The previous section detailed reasons vacancies remain unfilled for lengthy periods per sub-sector. Figure 11 below, indicates the sector's overall reasons for hard-to-fill occupations.



**FIGURE 11: REASONS FOR VACANCY**



Source: CATHSSETA SMS MGA 2018/19

A total of 37% of employers indicated the main reason vacancies are difficult to fill is due to a lack of candidates with required experience. This remains the case particularly in the hospitality, gaming and lotteries, and conservation sub-sectors and, to a lesser extent, in the sport, recreation and fitness sub-sector. The lack of suitably qualified candidates is rated 21% as a second reason vacancies are hard to fill. The other reasons for hard-to-fill-vacancies cited are equity requirements, geographical location and budgetary constraints. According to employers consulted during stakeholder engagements, some of the key issues fuelling the HTFVs were high staff turnover rate, company restructuring due to unstable sector, work pressure leading to high staff turnover, lack of (qualifications, experience and people management skills), low salaries, high salary expectations and competition within the sector.

Overall, it would seem the minimum requirements set by employers also contribute to vacancies. In most cases, employers seek employees who have skills at junior to middle management level and a minimum of a year's working experience, making it difficult for graduates without work experience to enter the industry. In addition, delays in updating curricula to address the needs of industry contribute to the number of hard-to-fill-vacancies.

Budgetary constraints, reported by 9% of employers, are prevalent within the arts, culture and heritage; hospitality; conservation; and sports, recreation and fitness sub-sectors, with most of the vacancies remaining unfilled for over two years. This could be an indication of a lack of relevant training or a mismatch between industry expectations and training offered at learning institutions.

### 3.2.3. Skills gaps at major OFO group level

Skills gaps refer to specific key or generic and 'top up' skills an employee requires to carry out tasks competently. Key or generic skills include cognitive skills (problem solving, learning to learn), language and literacy skills, mathematical skills, ICT skills and skills to do with working in teams. Occupationally specific 'top up' skills are those required for performance within that occupation to fill a 'skills gap' that might have arisen as a result of changing technology or the introduction of new forms of technology. The most common skills gaps are indicated for each OFO major group level in Table 9. These are ranked from most to least mentioned.

**TABLE 9: SKILLS GAPS PER MAJOR OFO GROUP LEVEL**

<b>Major occupations</b>	<b>Top 3 most common skills gaps</b>
<b>Managers</b>	Leadership
	Management
	Communication
<b>Professionals</b>	Leadership
	Financial management
	Management
<b>Technicians and associate professionals</b>	Communication
	Customer care
	Time management
<b>Clerical support workers</b>	Customer care
	Communication
	Time management
<b>Service and sales workers</b>	Customer care
	Communication
	Time management
<b>Skilled agricultural, forestry, fishery, craft and related</b>	Customer care
	Communication
	Time management
<b>Plant and machine operators and assemblers</b>	Communication
	Time management
	Customer care
<b>Elementary occupations</b>	Customer care
	Communication
	Time management

*Source: CATHSSETA SMS MGA 2018/19*

Based on the mandatory grant data and stakeholder consultations, managers and professionals require leaderships skills pertaining to developing teams through coaching and mentoring. The most common skills gaps across the majority of the occupational groups is communication, customer and/or service and time management skills. It is critical to have communication skills to convey information clearly and effectively, in writing and verbally, and to have the customer care skills necessary for delivering excellent service. A lack of communication and customer care service skills was ranked first and second in the plant and machine operators and elementary occupations major groups respectively. As per the data received through 2018/19 mandatory grant data and stakeholder consultation sessions in 2018/19, skills gaps such as leadership skills, communication, and computer literacy are consistent with the findings of the 2016/17 Skills Audit Report. These findings corroborate those of the mandatory grant applications data, in that employers highlighted the same areas as lacking and requiring further development.

### **3.3. EXTENT AND NATURE OF SUPPLY**

In order to determine the supply of skills within the sector, higher education management information system (HEMIS) data, publications from DHET, mandatory grant data submitted by employers, and the CATHSSETA annual report have been analysed.

### 3.3.1. Extent of occupational skills supply

The educational profile of employees in the sector is presented per sub-sector below.

**TABLE 10: EDUCATION PROFILE OF EMPLOYEES PER SUB-SECTOR**

Sub-sector	Education level	Employees	Percentage
<b>Arts, culture and heritage</b>	AET	36	1%
	NQF 1, 2	220	3%
	NQF 3, 4, 5, 6	5 985	86%
	NQF 7, 8, 9, 10	724	10%
	<b>Total</b>	<b>6 965</b>	
<b>Conservation</b>	AET	2 859	20%
	NQF 1, 2	2 818	20%
	NQF 3, 4, 5, 6	6 250	44%
	NQF 7, 8, 9, 10	2 331	16%
	<b>Total</b>	<b>14 258</b>	
<b>Gaming and lotteries</b>	AET	494	2%
	NQF 1, 2	1 261	4%
	NQF 3, 4, 5, 6	26 725	87%
	NQF 7, 8, 9, 10	2 099	7%
	<b>Total</b>	<b>30 579</b>	
<b>Hospitality</b>	AET	5 190	4%
	NQF 1, 2	26 110	20%
	NQF 3, 4, 5, 6	91 700	70%
	NQF 7, 8, 9, 10	8 730	7%
	<b>Total</b>	<b>131 730</b>	
<b>Sport, Recreation and Fitness</b>	AET	346	2%
	NQF 1, 2	1 648	10%
	NQF 3, 4, 5, 6	13 786	81%
	NQF 7, 8, 9, 10	1 185	7%
	<b>Total</b>	<b>16 965</b>	
<b>Tourism and Travel Services</b>	AET	449	3%
	NQF 1, 2	1 410	10%
	NQF 3, 4, 5, 6	11 188	76%
	NQF 7, 8, 9, 10	1 693	11%
	<b>Total</b>	<b>14 740</b>	

*Source: CATHSSETA SMS 2018/19*

An analysis in the Table above indicates the majority of employees in the sector fall within the middle level skills band, i.e. NQF levels 3-6 for all sub-sectors. This is followed by employees within the low-level skills band at NQF levels 1-2 in the gaming and lotteries, hospitality and SRF sub-sectors. This trend has not changed from 2017. The high occurrence of employees at the middle level skills category is indicative of the various types of occupations in the sector which are typically in the middle management and professional OFO major groups.

The hospitality, gaming and lotteries, tourism and travel and sport, recreation and fitness sub-sectors have the highest percentage of employees in the middle level skills category. The occupations within these sub-sectors are typically in the middle management and clerical support workers OFO major groups. This spread is encouraged by the industry requirement

that employees have at least a matric (for G&L) and a diploma or certificate (for T&T and SRF). Furthermore, competition for vacancies is high in these sub-sectors which often means that the candidate with the highest qualification and most appropriate experience is hired, which accounts for the majority of employees having middle-level skills and qualifications at NQF levels 3, 4, 5 and 6. The conservation and hospitality sub-sectors also have a significant percentage of employees at the low level of skills, encompassing both ABET/AET and NQF levels 1 and 2. This is indicative of positions within the elementary occupations OFO major group, which are characteristic of the sub-sectors.

Artisans within the CATHSSETA sector fall into a multitude of trades. Some of these are the chef, butcher, confectionary baker, tailor, tool maker and welder trades. However, the only sector-specific trade is that of the chef. An analysis of this occupation is illustrated in Figure 12 and 13 below, which analyses the occupation in terms of the age group, race and gender demographics.

**FIGURE 12: DEMOGRAPHIC ANALYSIS OF THE CHEF TRADE BY AGE GROUP**

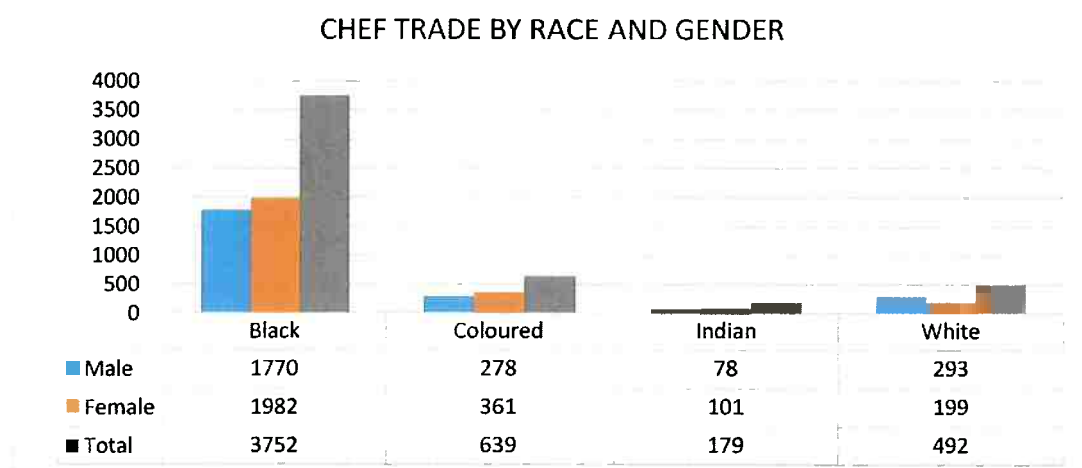


*Source: CATHSSETA SMS MGA 2018/19*

As per Figure 12, the sector reports that there are 5 062 Chefs employed in 2018/19. This figure has declined from of 7 634 in 2017/18 and 12 232 in 2016/17. The figures are based on the mandatory grant data from employers. The number of chefs has decreased by 7 170 (59%) in the past three years. This sharp decrease of the number of chefs could be attributed to ageing workforce as can be seen from the graph that about 144 are aged 55 and above and there is a slow intake compared with the exit. It could also be due to higher demand of chefs by other sectors and economic decline. Further research needs to be conducted to establish the real causes.

In terms of race and gender there are no significant changes from the 2017/18 figures that indicated a majority of the chefs in the sector to be 75% black, whereas 2018/19 figures indicate 74% black, 13% coloured, 10% white and 10% Indian/Asian. This trend signifies the decline in the number of chefs employed in the sector is across all races and gender.

**FIGURE 13: DEMOGRAPHIC ANALYSIS OF THE CHEF TRADE BY RACE AND GENDER**



Source: CATHSSETA SMS MGA 2018/19

### 3.3.2. State of education and training provision

The Higher Education Institution (HEI) data, sourced from the Department of Higher Education and Training, was analysed for the 2017 and 2018 periods. The figures are based on the headcount of unduplicated student enrolments and graduations according to the second order classification of educational subject matter (CESM) category of major(s)/area of specialisation and qualification type. More generic qualifications such as business administration management and operations have the highest proportion of enrolments and graduates. While sports, recreation and movement, and mind body therapy accounts for the lowest number of enrolments with lowest number of recorded graduates. The overall 2018 enrolment indicates over 50% drop. Reasons could be increased tuition fees, missing middle, alternative provisions or steep entry requirements. The Table 11 below presents the total number of enrolments and graduates in 2017 and 2018.

**TABLE 11: HEI ENROLMENTS AND GRADUATIONS PER SUB-SECTOR PER QUALIFICATION AREA**

Sub-sector	Qualifications*	NQF Levels	2018		2017	
			Total enrolment	Total graduates	Total enrolment	Total graduates
Arts, Culture and Heritage	Dance	5-10	828	92	359	93
	Design and Applied arts	5-10	5 455	828	3 412	890
	Drama/theatre Arts	5-10	3 338	545	2 148	518
	Film/video and Photographic arts	5-10	844	333	1 108	319
	Fine and studio art	5-10	7 101	844	3 812	704
	Music	5-10	200	710	3 174	560
	Visual and Performing Arts, Other	5-10	57	20	26	14
Conservation	Botany/plant biology	5-10	997	432	2 191	446

Sub-sector	Qualifications*	NQF Levels	2018		2017	
			Total enrolment	Total graduates	Total enrolment	Total graduates
	Zoology/animal biology	5-10	768	351	1 853	391
	Ecology, evolution, systematics and population biology	5-10	1 625	411	1 562	429
Hospitality	Food science and technology	5-10	2 106	554	2 055	535
	Hospitality administration/management	5-10	729	1656	7 371	1450
	Foods, nutrition and related services	5-10	411	322	1 414	322
Sport, Recreation and Fitness	Parks, recreation and leisure facilities management	5-10	440	729	2 986	712
	Movement and mind-body therapies and education	5-10	329	166	16	0
Travel and Tourism	Entrepreneurial and small operations	5-10	1 565	592	3 467	610
	Business administration, management and operations	5-10	18 813	16 681	82 169	17 482
			<b>45 606</b>	<b>25 266</b>	<b>119 123</b>	<b>25 475</b>

*Source: DHET HEMIS data 2018*

The Statistics on Post-School Education and Training (PSET) report includes 2016 enrolment and graduate statistics obtained from public and private higher education institutions (HEIs), technical and vocational education and training (TVET) colleges, private colleges, and community education and training (CET) colleges, as well as financial and workplace learning data for the 2017/18 financial year. Overall, data shows that enrolments in travel and tourism courses at basic level are high. It is noteworthy that enrolments for business administration, management and operations, which is more generic has the highest number of enrolments as well as graduates.

According to the THRD (2017), a fifth of graduates have never been employed since graduation, and even fewer learners and graduates aspire to find employment in the Conservation sub-sector. TVET graduates in particular struggle to gain experience and accordingly finding employment. There is evidence of misalignment between course content and the skills needs of the industry. This is in part attributed to limited or complete lack of



engagement by many higher education institutions with the tourism, hospitality and conservation industry stakeholders and other sub-sectors. There is growing need that course content of certain tourism, hospitality and conservation courses be revised to align with current trends in technology, particularly those offered at TVET colleges as they are outdated and revisions are long overdue. For example, the effects of the 4IR need to be taken into account. CATHSSETA needs to assist sub-sectors to align with the current trends of technology for future skills needs.

Another very important source of skills for the sector is industry itself as in-house training and work-shadowing are both practical, job and workplace specific, and combine training with the work experience considered so important by the employer. It is difficult to determine with accuracy the supply of skills needed by the labour market necessary to support a growing and transformative tourism and hospitality sector. The supplier-driven nature of training within the sector reinforces the misalignment between skills demand and supply. The soft skill component of current courses offered by schools and TVET colleges is inadequate, a real concern in an industry where such skills are vital. Importantly, tourism related training is unable to equip graduates with the required skills to meet industry needs and demands (THRD, 2017). This applies to other sub-sectors as well within the sector.

The general challenges associated with skills development among time-constrained owner-operated enterprises must be seen to apply to the sector as a whole, due to its overwhelming SE profile. A defining feature of the tourism industry is that it comprises multiple small players constituting about 94% of enterprises in the industry. This is a challenge in terms of addressing the human resource development (HRD) needs of workers in this sector and has possibly contributed to the poor HRD practices in the industry.

Training capacity in the SRF sub-sector is mainly provided by universities and universities of technology. These HEIs offer a variety of degrees and diplomas relevant to the SRF sub-sector but, it must be noted, there are no programmes in the TVET colleges relevant to this sub-sector. Besides formal educational institutions accredited by the Council on Higher Education (CHE) and Umalusi, CATHSSETA has accredited private providers to offer SRF programmes. And yet the need to increase the number of these providers' remains, as there are very few or no accredited training providers in certain provinces. In order to counter this deficit, the capacity of the public TVET system will have to be developed to offer a full spectrum of CATHSSETA sub-sector qualifications.

The number of learners in the CATHSSETA sectors has been increasing in recent years but graduates are generally viewed as not meeting employer expectations. The perception is that there is a mismatch between the skills and the academic knowledge of graduates exiting institutions and the required competencies to 'get the job done'. In addition, they were of the view there is a lack of clear learning pathways and articulation for TVET qualifications. Findings from the skills audit (2016) also indicated that employers prefer candidates with two to three years' experience, followed by matriculants and then graduates. This could be an indication that given the mismatch between their qualifications and industry requirements, employers perceive graduates as being of little benefit to the workforce. They see little difference between a graduate's capabilities upon entering the labour market and that of a candidate with a matric. This emphasises the need for more employers to participate in skills

development through internships and work integrated learning programmes to enable graduates to gain the level of skills required in the industry. The need for intensifying internships in particular is supported by findings from the 2016 impact assessment study which indicated that, of the surveyed learners, only 50% secured permanent or temporary employment.

The tourism sector as a whole has a relatively low average level of education. Nearly 30% of all workers in the tourism sector have a grade 10 or lower as their highest qualification. In addition, only 5% of all employees have a Bachelor's degree or higher, which is lower than the broader labour market Skills and Training Needs Analysis Survey Report (2016).

A graduate tracer study (conducted as part of a labour market study in 2016) found that although there is a mismatch between industry needs and academic qualifications, most graduates reviewed secured employment. Of the sampled graduates in the arts, culture and heritage sub-sector, 85% were employed. Furthermore, 82% were employed in the relevant industry. However, employment tended to be on a freelance basis due to the nature of jobs in this sub-sector. The only full-time employment opportunities are for arts administrators. The same was observed in the gaming and lotteries sub-sector, with over 60% of graduates securing employment, and 82% working in the gaming sector.

The findings from the sports, fitness and recreation sub-sector indicated that 48% of sampled graduates' secured employment in the industry related to their qualification. This sub-sector is dominated by volunteers and graduates competing for available job opportunities. Though the labour market has recognised sport and recreation as a career path, the prospects for young graduates remain grim. Due to their lack of experience, sport organisations do not recognise the potential of young graduates as opposed to older people with industry experience, and a general lack of opportunities for professional advancement.

### **3.3.3. Supply problems experienced by firms**

Supply of tourism-specific skills into the South African tourism sector takes place both formally and informally, and through a range of different agents. These agents include qualification, curriculum and training providers which take the form of the TVET colleges, Higher education institutions (HEIs), private training providers and industry training. The available information regarding the demand for skills in the tourism sector indicates that the range of skills required is not confined to those generally regarded as tourism, hospitality and gaming skills. A larger portion of the demand lies outside such a classification. These include the more generic 'skills' that underpin a service ethic; the skills required to manage individual tourism products and service enterprises, as well as the departments and agencies supporting such enterprises; the skills required to communicate effectively both verbally and non-verbally across cultural and language divides; and various entrepreneurial and technical skills, such as cooking.

Within the conservation sub-sector, there is a scarcity of qualified graduates at NQF levels 7, 8, 9 and 10, and vacancies remain unfilled due to this lack of suitably qualified graduates. Training provision in this sub-sector is mostly private-provider driven. There are challenges across all levels of education to do with this sector, from foundational learning through to preparing for access to higher learning, particularly in terms of diversity in the workplace. The

current measures that are in place are therefore proving to be inadequate and more needs to be done to improve the current situation.

### **3.4. SECTORAL PRIORITY OCCUPATIONS AND INTERVENTIONS (PIVOTAL)**

CATHSSETA utilises a combination of data and labour market signals to monitor and determine the occupations that are difficult to fill. These inform the priority skills, the occupations of which are listed in the sectoral priority occupations, formerly known as professional, vocational, training and academic learning (PIVOTAL) list in Table 12 below as approved by the CATHSSETA Board. Some of the data and signals used and observed were:

- All enterprises submitting mandatory grant applications (comprising planned training Interventions and reported training) completed a section on HTFVs in their sub-sectors
- The number of vacancies and degree of scarcity of HTFVs
- The pool of unemployed skilled people

Thus, the factors used to determine the occupational shortages and skills gaps include the following:

- Data collected from mandatory grant application submissions
- Input from relevant sector committees and focus group sessions
- Surveys conducted nationally

All data and input are captured using the six-digit OFO codes. Occupational shortages are identified as a function of two variables: the total number of vacancies identified and degree of scarcity. The occupations were identified across all the six sub-sectors within the CATHSSETA scope. Occupations that were deemed to support green economy and the 4IR were included in the list. Quantity of sectoral priority occupations was determined by tracking and listing occupations identified in 2018 and 2019 Sector Skills Plan and these were added to the occupations identified in the MGAs including hard-to-fill vacancies (HTFVs). The actual sectoral priority occupations quantity per occupation was arrived at by deducting total number of trained learners (as per the CATHSSETA Consolidated Scarce Skills Analysis Report 2019) from 2018/2019 SSP and MGA numbers. Occupations that reflected over supply and had been in the list for the past 10 years were removed. Occupations were further ranked according to demand per sub-sector to determine the top 10 sectoral priority occupations.

### 3.4.1. Sectoral priority occupations

TABLE 12: TOP 10 OCCUPATIONS ON THE SECTORAL PRIORITY OCCUPATIONS LIST

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NOF LEVEL	QUANTITY TO BE SUPPORTED BY SETA *
Arts and Culture	Managers	2017-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	17
	Managers	2017-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production	6	14
Conservation	Professionals	2017-213307	Park Ranger	Game / Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer / Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	320
	Managers	2017-134901	Environmental Manager	Land Care Manager, Wild Life Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wild Life Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary/Internships and Workplace Experience	6	123
Gaming and Lotteries	Clerical Support Workers	2017-421202	Gaming Worker	Casino Gaming Inspector, Casino / Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming Operator, Croupier, Gaming Table Operator	Learnership: National Certificate Gaming Operations	5	252
	Managers	2017-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management	5	28
Hospitality	Managers	2017-141201	Café (Licensed) or Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage studies/services	6	1311
	Technicians and Associate Professionals	2017-343401	Chef	Chef De Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef, Saucier, Executive Chef, Second Chef	Apprenticeship/Learnership: National Certificate - Professional Cookery	5	1281
Sport, Recreation and Fitness	Technicians and Associate Professionals	2017-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor / Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant / Trainer / Instructor, Personal Trainer	Skills Programme: Fitness Instructor	5	692
	Managers	2017-422102	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership: National Certificate - General Travel	5	717

*\*Subject for review once SLA targets have been approved*

Source: CATHSSETA SMS 2018

### **3.5. CONCLUSION**

This chapter focused on understanding occupation-specific skills-mismatches identified by employers in the sector. In general, the large majority of employment falls within the low to middle level range of skills, which is typical of the services industry. The supply of skills, however, necessarily takes places at all three levels: Low, middle and high. The skills mismatch occurs as a result of the disjuncture between supply and demand. The issue of skills gaps in the sector has been presented for each of the major occupational groups, the findings of which are corroborated by the training needs assessment. A sectoral priority occupations list identifying the top occupations that will be addressed was presented.

## CHAPTER 4: SETA PARTNERSHIPS

### 4.1. INTRODUCTION

To achieve the identified strategic objectives of the SETA and national development priorities relevant to the sector, CATHSSETA recognises the need to form key partnerships with:

- Public TVET colleges
- Higher education institutions and universities of technology
- Public entities
- Co-operatives, NPOs and community-based organisations
- Large employers and industry bodies within the sector

The partnership funding and selection criteria has been integrated into the discretionary grant (DG) framework through the special projects unit. This chapter focuses on existing SETA partnerships with the aim of establishing the state they are in and identifying the benefits associated with the partnerships. The secondary aim is to discuss new potential partnerships the SETA may form and how these may serve the SETA.

### 4.2. AN ANALYSIS OF EXISTING SETA PARTNERSHIPS

The SETA's existing partnerships are arranged into four groups; these are reflected in the sections below into which this chapter has been divided.

#### 4.2.1. State of existing partnerships

This section of the chapter outlines the state of existing partnerships with educational providers and entities operating within the CATHSSETA sub-sectors, Table 13. The partnerships with TVET colleges resulted in CATHSSETA entering into an agreement with the Chinese Culture Centre to participating in the Chinese culture exchange project where 112 TVET learners who completed N6 were co-sponsored in an international work integrated learning (WIL) programme.

TABLE 13: EXISTING PARTNERSHIP

Name of institution/ partner organisation	Nature of partnership)	Objectives of partnership	Value of partnership
Majuba TVET College	Funding support	Work integrated learning	Link learners to workplace and assist them complete their qualifications
South West Gauteng TVET College	Funding support	Work integrated learning	Link learners to workplace and assist them complete their qualifications
College of Cape Town	Funding support	Bursary funding	CATHSSETA provide tuition fees, books, stipend to learners
King Hintsa TVET College	Funding support	Bursary funding	CATHSSETA provide tuition fees, books, stipend to learners
KSD Colleges	Funding support	Bursary funding	CATHSSETA provide tuition fees, books, stipend to learners
South West Gauteng TVET College	Funding support	Bursary funding	CATHSSETA provide tuition fees, books, stipend to learners



*Technical Vocational Education and Training (TVET) colleges:* There are 43 TVET colleges across 55 campuses offering the National Certificate Vocational (NCV) in hospitality and tourism at levels 2, 3 and 4. Some of the TVET colleges have also obtained programme approval from CATHSSETA to offer CATHSSETA accredited NQF aligned 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 those of the TVET colleges which are not given a sufficient budget with which to upgrade their training facilities. CATHSSETA has partnered with five TVET colleges (Table 14) in order to establish regional offices so as to become more accessible to stakeholders in the rural areas.

**TABLE 14: EXISTING PARTNERSHIP**

Name of institution/organisation	Nature of partnership (start & end dates)	Objectives of partnership	Value of partnership
<b>Motheo TVET</b>	CATHSSETA regional office	Services Free State and Northern Cape	Provides CATHSSETA access to the TVET environment and serves as a provincial contact centre
<b>Lovedale TVET</b>	CATHSSETA regional office	Services Eastern Cape	Provides CATHSSETA access to the TVET environment and serves as a provincial contact centre
<b>Northlink TVET</b>	CATHSSETA regional office	Services Western Cape	Provides CATHSSETA access to the TVET environment and serves as a provincial contact centre
<b>eThekweni TVET college</b>	CATHSSETA Regional office	Services KwaZulu-KwaZulu-Natal	Provides CATHSSETA access to the TVET environment and serves as a provincial contact centre

*Higher Education Institutions (HEIs) and Universities of Technology (UoTs):* CATHSSETA has partnered with six universities, Table 15. CATHSSETA funds the bursaries, which cover the cost of tuition, books and accommodation with CATHSSETA over a period of two years.

**TABLE 15: EXISTING PARTNERSHIP**

Name of institution/partner organisation	Nature of partnership (start & end dates)	Objectives of partnership	Value of partnership
<b>University of the Free State</b>	For funding bursaries	Learner support	CATHSSETA provide tuition fees, books, stipend to learners
<b>Central University of Technology</b>	For funding bursaries	Learner support	CATHSSETA provide tuition fees, books, stipend to learners
<b>Tshwane University of Technology</b>	For funding bursaries	Learner support	CATHSSETA provide tuition fees, books, stipend to learners
<b>Durban University of Technology</b>	Funding HET Placements	Internship programmes	CATHSSETA provide tuition fees, books, stipend to learners

*Public entities:*

**Arts, culture and heritage:** The SETA has entered into partnerships with the North West Department of Sports, Arts and Culture to train 50 employees in FETC: Heritage resource management.

**Sports, recreation and fitness:** The SETA has entered into a partnership with the Department of Public Works to train 1 037 learners in the Expanded Public Works Programme (EPWP).

**Tourism and travel:** The SETA currently has a partnership with the National Department of Tourism which focuses on the National Tourism Careers Expo (NTCE), collaborating on a skills audit and a service excellence training programme. The NTCE flagship programme has been significant in terms of profiling tourism and its value chain products as employers of choice.

CATHSSETA has signed a Memorandum of Understanding (MOU) with the Northern Cape Department of Sports, Arts and Culture, Table 16. Another MoU between CATHSSETA and the Department of Public Works with a focus on hospitality and tourism is currently running with two programmes having been concluded and one is ongoing.

**TABLE 16: EXISTING PARTNERSHIP**

Name of institution/ partner organisation	Nature of partnership (start & end dates)	Objectives of partnership	Value of partnership
North West Department of Sports, Arts and Culture	Support by mobilising stakeholders	Train 50 employees in FETC: Heritage resource management	The partnerships reduce the cost of training and more learners benefit
Department of Public Works	Focus on hospitality and tourism and sports, recreation	Train 1 037 learners in the Expanded Public Works Programme (EPWP)	Provide training and short-term employment with stipend to unemployed learners
National Department of Tourism	MOA formalising partnerships and training interventions including National Tourism Career Expo	Focuses on the National Tourism Careers Expo (NTCE), collaborating on a skills audit and a service excellence training programme	The NTCE flagship programme has been significant in terms of profiling Tourism and its value chain products as employers of choice. In the 2016/17 financial year, over 5 000 learners attended the expo
Northern Cape Department of Sports, Arts and Culture	MOA formalising partnerships and training interventions	Sectoral training interventions within the province	Support CATHSSETA reach rural provinces

#### **4.2.2. Successful partnerships**

Partnerships that have resulted in producing successful outcomes have been seen these areas:

*Training provision:* Training, which occurred through partnerships with various stakeholders, which has been successfully completed:

- The partnership with Ezemvelo KZN Wildlife that provided training addressing customer care for 623 employees at NQF level 4 and 20 employees at NQF level 5.
- The partnership with the National Arts Festival resulted in most of the 20 unemployed learners who completed the music industry sound technology skills programme being employed in full-time positions.
- Fifty employed learners were trained towards a qualification in sports administration in partnership with Sports and Recreation South Africa (SRSA). About 339 were trained in partnership with the South African Sports Confederation and Olympic Committee (SASCOC) in facilitator, assessor and moderator courses. These learners successfully completed the training.

*Post-Graduate bursaries:* Since the inception of the NSDS III, CATHSSETA has entered into partnerships with HEIs, specifically to provide bursaries to learners to pursue post-graduate studies in the sector, with the intention of creating new knowledge and developing academic

expertise in the sector. Of these partnerships, the one with Rhodes University has had a number of successes: A number of Master's and PhD learners have produced research contributing to improve sector intelligence. Thus far, 23 recipients of bursaries (17 at Master's level and six at PhD level) have completed their studies.

*National Department of Tourism:* CATHSSETA partnered with the National Department of Tourism in undertaking a skills audit as part of the review of the THRD strategy. This was completed in 2016 and the findings have been incorporated into this SSP. The partnership on the women executive management training programme will see the first intake of learners completing the programme in June and graduating in August 2017.

*Qualification Review:* During the 2016/17 financial year, the chef qualification was reviewed to increase its level from NQF Level 4 to NQF level 5. This has been completed and upgraded to NQF level 5. CATHSSETA is also working with SA Chef Association in developing criteria and guidelines to assist training providers in terms of consistency with assessment in developing the Trade Test.

In the pipeline is a review of eight qualifications with QCTO. Desktop research was done to identify these occupations on the basis of occupations in high demand. Another 50 qualifications cutting across all sub-sectors still need to be reviewed with QCTO. Research will also be done by qualifications development facilitators registered with QCTO on assessing why private colleges have no learners registered in certain qualifications.

#### **4.2.3. Problems experienced with partnerships**

The main challenge the SETA has faced with promoting research at post-graduate level is the inability of students to keep to approved research programmes. As a result, the delivery of findings to the SETA is delayed which limits the usefulness of findings, given the need for recent, up to date information.

The partnerships that have been entered into for the development and review of qualifications have also presented certain challenges. Due to the voluntary nature of participation, and setting aside time for assigned tasks, travel and logistics as well as delays in the signing of contracts, the finalisation of qualifications poses a challenge. Sub-sector buy-in and budget constraints also pose a challenge to development of partnerships.

Partnerships with public entities are unique. Certain public entities are often reluctant to fund projects and expect the SETA to fund the project in its entirety. The roll out of projects is monitored only by the SETA and the appointed training provider and further involvement from the public entity's side, in terms of exercising oversight, is limited and relies heavily on the training provider. This is indicative of problems due to lack of role clarification and communication.

The challenge the SETA faced with TVET colleges is the lack of infrastructure geared towards responding to SETA requirements, for example, a lack of capacity enabling the preparation of relevant documents for programme approval. Another challenge encountered during the implementation of the programme is the delay in the recruitment of learners.

#### 4.2.4. Strengthening of partnerships

In order to strengthen partnerships, it is imperative the SETA takes better care of current partnerships, ensures there are more focused engagements, and that there is a clear determination of roles and responsibilities.

In strengthening partnerships, CATHSSETA entered into a MOU with the South African College Principals Organisation (SACPO) to implement the TVET lecturer programme. SACPO is an independent association appointed by the Department of Higher Education to oversee all 50 TVET colleges in South Africa represented by the principals, comprising a national general council and a national office.

To address the challenge of lack of participation by industry in the development and review of qualifications, CATHSSETA plans to increase stakeholder engagement and participation to solicit buy-in by building strong relationships with key stakeholders in the sector.

In strengthening TVET college capacity and infrastructure, the SETA plans to continue to implement capacity building projects and initiatives that include the strengthening TVET college human resource capacity, governance structures and infrastructure. Since 2015 to date, over 50 TVET lecturers spread across the Free State, Mpumalanga, KwaZulu-Natal, Limpopo and North West provinces have benefited from initiatives such as the vocational education orientation programme (VEOP). During the 2016/17 period, additional offices were established at TVET colleges in five provinces to foster easy accessibility and thus enable close communication.

#### 4.3. PLANNED PARTNERSHIPS

The SETA is looking at forming partnerships with these entities:

TABLE 17: PLANNED PARTNERSHIPS

Name of institution/ partner organisation	Nature of partnership (start & end dates)	Objectives of partnership	Value of partnership
Chinese Culture Centre	WIL programme for N6 TVET learners in hospitality and tourism, 4 September 2018 – 30 November 2019	To create opportunities for the learners to gain work experience through integrating them in a real work learning methodology within Chinese companies based in China	Addressing work integrated learning programme for TVET colleges
Department of Tourism	30 April 2019 – 31 March 2020	To actively participate in any initiatives that are aimed at strengthening skills development in the tourism sector as per CATHSSETA's mandate	Enhancement of career guidance interventions
CEEPSA	31 March 2019 – 31 March 2020	To implement recognition of prior learning (RPL) within CATHSSETA sub-sectors.	Supports institutions implementing RPL
King Hintsa and King Sabata TVET Colleges	2019/20 financial year	To fund the building of an industrial kitchen for practicals by hospitality students studying at the TVET.	Contributes to the acceleration of skills development in rural areas

Organised Labour	Skills needs analysis and Training interventions 2019/20 – 2020/21	To identify training needs provide training and RPL	Supports worker initiated training as per NSDP outcome
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New partnerships will include extending existing partnerships with institutions involved in Work Integrated Learning Programmes, strengthening skills development initiatives, youth and women empowerment.

**TABLE 18: NEW PARTNERSHIPS**

<b>Name of institution/ partner organisation</b>	<b>Gaps that the partnership will be addressing</b>	<b>Objectives of partnership</b>
Chinese Culture Centre	Work integrated learning programme for N6 TVET learners in arts and culture	To provide N6 Arts and Culture Learners with Arts and Entrepreneurial skills in China. The students will gain Entrepreneurial skills which will allow them to be equipped to create income opportunities within the arts and culture sector upon their return to South Africa
Department of Sports Department of Arts & Culture Department of Basic Education (Free State) FEDHASA SASCOC	Initiatives aimed at strengthening skills development	To actively participate in any initiatives that are aimed at strengthening skills development in the relevant sector as per CATHSSETA's mandate
Hilton Hotel	Women empowerment	To capacitate South African managers to gain international on-the-job International experience and coaching that will develop the managers into general managers in the promotion of women empowerment within the tourism industry

#### **4.4. CONCLUSION**

This chapter has outlined the existing partnerships that the SETA has and detailed the nature of these partnerships. In order to deliver on the provision of learning programmes in an effective manner, CATHSSETA has partnered with employers, HEIs, TVET colleges, public entities and other SETAs. The successful partnership models, specifically those that have resulted in the review of sector qualifications, are being replicated for the current year. Further collaborative measures are required in order for qualification development, the implementation of inter-SETA qualifications, the implementation of learning programmes, the placement of learners in internships and capacitating the TVET sector.



## CHAPTER 5: SETA MONITORING AND EVALUATION

### 5.1. INTRODUCTION

This chapter of the SSP reflects on the SETA achievement of the strategic priorities based on the previous financial year. CATHSSETA is required, on an annual basis, to monitor and evaluate learning interventions, performance and achievement of predetermined objectives. The CATHSSETA's monitoring and evaluation (M&E) policy sets out the SETA's monitoring and evaluation framework for managing performance by monitoring KPIs achievements in the annual performance plan.

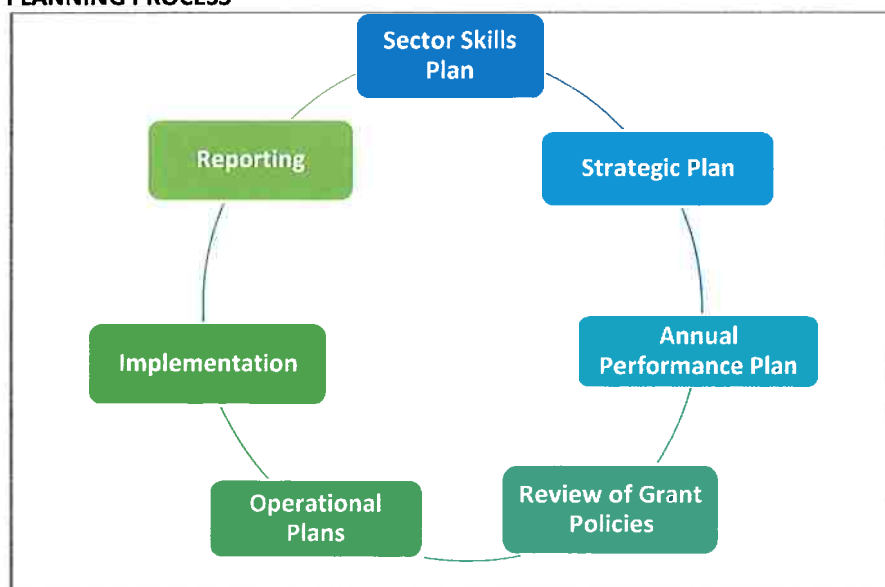
### 5.2. SECTOR SKILLS PLANNING REFLECTIONS

CATHSSETA has a unit responsible for monitoring, evaluation and reporting within the planning and executive support department. Currently, the unit provides evaluation reports such as quarterly monitoring reports, consolidated scarce skills report, consolidated monitoring and evaluation reports from learning programmes and annual reports to the research and planning unit for incorporation into the planning process. The unit is positioned to co-ordinate all monitoring and evaluation processes within CATHSSETA from planning to reporting, covering mainly quality assurance, learning programmes and special projects. In line with the NSDP 2030 outcomes, CATHSSETA intends to elevate the M&E function to be a stand-alone Programme 4 in order strengthen management of organisational performance.

### 5.3. PLAN OF ACTION

Research reports and tracer studies conducted on behalf of, in partnership with or sponsored by CATHSSETA, as per the research agenda, are used in the planning processes. They are captured in the Sector Skills Plan annual updates and further cascaded into the Strategic Plan where applicable. Figure 14 below illustrates the CATHSSETA planning process that leads to monitoring and evaluation process.

FIGURE 14: PLANNING PROCESS





#### 5.4. SCOPE OF MONITORING AND EVALUATION

The processes that cover the M&E scope are further unpacked in Table 19 below.

TABLE 19: THE SCOPE OF M&E FUNCTIONS

Planning cycle	Indicators	Instruments and programmes	Reporting cycle
Research process	Research agenda	Research policy	Impact assessment report
Sector skills plan	Sector priorities sectoral priority occupations skills	Funding policy Discretionary grants Mandatory grants	Sector report Sectoral priority occupations skills report
Strategic plan	Strategic goals and objectives Budgets	Delivery strategies Funding framework	Annual report Performance information report Annual Report
Annual performance plan	Key Performance Indicators and targets	Performance Information Policy	Quarterly Monitoring Report Quarterly Performance Report

#### 5.5. PREVIOUS SSP STRATEGIC PRIORITIES

The CATHSSETA SSP 2018/19 identified the following key development priorities and actions for the sector (Table 20):

TABLE 20: PREVIOUS SSP STRATEGIC SKILLS PRIORITIES

No.*	Strategic Skills Priority (SSP)	Strategic Objective in the SP	Number of KPIs in the APP	KPIs Achieved
1	Qualification review	Review qualifications for sector appropriateness	2	1
2	Training provision	Increase accessibility to accreditation Maintain quality assurance standards	5	4
3	Analysis of skills needs	Commissioned sector research to support informed decision-making Develop a credible Sector Skills Plan (SSP)	3	3
4	Workplace-based learning	Increased the number of learners enrolled in PIVOTAL programmes	6	6
5	TVET capacity building	Improved capacity of TVET colleges to deliver skills development interventions	2	1
6	Increased partnerships	Promoting access to the workplace through partnerships with the sector	4	4
7		Number of partnership projects implemented with People with disabilities associations Implemented skills development projects in rural areas for youth	14	14
8	Transformation in the sector	Address entry-level skills of youth and adult education Increase support to sector organisations through skills development		
	Addressing occupational shortages and skills gaps	Increased the number of learners enrolled in PIVOTAL programmes Address entry-level skills of youth and adult education	14	14

*\*Note: Numbering is not in order of priority*

*Source: Draft Annual Report 2019*

## 5.6. STRATEGIC PRIORITIES NOT ACHIEVED

The following Strategic Skills Priorities were not achieved in 2018/19 and reasons stated in the last column of Table 21.

**TABLE 21: STRATEGIC PRIORITIES NOT ACHIEVED**

No.	Strategic Skills Priority (SSP)	Strategic Objective in the SP	Reasons for deviation
1	Qualification review	Review qualifications for sector appropriateness	One KPI towards this priority was not met due to delays in the appointment of a service provider. The project will be implemented in the 2019/20 financial year
2	Training provision	Increase accessibility to accreditation Maintain quality assurance standards Increase support to sector organisations through skills development Address entry-level skills of youth and adult education	One KPI towards this priority was not met due to delays experienced with the accreditation processes. Annual target not attained due to inadequate response of trade unions to support programmes offered
5	TVET capacity building	Improved capacity of TVET colleges to deliver skills development interventions	One KPI towards this priority was not achieved to the TVET and Community (CET) national strike which was during the open CATHSSETA expression of interest window.

Planned mechanisms to address the skills priorities not achieved in the previous year are covered in detail in Table 22 below.

**TABLE 22: PLANNED MECHANISMS FOR STRATEGIC PRIORITIES NOT ACHIEVED**

No.	Strategic Skills Priority (SSP)	Planned Mechanisms to Address the Skills Priorities Not achieved in the previous year
1	Qualification review	An implementation plan has been developed as follows; Appointment and contract award of Qualification Development Facilitator. Signing of MOU between CATHSSETA and QCTO by 30 June 2019. Secure dates for scoping meeting and facilitation of qualifications reviews. An implementation plan has been developed as follows; Facilitate Stakeholder engagement and needs analysis by 31 August 2019.
2	Training provision	Coordinate the opening of the Special Projects window and selection process of Training Providers targeting Trade Unions and entities that indent to capacitate Trade Unions. Monitor the implementation of the project.
5	TVET capacity building	An implementation plan has been developed as follows; Appoint a training provider by 30 June 2019. Learner recruitment and registration by 31 July 2019. Commencement of training by 1 August 2019. Certification of learners by 31 March 2020.

## 5.7. NSDS III TO NSDP 2030 LINKED SSP PRIORITIES

The Strategic Skills Priorities for 2020/2021 have been identified and mapped to the NSDS III and linked to the NSDP 2030 outcomes, (Table 23).

TABLE 23: NSDS III TO NSDP 2030 LINKED SSP PRIORITIES

NSDS goals	NSDP outcomes	CATHSSETA linked priorities/ revised SOs.
<b>Goal 1: Establishing a credible institutional mechanism for skills planning</b>	Outcome 1: Identify and increase production of occupations in demand Outcome 4: Support the increase in access to occupationally directed programmes	Fourth Industrial Revolution Analysis of skills needs Monitoring and Evaluation Learning programmes/ occupationally directed programmes
<b>Goal 2: Increasing access to occupationally-directed programmes</b>	Outcome 7: Encourage and support worker-initiated training Outcome 3: Improving the level of skills in the South African workforce	Increased partnerships to include worker initiated interventions  Qualification review
<b>Goal 3: Promoting the growth of a public FET college system that is responsive to sector, local, regional and national skills needs and priorities</b>	Outcome 5: Support the growth of the public college system	Training provision TVET capacity building Transformation in the sector
<b>Goal 4: Addressing the low level of youth and adult language and numeracy skills to enable additional training</b>	N/A	
<b>Goal 5: Encouraging better use of workplace-based skills development</b>	Outcome 2: Linking education and workplace	Workplace-based learning and experiential learning Mentoring and coaching
<b>Goal 6: Encouraging and supporting cooperatives, small enterprises, worker-initiated, NGO and community training initiatives</b>	Outcome 6: Skills development support for entrepreneurship and cooperative development	SMMEs Support and Entrepreneurship (Informal Traders)
<b>Goal 7: Increasing public sector capacity for improved service delivery and supporting the building of a developmental state</b>	N/A	
<b>Goal 8: Building career and vocational guidance</b>	Outcome 8: Support career development and Placement services	Priority 6: Transformation (TVET and CET capacity building) Priority 4: Workplace-based learning and experiential learning

## 5.8. PLAN OF ACTION TO ACHIEVE SET STRATEGIC PRIORITIES

The Action Plan in Table 24 below provides details of strategic skills priorities' planned interventions.

TABLE 24: ACTION PLAN

Skills Priority	Programme/ project	Achieved/in progress	Planned measures	Link to NSDP outcome
Fourth Industrial Revolution	Scoping Exercise: Implications to CATHSSETA	New	Skills identification	UPDATED
Training provision	Assessment QCTO (JIP)	New	Engagement with QCTO, joint implementation plan	UPDATED

Skills Priority	Programme/ project	Achieved/in progress	Planned measures	Link to NSDP outcome
Analysis of skills needs	Research projects and qualification review	Research progress Report in the RA	Research projects articulated in the research agenda	UPDATED
Increased Partnerships to include worker initiated interventions	TBC	TVET Colleges Employers Universities	Organised labour engagement	UPDATED
Transformation	Mentoring and coaching/ TVET & CET capacity building	Work Readiness Programme Workplace-based learning & experiential learning	New teaching and learning methods/ workplaces	UPDATED
SMME Interventions and Green Economy (Resource Efficiency)	TBC	SMMEs Training Projects	Develop skills development strategy for SMME, entrepreneurship, new enterprises and informal traders	UPDATED
Monitoring and Evaluation	TBC	New	Review and elevate monitoring and evaluation Apprenticeship	UPDATED
Addressing Occupational Shortages and Skills gaps	Learning Programmes	Learning Programmes Delivered	Learnerships WIL and Internships Bursaries Skills programmes	UPDATED

## 5.9. CONCLUSION

Chapter 5 of the SSP outlined the SETA's approach to monitoring and evaluation. The use of information from previous year's annual report and reports from tracer studies informed research and planning. The strategic priorities in the previous SSP captured in the strategic plan and annual performance plan outlined including priorities that were not achieved. Lastly, the NSDP outcomes were linked to NSDS III, previous, current priorities and actions plans were presented. The SETA needs to strengthen the coordination and implementation of the M&E framework including training of staff on implementation tools.

## CHAPTER 6: SETA STRATEGIC SKILLS PRIORITY ACTIONS

### 6.1. INTRODUCTION

This chapter consolidates and presents the findings from previous chapters and reflects on priority actions for the CATHSSETA sector. The information and analyses from previous chapters have been reviewed and culminate in recommended actions that are realistic, consistent and achievable. This chapter provides a set of priority actions, but is not a detailed strategic or operational plan. Consideration of national strategies and plans has also been taken into account to ensure alignment with government's priorities.

### 6.2. KEY SKILLS FINDINGS FROM PREVIOUS CHAPTERS

The key findings from previous chapters have been summarised in Table 25.

TABLE 25: KEY FINDINGS

CHAPTER	KEY FINDINGS
<b>Chapter 1</b>	<ul style="list-style-type: none"><li>• The vast majority of entities in the sector (95%) are small entities.</li><li>• Overall, the country's gross domestic product (GDP) declined in 2018, and the country's economy entered a technical recession.</li><li>• The health of the economy has been reported to be worse in 10 years following the 3.2% GDP contraction in the first quarter of 2019.</li><li>• The economic contribution declined across all the economic sectors except for government, financial and personal service industries, which recorded some slight growth.</li><li>• The tourism and travel services and hospitality sub-sectors reported slight growth in some specific industries such as restaurants and hotels.</li><li>• Hospitality sub-sector employs the highest number of people in the sector, followed by gaming and lotteries. Arts and culture has the least employees in all the sub-sectors.</li><li>• The distribution of employees and employers is highest in Gauteng, Western Cape and KwaZulu-Natal provinces, and Northern Cape has the least.</li><li>• Majority of employees in the sub-sector are black with whites second, and the least being Indians.</li><li>• The majority of sub-sectors have a higher proportion of females with the exception of the conservation sub-sector.</li><li>• The age demographics illustrated show that the majority of employees in the sector (56%) are classified as youth (less than 35 years) with over 50% of them employed at higher OFO levels.</li><li>• The profile of the employees is getting younger across all OFO levels to an extent that they are even fewer older people in most OFO levels. Transitional programmes such as work readiness programmes (WRP) could be effective and there might be a need for mentoring and coaching to continue support the youth at workplace.</li><li>• A total of 224 039 employees are reported to be employed in the sector, reflecting a 2% decline from 2017/18.</li><li>• Sport, recreation and fitness sub-sector experienced a huge increase in 2017/18 followed by 49% decline again in 2018/19.</li></ul>
<b>Chapter 2</b>	<p><b>Key skills change drivers</b></p> <ul style="list-style-type: none"><li>• There has been increased technological advancements across the six sub-sectors e.g. online betting, use of internet to purchase, social media, mobile apps and wearable technology in sports. The implication is that functional and technical skills will need to be accompanied by technological skills.</li></ul>

CHAPTER	KEY FINDINGS
	<ul style="list-style-type: none"> <li>• Globalisation has brought about a more ‘sophisticated tourism market’, which can be linked to advances in technology.</li> <li>• Social networking, marketing, e-commerce and digital marketing have become increasingly more mainstream in their use to attract and retain customers.</li> <li>• 4IR brings in new technologies and occupations, which will translate into new occupations reshaping future skills needs and education and training needs.</li> <li>• As a result of changes in the sector, the demand for higher quality products and services is on the rise. This requires the enhanced skills base to meet the changing demand.</li> <li>• Employers need more flexible skills base, which is able to adapt to competing environments.</li> <li>• The sector needs to invest in training interventions and learning programmes favourable to the emerging green economy. The sector needs to find innovative and strategic ways of planning and mitigating the effects of climate change through research and development; and investment in green qualifications.</li> <li>• The key skills actions emanating from the above translate to keeping the qualifications and skills set of learners and educators relevant to rapid technological advancements in the sector.</li> </ul>
<b>Chapter 3</b>	<p><b>Occupational shortages and skills gaps</b></p> <ul style="list-style-type: none"> <li>• A total of 37% of employers indicated that the main reason vacancies are difficult to fill is due to a lack of candidates with required experience and (21%) lack of suitably qualified candidates.</li> <li>• The most common skills gaps across the majority of the occupational groups is leadership, communication, customer care and management skills.</li> </ul> <p><b>Supply of skills</b></p> <ul style="list-style-type: none"> <li>• The majority of employees are in the middle level skills band, between NQF levels 3-6.</li> <li>• Enrolment and graduation rates of sector specific qualifications at HEIs increased by 3% and 12% respectively in 2015</li> <li>• The sector reports that there are 5 062 chefs employed in 2018/19. This figure has declined from of 7 634 in 2017/18 and 12 232 in 2016/17. The number of chefs has decreased by 7 170 (59%) in the past three years. This sharp decrease of the number of Chefs could be attributed to ageing workforce and only about 144 are aged 55 and above. It could also be due to higher demand of chefs by other sectors, globalisation, economic decline or technological innovation. Further research needs to be conducted to establish the real causes.</li> </ul> <p><b>Skills gaps</b></p> <ul style="list-style-type: none"> <li>• Graduates in the sector are generally viewed as not meeting employer expectations in terms of skills requirements.</li> <li>• The sector perceives there to be a skills mismatch between graduates and job requirements.</li> <li>• In order to bridge the skills mismatch between graduates and job requirements, the SETA needs to form strategic partnerships with industry to ensure industry requirements are aligned with qualifications and providers are kept informed of these requirements.</li> </ul>
<b>Chapter 4</b>	<p>CATHSSETA recognise the need to form partnerships with:</p> <ul style="list-style-type: none"> <li>- Public TVET colleges</li> <li>- Higher education institutions and universities of technology</li> <li>- Public entities</li> <li>- Co-operatives, NPOs and community-based organisations</li> <li>- Large employers and industry bodies within the sector</li> </ul> <ul style="list-style-type: none"> <li>• Successful partnership models, which may be replicated, include the review of qualifications, research partnerships and career guidance events that inform existing and potential entrants to the sector of available career opportunities and paths.</li> </ul>



CHAPTER	KEY FINDINGS
Chapter 5	<ul style="list-style-type: none"> <li>• Further collaborative measures are required in order for qualification development, implementation of inter-SETA qualifications, implementation of learning programmes, placement of learners in internships and capacitating the TVET sector.</li> <li>• Strategic skills priorities for the previous year were assessed and those that were not achieved were indicated and action plans were provided.</li> <li>• Current priorities were included together with the proposed action plans.</li> <li>• The SETA needs to strengthen the coordination and implementation of the M&amp;E framework including training of staff on implementation tools.</li> </ul>

### 6.3. RECOMMENDED PRIORITY ACTIONS

The key findings from the previous chapters and common feedback from stakeholder engagements, the labour market and skills audit studies have culminated in the following recommended actions:

#### 6.3.1. IMPLICATIONS OF FINDINGS FOR SKILLS DEVELOPMENT

The key skills implications based on the sector profile can be summarised as such: The composition of the sector shows that the vast majority of entities (95%) are small (0-49), indicating that there is a need to support and prioritise SE development in the sector. Racial and gender disparities remain in the demographic composition of the overall sector, illustrating the need for further transformation to address employment equality disparities, especial for black females. The majority of employees in the sector (56%) are classified as youth (under 35); indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors. Lastly, overall the percentage of employees with disabilities falls short of the 2% target set by government. Out of the six sub-sectors, hospitality accounts for 52% of total employees with disabilities, thus there is a need to increase the number of people with disabilities employed across the sub-sectors.

#### 6.3.2. IMPLICATIONS FOR SKILLS PLANNING IN THE SECTOR

The technology advancement trend is critical for both skills supply and demand and for CATHSSETA to precisely identify skills requirements for qualification review, and priority skills identification across the sub-sectors. The implications for future skills planning is that the skills that will be in demand will be for high-level skills in computing technology, software development, artificial intelligence, robotics, etc. In addition, the soft skills required are changing to include skills such as agility, innovation, creativity, problem solving, etc. Proper planning requires that sub-sector specific skills demand and supply are identified and prioritised for funding.

#### 6.3.3. KEY SKILLS IMPLICATIONS

There is a need for the development of entrepreneurial, ICT skills and managerial skills across the sector, particularly amongst previously disadvantaged groups, to enable transformation in the sector. All sub-sectors need to invest more on succession planning, to facilitate retention rate of young employees; this can be done through mentorship programmes to

upskill youth in the sector and collaboration between HEIs, TVET colleges and industry to facilitate a pipeline for the supply and demand of skills in the sector.

Given the political and economic uncertainties, organisations within the sector need to re-skill employees on strategic marketing and public relations interventions to plan and mitigate the effects of instability on the sector. The SETA in partnership with the sector stakeholders need to embark on career guidance initiatives including career exhibitions to ensure that the youth is guided to the new and emerging careers in the sector.

#### 6.3.4. SUMMARY OF ACTIONS

Planned actions for current SETA strategic skills priorities are summarised in Table 26.

**TABLE 26: SETA STRATEGIC SKILLS PRIORITY ACTIONS**

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
1. Fourth Industrial Revolution	Scoping exercise: Implications to CATHSSETA	Skills identification through research agenda
2. Training provision	Assessment QCTO (JIP)	Engagement with QCTO, joint implementation plan
3. Analysis of skills needs	Research projects and qualification review	Research projects articulated in the Research agenda
4. Increased partnerships to include worker initiated interventions	TBC	Organised labour engagement
5. Sector transformation	Mentoring and coaching/ TVET & CET capacity building	New teaching and learning methods/ workplaces, WRP
6. SMME interventions and green economy (resource efficiency)	TBC	Develop skills development strategy for SMME, entrepreneurship, new enterprises and informal traders
7. Monitoring and evaluation	TBC	Review and elevate monitoring and evaluation
8. Addressing Occupational Shortages and skills gaps	Learning programmes	Apprenticeship Learnerships WIL and Internships Bursaries Skills programmes

#### 6.4. MEASURES TO SUPPORT NATIONAL STRATEGIES AND PLANS

The impetus to support national strategies and plans is embedded in the CATHSSETA strategy and the six sub-sector strategies. These are implemented in through partnerships with national departments responsible for the economic sectors. The newly aligned and merged national departments will require CATHSSETA to review partnership arrangements.

The National Department of Sports, Arts and Culture, Department of Tourism, Department of Environment, Forestry and Fisheries, and the Department of Trade and Industry are custodians of the following sector strategies related to CATHSSETA:

- National Cultural Industries Skills Academy, (NaCISA)
- Mzansi Golden Economy (MGE) strategy
- The National Sports and Recreation Plan (NSRP 2030)
- National Tourism Sector Strategy (NTSS)

- Tourism Human Development Strategy

Other specific measures initiated include:

- Accreditation support – 11 National federations were in the process of getting their accreditation status as training providers in 2018.
- Education and development of coaches through the training of coach developers will provide education and support to coaches – training has taken place for 379 facilitators, assessors (including RPL assessors) and moderators. Likewise, this will enable the implementation of RPL in support of fast-tracking the conferring of coaches' skills programmes and qualifications across all sporting codes within South Africa. This among other actions will include developing a curricula and implementing RPL pilot projects. CATHSSETA will partner with institutions engaged in RPL in terms of planning and implementation.

## **6.5. CONCLUSION**

The CATHSSETA sector, with its varying sub-sectors, has been deemed a crucial driver of skills development in the South African economy. As such, investment in human capital development knowledge and skills has great economic value. The impact of education and training on company performance and the economic sector as a whole is an important issue because of the large amount invested. Impact studies will be conducted during the period 2019/20 to establish the extent of progress achieved. At this stage, it can be noted that one single stand-out achievement has been getting employers in the sector involved in real training other than in-house non-accredited training. A large number of sector employers are beginning to realise that the effects of education and skills on productivity and innovation are generally positive and significant.

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# ANNEXURE 1: OCCUPATIONS IN HIGH DEMAND

Sub-sector	OFO CODE	Occupation	SPECIALISATION/ ALTERNATIVE TITLE	Intervention	NQF Level	Quantity Needed by the sector	Quantity to be Supported by SETA IN 2020*
Arts and Culture	2017-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	16	17
	2017-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production	6	13	14
Arts and Culture	2017-352103	Sound Technician	Video and Sound Recorder, Sound Effects Person, Re-recording Mixer, Dubbing Projectionist (Sound Mixing), Dubbing Machine Operator, Sound Editor / Mixer / Recordist / Operator / Specialist, Audio Technician, Audio Operator	Learnership	4	8	8
	2017-343203	Visual Merchandiser	Display Decorator, Window Dresser	Bursary and Internship	7	8	8
Arts and Culture	2017-263206	Heritage Consultant	n/a	Learnerships: National Certificate: Heritage Resource Management	7	8	8
	2017-343902	Light Technician	Lighting Electrician, Lighting Operator, Lighting Technician, Lighting Assistant, Lighting Director	Learnership	4	4	4
Arts and Culture	2017-216603	Multimedia Designer	Multimedia Artist, Instructional Designer, Digital Media Designer, Interactive Media Designer	Bursary and Internship	5	2	2
	2017-216601	Digital Artist	Calligrapher, Lithographic Artist, Display Artist, Advertising Artist / Designer, Lettering Designer, Art Director, Exhibition / Display Designer, Film and Video Graphics Designer, Commercial Artist, Graphic Artist, Publication Designer	Bursary and Internship	6	2	2
Conservation	2017-213307	Park Ranger	Game / Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer / Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial	5	305	320

	2017-134901	Environmental Manager	and Care Manager, Wild Life Management Services Manager, Pollution and Waste Manager, Agriculture and Forestry Coordinator, Water Resource Manager, Environmental Health Manager, Contaminated Sites Manager, Centralised Permits and Cites Manager, Land and Water Manager, Species Protection Manager, Conservation Science Manager, Sanitation Programme Manager, Environmental Education Manager, Wild Life Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary/Internships and Workplace Experience	6	117	123
Conservation	2017-211402	Hydrologist	Geophysicist, Geophysical Scientist, Physical Oceanographer, Seismologist, Marine Scientist	Bursary: Bachelor of Science Hydrology	7	10	11
	2017-335906	Environmental Practices Inspector	n/a	Learnership: National Certificate Environmental Practices	7	4	4
Conservation	2017-314102	Environmental Science Technician	Water Pollution Control Officer, Parks and Reserves Technical Officer, Naturalist, Ecological Technical Officer, Conservation Scientific Officer, Environmental Technical Officer	Bursary and Internship: National Diploma in Environmental Science	7	1	1
	2017-421202	Gaming Worker	Casino Gaming Inspector, Casino / Gaming Dealer, Gaming Pit Boss, Gaming Inspector, Casino Surveillance Operator, Gaming Operator, Croupier, Gaming Table Operator	Learnership: National Certificate Gaming Operations	5	240	252
Gaming and Lotteries	2017-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management	5	27	28
	2017-251201	Software Developer	Software Designer, ICT Risk Specialist, Software Architect, Information Architect Software, Software Engineer	Bursary and Internship	6	27	28
Gaming and Lotteries	2017-351301	Network Technician	Network Support Technician	Bursary and Internship	6	17	18
	2017-141201	Restaurant Manager	Bistro Manager, Internet Cafe Manager, Cafeteria Manager, Catering Manager, Food Services Manager, Caterer, Restaurateur, Mess Manager, Canteen Manager, Food and Beverage Manager	Bursary and Learnership: Food and Beverage studies/services	6	1249	1311
Hospitality	2017-343401	Chef	hef De Partie, Commis Chef, Head Chef, Pastry Chef, Demi Chef, Sous Chef, Saucier, Executive Chef, Second Chef	Apprenticeship/Learnership: National Certificate - Professional Cookery	5	1220	1281



	2017-515101	Hotel Service Manager	Bar Manager, Hotel Chief Steward, Commissionaire Porter, Accommodation Manager, Head Housekeeper, Head / Front Office Porter (Hotel), Hotel Concierge, Front Office Manager (Hotel), Hotel Office Manager	Skills Programme	5	1152	1210
	2017-141102	Guest House Manager	Bed and Breakfast Operator	Bursary: Management Development Programme	6	501	526
Hospitality	2017-141101	Hotel or Motel Manager	Lodge Manager, Boarding House Manager, Duty Manager (Hotel), Innkeeper, Hotelier, Resort Manager, Backpackers Manager, Hostel Manager	Bursary: Management Development programme	7	401	421
	2017-512101	Cook	n/a	Skills Programme: Cook Convenience/Assistant Chef	2	140	147
Hospitality	2017-513101	Waiter	Drink Waiter, Night Club Hostess, Wine Attendant, Restaurant Hostess, Food and Beverage Attendant, Silver Service Waiter, Dining Room Attendant, Maitre D, Formal Service Waiter, Lounge Assistant, Sommelier, Wine Steward	Skills Programme	5	107	112
	2017-841201	Kitchenhand	Pantry Attendant, Sandwich / Salad Preparer, Kitchen Steward, Kitchen Assistant (Non-domestic), Dishwasher	Skills Programme	2	102	107
Hospitality	2017-513202	Barista	Coffee Maker	Skills Programme	5	89	93
	2017-311903	Food and Beverage Technician	Beverage Laboratory Technician, Distillery Technician, Brewery Technician, Gas Chromatographic, Food Laboratory Technician, Fermentation Technician, Dairy Laboratory Technician, Sugar Laboratory Technician, Food Science Technician, Brewmaster / Master Brewer, Milling Laboratory Technician	Bursary and Internship	6	32	34
	2017-422401	Hotel Receptionist	n/a	Skills Programme and Learnership: Hospitality Reception; W/L: Hospitality studies	5	20	21
Hospitality	2017-121206	Health and Safety Manager	Safety, Health and Environmental (SHE) Manager	Bursary and Internship	5	14	15

	2017-342301	Fitness Instructor	Physical Training Instructor, Aerobics Instructor, Physical Fitness Trainer, Health and Fitness Instructor, Aquarobics Instructor, Gym Instructor / Trainer, Gymnasium Attendant, Physical Education Officer, Physical Activity Coordinator, Fitness Centre Worker, Fitness Consultant / Trainer / Instructor, Personal Trainer	Skills Programme: Fitness Instructor	5	659	692
	2017-143107	Fitness Centre Manager	Health Club Manager, Gym Manager, Fitness Centre Administrator, Sports Club Manager	Bursary and Internship	6	219	230
<b>Sport, Recreation and Fitness</b>			Diving Coach, Callisthenics Instructor, Show Jumping Instructor, Diving Instructor (Open Water), Football Coach, Martial Arts Instructor, Dive Master, Snowboarding Instructor, Water Polo Coach, Gymnastics Coach or Instructor, Tennis Coach, Athletic Coach, Snorkelling Instructor, Swimming Coach or Instructor, Polo Coach, Dressage Instructor, Squash Coach, Cricket Coach, Scuba Instructor, Surface Supply Breathing Apparatus (SSBA) Instructor, Equine Tutor / Riding Instructor, Skiing Instructor, Snowsport Instructor, Basketball Coach, Rhythmic Gymnastics Coach	Learnership: Further Education and Training Certificate: Sport Coaching: Juniors/Beginners	4	11	12
	2017-342204	Sport Coach					
<b>Tourism and Travel Services</b>	2017-141201	Travel Consultant	Inbound Tour Manager, Travel Agent Representative, Travel Consolidator, Booking Travel Clerk, Travel Reservation Clerk, Travel Officer, Travel Arrangements Manager, Travel Agent, Travel Clerk, International Travel Consultant, Domestic Travel Consultant, Travel Wholesaler	Learnership: National Certificate - General Travel	5	683	717
	2017-122101	Sales and Marketing Manager	Key Account Manager, Insurance Sales and Marketing Manager, Business Development Manager, Business Support Manager	Bursary and Internship	6	177	186
<b>Tourism and Travel Services</b>	2017-122105	Customer Service Manager	Client Services Advisor, Client Services Manager / Representative, Client Service Manager, Customer Services Engineer, Customer Care Manager / Representative	Skills Programme	3	53	56

	2017-333201	Events Manager	Functions Manager, Exhibition Organiser, Event Planner, Marketing Campaign Organiser, Conference and Event Organizer, Destination Manager, Government Protocol or Civic Event Organiser, Exhibition Director, Function Planner, Wedding Planner, Trade Fair Manager, Social/Life Cycle Coordinator, Conference Planner	Bursary and Internship	6	15	16
ALL	2017-862202	Handyperson	Handy Person, Hotel Yardperson, Hotel Useful, Handy Man	Workplace (SIPS)	3	93	98
	2017-134903	Small Business Manager	Owner Manager, Entrepreneurial Business Manager	Bursary: Management Development programme	6	88	92
ALL	2017-441903	Program or Project Administrators	Senior Officer, Project Programme Specialist, Support Officer, Project Coordinator, Course Coordinator, Administrator, Administration Officer, Assistant Secretary of The Cabinet, Strategic Support Officer, Project Corrections Operations Advisor / Coordinator, Programme / Project Coordinator, Project Planner, Project Controller, Project Advisor / Leader, Consents Officer / Clerk	Workplace (SIPS)	5	80	84
	2017-112101	Director (Organisation)	Managing Director (Enterprise / Organisation), Chief Executive Officer (CEO), Deemed (Shadow) Director, Company Director, Independent Non-executive Director, Managing Director, Senior / Lead Independent Non-executive Director, Alternative Director, Non-executive Director, Executive Director	Bursary: Business Administration	7	71	75
ALL	2017-733201	Truck Driver (General)	Lorry Driver, Freight Operator, Livestock Hauler, Dumper Truck Driver, Tilt Tray Driver, Compactor Driver (Rubbish Collection), Logging Truck Driver, Road Train Driver, Cement Mixer Driver	Workplace (SIPS)	4	36	38

*\*Subject for review once SLA targets have been approved*

*Source: CATHSSETA SMS 2018*

**ANNEXURE 2: CONTINUOUS IMPROVEMENT PLAN**



Culture, Arts, Tourism, Hospitality & Sport  
Sector Education and Training Authority

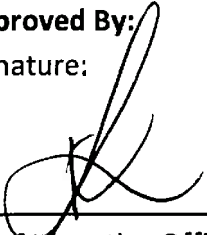
***SECTOR SKILLS PLAN***  
***CONTINUOUS IMPROVEMENT PLAN***  
***2019/20 – 2020/21***

## AUTHORISATION OF THE SECTOR SKILLS PLAN CONTINUOUS IMPROVEMENT PLAN

I, the undersigned, hereby approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY (CATHSSETA) the contents of the first draft Sector Skills Plan Continuous Improvement Plan for the period 2019/20 – 2020/21.

**Approved By:**

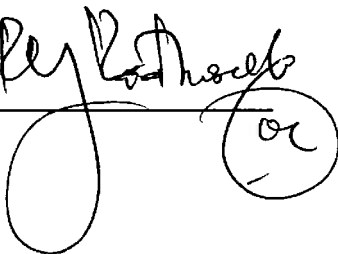
Signature:

  
\_\_\_\_\_  
Chief Executive Officer (CEO)  
Keitumetse Lebaka (Ms)

Date: 30/07/2019

30/07/2019  
Victor Ramathesele (Dr)  
Chairperson of the Board

Date: 30/07/2019





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## **1. Introduction**

The CATHSSETA Sector Skills Plan (SSP) Continuous Improvement Plan (CSSPCIP) aims to provide the Department of Higher Education and Training (DHET) with a guideline to the strategies that have been incorporated and employed by the SETA to ensure the production of an SSP that is fully reflective of the sector. The following areas will be further expanded upon to provide details regarding plans executed in 2019/20 – 2020/21 for the current financial year that are aimed at improving the quality and relevance of the SSP:

- Research Agenda and Strategy
- Collaboration with Universities and TVET Colleges
- Improving Data Sources
- Organising Framework for Occupations (OFO) and Sector PIVOTAL list
- Developing Mechanisms for Skills Planning and LMIP
- Alignment to government priorities
- Research Capacity in the System
- Career Advice System
- The role of the Accounting Authority in the Development of the SSP
- Stakeholder engagement in preparation of the SSP

## **2. CIP Matters**

The following table details CIP matters the SETA has addressed during the 2019/20 – 2020/21 period and plans the SETA aims to implement in the current financial year.

MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<b>1. Research Agenda and Strategy</b>	<p>The CATHSSETA research agenda for the financial 2019/20 focused on the following topics:</p> <ul style="list-style-type: none"> <li>• Tracking and Tracing study</li> <li>• Skills Forecasting Study: Fourth Industrial Revolution</li> <li>• Organising Framework for Occupations Study</li> <li>• Research Partnerships with HEIs through Post Graduate studies in areas of need</li> <li>• Impact Assessment</li> <li>• Training Analysis</li> </ul>	<p>Due to SCM related delays, CATHSSETA has to re-advertise the tender to appoint a service provider to conduct an Impact Assessment study to review the impact of the CATHSSETA funded learning interventions in terms of the NSDS III on the intended beneficiaries.</p> <p>The SETA aims to appoint a service provider by the end of November 2019.</p>	<p>CATHSSETA plans to appoint service providers to conduct the following studies:</p> <ul style="list-style-type: none"> <li>• Tracking and Tracing study</li> <li>• Skills Forecasting Study: Fourth Industrial Revolution</li> <li>• Organising Framework for Occupations Study</li> </ul> <p>The SETA will be conducting a Training Analysis using internal research capacity to determine the number of learners trained against planned training in the previous reporting period as per Mandatory Grant data.</p>
<b>2. Collaboration with Universities and TVET Colleges</b>	<p>Of the 43 TVET colleges across 55 campuses offering National Certificate vocational (NCV) in Hospitality and Tourism, some of the TVET colleges have obtained approval from CATHSSETA to offer CATHSSETA accredited NQF aligned qualifications.</p> <p>CATHSSETA has signed MoUs with various TVET colleges to offer bursaries, learnerships, experiential learning and to participate in the review of sector-related qualifications.</p> <p>The SETA is currently undergoing a process of reviewing 7 qualifications.</p> <p>CATHSSETA currently has no research partnerships or collaborations due to procurement processes and challenges related to the establishment of research chairs in the SETA context.</p>	<p>CATHSSETA plans to collaborate with universities through research partnerships in the 2019/20 financial year. This will increase the SETA's research capacity and improve data and research on the various CATHSSETA subsectors.</p> <p>The ETQA office submitted 8 applications for the review of qualifications to the QCTO in 2018/19. Feedback was received for seven as the other qualification (i.e. National Diploma: Event Coordination) is already being developed by another SETA i.e. Services Seta.</p> <p>The SETA is currently conducting the 1<sup>st</sup> scoping and profiling exercise. Which will include the:</p> <ul style="list-style-type: none"> <li>- National Certificate: Fitness (ID: 23374)</li> <li>- National Certificate: Sport Management (ID: 60309)</li> <li>- Further Education and Training Certificate: Sport Administration (ID: 58009)</li> <li>- Further Education and Training Certificate: Hospitality Reception (ID: 24433)</li> </ul>	<p>The SETA plans on reviewing 10 qualifications in the current financial year.</p> <p>As part of creating partnerships with Higher Education Institutions, CATHSSETA will partner will selected HEIs on areas of need to sponsor post graduate students at Masters and PhD level. The SETA aims to have the process of establishing HEI partnerships by the end of 2019.</p>

MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
3. Improving Data Sources	<p>CATHSSETA conducts workshops on an annual basis to capacitate organisations submitting Mandatory Grant applications.</p> <p>The SETA utilises national data sources and research conducted by other government departments, national research institutions and industry publications to gather information about the sector.</p> <p>The SETA also completed research studies, through which it consulted with industry stakeholders. In-depth interviews with key role-players in the various sub-sectors were conducted. Industry consultations also took place through a workshop held in February 2019 Kwa-Zulu Natal.</p> <p><b>Utilisation of Tracking and Tracing study</b></p> <p>database of learners who have successfully completed learning programmes during the 2014/15 to 2015/16 period so as to provide</p>	<ul style="list-style-type: none"> <li>- National Certificate: Craft Production (ID: 48806)</li> <li>- Further Education and Training Certificate: Craft Enterprise (ID: 48809)</li> <li>- National Certificate: Accommodation Services (ID: 14110)</li> </ul> <p>CATHSSETA established offices in the Eastern Cape, Western Cape and KwaZulu-Natal situated in the premises of Lovedale, Northlink and UMgungundlovu TVET colleges respectively. The SETA also has offices in Limpopo at the Capricorn TVET which will also service the Mpumalanga province. These offices are fully operational to deliver on learning programmes and will also be capacitated to provide support to stakeholders.</p> <p>In January 2019, CATHSSETA conducted key informant interviews to solicit additional information for the 2020/21 – 2024/25 SSP update. Additional SSP workshops were conducted in between June and July 2019, to verify the results of the draft SSP submitted on 13<sup>th</sup> June 2019, and solicit further information for final draft submission. Inputs from these engagements have been incorporated in the 1<sup>st</sup> August 2019 SSP submission.</p> <p>The CATHSSETA Research and Planning Unit in collaboration with the Skills Development department participated in Mandatory Grant Roadshows for the first time in 2019/20. The purpose of this was to ensure increased stakeholder awareness on the value of Mandatory Grant data and highlight the importance of providing the SETA with accurate data.</p>	<p>There are plans to use the regional offices as sources of data. With funding the regional offices will be developed to also serve as data collection centres.</p> <p>Expanded research agenda to reflect research needs of the sector in 2019/20. The SETA has 8 research agenda items:</p> <p>The SETA plans to continue to produce Sector Analysis reports, which are essentially an equivalent of mini SSPs for each of the 6 CATHSSETA subsectors. This will ensure even data representation across the 6 sub-sectors and provide the SETA with a comprehensive analysis of the sector.</p>

MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	employers with a pool of skilled potential employees CATHSSETA has developed and currently maintains databases of unemployed learners accredited training providers, and levy and non-levy paying entities.  CATHSSETA consulted various sources including the Higher Education Management Information System (HEMIS), maintained by the DHET, publications and reports by the World Travel and Tourism Council, National Gambling Board, South African Tourism, Stats S.A and stakeholders from all sub-sectors.		
<b>4. Organising Framework for Occupations (OFO) and Sector PIVOTAL list</b>	CATHSSETA complies with the use of OFO version 2017 which is the most current version.	The use of the 2017 OFO codes is reflected in all applicable documents including the Skills in High demand, Sectoral Priority list, as well as Mandatory Grant application data	As part of the research agenda for 2019/20, the SETA plans to draft an OFO handbook and mapping tables for all the six sub-sectors.  Undertaking an OFO mapping exercise to map out all occupations that fall under the 6 CATHSSETA subsectors will assist internal and external stakeholders in identifying CATHSSETA OFO codes.
<b>5. Developing Mechanisms for Skills Planning and LMIP</b>	CATHSSETA has developed and employs various mechanisms for skills planning including increased partnership, stakeholder consultations, increased research initiatives to assess skills requirements of the sector and the impact of learning interventions.	Internal stakeholders including the relevant Board structures were consulted for their input into the SSP.	The Research and Planning unit collaborated with the Skills Department by participating in the Mandatory Grant Roadshows that took place in March 2019 – the team used the platform to inform stakeholders about the importance of submitting the correct OFO codes and capacitate stakeholders on the OFO guide.

MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	<p>The SETA identified various platforms to disseminate research recently undertaken in the sector.</p> <p>Internal stakeholders are consulted for their input which also involves translation of the skills development priorities into key performance indicators (KPIs) for the SETA.</p>	<p>Research and planning is collaborating with the Skills department by participating in the Mandatory Grant Roadshows taking place in March 2019.</p> <p>Various Research Consultative Workshops in all nine provinces were held in from June to July 2019 in collaboration with the CATHSSETA regional offices.</p>	
<p><b>6. Alignment to government priorities</b></p>	<p>CATHSSETA's strategic priorities are aligned and developed in line with the Department of Higher Education and Training (DHET) primary guiding priorities and considerate of sub-sector strategies and plans relevant to each of the sub-sectors.</p>	<p>The key policy drivers have been identified and considered in the 2020/21-2024/25 SSP, this includes the National Development Plan, the White Paper for Post-School Education and Training, the Sector Education and Training (SETA) Grant Regulations and NSDS III and the National Skills Development Plan (NSDP).</p> <p>Further sub-sectoral specific plans considered include the Department of Arts and Culture (DAC) Strategy, the National Sport and Recreation Plan (NSRP), the National Tourism Sector Strategy (NTSS), the Tourism Human Resources Development Strategy (THRD), the Lotteries Act 32 of 2013, and the Department of Environmental Affairs (DEA) Strategy.</p> <p>These government priorities and strategies have been taken into consideration in developing the final CATHSSETA 2020/21 – 2024/25 SSP priorities.</p>	<p>CATHSSETA continuously reviews all relevant strategies and plans and utilises any updates/changes to guide the development of the SETA's priorities</p> <p>Upon the approval of the Tourism Human Resource Development Strategy, CATHSSETA will identify and address the priorities that are pivotal to achieving the objectives of the Strategy.</p>
<p><b>7. Research Capacity in the System</b></p>	<p>The CATHSSETA Research Unit resides within the Executive Support department and is headed by a Research and Planning Manager with support staff.</p>	<p>Appointment of a Research resource was done to assist in the Research and Planning unit.</p>	<p>As part of increasing research capacity and improving data sources, CATHSSETA will be creating partnerships with High Education Institutions. The CATHSSETA will partner will selected HEIs on areas of need to sponsor post graduate students at Masters and PhD level.</p>



MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
8. <b>Career Advice System</b>	<p>Each CATHSSETA sub-sector prepares career guides to inform potential learners of qualifications, skills programmes and learnerships available as well as the entry level requirements for each occupation.</p> <p>In the past three years, CATHSSETA has aimed to reach potential learners to disseminate information on learning programmes.</p> <p>The SETA participates annually in national events such as, the National Tourism Council Expo and Africa Travel Indaba.</p> <p>CATHSSETA, in partnership with the National Department of Tourism (NDT) and a host provincial tourism department, host the Annual National Tourism Careers Expo (NTCE) which creates a highly interactive platform for the promotion and identification of tourism careers, job and entrepreneurial prospects.</p>	<p>CATHSSETA participated in the Africa Travel Indaba in May 2019.</p> <p>The career guides for all 6 sub-sectors were distributed in June 2019.</p> <p>A total of 20 career guidance interventions were attended by CATHSSETA in 2018/19.</p> <p>Regional offices are also geared to offer career guidance at the TVET colleges.</p>	<p>A total of 20 career guidance events are planned for the 2019/20 financial year.</p> <p>Plans are underway for the annual NTCE. The annual NTCE is scheduled to take place in September 2019.</p>
9. <b>The role of Accounting Authority in the Development of the SSP</b>	<p>In April 2018, DHET appointed a new Chairperson and Board members with the mandate to give strategic direction of the business and affairs of CATHSSETA.</p> <p>Relevant Board structures, such as the Governance and Strategy Committee, have also been established. The role of the Governance and Strategy Committee is to provide expert advice on the sector, facilitate and enable broad sub-sector specific stakeholder consultation and participation, and give advice on priority skills requirements for sub-sectors. The Governance and Strategy committee was consulted to provide input into the SSP.</p>	<p>The Accounting Authority endorses the final SSP as per the recommendations done by the relevant committees.</p>	<p>The Governance and Strategy and the Board, are integral in providing relevant sector specific insight to CATHSSETA, and will continue to provide input on the first and final draft of the SSP.</p>

MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
	The first draft of the SSP was approved by the Board and the G&S Committee in May 2019. This final draft was also endorsed by the G&S committee and the Board on the 30 July 2019.		
<b>10. Stakeholder engagement in preparation of the SSP</b>	<p>Stakeholders are consulted as part of internal research and/or research studies that have been commissioned to service providers.</p> <p>In-depth interviews with key role players in the various sub-sectors were conducted. Industry consultations also took place through focus group sessions.</p> <p>Key informant interviews (to evaluate skills needs and priority interventions) – 60 sampled employers in the 6 subsectors (as opposed to the 10 recommended by DHET) have been completed;</p> <p>Research and Planning unit was part of the Mandatory Grant Data Roadshows for the first time this year – this is to highlight to stakeholders the importance of providing the SETA with accurate data and further illustrate the use of data received from stakeholders</p>	Additional stakeholder consultation sessions were held in June – July 2019 in all nine provinces to verify preliminary SSP draft findings and solicit further input for the final 2020/21 – 2024/25 SSP.	The SETA aims to continuously engage with stakeholders as part of the research efforts the SETA undertakes in updating the sector information.

### 3. Conclusion

This document has outlined the CIP matters and the plans the SETA has to address the issues identified. The SETA has made significant progress in stakeholder engagements for all the sub-sectors during the consultation period prior to the first and final draft submissions of 2019. This has also improved data sources. The appointment of Research Partnerships is underway and we expect that these partnerships will further improve

the SETA's research capacity. The SETA has put in place governance structures, including a Board comprising of government, sub-sector, employer and labour organisation representatives. This SSP was presented to the Board and its sub-committees for input and approval.

## **ANNEXURE 3: COVER LETTER**

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2128, South Africa

Physical Address  
01 Newtown Avenue,  
Kilburn, Johannesburg,  
2193

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Call Centre: 0860 100 221  
Telephone: 011 217 0600  
Fax: 011 783 7745



30 July 2019

Department of Higher Education and Training  
SETA Support Directorate  
123 Francis Baard Street  
Pretoria  
Private Bag X174

Attention: Ms Weziwe Sikaka  
Acting Director: SETA Support and Learnerships

Dear Ms Sikaka

**Re: CATHSSETA 5 year Sector Skills Plan 2020/21 – 2024/25**

We, the undersigned, on behalf of the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA) submit to the Department of Higher Education and Training (DHET) the SETA's First draft Sector Skills Plan (SSP) for the period 1 April 2020 to 31 March 2025. The SSP has been prepared in accordance with the guidelines included in the National Skills Development Plan (NSDP), as well as the DHET SSP framework and requirements for submission.

The CATHSSETA Continuous Improvement Plan (CIP); OFO Based Sectoral Priority (PIVOTAL) List; Research Agenda; and Mandatory Grant (MG) application data accompany this submission.

The findings presented in the final SSP were collected using improved data sources such as the MG application data, and input from in-depth Key-Informant interviews with role-players in the sector. Additional input was also drawn from secondary data sources such as industry publications and reports. The findings derived from the draft SSP were presented to stakeholders through research consultative workshops that took place between 20 June and 2 July 2019. These workshops were used to validate the findings from the first draft and solicit further input for inclusion in this final SSP. Additional information sources such as DHET and industry publications and reports were also utilised in this version.

The SETA completed two internal studies in the previous financial year, namely the Occupational Shortages report, and Training Analysis report. The SETA also commissioned two studies, namely a Tracking and Tracing study, and a Feasibility Study on Work Readiness Programme (WRP). These studies were completed in September 2018. Input from these

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completed studies undertaken by the SETA have been analysed and incorporated into this version of the SSP.

This final version of the SSP has also taken into consideration the feedback, recommendations and comments received from the DHET SSP feedback meeting that took place on the 8 July 2019.

Yours sincerely,

A handwritten signature in black ink, appearing to be "Keitumetse Lebaka", written over a horizontal line.

Keitumetse Lebaka (Ms)  
Chief Executive Officer (CEO)

2019/07/30

A handwritten signature in black ink, appearing to be "Victor Ramathesele", written over a horizontal line. There is a circular stamp or mark to the right of the signature.

Victor Ramathesele (Dr)  
Chairperson of the Board

2019/07/30



## **ANNEXURE 4: RESEARCH AGENDA**



**RESEARCH AGENDA  
OF THE  
CULTURE, ARTS, TOURISM, HOSPITALITY & SPORT  
SECTOR EDUCATION AND TRAINING AUTHORITY**

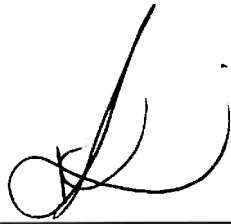
*2019-2020*

## AUTHORISATION OF THE RESEARCH AGENDA

I, the undersigned, hereby approve, on behalf of the CULTURE, ARTS, TOURISM, HOSPITALITY AND SPORT SECTOR EDUCATION AND TRAINING AUTHORITY (CATHSSETA) the contents of the draft Research Agenda for the 2019/2020 period.

**Approved By:**

Signature:



Keitumetse Lebaka (Ms.)  
Chief Executive Officer

Date:

30/07/2019

Signature:



Victor Ramathesele (Dr)  
Chairperson of the Board

Date:

30/07/2019

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## **ACRONYMS**

APP	Annual Performance Plan
CATHSSETA	Culture, Arts, Tourism, Hospitality And Sport Sector Education and Training Authority
DHET	Department of Higher Education and Training
ETQA	Education, Training and Quality Assurance
NSDP	National Skills Development Plan
OFO	Organising Framework for Occupations
PFMA	Public Finance Management Act
SDA	Skills Development Act
SP	Strategic Plan
SSP	Sector Skills Plan
ToR	Terms of Reference

## 1. INTRODUCTION

CATHSSETA is a statutory body established through the Skills Development Act of 1998. It is a schedule 3(a) listed public entity in terms of the Public Finance Management Act (PFMA) (Act 1 of 1999 as amended), and is accountable to the National Department of Higher Education and Training (DHET). CATHSSETA conducts its activities within the following six sub-sectors:

- Arts, Culture and Heritage;
- Conservation;
- Gaming and Lotteries;
- Hospitality;
- Sport, Recreation and Fitness; and
- Travel and Tourism.

Research is a key component in providing evidence to inform decision making, policy review and strategy formulation and to improve upon systems and services within the SETA. This Research Agenda seeks to respond to the National Skills Development Plan (NSDP) outcomes and principles.

The NSDP underpins the following principles: (1) Locating the NDSP within an integrated PSET System; (2) Contributing to the country's socio-economic development objectives; (3) Advancing an equitable and integrated system; (4) Greater inclusivity and collaboration will be promoted; (5) Focus on support system for learners and employers; (6) Strong emphasis on accountability; (7) Understanding skills demand; (8) Steering supply: qualifications and provision and (9) Steering supply funding mechanisms.

This Research Agenda seeks to also respond to the outcomes of the NSDP which are: (1) to identify and increase production of occupations in high demand; (2) Linking education and the workplace; (3) Improving the level of skills in the South African workforce; (4) Increase access to occupationally directed programmes; (5) Support the growth of the public college institutional type as key provider of skills required for socio-economic development; (6) Skills development support for entrepreneurship and cooperative development; (7) Encourage and support worker initiated training and (8) Support career development services.

The core function of the unit is to uplift the research and skills planning activities of CATHSSETA with the aim that these may directly contribute to the establishment of a reliable institutional mechanism for skills planning for both our sector and the country.

The Research unit plays an integral role in gathering statistical data and other relevant information on the labour market, skills needs and training provision. Such information is essential in planning to meet the country's skills needs and guiding investment in education



and training provision. The unit is further responsible for producing the Strategic Plan (SP), Annual Performance Plan (APP) and Sector Skills Plan (SSP) as well all research studies, establishing research partnerships, coordinating research conferences and all skills development and planning activities from 1 April 2020 onwards.

## **2. IMPORTANCE OF RESEARCH**

The SSP is the key research output of CATHSSETA. The SSP assists in outlining the occupational shortages list in the CATHSSETA sector and this list is prioritized in the scoping of projects on an ongoing basis. The SSP is also the foundation upon which the SP and APP of the SETA are developed. The SSP is submitted along with the SP and APP as an annexure of the SETA's documents that are tabled in parliament annually. The DHET Framework and Requirements requires the following from SETA SSPs:

- i. Authoritative and focused research on the state of the skills market;
- ii. Production of skills intelligence to support growth and development;
- iii. Consistent, rich and comparable understanding within different economic sectors;
- iv. Participation by stakeholders in the development process;
- v. Evidence-based research; and
- vi. Actionable interventions that make a difference to skills planning.

Thus, all research conducted or commissioned by CATHSSETA is intended to feed into the SSP for Strategic Planning that outlines key strategic interventions to address identified skills needs and constraints to effective recruitment, utilization and skills development. Table 1 below outlines the research agenda items CATHSSETA intends to conduct in 2019.

Table 1: Research output

Name of study	Purpose of Study	Main objectives of the study	Research Mechanism	Valid for Period
Tracking and Tracing study*	The primary focus of the study is to understand the outcomes of workplace-based learning (WBL) through the tracking and tracing of learners supported by CATHSSETA. The main purpose of the study will be to provide the SETA with information regarding the activities of learners who have completed CATHSSETA programmes. Tracer studies are designed to determine whether or not a programme is achieving its mission and assist in demonstrating the programme's outcomes.	<ol style="list-style-type: none"> <li>To determine the destinations of learners who have completed learnerships, internships and apprenticeships;</li> <li>To understand the factors associated with employment/unemployment;</li> <li>To understand the intricacies of the articulation of qualifications into occupations;</li> <li>To determine the nature of employment of learners who received employment;</li> <li>To pilot a survey of the perceptions of employers on the value of learnerships, apprenticeships and internships</li> </ol>	Research Commissioned	1 September 2019 – 31 August 2020
Skills Forecasting Study: Fourth Industrial Revolution	We need further research on the impact of the fourth industrial revolution on the six CATHSSETA sub-sectors. How will the 4IR affect jobs in the sector and what are the future skills employers should be planning for? What jobs will be lost? How do we re-skill employees affected by the disruption? How can we support employers?	<ol style="list-style-type: none"> <li>To determine the impact of the 4IR on the six CATHSSETA sub-sectors;</li> <li>Find out the future occupations emerging from the study;</li> <li>Find out how employers can plan and prepare for the disruption.</li> </ol>	Research Commissioned	1 October 2019 – 31 March 2020
Organising Framework for Occupations Study	There is limited information in the sector that outlines the CATHSSETA specific occupations and a mapping tool that can assist employers in understanding the OFO better.	<ol style="list-style-type: none"> <li>Produce a CATHSSETA specific OFO handbook for the sector</li> <li>Provide an OFO mapping tool for the sector</li> </ol>	Research Commissioned	1 August 2019 – 31 August 2020
Research Partnerships with HEIs through Post Graduate	As part of creating partnerships with High Education Institutions, the CATHSSETA will partner will selected HEIs on areas of need to	The SETA will look into partnerships with HEIs that have established themselves as leaders in the Conservation, Sports and Recreation, Gaming, and Arts, Culture and Heritage sub-	Selective partnering with the relevant HEIs e.g. CPUT has established itself as a leader in sports and recreation	1 July 2019 – 31 July 2020

Name of study	Purpose of Study	Main objectives of the study	Research Mechanism	Valid for Period
studies in areas of need	sponsor post graduate students at Masters and PhD level.	sectors. As part of the SSP findings these sub-sectors have consistently been reported as lacking sufficient information to inform skills development.		
Impact Assessment	<p>The purpose of this project is to conduct an impact assessment study to review the impact of the CATHSSETA funded learning interventions in terms of the NSDS III on the intended beneficiaries (it is expected that the NSDS III transformational imperatives will be used as indicators on this project).</p> <p>The overall objective of the study is to evaluate the effectiveness of the implementation of the CATHSSETA learning programmes and measure impact on programme beneficiaries for the period 2015/16 to 2018/19.</p>	<ol style="list-style-type: none"> <li>1. Assess the impact of CATHSSETA Learnerships, Bursaries, Internships, artisans, skills programmes and WIL interventions on programme beneficiaries for the period 2015/16 to 2018/19;</li> <li>2. Ascertain the impact of CATHSSETA interventions in addressing NSDS III goals and imperatives;</li> <li>3. Evaluate the socio economic status of beneficiaries following intervention/support from CATHSSETA;</li> <li>4. Assess employment status of CATHSSETA beneficiaries, including an assessment of the promotion and/or absorption rate of beneficiaries into the labour market;</li> <li>5. Determine the completion rate of Learnerships, Bursaries, Internships, Artisans, WIL interventions and Skills Programmes;</li> <li>6. Evaluate alignment of supply and demand of skills in the labour market within the CATHSSETA subsectors;</li> <li>7. Assess the relevance of qualifications and services rendered by CATHSSETA;</li> <li>8. Assess the impact of training interventions on employers of the various subsectors within the scope of CATHSSETA;</li> <li>9. Assess whether CATHSSETA interventions have positively impacted the lives of beneficiaries and the social impact on their families and social surroundings</li> </ol>	Research Commissioned	1 July 2019 – 31 July 2020

Name of study	Purpose of Study	Main objectives of the study	Research Mechanism	Valid for Period
Training Analysis	The aim of this report is to provide an analysis of training achieved by the sector through a comparison of training planned in the previous reporting period with training achieved in the current reporting period.	Determine the number of learners trained against planned training in the previous reporting period as per Mandatory Grant data	Internal Research	1 March 2019 – 31 March 2020

*\*Note that due to budget constraints the Tracking and Tracing study is subject to review. As a result the study might not be conducted in the 2019/20 financial year as planned*

### **3. PURPOSE OF RESEARCH AGENDA**

The Research Agenda sets out the research needs of CATHSSETA for the period 1 April 2019 to 31 March 2020. The purpose of the research agenda is to help organise and prioritise research requests and to improve the quality of data and information available within the CATHSSETA sector. It provides a mechanism for building research capacity and a guide for the allocation of resources for research and the strategic actions that will be undertaken to achieve the stated goals.

### **4. CONCEPT OF RESEARCH**

For the purposes of the Research Agenda, the term “research” is taken to mean rigorous and systematic enquiry and analysis. Such research may be empirical or theoretical, quantitative or qualitative and applied or basic.

### **5. RESEARCH POLICY NEXUS**

The relationship between research and evidence based policy decision making is a complex one. There seemingly appears to be a more indirect influence of research on policy, process and practice. Research provides much needed insight into the CATHSSETA sector, its workings and skills requirements. There is a need for a sustained dialogue between researchers and users of research in cultivating a practice of employing research-based evidence in the policy process.

### **6. CATHSSETA AND THE RESEARCH COMMUNITY**

The nature of research may vary in complexity and scale. CATHSSETA aims to achieve the priorities of its research themes/topics through the implementation of the following actions:

- 6.1. Commission research: Research commissioned through the appointment of research partners, whose terms of reference are specified by CATHSSETA as part of the research theme/topic outlined in this strategy.
- 6.2. Research Partnerships: Research projects undertaken in partnership with other public entities or government departments aligned to CATHSSETA’s research priorities.
- 6.3. Post Graduate Research Partnerships: Partnerships with public South African Universities by means of Memorandums of Understanding which outline both research

collaboration areas and research grants. Postgraduate students from the identified universities will receive research grants to carry out research in areas pertaining to skills development and training and broader topics relevant to the CATHSSETA sector. The CATHSSETA research partnerships will focus on proposing and supporting a university-based research programme that will:

- Refine and where necessary develop new methods for collecting sector skills information that can be used on an ongoing basis for improved skills planning.
- Gather and analyse Sectoral information to establish baselines or updates on current information, using rigorous processes that can then be applied on an ongoing basis for improved skills planning.
- Study particular issues that are currently proving to be bottlenecks in our understanding, and provide practical frameworks, guidelines or 'maps', where appropriate.
- Evaluate pilot skills development initiatives in order to inform further roll-out, adaption or step-changes.
- Produce practical reports (in addition to academic theses) to inform sector skills development initiatives.
- Contribute to the strengthening of recognised centres of expertise in Human Capital Development in the respective sub-sectors.
- Contribute to the building of a cadre of high level Human Capital Development skills specialists in the country to seed the expansion of Human Capital Development expertise into sector organisations and universities.

## **7. RESEARCH PRIORITIES**

The 2019/20 SSP has identified the following key skills development priorities for the sector:

- i. Qualification review
- ii. Training provision
- iii. Technological advancement
- iv. Analysis of skills needs
- v. Workplace-based learning and experiential learning
- vi. Mentoring and coaching
- vii. TVET capacity building
- viii. Increased partnerships
- ix. Transformation in the sector



In addressing these priorities, the research agenda comprises the following six (6) themes/topics that have been aligned to the key imperatives of the White Paper on Post School Education and Training and the DHET's research agenda. The listed themes/topics are complementary and are not exhaustive:

- 7.1. Tracking and Tracing study
- 7.2. Skills Forecasting Study: Fourth Industrial Revolution
- 7.3. Organising Framework for Occupations Study
- 7.4. Research Partnerships with HEIs through Post Graduate studies in areas of need
- 7.5. Impact Assessment
- 7.6. Training Analysis

## **8. RESEARCH FUNDING AND PROCUREMENT**

- 8.1 Research partnerships are critical in meeting CATHSSETA's research priorities. CATHSSETA will explore and initiate partnerships with researchers and research to meet the research needs of the sector.
- 8.2 To support the objectives of the research policy, a research grant shall be awarded to a specialised unit or faculty of a public University or University of Technology to conduct sector-based research for CATHSSETA.
- 8.3 Research funding shall be sourced from the CATHSSETA Discretionary Grant.
- 8.4 Research projects shall be funded within minimum and maximum thresholds, subject to budget availability.
- 8.5 Funding of research shall be for research projects commissioned by CATHSSETA.
- 8.6 CATHSSETA shall issue the Terms of Reference (ToRs) for any research required in terms of the PFMA and supply chain management processes for public entities. These ToRs serve as guidelines, establish the minimum requirements for research projects and research costs that will be covered by CATHSSETA.

## **9. CONCLUSION**

This Research Agenda has been developed with the aim of addressing and supporting the eight NSDP outcomes and the nine NSDP Principles in order to set up a credible mechanism for skills planning for the CATHSSETA sector. The purpose is to both strengthen the organisation's research capacity and ensure that CATHSSETA serves as the repository of skills development knowledge in the sector. The achievement of these research priorities through the approaches stated above will enable CATHSSETA to be acknowledged as the credible authority for skills planning and development in the sector.