



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

SECTOR SKILLS PLAN

2020/21 - 2024/2025

2023/24 UPDATE



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA





FOREWORD BY THE CHAIRPERSON OF THE ACCOUNTING AUTHORITY

I have the pleasure of presenting to you the Sector Skills Plan (SSP) update for the Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA), for the period 2023 – 2024.

The year under review has generally been a good year for the sector. The gradual reopening of the South African economy witnessed a 4.9% increase in real GDP in the 2021 calendar year, following a decrease of 6.4% in 2020. Our sector also benefited from this welcome development with the Tourism and Travel Services sub-sectors registering phenomenal growth as international arrivals more than doubled to over 130% in January 2022, compared to the same period in 2021. In the Hospitality sub-sector, revenue from accommodation increased by 98.3% in February 2022 as compared to the same period in 2021. The SETA has also seen an increase in total levies received in the 2021/22 financial year compared to the previous year.

However, despite the economic revival of 2021, the local macroeconomic outlook has deteriorated alongside global challenges to economic growth. High interest rates, increasing inflation, ongoing power cuts together with severe flooding in Kwa-Zulu Natal are some of the downside risks to South Africa's economic outlook. In addition, South Africa's youth continue to be disadvantaged in the labour market, with an unemployment rate higher than the national average. For instance, in the first quarter of the 2022 calendar year, the unemployment rate was 63.9% for those aged 15-24 and 42.1% for those aged 25-34 years, while the current official national rate stands at 34.5%. It is for this reason that the SETA will seek to develop strategies to address the problem of youth unemployment and come up with alternative approaches to empower and capacitate youth to play an active role in the economy.

The SETA will continue to adjust and seize the opportunities presented by the impact of the pandemic such as trends in remote work, e-commerce and automation. The sector will continue to reconfigure itself by leveraging opportunities presented by technological advancements and the Fourth Industrial Revolution (4IR). For instance, technologies such as computer-aided design and improved audio-visual software play a role in the creation and distribution of creative work in the Arts, Culture and Heritage sub-sector. In the Gaming and Lotteries sub-sector, augmented reality (AR) and virtual reality (VR) are used in virtual games and casinos, blockchain improves the security of transactions whilst gene sequencing and nanotechnology are improving the performance of athletes in Sports, Recreation and Fitness.

The sector will continue to work towards striking a healthy balance between the adoption of technology and automation on the one side and investing in the education and skilling of our people. The 4IR presents the sector with many opportunities due to various technological advancements. However, without the necessary skills set in place, we risk falling behind. Skills development from the bottom up therefore becomes critical in enabling the sector to take advantage of these advancements. If the labour market is continuously skilled to reach higher levels of education, we will be able to address skills gaps right through from elementary workers to highly skilled technicians and professionals. The sector further needs to be equipped with digital skills and explore innovative approaches to training delivery. Our efforts should not just be to build technical skills, but also to use technology to extend and enrich educational experiences across the curriculum. Increased interest in e-learning has provided an unprecedented opportunity to reflect on current and past practices in education and to establish a dialogue among practitioners and researchers to guide the future of e-learning in the sector.

Such engagements will assist in informing the type of technological requirements that need to be considered, subject domains that are possible for e-learning, the role of lecturers, assessment approaches that would work best for the sector, and industry best practices.

The SETA has had significant success in implementing partnership projects in the sector. CATHSSETA continues to partner with the National Student Financial Aid Scheme (NSFAS) to increase the funds available for student loans and bursaries through the Scheme, particularly for the “missing middle” category of learners. The SETA awarded R30 million to NSFAS for the provision of bursary funding to learners at various public institutions of higher learning. In this project, NSFAS is awarding bursaries to qualifying final year “missing middle” students studying for qualifications aligned to the sub-sectors of the CATHSSETA.

In addition, the SETA has identified the need to enter into partnerships with universities and Universities of Technology (UoT) to create platforms for knowledge and information sharing as well as collaborate on the execution of innovative research on emerging trends in the sector. Research is central in providing evidence to inform policy formulation and the design of programmes aimed at improving systems and services within the SETA.

In support of the Economic Reconstruction and Recovery Plan (ERRP), the SETA is guided by the Department of Higher Education and Training’s (DHET) Skills Strategy called the Economic Reconstruction and Recovery Skills Strategy (ERRSS), which focuses on the following priorities:

- The funding of learners enrolled in Work Based Learning (WBL) in occupations in demand;
- The provision of funding to support Technical Vocational Education and Training (TVET) colleges, universities and Community Education and Training (CETs) colleges that seek to increase enrolment in targeted programmes; and
- The development of occupationally based qualifications.

In conclusion, I would like to thank the Honourable Minister, Dr B.E. Nzimande for his leadership during this time of uncertainty. Although the economy has opened up, we urge our stakeholders to exercise caution, adhere to regulations and find innovative ways to contain the virus. We look forward to improving on how best we can implement our mandate and build on our successes to contribute positively to the economic reconstruction and recovery of our country.

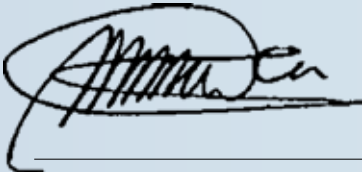


Mr David Themba Ndhlovu
Accounting Authority Chairperson

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, the contents of the Sector Skills Plan update for the period 2023 - 2024.

Approved by:



Mr Marks Thibela
Chief Executive Officer



Mr David Themba Ndhlovu
Accounting Authority Chairperson

ABBREVIATIONS AND ACRONYMS

Accord	National Skills Accord
AGSA	Auditor-General South Africa
AG	Auditor-General
BCEA	Basic Conditions of Employment Act No. 75 of 1997 as amended
BUSA	Business Unity South Africa
APP	Annual Performance Plan
B-BBEE	Broad-Based Black Economic Empowerment Act No. 53 of 2003 as amended
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority
CBO	Community-Based Organisation
CET	Community Education and Training
CIMS	CATHSSETA Information Management System
Constitution	Constitution of the Republic of South Africa, Act No. 108 of 1996 as amended
COVID-19	Coronavirus was declared a Pandemic by the World Health Organisation
DHET	Department of Higher Education and Training
DSI	Department of Science and Innovation
EC	Eastern Cape
EEA	Employment Equity Act No. 55 of 1998 as amended
ERRP	Economic Reconstruction and Recovery Plan
ERSS	Economic Reconstruction Skills Strategy
ETI	Employment Tax Incentive
FS	Free State
DPME	Department of Planning, Monitoring and Evaluation
HEI	Higher Educational Institution
GDP	Gross Domestic Product
GP	Gauteng Province
ICT	Information and Communications Technology
KZN	KwaZulu-Natal
LC	Labour Court
LAC	Labour Appeal Court
LRA	Labour Relations Act No. 66 of 1995 as amended
Minister	Minister of Higher Education, Science and Innovation
MOU	Memorandum of Understanding
MP	Mpumalanga Province
MTSF	Medium-Term Strategic Framework
NDP	National Development Plan of 2030
NGO	Non-Governmental Organisation
NHRDSSA	National Human Resources Development Strategy of South Africa
NOLS	National Open Learning System
NPO	Non-profit Organisation
NPPEST	National Plan for Post-School Education and Training
NQF	National Qualifications Framework

NQFA	National Qualifications Framework Act No. 67 of 2008 as amended
NSDP	National Skills Development Plan of 2030
NSF	National Skills Fund
NW	North West Province
PESTEL	Political, Economic, Social, Technological, Environmental and Legal
PFMA	Public Finance Management Act No. 1 of 1999 as amended
PIVOTAL	Professional, Vocational, Technical and Academic Learning
PMN	Pathway Management Network
POPIA	Protection of Personal Information Act No. 4 of 2013
PPPFA	Preferential Procurement Policy Framework Act No.5 of 2002 as amended
President	President of the Republic of South Africa
PYEI	Presidential Youth Employment Initiative
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority
SARS	South African Revenue Service
SDA	Skills Development Act No. 97 of 1998 as amended
SDLA	Skills Development Levies Act No. 9 of 1999
SDL	Skills Development Levy
SETA	Sector Education and Training Authority
SITA	State Information Technology Agency
SLA	Service Level Agreement
SMME	Small Medium and Micro Enterprises
SONA	State of the Nation Address
SP	Strategic Plan
SSP	Sector Skills Plan
SWOT	Strengths, Weaknesses, Opportunities, Threats
TVET	Technical, Vocational Education and Training
UoT	University of Technology
WBL	Workplace Based Learning
WC	Western Cape
WIL	Work Integrated Learning
WHO	World Health Organisation
WPPSET	White Paper on Post-School Education and Training
WRP	Work Readiness Programme
WTO	World Trade Organisation
4IR	Fourth Industrial Revolution

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EXECUTIVE SUMMARY

CATHSSETA has compiled the SSP update for the 2023/24 financial year. This SSP is prepared in accordance with Section 10 (1) (a) of the Skills Development Act No. 97 of 1998 as amended (SDA), which mandates the SETA to develop an SSP within the Framework and Guidelines included in the National Skills Development Plan (NSDP), 2030, for the period 2020 to 2030, as well as requirements set out by the DHET SSP Framework and Guidelines. The key policy drivers identified and considered in this SSP are the National Development Plan (NDP), 2030, the White Paper for Post-School Education and Training, the SETA Grant Regulations, 2012, and the NSDP. Other 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 (THRD) Strategy, the Lotteries Act No. 57 of 1997 as amended, and the South African ERRP.

CATHSSETA is organised into six (6) sub-sectors, namely: (a) Arts, Culture and Heritage; (b) Conservation; (c) Gaming and Lotteries; (d) Hospitality; (e) Sports, Recreation and Fitness; and (f) Tourism and Travel Services, 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 Gauteng, the Western Cape and KwaZulu-Natal. The number of entities shows a decrease from 40 963 in 2020/21 to 31 994 in 2021/22 financial years, amounting to a decrease of 8 969 entities in the sector (22%). While the total number of entities registered with CATHSSETA has decreased, the percentage contribution of the Arts, Culture and Heritage, as well as that of the Tourism and Travel Services sub-sectors have increased by 3% and 1% respectively. This is consistent with the results of the COVID-19 research study on the impact of the pandemic in the sector where it was found that 60% of businesses in the sector retrenched employees, with 36% retrenching between 6% and 25% of their workforce.

Relative to the previous years, significant strides have been made towards greater representation and overall transformation of the sector. However, while most employees in the sector are African females, the vast majority occupy lower occupational groups, indicating a need for further transformation of the sector. Most employees in the sector are classified as youth (under 35 years), indicating that the SETA needs to prioritise and support the development of youth in the various sub-sectors.

There are also change drivers which influence the supply and demand of skills, either positively or negatively. The change drivers identified are the COVID-19 pandemic, technology and the digital divide, the gig economy, the green economy, remote learning and digital connectivity. CATHSSETA takes into consideration these drivers of change and their implications on skills development, by directing relevant learning programmes and interventions to support and/or mitigate their effects.

The analysis of the demand and supply of skills within the sector is assessed utilising Mandatory Grant (MG) data as well as inputs from stakeholder engagements. The analysis and interpretation of the consolidated inputs are augmented by research conducted by CATHSSETA and its partners. The data is analysed using descriptive statistics and presented in the form of tables, graphs and summary statistics. Trend analysis, based on historical data, combined with consultation inputs for comparison across different categories and over various periods, is conducted. The recognition of priority skills is based on the occupations identified as experiencing shortages. The identified occupational shortages are a function of two determinants: the number of vacancies in the sector and the degree of scarcity of vacancies identified.

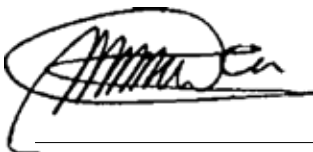
To support the industry's success and to facilitate the growth of the sector, industry partners must work together to ensure access to skilled labour. In response to this, this SSP will contribute to the following skills development priorities in the sector:

1. The Fourth Industrial Revolution (4IR);
2. Training provision (skills supply, quality assurance: accreditation, assessment, certification and training providers);
3. Analysis of skills needs (research projects and qualifications review);
4. Increased partnerships to include worker-initiated interventions;
5. Sector advancement (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);
9. Technological advancements to combat the impact of the COVID-19 pandemic; and
10. Sector transformation (partnership projects for transformation imperatives).

The SSP contains six chapters. Chapter 1 presents the profile of the sector and examines the six sub-sectors in terms of scope, key role-players, economic performance and labour market profile. Chapter 2 identifies key skills issues in the sector and their implications for skills planning, together with the policy frameworks affecting the demand and supply of skills in the sector. Chapter 3 considers the demand and supply of skills and includes the identification of occupational shortages and skills gaps in the sector. Chapter 4 provides an outline of sector partnerships that CATHSSETA currently has in place, as well as new partnerships that are required.

Chapter 5 reflects on the SETA's performance in the previous financial year. Chapter 6 summarises key findings from the previous chapters and identifies the SETA's strategic skills priorities.

Approved By:



Mr Marks Thibela
Chief Executive Officer



Mr David Themba Ndhlovu
Accounting Authority Chairperson
Date:

RESEARCH PROCESS AND METHODS

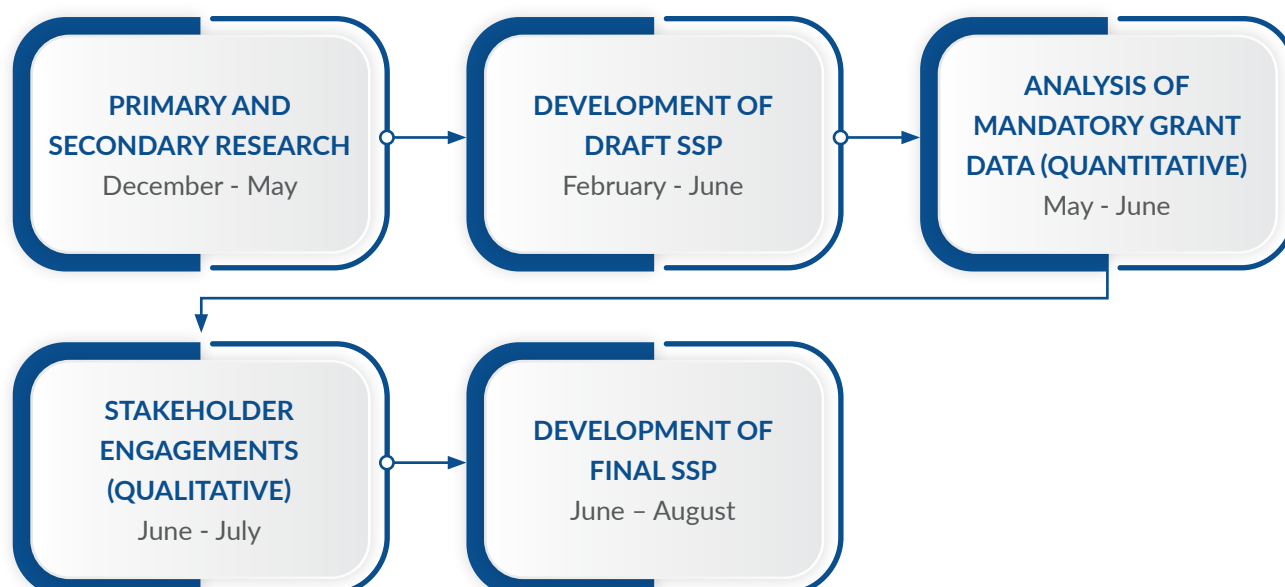
This section details the research process and methods CATHSSETA used in updating the SSP for the 2023/24 financial year. The process entailed using both qualitative and quantitative research methodologies to conduct primary and secondary research to inform the findings in the SSP. The SETA conducted desktop research using secondary data sources to examine economic performance in the country and key skills issues affecting the sector. These secondary data sources include GDP performance figures from Statistics South Africa (Stats SA), the World Tourism and Travel Services Council (WTTC), the NGB and information from the Department of Planning, Monitoring and Evaluation (DPME), amongst others. Qualifying employers are expected to submit their Mandatory Grant applications by the 30th of April. The MG applications contain specified data that is key to understanding the labour market profile of the sector. The MG data is also important for understanding the skills and occupational needs of employers in the sector.

Between June and July 2022, the SETA facilitated stakeholder engagements in the form of qualitative focus group sessions and in-depth key informant interviews to validate the results of the draft SSP for the 2023/24 financial year.

Data sources for the desktop research on the economic, social and developmental status of the sector includes data and publications from the Higher Education Management Information System (HEMIS), industry regulators and entities such as the National Gambling Board (NGB) and South African Tourism (SAT). Primary sources of data include MG data (previously known as the Workplace Skills Plan and Annual Training Report), the CATHSSETA Information Management System (CIMS), as well as internal and external stakeholder consultative sessions to elicit further input were also used to substantiate the research findings.

The process outlined in Figure 1 below is followed in updating the SSP every year. The updating of the SSP typically begins in February of each year and continues until the final draft is submitted to DHET on the 1st of August.

FIGURE 1: SECTOR SKILLS PLAN UPDATE AND DATA COLLECTION CYCLE



The table below outlines the research conducted by CATHSSETA during the 2021/22 financial year.

TABLE 1: CATHSSETA RESEARCH STUDIES, 2021/22

RESEARCH TOPIC	TYPE OF STUDY	OBJECTIVES OF STUDY	DATA COLLECTION TOOL	SAMPLE SIZE AND SCOPE OF STUDY	DATA SOURCES	TIMEFRAME
Impact of the Fourth Industrial Revolution (4IR) on the six sub-sectors within CATHSSETA	Qualitative Study	<ul style="list-style-type: none"> To assess the impact that the 4IR has on the six sub-sectors within CATHSSETA 	Desktop research – document analysis and review and in-depth interviews	12 4IR published experts; 100 employers	CATHSSETA stakeholder database and publications	Jan – Sept 2021
Impact of COVID -19 on CATHSSETA-sub-sectors	Mixed-Method Study	<ul style="list-style-type: none"> To examine the extent to which COVID-19 has affected training provision in the sector; To assess the economic performance of the CATHSSETA sub-sectors amidst the COVID-19 pandemic To determine ways to mitigate the effects of COVID-19 on training provision and skills development in the sector 	Desktop research, in-depth interviews, focus groups and surveys	636 employers, SDFs and training providers, learners, and industry experts		Nov 2021 – May 2022
Sector Analysis for Arts, Culture and Heritage (ACH), and Sport, Recreation and Fitness (SRF) sub-sectors	Qualitative Study	<ul style="list-style-type: none"> Provide an in-depth analysis of the ACH and SRF sub-sectors to understand their economic performance and labour market profile and how the sub-sectors have been evolving to identify new trends that will inform CATHSSETA qualifications and programme offerings. 	Desktop research – document analysis and review and in-depth interviews	18 industry experts		Nov 2021 – Apr 2022
Feasibility Study: Implementing e-Learning in the Sector	Mixed-Method Study	<ul style="list-style-type: none"> To examine the feasibility of e-learning implementation as an alternative mode of training in the sector. 	Desktop research, in-depth interviews and surveys	147 providers, employers and learners		Jan – April 2022

RESEARCH TOPIC	TYPE OF STUDY	OBJECTIVES OF STUDY	DATA COLLECTION TOOL	SAMPLE SIZE AND SCOPE OF STUDY	DATA SOURCES	TIMEFRAME
Track and Trace Study	Quantitative Study	<ul style="list-style-type: none"> To determine the destinations of learners who have completed learnerships, internships and apprenticeships; To understand the factors associated with employment/unemployment; To understand the intricacies of the articulation of qualifications into occupations; To determine the nature of employment of learners who received employment; To pilot a survey of the perceptions of employers on the value of learnerships, apprenticeships and internships. 	Desktop research and surveys	1160 learners, 40 employers.		August 2020-January 2022

A range of data has been used to develop this SSP. These sources are:

1. MG application data is collected using the CIMS. Data from stakeholders registering and applying for various SETA grants on CIMS is also used as additional data to profile the sector. CIMS is also a data storage and reporting facility.
2. Workplace Skills Plan (WSP) data on sector employment, as well as demographic and occupational profiles of employees per sub-sector. The total MG applications submitted in the 2022/23 period amounted to 1 183. The data for MG was collected based on the Organising Framework for Occupations (OFO), version 2021.
3. National data sources include the HEMIS, maintained by DHET, publications and reports by the WTTTC, the NGB and SAT, as well as research conducted by other government departments, national research institutions and industry publications.
4. Another newly developed and useful dataset is the Tourism Satellite Account (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 the evaluation of their efficiency.
5. CATHSSETA, together with the relevant national and provincial government departments in the sector, conducts research to ensure that sufficient data is available to accurately analyse the labour market and the skills needs of the sector.
6. Findings from online and telephonic consultations with key sector stakeholders have been incorporated in the final SSP update. Internal stakeholders (regional managers and relevant governance structures) have also provided input.



CHAPTER 1: ECONOMIC SECTOR PROFILE

1.1. Introduction

This chapter provides an overview of the composition of the sector, including a profile of the sector's key role-players, economic performance, employer profile and labour market profile. Key data sources include MG data, national statistics and sub-sector strategies.

1.2. Scope of Coverage

CATHSSETA clusters 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; as well as Tourism and Travel Services. 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 six sub-sectors fall within the broader services sector of the economy.

The tourism sector is not measured as an industry in national accounts, since 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). Stats SA explains that the tourism industries are classified according to the goods and services they produce, whilst tourism is a consumption-based concept depending on the status of the consumer.

The SETA landscape for NSDP 2030 is promulgated in the Government Gazette of July 2019, which re-established SETAs from 1 April 2020 to 31 March 2030. The Gazette places 62 SIC codes within CATHSSETA's scope of activity, as listed in table 2.

TABLE 2: SIC CODES AND DESCRIPTIONS PER SUB-SECTOR

CONSERVATION	
11520	Hunting and trapping, including related services
96333	Game parks, reserves, including but not limited to, wildlife, parks, zoological or animal parks and botanical gardens
96334	Activities of conservation bodies
96335	Wildlife conservation, including wildlife, game, parks, game reserves, zoological establishments, botanical gardens
ARTS, CULTURE AND HERITAGE	
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 not elsewhere classified (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
GAMING AND LOTTERIES	
96419	Operation and management of horse-racing events and clubs and academies
96494	Gambling, licensed casinos and the national lotteries, but not limited to bookmakers, totalisators, casinos, bingo operators
HOSPITALITY	
64101	Hotels, motels, boatels and inns registered with SA Tourism Board
64102	Caravan parks and camping sites
64103	Guest houses and guest farms
64104	Hotels, motels, boatels and inns not registered with the SA tourism board
64105	Bed-and-breakfasts
64106	Management and operation of game lodges
64201	Restaurants or tearooms with a liquor license
64202	Restaurants or tearooms without a 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, nightclubs
64209	Other catering services N.E.C
84111	Timesharing
88994	Bioscope cafes
96195	Operation and management of convention centres
SPORT, RECREATION AND FITNESS	
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 the 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 sports academies
96413	Promotion and management of sporting events and activities
96415	Management and operation of non-motorised sporting activities
96417	Sporting activities, including, but not limited to, sports federations
96418	Management and operation of motorised sporting activities
96491	The operation and management of recreation parks and beaches, fairs and shows of a recreational nature and recreational transport activities

TOURISM AND TRAVEL SERVICES	
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, including car rentals
8899A	Event and conference management
96195	Operation and management of convention centres
96336	Tourist info centres
99028	Car hire
99048	Tourism authorities, including, but not limited to, tourism marketing, tourist information centres, publicity associations
99049	Guides, including tourist river, mountain etc.

1.3. Key Role-Players

The sector is a regulated industry and has several key role-players, ranging from regulatory institutions and employer representatives, to organised labour associations. Table 3 outlines CATHSSETA role-players and their contribution to the sector. Their contributions range from paying skills levies, supporting SETA partnerships, representing the interests of the state to supporting skills development through various learning interventions, such as providing workplace mentorship and coaching. Key role-players also provide CATHSSETA with the data and strategic information necessary for planning skills development interventions.

TABLE 3: CATHSSETA KEY STAKEHOLDERS

NATIONAL DEPARTMENTS		
Outcome 8 of the NSDP: Support Career Development Services. Encourages the SETA to facilitate accessible career development opportunities. The SETA has partnered with various Departments, including the National Department of Tourism for the National Tourism Careers Expo; Limpopo's Economic Development, Environment and Tourism Department for the Marula Festival; and DHET on the Mandela Day Career Development Festival.		
Department	Role	Role in CATHSSETA
Department of Higher Education and Training	Higher education and training, skills development	Skills development policy and regulation, planning for higher education and training, co-operation and resources; research development and support; and socio-economic innovation.

Department	Role	Role in CATHSSETA
Department of Sports, Arts and Culture	Policy and Regulation within the Sports, Arts and Culture sub-sector	Contributes to the SETA administration fee. The 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.
Department of Tourism	Policy and regulation, which is, amongst other things, providing a National Tourism Sector Strategy	Contribution to the SETA administration fee, and, through the National Tourism Sector Strategy (NTSS), advocates the Tourism Human Development Strategy.
Department of Environment, Forestry and Fisheries	Policy and regulation, Custodian of the Industrial Policy Action Plan (IPAP)	Instrumental in driving the Environmental Sector Skills Plan, since 2010.
Department of Employment and Labour		Through Sectoral Determination and all labour matters in the SETA workplace.
Department of Trade and Industry		Trade policy regulation and industry development, responsible for the gaming sector.

EMPLOYER INTEREST GROUPS

Outcome 2 of the NSDP: Linking education and workplace. Encourages employers to open workplace learning opportunities for students and graduates completing qualifications in the sector. Outcome 2 together with Outcome 5: Support the growth of the Public College system to further encourage collaboration with TVET Colleges for the facilitation of TVET lecturer workplace exposure.

Employer Interest Groups	Role	Role in CATHSSETA
Federated Hospitality Association of Southern Africa (FEDHASA)	Employer interest, regulations, professional standards and training	Industry representation and partnerships within the Hospitality sub-sector.
South African Football Association (SAFA)	Single major sports body in the country, regulating national professional football	Football industry representation and the promotion of skills development.
Tourism Business Council South Africa (TBCSA)	Promotes interests of the private sector within the tourism industry	Watchdog for the private sector within the area of tourism and the promotion of skills development.
Visual Arts Network of South Africa (VANSA)	A national network of artists and arts organisations	Develops industry knowledge, resources and networks, including skills development and professional standards.
South African Chef Association (SACA)	A network of chefs, cooks and culinary professionals	Promotes the art and science of cooking by sharing knowledge and teaching skills development.
Employers	Various employers from the six sub-sectors	Open workplace learning opportunities for students and graduates completing qualifications in the sector.

PUBLIC ENTITIES

Outcome 1 of the NSDP: To identify and increase production of occupations in demand. It outlines various sub-outcomes aimed at increasing the identification and increase of priority occupations and qualifications in the sector. CATHSSETA is part of a post-school education and training (PSET) research forum, together with other public entities in the PSET sector, to encourage learning and best practice approaches for labour market intelligence and the identification of skills needs.

Public Entity	Role	Role in CATHSSETA
National Skills Authority	Provides oversight	Monitoring and accountability.
National Skills Fund	Funding responsibility	Funding support to the sector.
South African Qualifications Authority	Registers and maintains standards for qualifications	CATHSSETA registered qualifications.
Quality Council for Trades and Occupations (QCTO)	SETA qualification's authority	Occupational qualifications; accreditation of skills development providers.
Sector Education and Training Authorities (SETA)	Facilitation of skills development and funding	SETA partnerships, cross-SETA MoUs for qualifications and accreditation.

ORGANISED LABOUR

Outcome 7 of the NSDP: Encourage and Support Worker-Initiated Training. Encourages skills levy-paying institutions to collaborate with federations/trade unions in identifying skills needs and implementing relevant interventions for the sector.

Organised Labour	Role	Role in CATHSSETA
South African Commercial, Catering and Allied Workers Union (SACCAWU)	Employees' interest group, lobbying labour matters in the commercial and catering sectors	Sector employee representation on the CATHSSETA Accounting Authority. According to a 2019/2020 study on labour union involvement in the sector, 47 labour unions are active in the sector, with some labour unions active in more than one sub-sector.
Hospitality Industries and Allied Workers Union (HIAWU)	Employees' interest group, lobbying labour matters in the Hospitality sector	
Hotel, Liquor, Catering, Commercial and Allied Workers Union of South Africa (HOTELLICA)	Employees' interest group, lobbying labour matters in the hotel and catering sector	
Creative Workers Union of South Africa (CWUSA)	Employees' interest group, lobbying labour matters in the creative arts sector	
South African Football Players Union (SAFPU)	Employees' interest group, lobbying labour matters in the football sector	
Accounting Authority representation	Represents the interests of its members as employees in the sector	

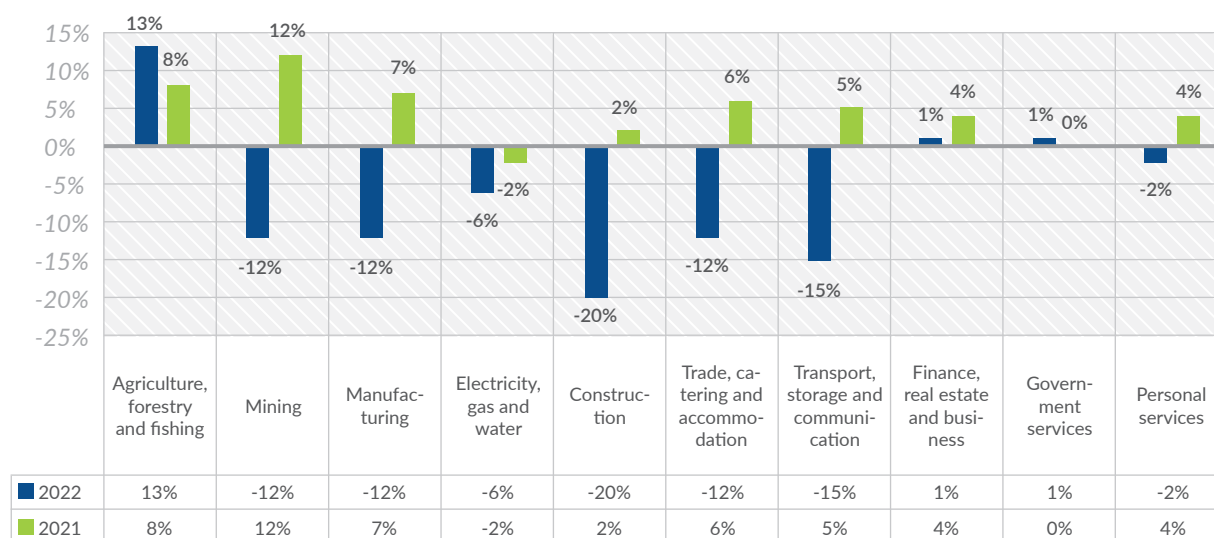
TRAINING PROVIDERS		
Outcome 5 of the NSDP: Support the growth of the Public College System. Advocates SETA support for TVET Colleges and Community Education and Training (CET) Colleges in implementing occupationally directed programmes.		
Training Providers	Role	Role in CATHSSETA
Universities	Provides higher education and training	To offer training services to CATHSSETA stakeholders, particularly at higher National Qualifications Framework (NQF) levels. Service delivery vehicle for the SETA.
TVET Colleges	Provide technical, vocational and occupational skills	To offer training services to CATHSSETA stakeholders for technical and vocational skills. Service delivery vehicle for the SETA.
SETA accredited providers	Provide occupational skills training	To offer full and part occupational qualifications to employed and unemployed learners, particularly Learnerships, as a service delivery vehicle for SETA.

1.4. Economic Performance

Skills development has many interdependencies such as people, the economy, the environment, political context, technology and legal frameworks. The South African economic and policy outlook is critical in providing an enabling environment for world-class education and training. This section presents the contribution of CATHSSETA sub-sectors to the South African economy and its comparison to the rest of the country's economy.

The outbreak of the COVID-19 pandemic in March 2020 deepened the economic crisis in South Africa due to low levels of investment, loss of income and increased unemployment rates. April 2022 marked approximately 750 days since President Cyril Ramaphosa declared the outbreak of COVID-19 in South Africa a National State of Disaster. Since February 2022, a downward trend has been observed in the number of COVID-19 related illnesses, hospitalisation cases and deaths related to COVID-19, resulting in the lifting of the National State of Disaster on the 5th of April 2022.

After recording one of its deepest contractions (-7%) in 2020, South Africa's real GDP growth bounced back to 4.9% in 2021, driven primarily by a combination of base effects, strong commodity prices, and the gradual reopening of the economy after strict COVID-19 regulations and mobility restrictions (PricewaterhouseCoopers [PwC], 2022). The economic performance of the CATHSSETA sector is difficult to assess due to the lack of a single comprehensive sector database that encompasses the six (6) CATHSSETA sub-sectors. As mentioned earlier, South Africa's economy began to recover in 2021 with the GDP increasing by 4.9% in 2021 following a decrease of 6.4% in 2020 (Stats SA, 2022). The graph below outlines the Stats SA 2021's fourth quarter GDP report, the year-on-year change is reflected for the years 2020 and 2021. The majority of industries recorded an increased growth rate in the year 2021 as compared to 2020. This can be attributed to the economy recovering from the effects of the pandemic at its peak. Industries that recorded the most year-on-year change since 2020 includes Mining, Construction and Transport, Storage and Communication.

FIGURE 2: INDUSTRY VALUE-ADDED AND GDP (2020/2021)

Source: Stats SA (2022)

As reassuring as the 2021 turnaround is, in 2022, economic activity still fails to keep up with pre-pandemic levels and a more sustained economic recovery remains at risk. Against the backdrop of an unstable global growth environment (largely due to economic disruptions caused by the Ukraine crisis, higher food and energy prices, and rising policy rates globally), the local macroeconomic outlook has deteriorated alongside global challenges to economic growth (PwC, 2022).

Contrary to National Treasury's projections of real economic growth of 2.1% in 2022, the Rand lost 8.5% of its value against the US dollar (\$) in April 2022. At the domestic level, this can be due to a combination of local factors, including: (1) higher interest rates; (2) increasing inflation; (3) high unemployment; (4) the return of stage 4 load-shedding; (5) disruptive effects of flooding in KwaZulu-Natal; and (6) new COVID-19 strains amid a low vaccination rate and the COVID-19 test positivity rate further cloud the outlook. As a result, real GDP growth is forecast to remain below 2% in 2023 and 2024, a rate that is not sufficient to address the country's growing socio-economic needs. In the third quarter of 2021, the official unemployment rate rose to 34.9% and the expanded definition—which includes discouraged work-seekers that are no longer searching for job opportunities—reached 46.6% (Deloitte, 2022).

Arts, Culture and Heritage

Most companies practising in the Arts industry operate in the informal economy with hazardous contracting arrangements and are generally small. This means that they cannot easily create, produce, and in most cases, get access to distribution channels that display their work to international, and local markets. Joffe (2021) highlights that human capital and systemic and embedded factors are as much part of the constraints compromising the sub-sector's performance.

The Arts, Culture and Heritage sub-sector sustained substantial losses during the peak of the pandemic. Results from the key informant interviews reveal that close to half of staff were retrenched in the sub-sector and relief funds received from the government were not enough to sustain organisations throughout the pandemic. As a result, businesses still in operation reduced the number of employees due to financial constraints. In addition,

stakeholders further indicated that mitigation measures such as virtual theatre experiences hosted online were costly and did not generate much income for the sub-sector.

With that said, the sub-sector continues to play a significant role in economic growth, job creation and development in South Africa. In 2021, the cultural and creative industries (CCIs) contributed an estimated 7% to total employment in the country, which accounts for approximately 1.14 million jobs (South African Cultural Observatory [SACO], 2021). South Africa's rich and diverse culture and heritage make CCIs, including Tourism and Travel Services, potential boosters to the economy. According to SACO (2021), the contribution of CCIs to the country's GDP has improved significantly since 2020, contributing an estimated R46.9 billion to GDP in 2021, compared to R42.1 billion in 2020. It has also been estimated that a faster economic recovery will take place in the sub-sector from 2022.

South Africa's music industry was also severely impacted by the COVID-19 pandemic. According to the Recording Industry of South Africa (RISA, 2021), independent music labels in South Africa only make up 0.08% of the world's music market, with an estimated revenue of R30 million in 2021. Productions in the film and television industry were also destructed by the peak of the pandemic in 2020, resulting in the total revenue of the industry declining to R2.9 billion in 2021 as compared to R7.2 billion in 2020 (IOL, 2021). Total employment sustained by the industry declined to 12 775 full-time jobs during the financial year 2020/21 as compared to 31 444 during the year 2019/20.

Tourism and Travel Services

The Tourism and Travel Services sector has continued to recover in 2022 compared to a weak start to 2021. As of 2022, the country houses the largest number of UNESCO World Heritage sites on the African continent and ranks among the most popular countries for tourists. In 2020, the Travel and Tourism sector (direct and indirect) contributed approximately 987 400 jobs to the country's total employment (Department of Tourism, 2021).

According to the Tourism 2020 report released by Stats SA, foreign arrivals dropped by 71% from just over 150.8 million in 2019 to less than 5 million in 2020 (Stats SA, 2021). The World Travel and Tourism Council (WTTC, 2022) reported that Tourism and Travel Services contributed 6.1% to the global GDP in 2021. Global international tourist arrivals more than doubled to over 130% in January 2022 compared to 2021. Whilst these figures confirm the positive trend already underway last year, the pace of recovery during the start of 2022 was impacted by the emergence of the Omicron variant and the re-introduction of travel restrictions in several destinations (United Nations World Tourism Organisation, 2022). Comparably at the domestic level, between the period February 2021 to February 2022, Tourism and Travel Services recorded an increase in the number of arrivals, departures and transits for both South African residents and foreign travellers. For South African residents, total arrivals increased by 166.5%, departures increased by 179.5% and transits increased by 233.9%. On the other hand, foreign travellers' arrivals increased by 192%, departures by 191% while transits increased by 348.6% (Stats SA, 2022).

Hospitality

The hotels, catering and restaurants sector is one of the fastest growing sectors of the global economy. It is also among the top-job creating sectors because of its labour-intensive nature and its significant multiplier effect on employment in other related sectors (ILO, 2022). During the period from September 2021, Google's Consumer Insights research tool reported a significant growth in South Africans' interest to visit locally. Searches such as

“things to do”, “weekend getaways”, “flights to and flights from”, and destination-related searches surged by 200% in the past two years.

Similar to the performance of the Tourism and Travel Services sub-sector, Hospitality recorded positive growth in income between February 2021 and February 2022 in South Africa. Revenue from accommodation increased by 98.3% in February 2022 as compared to February 2021. This is as a result of a 59.8% increase in the number of per stay units sold and a 24.1% increase in the average income per stay unit sold. The main contributors to the 98.3% increase in revenue from accommodation are hotels which recorded 131.1% growth in income and 66% total income generated from the accommodation industry (Stats SA, 2022).

Total income generated by the food and beverages industry in February 2022 increased by 17.3% as compared to February 2021. The main contributors to the 17.3% increase were takeaway and fast-food outlets with a 20.8% growth rate and catering services with a 48.2% growth rate (Stats SA, 2022)

Conservation

In Africa, world life tourism including hunting expeditions, safaris and game drives is one of the leading generators of tourist income and represents approximately one third of the total Tourism and Travel Services revenue (Van der Merwe, 2021). Safari tours and other forms of wildlife tourism in Africa generate more than \$29 billion each year. Game reserves as part of the conservation sector also make up the bulk of South Africa’s tourism industry, which indirectly employs some 1.5 million people and contributes 7% of GDP. In the year 2022, South Africa’s share of the wildlife economy currently amounts to \$9.6 billion, and the industry is responsible for employment of approximately half a million people (Wildlife Ranching South Africa [WRSA], 2022).

Africa’s wildlife also attracts considerable foreign investment through funding efforts. Contributors range from multilateral institutions and bilateral funding agencies to private foundations, philanthropists, zoos, and non-governmental organisations (NGOs). COVID-19 disruptions on international tourism cut off critical revenue flows to many wildlife conservation initiatives, and its general effects on the economy have constrained the extent to which governments and multi-lateral agencies can step in and provide subsidies to compensate for these losses (IOL, 2022).

Gaming and Lotteries

CATHSSETA partnered with Wits Enterprise to conduct a Sector Analysis on the Gaming and Lotteries sub-sector in South Africa. Results from the study reveal that, despite the general drop in the number of operators in the Gaming and Lotteries sub-sector between 2016 to 2020, there were some encouraging developments in operational performance. The number of Limited Payout Machines (LPMs), and operational bingo outlets recorded improved performance during the period. While casinos lost approximately 1.4% in gross gaming revenues (GGR) between 2019 and 2020, bingos, LPMs and sports betting gained, respectively, 14.6%, 9.9% and 21.3% during the same period.

South Africa’s gambling industry reported mixed results during the COVID-19 disaster period. The cancellation of traditional gambling and sporting events has seen a decline in the market share of such categories. During the first two (2) months of the national lockdown, the gambling industry saw its revenue collapse by 90% as casinos, LMPs and bingos were closed to the public (Mail and Guardian, 2021). With that said, it is pleasing to note that respondents from the CATHSSETA key informant interviews indicated that the majority of entities (75%) in the sub-sector retrenched less than 10% of employees during the peak of the pandemic.

Online gambling is increasingly taking share from on-the-ground casinos and other betting modes and reported a surge in activity since the national lockdown in March 2020. During the financial year 2020/21, GGR decreased by 28.7% as compared to 2019/20. Sports betting was the only mode that recorded a positive growth of 21.2% in revenue and accounted for 45.6% of total GGR. The contribution of casinos to the GGR dropped by more than 50%, while LPMs and bingos saw a decline in revenues of 33.9% and 39.1%, respectively, compared to the previous financial year (National Gambling Board, 2021).

Sport, Recreation and Fitness

The African continent has realised that sports activities offer an opportunity to diversify the economy. The Sport, Recreation and Fitness sub-sector contributes substantially to national, regional, and local GDP. In 2020, the South African e-commerce, sport and outdoor segments had an estimated value of \$429 million. This industry is expected to grow at an annual rate of 11.6% between 2021 and 2024 as the market for daily sports leisure activities including marathons, motorcycling, and biking is on the rise (Global Africa Network, 2021).

The business of sport, normally robust against most forces, was also severely impacted by the cancellation of major sporting events impacting the contribution of sport to the economy as well as to health and social inclusion. Stakeholder engagements revealed that COVID-19 forced the closure of hundreds of small gymnasiums and sport clubs in South Africa. Several organisations were forced to cut salaries and implement split shifts for workers as they struggled to stay afloat due to lower revenue during the pandemic. Virgin Active, one of South Africa's top gym companies, reportedly cut salaries by up to 75% to mitigate the effects of the pandemic on the business. However, with the relaxation of COVID-19 regulation and the return of spectators to sporting events, the Sports Global Market Report (2021) estimates that the global sports market is expected to grow by 40% from \$354.96 billion in 2021 to \$501.43 billion in 2022. The main contributing factor to the expected annual growth is that sporting companies are re-arranging their operations and recovering from the impact of COVID-19. It is further anticipated that the global sports industry revenue will reach approximately \$599 billion by 2025 (Research and Markets, 2021).

The Small, Micro and Medium Enterprises (SMME) Sector

SMMEs represent approximately 98% of businesses in South Africa, employing approximately 50% of the country's workforce across all sectors. CATHSSETA sub-sectors constitute a large share of the overall number of SMMEs in South Africa. Consistent with this, 95% of entities under CATHSSETA are categorised as SMMEs, and economic growth is strongly linked to small business development. Globally, over 95% of enterprises are SMMEs, which employ 60-70% of the total working population (Mail and Guardian, 2021). Domestically, SMMEs account for 42% of the National GDP. The NDP envisioned that by 2030, SMMEs will account for approximately 60-70% of the National GDP and be responsible for 90% of the new jobs in the South African labour market (Mail and Guardian, 2021).

During the peak of the COVID-19 pandemic, the majority of small businesses did not have the financial capacity to deal with the economic and financial challenges they faced as a result of the restrictions imposed. The research found that during the first five (5) months of the national lockdown in 2020, existing debts and a lack of cash reserves resulted in the closure of 42.7% of small businesses in South Africa (BusinessTech, 2020). Both the State of the Nation Address and the Budget Speech emphasised the importance of supporting and rebuilding the SMME sector. The President emphasised the importance of reducing red tape in supporting SMMEs, and this initiative is led by the Presidency.

On the 26th of January 2021, the National Department of Tourism in collaboration with the Small Enterprise Finance Agency (SEFA) launched the Tourism Equity Fund (TEF). TEF is an equity fund which aims to support small-scale stakeholders in the industry funded through government departments and South Africa's major banks. The TEF provides financial assistance to enterprises with a Black Economic Empowerment (BEE) status to drive transformation from a pool of R1.2 billion to advance equitable opportunities in the sector and ensure inclusive economic activity in the Tourism sector through finance acquisitions, developments, and expansion projects.

The Department of Small Business Development (DSBD) has also commenced with the Business Recovery Support Programme and reprioritised the Business Viability Scheme. As of January 2022, the Programme has already committed R192.6 million for 195 deals and disbursed R123.5 million for 114 deals. The Budget Speech announced changes to the Employment Tax Incentive and encouraged small businesses to use the Employment Tax Incentive and hire qualified individuals to help alleviate unemployment and boost the economy. As per the 2022 Budget Speech, the Employment Tax Incentive (ETI) has been extended to 28 February 2029. The ETI is aimed at supporting the private sector in the employment of young people from the age of 18 to 29 years who have a South African identity document. SMMs who employ the qualifying employees can claim ETI for qualifying employees for a maximum of 24 months, during the period in which the employee is employed (SARS, 2022)

1.5. Employer Profile

Information on the number and size of entities registered with CATHSSETA was sourced utilising CATHSSETA's SARS Huge File. The figures are presented in the table below.

TABLE 4: NUMBER 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+)		
Arts, Culture and Heritage	2 355	34	18	2407	8%
Conservation	1 568	19	6	1593	5%
Gaming and Lotteries	394	16	27	437	1%
Hospitality	20 658	405	109	21 172	66%
Sport, Recreation and Fitness	2 479	34	12	2526	8%
Tourism and Travel Services	3 801	42	17	3 860	12%
Total	31 255	550	189	31 994	100%
	97%	2%	1%	100%	

Source: CATHSSETA SARS Hugefile, 2022/23

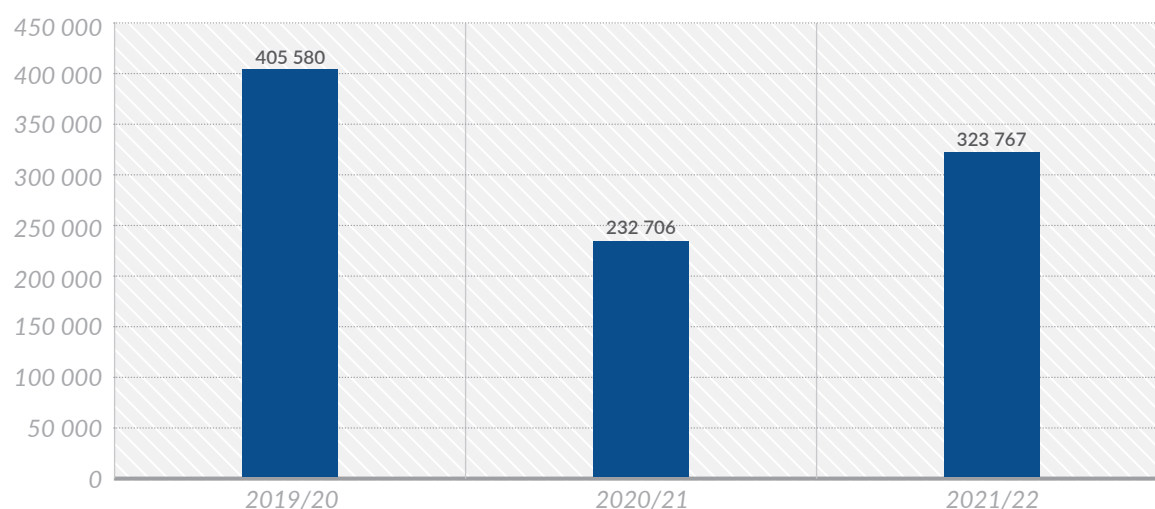
The number of entities shows a decrease from 40 963 in 2020/21 to 31 994 in 2021/22, amounting to a decrease of 8 969 (22%) entities in the sector. While the total number of entities registered with CATHSSETA has decreased, the percentage contribution of the Arts, Culture and Heritage, as well as the Tourism and Travel Services sub-sectors, has increased by 3% and 1% respectively.

During the 2021/22 financial year, the SETA conducted a study on the impact of COVID-19 on the sector where it was found that 93% of businesses were negatively impacted by the COVID-19 pandemic, with 94% of businesses indicating a drop in revenues. A further 60% of businesses indicated they retrenched employees as a result of the pandemic, with 36% retrenching between 6% and 25% of their workforce. Additionally, 76% of respondents were of the view less than 5% of their workforce would continue to work remotely after the pandemic. This may be due to the nature of the work done by businesses in the CATHSSETA sub-sectors.

Of the 31 994 employers in the 2021/22 financial year, the Hospitality sub-sector accounted for most employers in the sector (66%), followed by 12% of employers in the Tourism and Travel Services sub-sector. The least represented sub-sector is Gaming and Lotteries, which accounted for only 1% of the total number of entities. This sub-sector has decreased by 2% from the previous financial year. Overall, 97% of the sector comprises of small entities, increasing by 1% from the previous year. Small entities are predominantly exempt from payment of the Skills Development Levy (SDL). Considering the size of the overall sector, combined with the fact that small entities account for 97% of the sector, the allocation of resources becomes a challenging task.

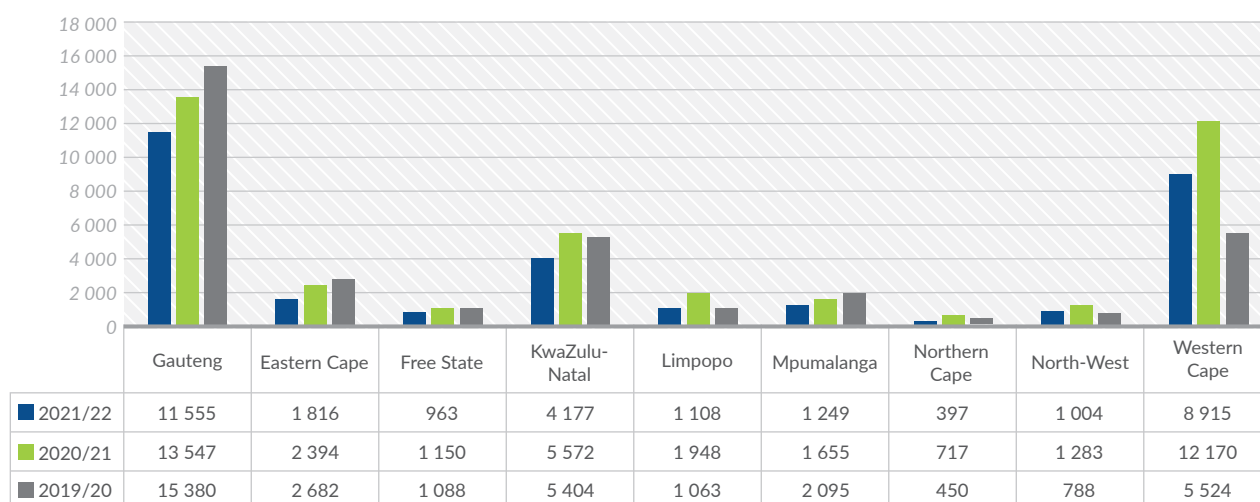
To examine levy income from organisations within the sector, the figure below compares the total levies received over three years, from the 2019/20 to 2021/22 financial years. The total levies received from employers have increased by approximately 28% from R233 million in 2020/21 to R324 million in the 2021/22 financial year.

FIGURE 3: LEVIES RECEIVED IN THE 2019/20 – 2021/22 FINANCIAL YEARS



Source: CATHSSETA Unaudited Annual Financial Statements, 2021/22

The geographical spread of entities in the sector is illustrated in the figure below. Most entities in the sector (37%) are located in Gauteng, followed by the Western Cape (29%) and KwaZulu-Natal accounting for 13%. The least represented provinces include the Free State (3%), the North-West (3%) and the Northern Cape (1%).

FIGURE 4: GEOGRAPHICAL LOCATION OF ACTIVE ENTITIES CONTRIBUTING TO SDL

Source: CATHSSETA SARS Hufefile, 2021/22

1.6. Labour Market Profile

The labour market profile provides an outline of the number of people employed in the sector; the demographics of employees – including race, gender, age and disability; as well as the geographic and sectoral spread of employees. This information was sourced utilising CATHSSETA's MG data.

The table below illustrates the total number of employees in the sector by sub-sector, as well as employee trends over the last three years. A total of 176 258 employees are employed in the sector. Consistent with the economic recovery trends post COVID-19, there seems to be an increase in employment of 3.17% from the 2021/22 figure of 170 841.

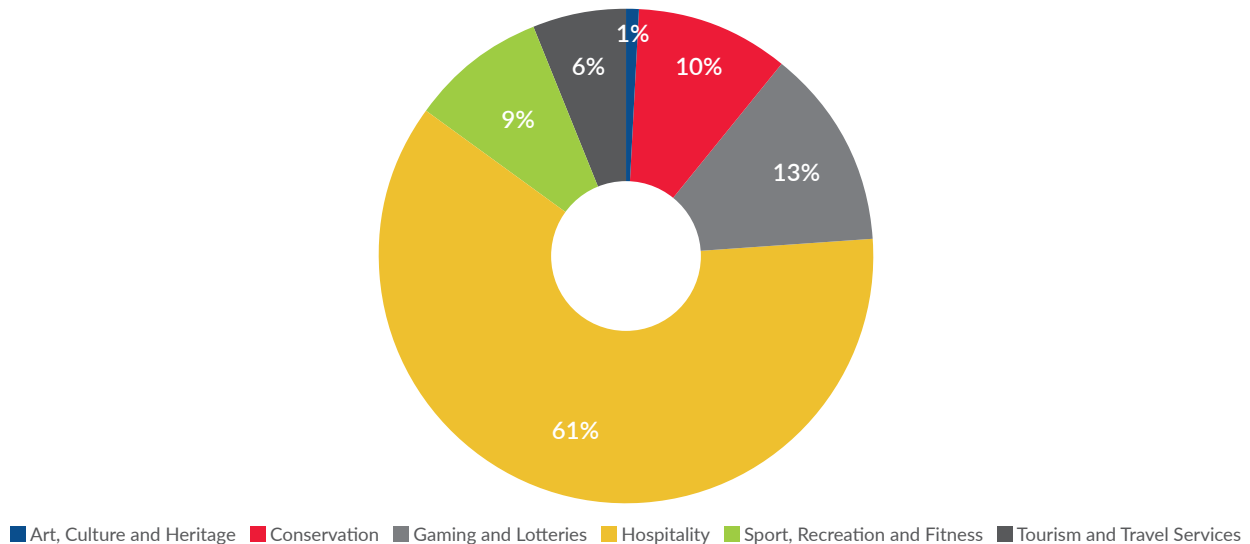
TABLE 5: NUMBER OF EMPLOYEES IN THE SECTOR

Sub-sector	2020/21		2021/22		2022/23		
	# of employees	# of employees	Growth/ decline	% variance per year	# of employees	Growth/ decline	% variance per year
Arts, Culture and Heritage	3 380	2 069	-1,311	-38.79%	1864	-205	-9.91%
Conservation	18 384	17 397	-987	-5.37%	16 738	-659	-3.79%
Gaming and Lotteries	30 663	23 597	-7,066	-23.04%	22 890	-707	-3.00%
Hospitality	125 605	102 452	-23,153	-18.43%	108 224	5772	5.63%
Sport, Recreation and Fitness	16 602	16 037	-565	-3.40%	16 313	276	1.72%
Tourism and Travel Services	16 299	9 289	-7,010	-43.01%	10 229	940	10.12%
Total	210 933	170 841	-40 092	-19.01%	176 258	5417	3.17%

Source: CATHSSETA WSP data, 2022/23

The figure below provides a percentage breakdown of employees per sub-sector. Consistent with table 5, the majority of employees are employed in the Hospitality sub-sector (61%), followed by Gaming and Lotteries (13%).

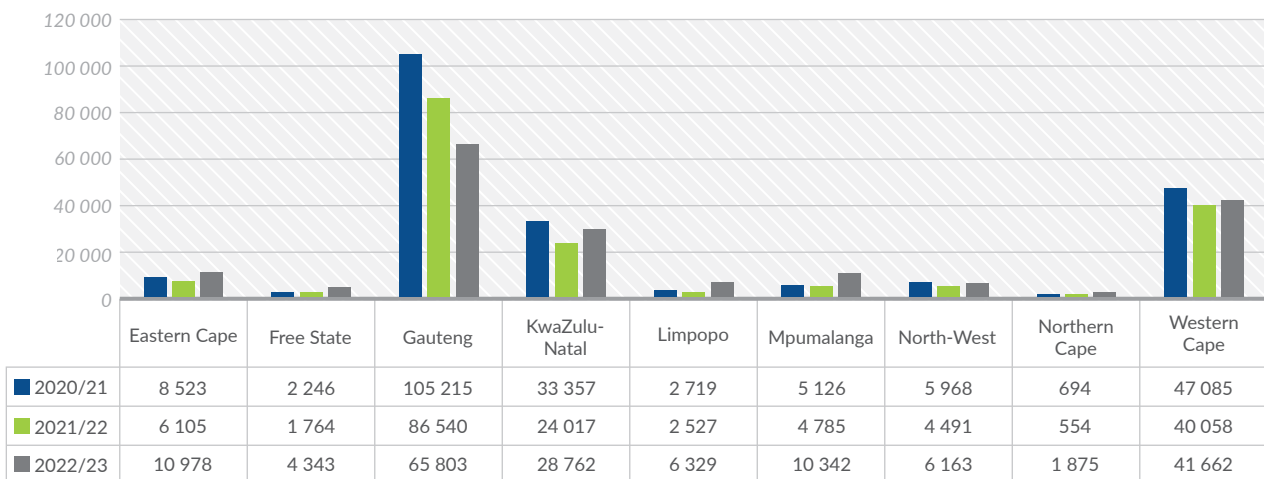
FIGURE 5: EMPLOYEES PER SUB-SECTOR



Source: CATHSSETA WSP data, 2022/23

The geographical spread of employees in the sector is shown in the figure below. The largest number of employees is in Gauteng (65 803) followed by Western Cape (41 662) and KwaZulu-Natal (28 762) which is in line with the distribution of entities. Employee distribution has decreased across most provinces.

FIGURE 6: EMPLOYEES IN THE SECTOR PER PROVINCE



Source: CATHSSETA WSP data, 2022/23

The figures below outline the gender and race demographics of the sector by occupational category. Females make up 60% of employees in the sector, 54% of which are African females. Most employees fall into the Service and Sales occupational category (36%), followed by Elementary workers (19%) and Clerical Support workers (15%). An analysis of employees based on these demographic variables by sub-sector indicates the following:

Arts, Culture and Heritage: Female employees represent 53% of the sub-sector. The majority of employees (23%), occupy Managerial positions, followed by 22% in Professional positions. 65% of employees in the sub-sector are African, followed by 25% of White employees.

Conservation: Females account for 45% of employees in the sub-sector. Most employees (23%), occupy Elementary work positions, followed by employees in Professional occupations (19%). 81% of employees in the sub-sector are African, the majority of which (19%) are Clerical Support workers, followed by 10% Coloured employees.

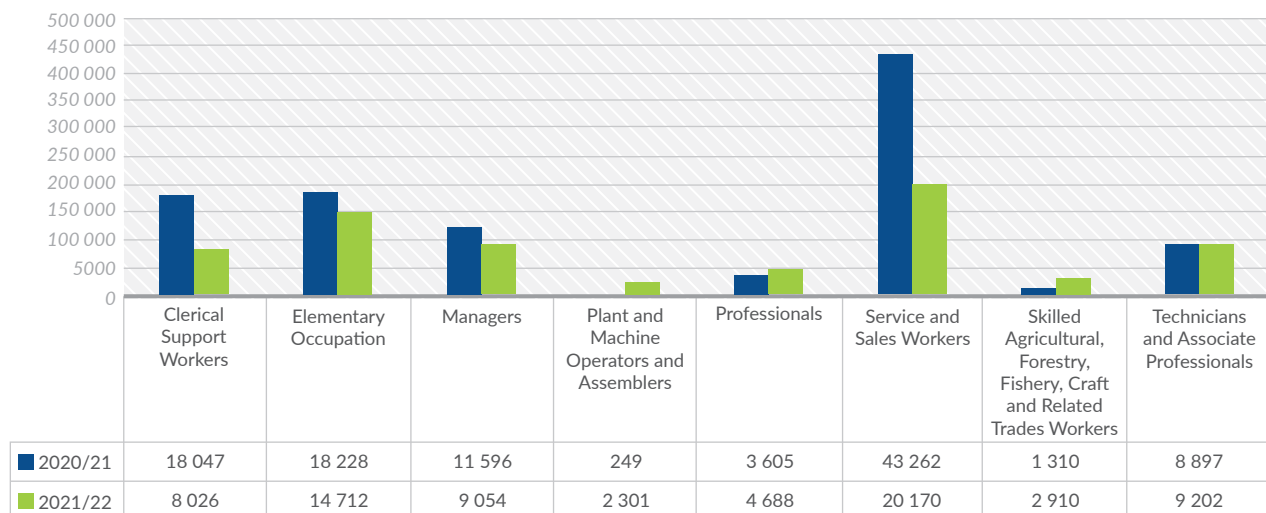
Gaming and Lotteries: The sub-sector employs 60% females. Most employees (43%) work as Clerical Support workers, followed by Service and Sales workers (22%). 81% of employees are African, followed by 8% Coloured employees.

Hospitality: The majority of employees in this sub-sector are female (64%). Service and Sales Workers (48%) account for the highest proportion of employees in the sub-sector, followed by Elementary workers (23%). The majority of employees are characterised as African, followed by 10% Coloured employees.

Sport, Recreation and Fitness: There is almost an equal representation between male (51%) and female (49%) employees in the sub-sector. Most employees are Technicians and Associate Professionals (40%), followed by 19% Clerical Support Workers. Africans account for 61% of employees, followed by White employees at 23%.

Tourism and Travel Services: The majority of employees in this sub-sector (59%), are female. Clerical Support workers account for the highest proportion of employees (37%), followed by Managers at 15%. In terms of equity, 54% of employees are African, followed by White employees (25%).

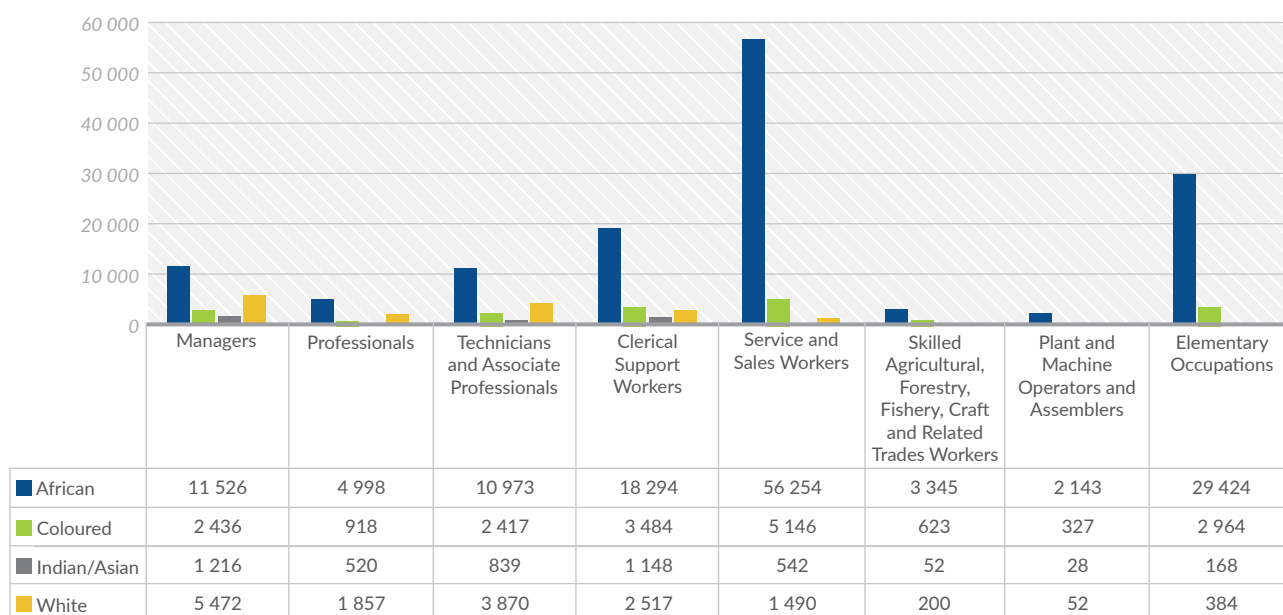
FIGURE 7: GENDER DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA WSP data, 2022/23

The race demographics of the sector are presented per sub-sector in the figure below. There is a slight increase from previous years in terms of the number of employees who are Africans (78%) within the sector, followed by Coloured employees (10%), White (11%) and Indian/Asian (3%).

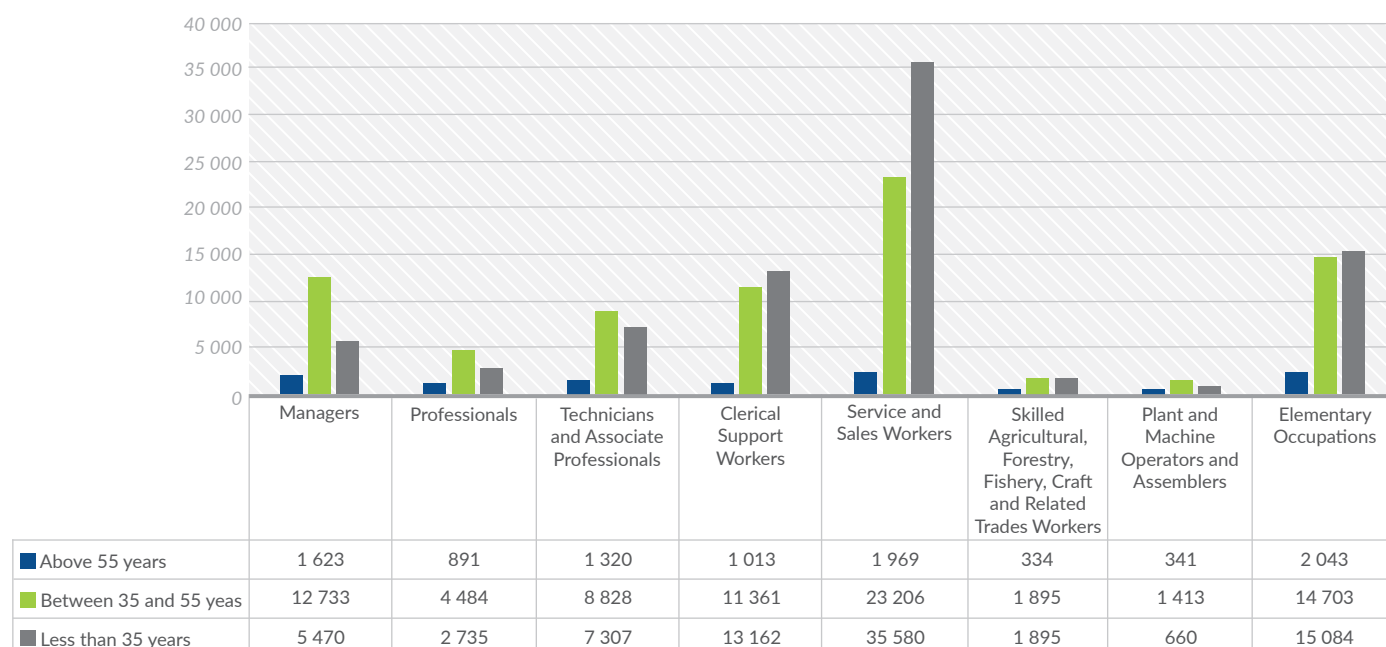
FIGURE 8: RACE DEMOGRAPHICS OF EMPLOYEES PER MAJOR OFO GROUP



Source: CATHSSETA WSP data 2022/23

The age distribution of employees outlined in the figure below illustrates that most employees in the sector (48%) are classified as youth (less than 35 years). This is followed by 46% of employees between 35 and Sales positions.

FIGURE 9: AGE DEMOGRAPHICS

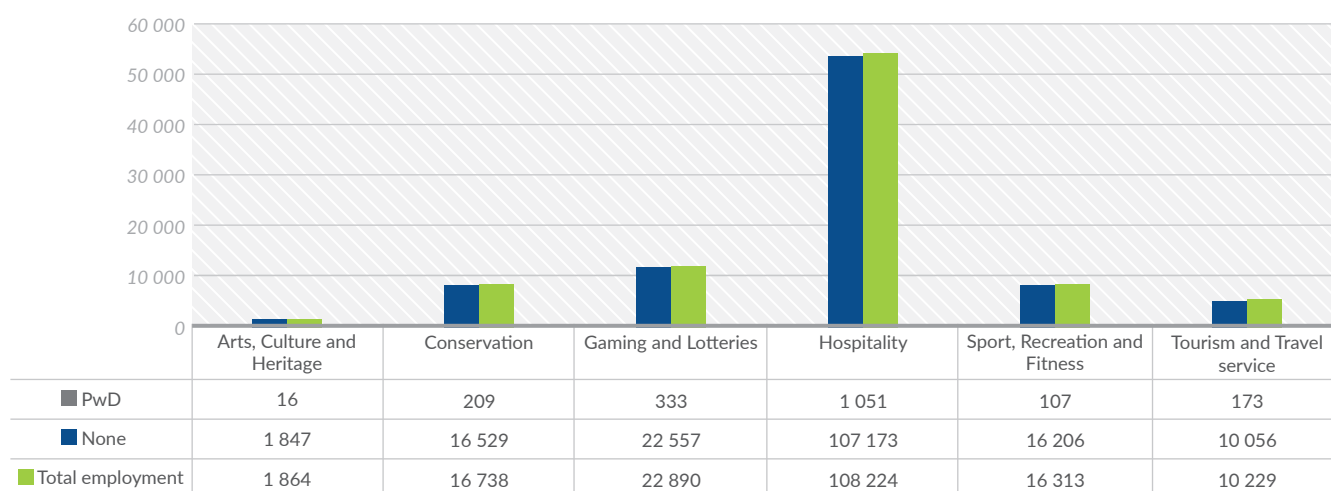


Source: CATHSSETA WSP data 2022/23

The figure below outlines the number of people with disabilities in the sector. The percentage was calculated relative to the total number of employees in the sector. Overall, out of the 176 258 employees in the sector, only 1 889 employees indicated they were living with some form of disability, illustrating a decrease from the

3 194 reported in the previous year. People with disabilities therefore account for 1.07% of total employment, representing less than the 2% national target for the overall employment in the sector. In the Tourism and Travel Services sub-sector, people with disabilities account for 1.69% of total employment in the sub-sector, followed by Gaming and Lotteries (1.45%) and Conservation (1.25%). The sub-sectors that employ the least number of people with disabilities in their respective sub-sectors include, Sport, Recreation and Fitness (0.66%) and Arts, Culture and Heritage (0.86%).

FIGURE 10: DISABILITY STATUS OF EMPLOYEES WITHIN THE SECTOR



Source: CATHSSETA WSP data, 2022/23

1.7. Implications for Skills Planning

The composition of the sector shows that the bulk of entities (97%) are small (0-49 employees), indicating a need for CATHSSETA to continue supporting and prioritising SMME development in the sector. Significant strides have been made towards greater representation and overall transformation in the sector. However, whilst 78% of employees in the sector are African, 60% of whom are African females, the vast majority are employed as Service and Sales workers, illustrating the need for further education and training to respond to transformational issues. There is a need to develop entrepreneurial and managerial skills across the sector, particularly amongst previously disadvantaged groups, to enable transformation within the sector. In addition, 48% of employees are classified as a youth (less than 35), a decrease from 51% the previous year. This is consistent with the recently published unemployment rate, illustrating a reduction in youth employment in the country. This implies that CATHSSETA's offerings and interventions should prioritise youth development in the various sub-sectors. Lastly, the number of people with disabilities has decreased from 3 194 in the previous year, to 1 889 (1.09%). CATHSSETA should consider entering into partnerships with NGOs and CBOs that work with people with disabilities to increase access to skills development opportunities for people with disabilities.

Despite the economic revival of 2021, South Africa continues to be under severe economic pressure. This requires the organisations in the sector to evaluate their supply chain resilience to continuously plan and mitigate the effects of uncertain events.

1.8. Conclusion

This chapter has outlined the scope of the sector, including a description of key role-players, 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. Key skills implications drawn from the findings in the chapter have also been highlighted.



CHAPTER 2: KEY SKILLS ISSUES

2.1 Introduction

This chapter seeks to identify factors driving change in the sector and influencing the direction of skills development. The chapter aims to identify the skills change drivers and national policies that may impact skills demand and supply. A change driver is a phenomenon that changes the sector and causes it to develop in a certain way. Analysis and implications in terms of skills planning are discussed concerning interventions offered by the SETA. Sources of information include inputs from stakeholder consultations and desktop research.

2.2 Factors Affecting Skills Demand and Supply

CATHSSETA has identified change drivers within its six sub-sectors which are related to how work is carried out in the said sub-sectors. The identified change drivers are as follows: the COVID-19 Pandemic, Technology and the Digital Divide, the Gig Economy, the Green Economy, as well as Remote Learning and Digital Connectivity.

2.2.1 COVID-19 Pandemic

As the world enters into a post COVID-19 transitional period, the trends that COVID-19 has accelerated are predicted to have profound effects on CATHSSETA sub-sectors and the labour market, even after the pandemic recedes. A study conducted by the McKinsey Global Institute (2021) revealed the pandemic has accelerated existing trends in remote work, e-commerce, and automation, with approximately 25% more workers than previously estimated, potentially needing to switch occupations. Before COVID-19, the most valued asset in the workplace and the economy was human capital, and organisations were invested in reskilling and upskilling their workforce. However, post the peak of the pandemic, due to automation at work combined with the global economic challenges, workforce transition may be larger in scale than estimated before the pandemic, and the share of employment in low-wage job categories may decline (McKinsey Global Institute, 2021).

Emerging trends in the Tourism and Travel Services sub-sector include demand for global cooperation on travel governance and regulation, travel digitisation, travel security and risk resilience as well as demographic shifts in the travel market (World Economic Forum, 2022). In September 2021, the United Nations World Tourism Organisation (UNWTO) conducted a global survey among its UNWTO Panel of Tourism Experts on the impact of COVID-19 on tourism and the expected time of recovery. Rapid and widespread vaccination roll-out was considered the main factor that could contribute to the effective recovery of international tourism.

Research on the impact of COVID-19 on CATHSSETA sub-sectors further reveals that businesses within the sector were able to adapt to the pandemic by modifying their business models to mitigate the effects of the pandemic on operations. For instance, respondents from the Arts, Culture and Heritage sub-sector indicated that they often opted for outdoor and virtual events to observe COVID-19 regulations, while continuing with operations, whereas businesses from the Gaming and Lotteries sub-sector were able to adapt by shifting to online platforms for the placement of bets and playing of lotteries. This is consistent with the observed emergence of cloud gaming in the Gaming and Lotteries sub-sectors, where recent developments in advanced cloud technology pose a serious competitor to the traditional gaming, lotteries and casino market. eSports has also witnessed a substantial market demand in the context of COVID-19. During the months of hard lockdown, fitness fanatics often resorted to online instructors and fitness games, during a time when gyms and recreational centres were closed.

In the wake of the COVID-19 recovery period, the SETA thus needs to consider targeted interventions aimed at capacitating the sector to effectively transition to remote work and the implications of this for the supply

and demand of skills in the sector. Stakeholder engagements further revealed that accelerated technological advancements during the pandemic have changed the operating models of businesses across the sector. According to the respondents, this has resulted in the increased need to enhance employee agility skills to react and adapt to unpredictable environments. The sector therefore needs to invest in change agility training, risk management and business continuity as priority training interventions to enable businesses to plan and minimise the effects of unforeseen events and efficiently restore business operations under future stresses.

2.2.2 Technology and the Digital Divide

Technological advancements and the Fourth Industrial Revolution (4IR) have played an important role in all the CATHSSETA sub-sectors in the last decade. Technology has helped reduce costs, enhance operational efficiency, and improve services and customer experience. As an extension of these technological developments, 4IR also represents a fundamental change in the way people live and work. These advances in human development are merging the physical, digital, and biological worlds in ways that create huge potential for the sector.

CATHSSETA conducted a study on the impact of the 4IR on its sector. Findings from this study revealed that the experiences of the sub-sectors with 4IR are vastly different, therefore, there should be tailored strategies for effective adoption in the sector. In addition, while respondents were familiar with the overall concept of 4IR, the majority could not identify the related technologies. As a result, stakeholders need exposure to 4IR technologies to gain a better understanding and increase the rate of adoption of these technologies.

Industries across South Africa are considering ways in which new technological developments can improve business practice, which calls for a reform in regulatory frameworks to ensure the use of technology is fair, responsible and considers the country's broader socio-economic objectives. In the context of skills development, South Africa has an opportunity to reshape the composition of the sector by leveraging opportunities presented by technological advancements. The 4IR has forced us to re-examine and re-develop a fit-for-purpose skills development system to prepare the workforce for the new world of work.

The internet has an impact on all CATHSSETA's sub-sectors. A customer's first experience with a business is often through a visit to the website or social media pages. Online advertising, social media, and online purchasing technology is already being used in some businesses. In the Tourism and Travel Services and Hospitality sub-sectors, technological advances have resulted in the use of fingerprint recognition to allow for semi-contactless check-outs, Electronic Tourist passes, Global IT booking systems, accommodation booking sites and applications, such as Trivago, Airbnb, TripAdvisor, etc. The industry has also seen the use of remote access technology for Tourist Guides to easily access information on key points of interest as well as the use of remote listening devices that Tourist Guides use to guide visitors. Artificial Intelligence (AI) systems, in particular, are forecasted to have a significant impact on the Gaming and Lotteries sub-sector. This includes the use of AI-based nudging techniques to influence punters' decision making, and profile individuals to provide personalised advertising for gambling services and products, allowing AI and swarm intelligence to track, predict and control human behaviour (Fong, 2018). This will minimise human interaction and interference, allowing experts to analyse customer behaviour and marketing insights.

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 even in the way sports events are covered. Wearable technology is becoming ingrained in professional sports, allowing adverse metrics to be

considered and utilised within training, thus permitting real-time decisions. The use of virtual fitness instructors within the field of recreation will see a decrease in the use of fitness instructors and fitness facilities. 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 transdisciplinary skills. This calls for tailored professional development programmes and ICT strategies as well as plans to support traditional higher education curricula. In the Arts, Culture and Heritage sub-sector there is a movement towards the 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.

Technological innovation necessitates a transformation in education and the update of skills required to facilitate training. Building future-ready (and pandemic-proof) education systems require curricula fit for this current phase of the 21st century. The sector needs to take the time to frame an approach for building future-ready (and pandemic-proof) education that is widely accessible. Conceptualising an e-learning policy and framework for accreditation and implementation in the sector will need to move with speed as demand increases.

With that said, South Africa's post-education system is complex, with historical inequalities. Most of the country's learners come from disadvantaged backgrounds and there is a huge digital divide to be considered. From an economic perspective, the "divide" is related to a lack of affordability due to low disposable income, while geographical factors are related to a lack of infrastructure support. The 2020 General Household Survey conducted by Stats SA revealed that 74.1% of South African households had at least one member who had access to the internet. (Stat SA, 2021). Most of those households were reported in the more developed provinces such as Gauteng and the Western Cape, where over 80% of households had access to the internet, while the more rural provinces such as Limpopo and the Eastern Cape reported numbers below 60% (Stats SA, 2021).

2.2.3 Gig Economy

The sector has seen a growing trend in the 'gig economy'. The gig economy is defined as a labour market characterised by freelance, flexible, on-demand work rather than the more traditional nine-to-five working model. The gig economy is made up of three main components – the independent workers paid by the gig (i.e. a task or a project) as opposed to those workers who receive a salary or hourly wage; the consumers who need a specific service, for example, a ride to their next destination, or a particular item delivered; and the companies that connect the worker to the consumer in a direct manner, including app-based technology platforms. Companies such as Uber, Airbnb, Takealot, Bookings.com and Mr Delivery act as the medium through which the worker is connected to and ultimately paid by the consumer. These companies make it easier for workers to find a quick, temporary job (i.e., a gig), which can include any kind of work, from a musical performance to plumbing.

The growth of the gig workforce in the past decade was driven by the development of new technologies that enable transactions directly between providers and consumers, as well as difficulties of finding traditional, stable jobs. On the one hand, app-based technology platforms are replacing people as middlemen to connect consumers and producers quickly and easily, allowing individuals to perform a variety of tasks for strangers based on real-time demand. According to the World Economic Forum (WEF), the ongoing shift in the division of labour between humans, machines and algorithms is expected to displace almost 85 million jobs worldwide in the next 5 years. A location-independent global workforce is emerging and location is also increasingly becoming a non-factor in acquiring capable talent across the globe.

One of the characteristics of the CATHSSETA sector is that it is highly seasonal. Gig workers are especially helpful in the Hospitality and Tourism and Travel Services sub-sector when it comes to the staffing approach in the high and low seasons. The gig economy has already changed the sector in more ways than one. People are spending more money on ride-sharing services such as Uber and food-delivery services such as Mr Delivery and Uber Eats (Texas Hotel and Lodging Association, 2017).

Skills interventions need to respond to the virtual and fluid requirements emanating from careers in the gig economy. The sector, therefore, needs to move beyond traditional methods of upskilling and training employees and adopt more flexible and easily accessible modes of learning provision. Through stakeholder engagements/workshops, the SETA in collaboration with the sector needs to set out a plan on how to increase equitable access to skills development opportunities for the modern labour market in the gig economy.

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 a more environmentally sustainable, climate change resilient country, 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 of the country.

The country depends on healthy ecosystems for economic and livelihood activities, including tourism, and several income-generating and subsistence-level activities (South African National Biodiversity Institute [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 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 carbon emissions and helped in public education (MTSF, 2014-2019). In addition, there are substantial job creation opportunities in programmes contributing to biodiversity conservation. The sector can contribute to the Green Economy by focusing on environmental science training interventions to produce Environmental Scientists, Plant Engineers, Sustainability Managers, Industrial Efficiency Managers, and Environmental Sustainability/Energy Consultants (SSP Consultation Sessions, 2019). These are some of the substantial occupations supporting the Green Economy.

2.2.5 Remote Learning and Digital Connectivity

According to the Reinventing Higher Education Conference (2021), which is a conference aimed at examining issues set to affect academia, government and the private sector, the future of education and work is increasingly becoming hybrid and blended. Face-to-face classroom learning will be complemented by multiple educational resources, both synchronous and asynchronous, to facilitate greater flexibility and adaptation to the learners' personalities and circumstances. In this transformed educational environment, education will have a greater impact on both the development of global citizens and enhancing employability in the global context. Contrary to predictions that robots could take over humans, COVID-19 lockdowns across the world have highlighted the role of technology in bringing people closer by providing powerful platforms for group working, virtual meetings and delivering effective education programmes.

The pandemic further highlighted that well-established digital networks and supportive remote learning policies, which provide flexibility and resilience to the South African education system, should be put in place as a matter of urgency. A recent CATHSSETA study on the feasibility of implementing e-learning in the sector revealed that 83% of CATHSSETA training providers indicated that e-learning promoted greater flexibility in learning time, while 75% agreed that it encourages self-learning. On the other hand, 88.9% of learners indicated that e-learning encourages self-learning, while 33,3% indicated that it provides a high level of accessibility. This flexibility will also be reflected through the creation and distribution of knowledge, teaching methodologies and other post-education and training activities, including extracurricular experiences, which may become partly virtual. The growth of technological capabilities means that a variety of media and learning-support tools now exist to help students receive higher quality education through digital connectivity networks.

2.3 Implications for Skills Planning in the Sector

Indications are that the 4IR requires high-end skills in data management and computer programming and CATHSSETA needs to reposition itself to equip the sector with not only digital skills but explore innovative approaches to training delivery. This will also include a review of qualifications, training provision and accreditation, to meet the changing nature of the sector. E-learning has is far cheaper and has the potential for a wider reach than physical learning institutions. Therefore, ensuring that students have online access is essential. According to the CATHSSETA feasibility study on the implementation of e-learning within the sector the SETA needs to improve the quality assurance process and policy to ensure standardisation and alignment as a means of support. This will assist the SETA in the design and identification of conditions and practices in which e-learning can be used effectively in the PSET system. The challenges of implementing e-learning as identified by research include lack of connectivity, regular load shedding challenges, lack of adequate funding and lack of computer knowledge.

The skills that are relevant across all sectors are statistics, mathematics and computer science. Indeed, these skills make up the foundation for almost all other skills needed for the 4IR. There are some differences across sub-sectors, where specialised skills are required. In Conservation and Sport, Recreation and Fitness, for example, there is a higher need for skills relating to genomics, resulting in a higher demand for skills in biology and medicine. In Hospitality and Tourism and Travel Services, there is a higher demand for skills in robotics, resulting in increased demand for skills in engineering, physics and computer programming. Finally, Gaming and Lotteries and Hospitality and Conservation all have a higher demand for blockchain technologies and require additional skills in physics, edge computing, cryptography and data science.

The SETA, in partnership with sector stakeholders, needs to embark on career guidance initiatives to ensure that the youth is guided to new and emerging careers in the sector. Based on the factors outlined above and primary research, the following emerging occupations have been identified per sub-sector.

TABLE 6: EMERGING OCCUPATIONS

Sub-sector	Emerging Occupations
Arts, Culture and Heritage	Audio-Visual 3D Technicians; Application Development Practitioners; Social Media Specialists; Heritage Multimedia Specialists; Repatriation Artists; Marketing Practitioners; Digital Lighting Practitioners; On-Site Nurses; Digital Media Strategists; Information Technology Technicians; Information Technology Support; Information Technology Recruiter, Human Resources Partner, Talent Acquisition Specialist, Human Resources Business Partner
Conservation	Chief Information Officers; Brownfield Redevelopers; Ecological Rehabilitation Professionals; Social Media Specialists; Business Development Specialists; Technologists; Environmental Scientists; Bio Technicians; Wildlife Ranchers; Animal Attendants; Biodiversity Planners; Conservation Scientists; Climate Awareness Educators; Environmental Disaster Responders; Green Marketers; Fish and Game Warden, Recycling Coordinator, Compliance Manager, Green Marketer, Environmental Science and Protection Technicians
Gaming and Lotteries	Application Development Managers; Customer Relations; Data Analysts and Marketing Data Analysts; Social Media Specialists; Website Designers; Customer Relations Specialists; Industrial Psychologists; CCTV Technicians; Data Feeds Managers; Digital Artists; ICT Developers; Emergency Service and Rescue Officials; Gaming Supervisors, Fraud and Risk Analyst, Senior Data Engineer, Test Engineer, Retention Manager, Network Architect
Hospitality	Social Media Specialists; Operations Managers; Trends/Market Analysts; Health and Safety Auditors; Food Safety Assurance; Information Technology Specialists; Administrative Maintenance; Bar Managers; Food and Beverage Scientists; Online Bookings Specialists; Dieticians; Computer Network and Systems Engineers; Internet of Things Specialist
Sports, Recreation and Fitness	Risk Managers; Payroll Managers; Sports Psychologists; Sports Agents; Event and Project Management; Sports Lawyers; Media Coordinators; Fitness Management; Exercise Physiology, Disease Control Specialists; Sports Copywriter and Social Media Manager, Sport Scout, Sport Director, Content Developer
Tourism and Travel Services	Business Development Managers, Guest Relations Officers; Communication Strategists; Legal Tourism Consultants; Marketing Practitioners; Travel Accommodation Inspectors; Travel Agency Managers; Business Analysts; Software Developers; Applications Developers; Online Travel Agent, Influencer Marketer, Smart Technology Developer, Sustainability Consultant, Diver Rigger

2.4 Policy Frameworks Affecting Skills Demand and Supply

The next section outlines 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, 2014

The White Paper sets out strategies for an improved PSET system that will meet the needs of South Africa by 2030. A sharpened focus on the SETAs is proposed, limiting the scope of a SETA to the 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 for the development of a national skills planning system. The focus of the SETA's Mandatory Grant will be exclusively on gathering accurate data on sector skills needs while sector training and training provider capacity will be catered for through the Discretionary Grant.

2.4.2 National Development Plan, 2030 (NDP)

The NDP identifies skills development and education as a catalyst for economic development and growth. The NDP correctly positions skills development and education as a necessity for the empowerment of people. Education must enable people to define their identity, take control of their own lives, raise healthy families, and play a meaningful role in broader societal development.

The NDP acknowledges that education, training, and innovation are not the only solutions to common national problems. Rather, education is critical in building national capacity to solve problems. Addressing national training and educational expectations requires harnessing the capacity of different provider institutions so that they can be effective in delivering their respective mandates.

2.4.3 National Skills Development Plan, 2030 (NSDP)

The NSDP aims to ensure that the country has adequate and high-quality skills that contribute towards economic growth, employment creation and social development. The Plan came into effect on 1 April 2020 and outlines key objectives for skills development. The Plan also provides performance indicators against which SETAs must perform against 2020 and beyond.

2.4.4 National Skills Accord, 2011 (NSA)

The National Skills Accord established a partnership between DHET, communities, organised business, and labour, aimed at promoting common skills development and training priorities. These representatives of business, organised labour, the community constituency, and government have agreed to partnerships in order to achieve the New Growth Path target of five million new jobs by 2020. A reflection and review of the target, in line with the CATHSSETA sectors, becomes a baseline for the 5-year trajectory.

2.4.5 Strategic Integrated Projects (SIPs)

CATHSSETA's approach to SIPs funding has been integrated into the Discretionary Grant policy. The skills required for the delivery of SIPs are presented by the DHET. CATHSSETA has identified the following four occupations, which will be addressed by supporting learners through WIL and internship programmes: Environmental Manager; Programme or Project Administrator's Assistant; Truck Driver and Handymen (persons).

2.4.6 Economic Reconstruction and Recovery Plan, 2020 (ERRP)

The South African government developed the ERRP to directly respond to the immediate economic impact of the COVID-19 Pandemic on the South African economy. The Plan sets out a reconstruction and recovery plan for the South African economy aimed at stimulating equitable and inclusive growth. Skills development is highlighted as one of the key enablers for the successful implementation and realisation of the Plan. The ERRP also highlights the need to contribute to the prevention of job losses through the expansion of reskilling and retraining of workers.

In response to the Plan, DHET developed an Economic Recovery Skills Strategy (ERSS). The skills strategy is demand-led as well as, in the immediate term, focuses on SETA skills training on addressing the impact of COVID-19. As part of the strategy, DHET identifies nine (9) priority interventions to be implemented in the short term to accelerate access to income-earning opportunities. The following interventions have been identified:

1. Embedding skills planning into sectoral processes;
2. Updating or amending technical and vocational education programmes;
3. Increased access to programmes resulting in qualifications in priority sectors;
4. Access to targeted skills programmes;
5. Access to workplace experience;
6. Supporting entrepreneurship and innovation;
7. Retraining/up-skilling of employees to preserve jobs;
8. Meeting demands outlined in the List of Critical Occupations; and
9. National Pathway Management Network.

CATHSSETA's action plan for the implementation of the ERRP is outlined in Chapter 5.

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

TABLE 7: SUB-SECTORAL STRATEGIES AND PLANS

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 management development programmes to assist in this drive by training leaders and managers.
National Heritage and Cultural Tourism Strategy, 2012	The Strategy outlines the 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. CATHSSETA is making a concerted effort to ensure required qualifications are assessed, certified and relevant for its sector.
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. CATHSSETA has identified Conservation Science Managers, Wildlife Protection Services Managers and Environmental Technical Managers, among others, within the Conservation and Biodiversity sectors as occupational shortages and these will be prioritised and funded through the Discretionary Grant.
National Climate Change Adaptation Strategy, 2019	This Strategy stipulates that government must ensure that 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. Including, interventions to encourage research and training, through bursaries, for 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 in the funding of post-graduate scholars who will conduct research into the sub-sector.

National Plans or Strategies	Implications for Skills Planning
Department of Environmental Affairs Strategy, 2019	The Strategy places significant emphasis on CATHSSETA, which is tasked with skills development for conservation bodies and agencies, such as 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, and CATHSSETA's role is to develop training initiatives to address this.
Hospitality	
National Development Plan, 2030	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, together with the QCTO, has completed the review and registration of the Chef qualification as a trade from NQF level 4 to NQF level 5.
Immigrations Regulations Act of 2002	Amendments to the Immigrations Regulations Act of 2002 resulted in the implementation of new visa regulations in 2015. This brought about the repeal of the quota for exceptional skills work permits and the introduction of the category of critical skills work visa to attract professionals with critical skills into the country who are likely to advance national interests.
Sectoral Determination 14: Hospitality	Sectoral determination for the Hospitality sector requires that the minimum wage offered by employers with 10 or less employees, be R2 959.35, and that, for employers with more than 10 employees, be R3 298.52. For CATHSSETA, this translates into a need to ensure that funding criteria is in line with the Department of Labour in terms of regulated minimum wage for the sector.
Gaming and Lotteries	
Lotteries Act No. 57 of 1997 as amended	The Lotteries Act regulates lotteries activities and provides the basic framework for the management and operation of the National Lotteries. 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 identified within the NSDP, 2030 outcomes.
Sport, Recreation and Fitness	
National Sport and Recreation Plan (NSRP), 2012	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 educational 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 national federations, and also on the training of coach-developers as facilitators, assessors and moderators.
Sport Tourism Strategy	The aim is to broaden capacity-building initiatives within the sports industry to encompass elements of Tourism, so as to deepen the understanding of the Sports Tourism element in sports development. CATHSSETA will work with its partners, such as the Higher Education Institutions (HEIs), to ensure that sport tourism qualifications are available at all levels. Also, as volunteers are crucial to the success of international sporting events in South Africa, CATHSSETA will compile a database of volunteers and make sure they receive the necessary training as required in the NSRP.

National Plans or Strategies	Implications for Skills Planning
Tourism and Travel Services	
Tourism Sector Recovery Plan, 2021	The Plan, which is aligned to the ERRP, is anchored on three interlinked pillars or strategic themes, namely, protecting and rejuvenating supply, reigniting demand and strengthening enabling capability for long term sustainability. Guided by these themes, the plan further identifies seven strategic interventions which will be implemented in order to support the revival of the sector. The first strategy intervention of the plan is to “Implement Norms and Standards for safe operations across the value chain to enable safe travel and rebuild consumer confidence” and CATHSSETA’s role is to provide training opportunities to SMMEs on norms and standards for safe operations.
National Tourism Sector Strategy, 2020	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 to offer training programmes that are aligned to the needs of the sector, with the emphasis being on developing and improving skills within the sector.
Tourism Human Resource Development Strategy (THRD) Strategy 2017- 2027	The THRD Strategy is aligned to both the National Tourism Sector Strategy 2020 (NTSS) and to the NSDP. The role of CATHSSETA is to assist in addressing Workplace Skills gaps, particularly the strengthening of “soft skills”, in collaboration with other actors, such as Umalusi, TVET Colleges and others.
National Rural Tourism Strategy, 2012	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 for rural development initiatives, through special projects, as well as extending its operational presence across various regions in the country.
Tourism Act, 2014	The Act regulates the Tourist Guide profession and acknowledges the value and importance of the Tourist Guide in the sector. It provides for the registration and professionalisation of Tourist Guides, with a defined career path. CATHSSETA, together with relevant partners, is responsible for identifying the training, certification and registration needs for Tourist Guide in the sector. CATHSSETA also assist with the development of Curricula and the implementation of RPL pilot projects, especially on Tourist Guides.

2.5 Conclusion

This chapter has identified factors that are driving change in the sector, such as the COVID-19 Pandemic, Technology and the digital divide, gig economy, green economy, remote learning and digital connectivity, as well as the influence which these have on skills demand and supply. Changes in occupational patterns and structures are reflected in the profile of the skills that are required by employers in the sector. This reveals a need for human resources with increased proficiency in the use of technology, and greater cross-cutting 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 given this revolution as there is a need to increase exposure to technology to increase the skills sets during the phase of COVID-19.



CHAPTER 3: OCCUPATIONAL SHORTAGES AND SKILLS GAPS

3.1 Introduction

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

- Occupational shortages and skills gaps;
- Extent and nature of supply; and
- Sectoral Priority Occupations and Interventions list (previously PIVOTAL list).

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 DHET, 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, the number 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 to fill. The table below depicts the identified HTFVs by sub-sector. Not all sub-sectors had occupations vacant for longer than a year, as a result, the list is extended to include occupations vacant for a period of 6 months to a year. Based on the information submitted by employers, the HTFVs listed are classified from 1 to 3 according to the degree of scarcity.

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	2021-352102	Camera Operator Film, Television or Video	4	Salary considerations
	2021-432201	Production Coordinator	2	Lack of suitably qualified candidates
	2021-216302	Industrial Designer	3	Lack of suitably qualified candidates
				Qualification required
	2021-216601	Digital Artist	2	Lack of suitably qualified candidates
	2021-134903	Small Business Manager	7	Lack of suitably qualified candidates
	2021-121101	Finance Manager	2	Salary considerations
	2021-261901	Intellectual Property Advisor	7	Lack of suitably qualified candidates

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Conservation	2021-121101	Finance Manager	3	Lack of candidates with required work experience
	2021-342302	Outdoor Adventure Guide	4	Lack of suitably qualified candidates
Gaming and Lotteries	2021-516401	Animal Attendant / Groomer	4	Lack of candidates with required work experience
	2021-141201	Café Licensed or Restaurant Manager	4	Salary considerations
	2021-513201	Bar Attendant	4	Lack of suitably qualified candidates
	2021-351301	Computer Network Technician	3	Lack of suitably qualified candidates
	2021-143102	Gaming Manager	5	Salary considerations
	2021-242101	Business Analyst	2	Salary considerations
	2021-242204	Risk Manager	2	Lack of candidates with required work experience
				Lack of suitably qualified candidates
	2021-421201	Bookmakers	2	Lack of suitably qualified candidates
Hospitality	2021-513101	Waiter	68	Lack of candidates with required work experience
				Lack of suitably qualified candidates
	2021-841101	Fast Food Cook	120	Geographical location of the position is not favourable/remote
				Lack of candidates with required work experience
	2021-141201	Café Licensed or Restaurant Manager	39	Lack of suitably qualified candidates
	2021-522301	Sales Assistant General	100	High staff turnover
				Lack of suitably qualified candidates
	2021-342302	Outdoor Adventure Guide	10	Lack of suitably qualified candidates
	2021-343401	Chef	9	Lack of suitably qualified candidates

Sub-sector	OFO Code	Occupation	Number of HTFVs*	Reason for HTFV
Sport, Recreation, and Fitness	2021-264203	Sports Writer	2	Lack of suitably qualified candidates
	2021-651203	Fitter-welder	2	Salary considerations
	2021-241101	General Accountant	2	Salary considerations
	2021-671101	Electrician	4	Lack of suitably qualified candidates
	2021-143902	Cleaning Services Manager	2	Lack of suitably qualified candidates
	2021-522301	Sales Assistant General	20	Lack of candidates with required work experience
	2021-143107	Fitness Centre Manager	2	Lack of suitably qualified candidates
	2021-224102	Sports Scientist	2	Lack of suitably qualified candidates
	2021-333903	Sales Representative Business Services	383	Lack of suitably qualified candidates
	2021-342301	Fitness Instructor	317	High staff turnover
	2021-143108	Facility Centre Manager	20	High staff turnover
	2021-342302	Outdoor Adventure Guide	2	Lack of candidates with required work experience
Tourism and Travel Services	2021-523103	Ticket Seller	4	Lack of candidates with required work experience
				Lack of candidates with required work experience
	2021-251101	ICT Systems Analyst	7	Geographical location of the position is not favourable/remote
	2021-243102	Market Research Analyst	2	Lack of candidates with required work experience
	2021-134904	Office Manager	2	Salary considerations
	2021-243204	Event Producer	3	Lack of candidates with required work experience
	2021-332201	Commercial Sales Representative	2	Lack of suitably qualified candidates
	2021-252201	Systems Administrator	2	Lack of candidates with required work experience
	2021-422102	Travel Consultant	3	Salary considerations
	2021-243103	Marketing Practitioner	7	Lack of candidates with required work experience
				Salary considerations
	2021-122101	Sales and Marketing Manager	10	Salary considerations
	2021-511302	Tour Guide	2	Lack of suitably qualified candidates

Source: CATHSSETA WSP data, 2022/23

Arts, Culture and Heritage: Small Business Manager, Intellectual Property Advisor and Camera Operator Film, Television or Video have been identified as occupations with the highest demand in the sub-sector due to lack of suitably qualified candidates and the salary expectations of candidates.

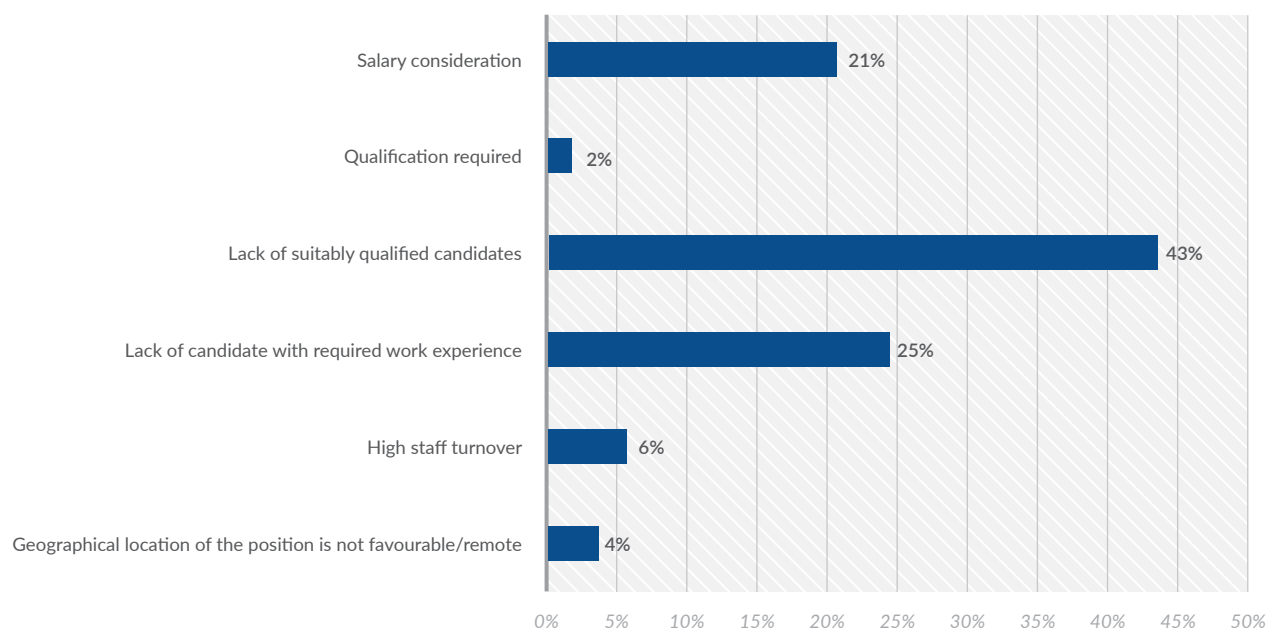
Sport, Recreation and Fitness: Has a shortage of Sales Representative Business Services and Fitness Instructors. This is largely due to the high turnover rate and lack of suitably qualified candidates. Facility Centre Managers were also identified as HTFV due to high staff turnover. From the stakeholder engagements, it was further revealed that financial managers and software analysts were among the positions identified as hard to fill in the sub-sector. These vacancies are hard to fill due to non-market-related salaries and a lack of suitably qualified professionals in the sub-sector.

Tourism and Travel Services: The sub-sector interestingly identified a shortage of Sales and Marketing Managers due to the salary expectations of candidates. ICT Systems Analysts and Marketing Practitioners were also identified as HTFV due to a lack of candidates with the required work experience.

3.2.2 Reasons for Hard-To-Fill Vacancies

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

FIGURE 11: REASONS FOR VACANCY



Source: CATHSSETA WSP data, 2022/23

43% of employers indicated that the main reason vacancies are difficult to fill is due to a lack of suitably qualified candidates. This is followed by lack of candidates with required work experience (25%), as the second reason vacancies are hard to fill. This is consistent with the reasons provided by stakeholders during the qualitative focus group sessions and in-depth interviews, where stakeholders cited both lack of qualified candidates and work experience as the primary reasons for occupational shortages in the sector.

3.2.3 Skills Gaps at Major OFO Group Level

Skills gaps refer to a specific key or generic and 'top-up' skill that 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 that have to do with working in teams. Occupationally-

speaking, 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 the table below.

TABLE 9: SKILLS GAPS PER MAJOR OFO GROUP LEVEL

Major Occupations	Top 3 Most Common Skills Gaps	Number of Skills Gaps
Managers	Leadership	172
	Advanced Computer, IT and software	159
	Management	125
Professionals	Advanced Computer, IT and software	147
	Management	140
	Leadership	130
Technicians and Associate Professionals	Advanced Computer, IT and software	151
	Finance for non-financials	128
	Management	64
Clerical Support Workers	Advanced Computer, IT and software	163
	Attention to Detail	158
	Customer service	138
Service and Sales Workers	Customer service	204
	Attention to Detail	150
	Advanced Computer, IT and software	136
Skilled Agricultural, Forestry, Fishery, Craft and related	Customer service	140
	Attention to Detail	128
	Legal, governance and risk	94
Plant and Machine Operators and Assemblers	Customer service	125
	Attention to Detail	114
	Legal, governance and risk	95
Elementary Occupations	Customer service	157
	Attention to Detail	147
	Computer Literacy	89

Source: CATHSSETA WSP data, 2022/23

Based on the Mandatory Grant data, the most common skills gaps across all occupational groups is advanced computer, IT and software; attention to detail; and customer service. This points to the transition towards a more customer-centric focus and creating positive experiences for customers. This is consistent with the findings of the CATHSSETA 4IR study which indicated that companies within each of the sub-sectors need to focus on upskilling their employees to ensure that they stay on par with international organisations and that a human touch will remain relevant even in the context of the 4IR, but the way that goods and services are experienced will become increasingly important.

3.3 Extent and Nature of Supply

To determine skills supply within the sector, HEMIS data, publications from DHET, Mandatory Grant data submitted by employers, and the CATHSSETA's Annual Report for the 2021/22 financial year, 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	Educational level	Employees	Percentage
Arts, Culture and Heritage	AET	7	0%
	NQF 1	77	4%
	NQF 2, 3	51	3%
	NQF 4	756	41%
	NQF 5, 6	443	24%
	NQF 7, 8, 9, 10	503	27%
	Total	1 837	
Conservation	AET	141	1%
	NQF 1	6 375	39%
	NQF 2, 3	878	5%
	NQF 4	5 285	32%
	NQF 5, 6	2 204	13%
	NQF 7, 8, 9, 10	1 659	10%
	Total	16 542	
Gaming and Lotteries	AET	0	0%
	NQF 1	294	1%
	NQF 2, 3	1 034	5%
	NQF 4	15 549	68%
	NQF 5, 6	4 603	20%
	NQF 7, 8, 9, 10	1 261	6%
	Total	22 741	
Hospitality	AET	680	1%
	NQF 1	4 300	4%
	NQF 2, 3	11 163	11%
	NQF 4	75 413	72%
	NQF 5, 6	10 029	10%
	NQF 7, 8, 9, 10	2 520	2%
	Total	104 105	
Sport, Recreation and Fitness	AET	36	0%
	NQF 1	556	3%
	NQF 2, 3	579	4%
	NQF 4	8 571	54%
	NQF 5, 6	5 588	35%
	NQF 7, 8, 9, 10	613	4%
	Total	15 943	

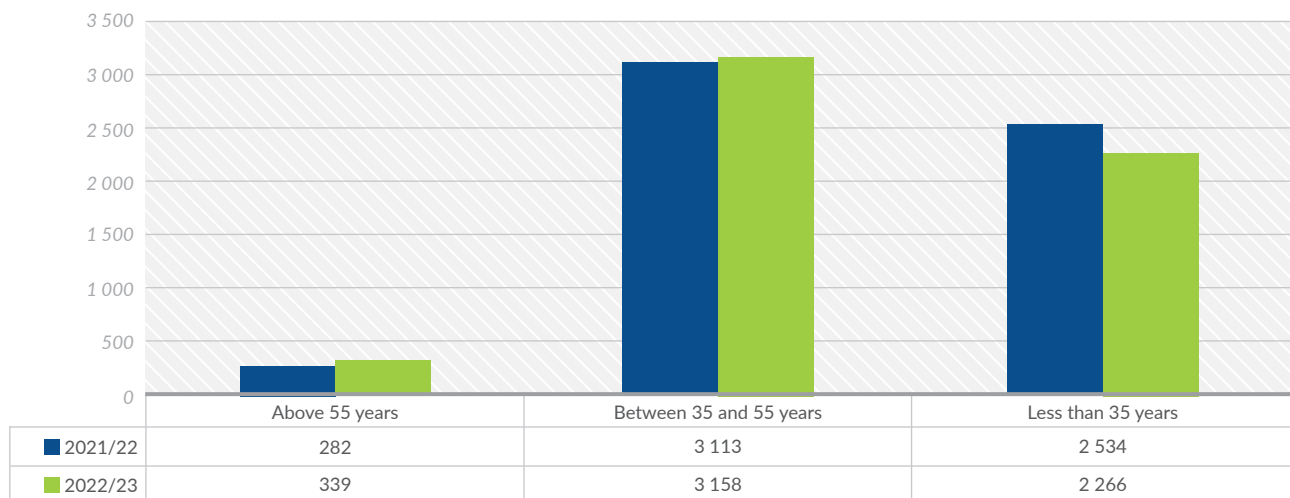
Sub-sector	Educational level	Employees	Percentage
Tourism and Travel Services	AET	11	0%
	NQF 1	237	2%
	NQF 2, 3	572	6%
	NQF 4	4 490	44%
	NQF 5, 6	3 649	36%
	NQF 7, 8, 9, 10	1 152	11%
	Total	10 111	

Source: CATHSSETA WSP data, 2022/23

An analysis of the educational profile of the sector illustrates that the highest level of education for most employees (64%) in the sector is NQF level 4 – which is the equivalent of a National Certificate/Matric. This is followed by employees within the middle-level skills band i.e., NQF level 5 and 6, at 15%. The high occurrence of employees in the lower to middle-level skills category is consistent with the types of positions that employees occupy in the sector, where most employees fall into Elementary, Service and Sales, as well as Clerical Support to the OFO major groups.

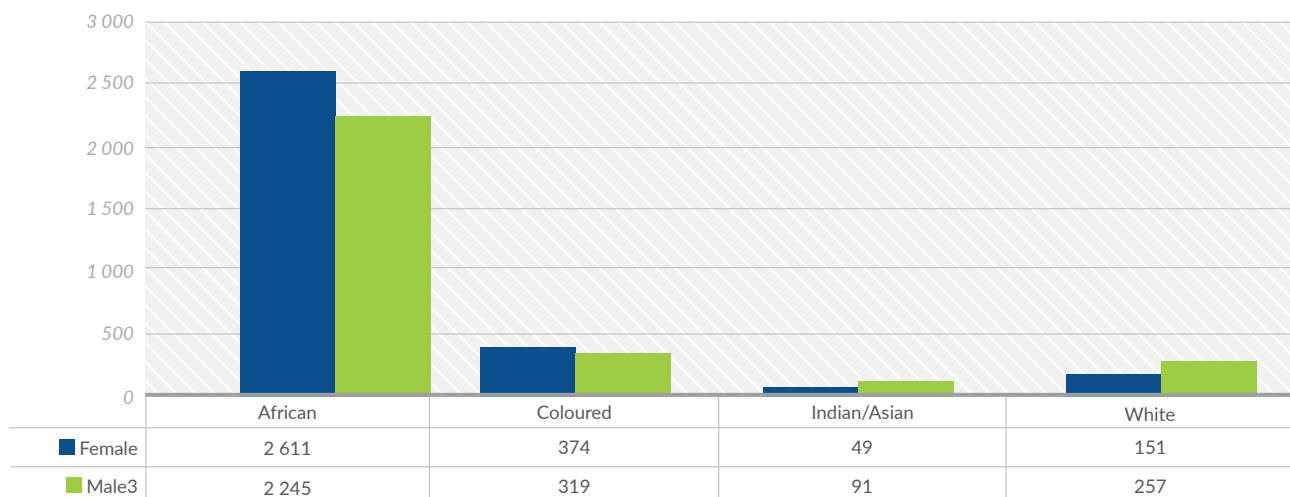
Out of the six CATHSSETA sub-sectors, Conservation is the only sub-sector wherein the highest proportion of employees (39%) possess an NQF level 1 qualification. This is consistent with the overall employment profile of the sub-sector, where most employees occupy elementary positions. While Conservation has the highest proportion of employees falling into the lower skills levels, the sub-sector also has the highest number of employees with a post-graduate qualification. The Arts, Culture and Heritage, Gaming and Lotteries, Sport, Recreation and Fitness, and Hospitality sub-sectors have the highest percentage of employees in the middle-skills category.

Artisans within the CATHSSETA sector fall into a multitude of trades. Some of these include Chef, Butcher, Confectionery Baker, Tailor, Toolmaker and Welder trades. However, the only trade currently registered under CATHSSETA is that of Chef. An analysis of this occupation is illustrated in figure 12 and 13 below, which analyses the occupation according to age group, race and gender demographics.

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

Source: CATHSSETA WSP data 2022/23

Based on Mandatory Grant data received from employers, the total number of Chefs employed in the sector has increased from 5 966, in 2021/22, to 6 097, in 2022/23. In previous years, the number of Chefs in the sector was decreasing, largely attributed to an ageing workforce, where a high proportion of Chefs were above the age of 55 years. In terms of race and gender, there is a slight increase from the 2021/22 figures indicating 79% of Chefs in the sector as African, while there was a 1% decrease of coloureds in the sector. In the current year, 80% of Chefs in the sector are African, followed by 11% Coloured, 7% White, and 2% Indian/Asian.

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

Source: CATHSSETA WSP data 2022/23

3.3.2 State of Education and Training Provision

Analysis has been conducted on skills supply from the Technical Vocational Education and Training (TVET) sector as well as the University sector. Great attention was paid to trends in enrolment and completion rates for each of the educational levels. Higher Education Institution (HEI) data, sourced from DHET, was analysed for the 2019 and 2020 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 practical qualifications such as Dance and Applied Arts reported minimal to no enrolments in 2020. Reasons for no enrolments in 2020, especially in qualifications that cannot be offered online can be attributed to the COVID-19 Pandemic, where everything from schools, events, parks, fitness centres, etc. was shut down and no physical contact was permissible. The table below presents the total number of enrolments and graduates in 2019 and 2020. Overall, the data shows that there was a 99% decrease in enrolment, with 48% of learners graduating from prior years' enrolments.

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

Sub-sector	Qualifications*	NQF Levels	2019		2020	
			Total Enrolment	Total Graduates	Total Enrolment	Total Graduates
Arts, Culture and Heritage	Dance	5-10	297	73	0	21
	Design and Applied Arts	5-10	3 485	908	0	250
	Drama/Theatre Arts	5-10	2 882	606	62	293
	Film/Video and Photographic Arts	5-10	1 254	335	0	108
	Fine and Studio Art	5-10	3 895	710	0	131
	Music	5-10	3 156	584	0	229
	Visual and Performing Arts, Other	5-10	32	15	0	4
Conservation	Botany/Plant Biology	5-10	2 230	481	51	179
	Zoology/Animal Biology	5-10	2 224	490	254	110
	Ecology, Evolution, Systematics and Population Biology	5-10	1 746	549	49	143
Hospitality	Food Science and Technology	5-10	2 210	534	0	193
	Hospitality Administration/Management	5-10	8 645	1 456	0	1 231
	Foods, Nutrition and Related Services	5-10	1 488	303	14	139
Sport, Recreation and Fitness	Parks, Recreation and Leisure Facilities Management	5-10	3 409	761	0	298
	Movement and Mind-Body Therapies and Education	5-10	46	6	2	0
Tourism and Travel Services	Business Administration, Management and Operations	5-10	87 379	18 266	410	10 107
	Entrepreneurial and Small Business Operations	5-10	3 392	577	28	384
			127 770	26 654	870	13 820

Source: DHET HEMIS data, 2020

Contrary to the decline in enrolments and suspension of various learning activities, the Pandemic accelerated opportunities for online, remote learning, also known as e-learning. Enrolments from 2021 onward are expected to increase as COVID-19 restrictions are relaxed. Unlike HEIs, TVET Colleges have different enrolment cycles which affect the manner in which students are counted and reported. For each academic year, there are six (6) enrolment intakes/cycles i.e., annual, trimester and semester. The TVET colleges enrolment figures reported in this section reflect a cycle count of student records where a student record is counted only once in an enrolment period/ cycle and counted at the highest level of the programme they are enrolled into. The table below provides the 2020 enrolment data reported and submitted on the Technical and Vocational Education and Training Management Information System (TVETMIS). Overall, a total of 125 976 learners were enrolled in TVET programmes relevant to the CATHSSETA sector. There was a higher proportion of female enrolments (79%) relative to males (21%). Females also accounted for a large number of enrolments across all programmes. The majority of enrolments for National Certificate Vocational (NCV) programmes were in Office Administration (49% or 61 756), followed by Hospitality (15% or 19 450) and Tourism (15% or 18 898).

TABLE 12: ENROLMENT CYCLE COUNT OF STUDENTS IN TVET COLLEGES BY NC(V) PROGRAMMES AND GENDER, 2020

Programme	NC(V) Level 2		NC(V) Level 3		NC(V) Level 4		NC(V) Total		
	Female	Male	Female	Male	Female	Male	Female	Male	Total
Hospitality	3 427	867	2 476	570	1 971	414	7 874	1 851	19 450
Management	2 461	922	1 468	535	1 288	385	5 217	1 842	14 118
Marketing	1 860	905	1 047	439	1 154	472	4 061	1 816	11 754
Office Administration	10716	2 379	7 709	1 475	7 390	1 209	25 815	5 063	61 756
Tourism	3 329	1 431	1 824	723	1592	550	6 745	2 704	18 898
Total	21 793	6 504	14 524	3 742	13 395	3 030	49 712	13 276	125 976

Source: DHET TVET MIS data 2020.

Table 13 below outlines the TVET throughput rate of a cohort of learners entering and completing NC(V) qualification in CATHSSETA programmes. In the 2017 academic year, 25 452 students enrolled for the NC(V) Level 2 programmes relevant to the CATHSSETA sector. In 2019, 3 491 learners from the cohort completed the NC(V) Level 4. Therefore, only 12.34% of students enrolled in the NC(V) 2 programme in 2017 completed this qualification within the 3-year expected time frame.

TABLE 13: THROUGHPUT RATE OF NCV LEVEL 2 STUDENTS ENROLLED IN TVET COLLEGES IN 2017 BY PROGRAMME, 2022

Programme	Number enrolled (NCV 2, 2017)	Number completed (NCV4, 2019)	Throughput rate (%)
Hospitality	3 964	473	11.9
Management	2 982	357	12.0
Marketing	2 858	210	7.3
Office Administration	11 641	1 874	16.1
Tourism	4 007	577	14.4
Total	25 452	3 491	12.34

Source: DHET PSET Monitoring Report, 2022

TVET graduates, in particular, struggle to gain workplace experience and, ultimately, find work after graduation. According to CATHSSETA's Tracer Study (2022), the employment status of TVET graduates who completed CATHSSETA training programmes declined in 2020 when compared to 2019, which was the highest when compared to previous years. This could be attributed shutting down of businesses during lock down. However, TVET colleges are still regarded as important in their ability to create the skills required by the economy and industry. If the education provided by TVET matches the needs of the labour market, it increases not only the student's employability but also contributes to political and social participation as well.

There is a growing need to revise the course content of certain Tourism and Travel Services, Hospitality, and Conservation courses offered at TVET Colleges in order to align them with current trends and industry developments. This is also confirmed by the CATHSSETA's Sector Analysis Study (2022), which found that there is evidence of misalignment between course content and industry skill requirements. For example, the effects of 4IR as well as emerging trends and occupations must be considered and integrated in the curricula offered in TVET Colleges. This is due, in part, to a limited or total lack of stakeholder engagements amongst employers and HEIs. As a result, CATHSSETA must take a more active role in assisting the sector by forging stakeholder engagements and encourage skill development institutions to align themselves with current trends and future skill requirements. Additionally, As part of its efforts to close the industry's skills requirement gaps, CATHSSETA is also engaged in the development of TVET lecturers to maximise their contribution to skills development.

DHET embarked on a process of reviewing the curricula of programmes offered in TVET Colleges to ensure their relevance and alignment to the needs of industry and society post COVID-19. So far, 22 more subjects have been revised, with the N4 Business and Services Studies subjects implemented in the first semester of 2022 and the N5 in the second semester.

The current global health challenge has catapulted e-learning as a necessary alternative to traditional forms of education and has triggered innovative approaches to higher education provision, as universities continue to make efforts to keep academic programmes running. However, the digital divide between students from different backgrounds cannot be denied and the ability for students to equally participate in this alternative is dependent on the learners' technological abilities and access to the necessary resources and connectivity. Despite these challenges facing learners, the Minister of Higher Education, Science and Innovation, in his February 2022 statement on PSET sector readiness, indicated that the PSET system has been immensely creative and adaptive in managing responses to the pandemic through the "Save Lives, Save the Academic Year", and Science and Innovation and campaigns.

The general challenges associated with skills development among time-constrained, owner-operated enterprises must be seen to apply to the entire sector, due to its overwhelming SMME profile. A defining feature of the Tourism and Travel Services sub-sector 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 the sub-sector and this may have also contributed to the poor HRD practices in the industry.

Training capacity in the Sport, Recreation and Fitness sub-sector is mainly provided by universities and universities of technology HEIs. While HEIs offer a variety of degrees and diplomas relevant to the SRF sub-sector, it must be noted, that there are no accredited programmes in TVET Colleges relevant to this sub-sector. Besides formal education institutions, accredited by the Council on Higher Education (CHE) and Umalusi, CATHSSETA has accredited private providers to offer SRF learning programmes. However, the need to increase the number of

these providers remains, as there are very few accredited training providers, or none, in certain provinces. 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.

In recent years, the number of students in the CATHSSETA's sub-sectors has grown significantly. However, a 2016 Skills Audit undertaken by CATHSSETA revealed that graduates are typically thought to fall short of employer standards. There is a belief that there is a mismatch between graduates' academic knowledge and skills and the competences needed to "get the job done." Additionally, according to companies, TVET qualifications lack articulation and defined learning pathways. CATHSSETA has made efforts to enhance its educational pathways and guarantee that graduates satisfy industrial standards. Another important source of skills for the sector is industry itself, because in-house training and work-shadowing combine training with work experience and are both practical, job and workplace-specific, which employers value. The 2022 CATHSSETA Tracer Study revealed that half of all employers indicated that the main benefit of hosting beneficiaries was the enhanced productivity obtained, indicating that they recognized the significance of these programmes.

Host employers were also asked to describe how the COVID-19 pandemic affected the implementation of the TVET WIL and apprenticeship programmes as well as the acquired skills. 68% of host companies, changed how various learning programmes, including WIL programmes, are administered, while 19% said it had an impact on the caliber of skills acquired by beneficiaries. In addition, 50% of employers sought to absorb candidates from TVETs with the technical abilities and proficiency. This represents a more significant shift from the 2016 CATHSSETA Skills Audit study which revealed that businesses preferred individuals with two to three years of experience, followed by matriculants, and then graduates.

CATHSSETA is always working to strengthen the connection and relationship between TVET colleges, and industry in order to improve work placement opportunities and further ensure that graduates are readily absorbed into the labour market through gaining adequate industry exposure.

3.4 Sectoral Priority Occupations and Interventions (PIVOTAL)

CATHSSETA utilises a combination of data and labour market signals to monitor and determine occupations that are hard 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 the table below, as approved by the CATHSSETA's AA. Some of the data and signals used and observed were:

- All enterprises submitting MG applications (comprising of 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; and
- 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; and
- Surveys conducted nationally.

All data and inputs 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 the degree of scarcity. Occupations were

identified across all six sub-sectors within the CATHSSETA scope. Occupations that were deemed to support the Green Economy and the 4IR were included in the list. The quantity of Sectoral Priority Occupations was determined by tracking the implementation of similar priority occupations implemented in the previous MTSF period (2014-2019), the list of occupations in high demand identified in the WSP, including HTFVs. The actual quantity per occupation of Sectoral Priority Occupations was arrived at by deducting the total number of trained learners (as per the CATHSSETA's Consolidated Scarce Skills Analysis Report 2019), from the 2019/20 SSP and WSP numbers. The list is presented to key role players every year to ascertain the relevance and responsiveness of identified occupations. In 2022 this was done through focus group sessions and key informant interviews. The AA has approved the current sectoral priority occupations following the removal of occupations that reflected over-supply, and which had been on the list for the past 10 years. Occupations were further ranked according to demand per sub-sector, to determine the top 10 Sectoral Priority Occupations.

TABLE 14: 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	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Arts and Culture	Professionals	2019-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	NQF Level 5 in Digital Content and Copywriting NQF Level 5 in Digital Copywriting and online marketing Advanced Diploma in Copywriting Degree/Diploma in Media Studies	5 - 7	17
	Professionals	2019-251301	Multimedia Specialist	Multimedia Programmer, Animation Programmer, Computer Games Programmer, Graphical Programmer, Digital Media Specialist, Multimedia Developer	Bursary: National Diploma - Sound Technology and Production National Certificate: 3D Animation and Visual Effects NQF Level 5 National Certificate: Film and Television Production NQF Level 5 FET Certificate: Photography NQF Level 4 National Certificate Design Techniques NQF Level 5 – Communication Design Advanced Diploma in Computer Applications Technology (CAT) Education Advanced Certificate: 3D Animation and Visual Effects Advanced Diploma in Multimedia Computing National Certificate Design Techniques NQF Level 5 – User-Interface Design Higher Certificate in Game Graphics and Multimedia Entertainment Higher Certificate in Game Design and Production National Certificate: 3D Animation and Visual Effects Advanced Diploma in Information and Communication Technology in Multimedia Application	5 - 7	14

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Conservation	Professionals	2019-213307	Park Ranger	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Learnerships: National Certificate - Nature Resource Guardianships Terrestrial Further Education and Training Certificate: Nature Conservation: Natural Resource Guardianship National diploma in game ranch management Higher Certificate in Ecotourism Management Advanced Diploma in Ecotourism National Diploma: Nature Conservation Further Education and Training Certificate: Professional Hunting Endangered and Priority Species Conservation and Habitat Management Course Eco Training Field Guide, Nature Site Guide NQF2 Bachelor of Science: Zoology	2 - 7	320
	Managers	2019-134901	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, Wildlife Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bachelor of Applied Science in Nature Conservation Advanced Certificate in Nature Conservation in Trans-Frontier Conservation Management B.Sc. In Wildlife Management B.Sc. In Environmental and Water Science B.Sc. In Ecology and Conservation Bachelor Nature Conservation Advanced Diploma in Wildlife Management	6 - 7	123

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Gaming and Lotteries	Clerical Support Workers	2019-421202	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 National Certificate: Dealing	5	252
	Managers	2019-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Learnership: Generic Management Diploma in Casino Resort Management Advanced Certificate in Operations Management Further Education and Training Certificate: Gaming Supervision	5 - 6	28
Hospitality	Managers	2019-141201	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 Advanced Certificate: Education: Hotel Keeping and Catering Advanced Certificate in Hospitality Management Diploma in Hospitality Management Advanced Diploma in Hospitality and Food and Beverage Management National Diploma: Professional Cookery Advanced Diploma in Hospitality and Professional Cookery Bachelor of Business Administration in Hospitality Operations Management	6	1311
	Technicians and Associate Professionals	2019-343401	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 Certificate: Food Preparation and Cooking Certificate: Culinary Arts Advanced Diploma in Hospitality and Professional Cookery	5	1281

SUB-SECTOR	OFO MAJOR GROUP	OCCUPATION CODE	OCCUPATION	SPECIALISATION/ ALTERNATIVE TITLE	INTERVENTION PLANNED BY THE SETA	NQF LEVEL	QUANTITY TO BE SUPPORTED BY SETA*
Sport, Recreation and Fitness	Technicians and Associate Professionals	2019-342301	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 Advanced Certificate in Exercise Science Advanced Certificate in Fitness in Sport Conditioning Diploma in Sport Management Advanced Diploma in Kinesiology and Coaching Science Bachelor of Arts in Sport Science Advanced Diploma in Sport, Exercise and Recreational Therapy Advanced Certificate in Fitness Conditioning Coach	5 - 7	692
					Advanced Diploma in Tourism Management Learnership: National Certificate - General Travel Bachelor of Commerce: Travel and Tourism Further Education and Training Certificate: Travel and Tourism Bachelor of Tourism Development and Management		
Tourism and Travel Services	Clerical Support Workers	2019-422102	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	Advanced Diploma in Tourism Management Learnership: National Certificate - General Travel Bachelor of Commerce: Travel and Tourism Further Education and Training Certificate: Travel and Tourism Bachelor of Tourism Development and Management	5 - 7	717

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

3.5 Conclusion

This chapter focused on understanding occupation-specific skills mismatches identified by employers in the sector. In general, most employment falls within the low to the middle-level range of skills, which is typical of the services industry. The supply of skills, however, necessarily takes place at all three (3) levels: low, middle and high. The skills mismatch occurs due to 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: SECTOR 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 and CETs
- HEIs, Universities of Technology (UoTs) and other PSET institutions
- Labour Unions
- SMMEs, Co-operatives, Non-Profit Organisations (NPOs), NGOs and Community-based Organisations (CBOs); and
- Large employers and industry bodies within the sector

The partnership funding and selection criteria have been integrated into the Discretionary Grant Policy. This chapter focuses on existing SETA partnerships, to establish the state they are in and identify the benefits associated with the said partnerships. The secondary aim is to discuss new potential partnerships the SETA may form and how these may serve the SETA.

4.2 Analysis of Existing SETA Partnerships

The SETA's existing partnerships are arranged into four groups which are reflected in the subsequent sections.

4.2.1 State of Existing Partnerships

This section outlines the state of existing partnerships with educational providers and entities, operating within the CATHSSETA sub-sectors.

TVET and CET Partnerships: The NSDP envisages that the growth of TVET Colleges will expand the provision of mid-level technical and occupational qualifications and translate to work opportunities for the growing number of young people leaving the schooling system. There are 43 TVET Colleges, across 55 campuses, offering the National Certificate Vocational (NCV) in Hospitality and Tourism at NQF levels 2, 3 and 4. Some of the TVET Colleges have also obtained programme approval from CATHSSETA to offer CATHSSETA's accredited NQF aligned qualifications. During the 2021/22 financial year, CATHSSETA supported the placement of 319 TVET learners through work-integrated learning opportunities to enable learners to complete their Diplomas and increase their chances of employability or self-employment. The NSDP further acknowledges the role played by CETs in expanding skills development in the country. CETs cater for the knowledge and skills needs of the large numbers of adults and youth requiring education and training opportunities, unemployed people, and those employed but in low or semi-skilled occupations.

Certain public providers face facility challenges, especially those of the TVET Colleges and CETs, which are not given a sufficient budget with which to upgrade their training facilities. CATHSSETA funded TVET Colleges and CETs to upgrade the infrastructure used by students studying qualifications in the CATHSSETA sub-sectors. The infrastructure projects

funded included the following: upgrade of the hospitality facility, and renovation of the kitchen infrastructure for hospitality students and baking equipment (oven, bench, cake mixer, bread pan, scale, dough mixer and king mixer). Details of existing TVET College and CET partnerships are outlined in the table below.

TABLE 15: EXISTING TVET AND CET PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Gauteng Community Education and Training College	Discretionary Grant funding support	Adult Education Training	28-Mar-22	28-Aug-23	Link learners to the workplace to assist with completing qualifications to address occupational shortages in the sector.
Free State Community Education and Training College			29-Mar-22	28-Aug-23	
KwaZulu-Natal Community Education and Training College			30-Mar-22	28-Aug-23	
Lovedale TVET College		TVET WIL	17-Dec-21	30-Jul-23	
Mnambithi TVET College		WIL N6	14-Feb-22	30-Jul-23	
Mopani TVET College		Learnership Unemployed	01-Oct-21	30-Sep-23	
False bay TVET College		Internship N diploma and NCV (TVET Placement)	30-Sep-21	29-Mar-24	
eThekweni TVET College		Graduate Internships	30-Sep-21	29-Mar-23	
eThekweni TVET College		Internship N diploma and NCV (TVET Placement)	30-Sep-21	29-Mar-24	
Nkangala TVET College		Internship N diploma and NCV (TVET Placement)	30-Sep-21	29-Mar-24	
Mopani TVET College		Learnership Unemployed	01-Oct-21	30-Sep-23	
eThekweni TVET College		Skills Programme Unemployed Level 2	30-Sep-21	29-Mar-23	
Ekurhuleni East TVET College	Infrastructure development project	MoU for procurement of baking equipment for Hospitality students	31-Mar- 2021	31-Mar-21	Joint training projects in support of CATHSSETA's SSP and the NSDP
Limpopo CET College	Training and development services	Act and host as a partner in CATHSSETA's undertaking to provide training and development services in Limpopo	15-Mar- 2022	15-Mar-24	
South-West Gauteng TVET College	Infrastructure development project	MoU for renovating the kitchen infrastructure for hospitality students	31-Mar- 2021	31-Mar-24	

HEIs and UoT Partnerships: To address occupations in high demand and priority occupations, CATHSSETA acknowledges the need to support and offer bursaries to prospective learners studying towards qualifications relevant to the needs of the sector. In the 2021/22 financial year, CATHSSETA continued to nurture its partnerships with various HEIs and UoTs through the provision of bursary funding to 146 learners studying towards qualifications in the sector.

In addition, CATHSSETA provided support for workplace-based learning in the form of internships for university graduates and those university learners requiring work experience to complete their qualifications. During this period, CATHSSETA partnered with six (6) HEIs and UoTs for the placement of 189 learners in internships within CATHSSETA. CATHSSETA also entered into a partnership with North-West University: Tourism Research and Economic Environs and Society (TREES) for joint research and development projects.

TABLE 16: EXISTING HEI AND UOT PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
University of Cape Town	Discretionary Grant funding support	Bursary Unemployed- Public Universities and UoTs	23-Sep-21	22-Sep-23	To increase the throughput of students registered in high- demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.
North West University			23-Sep-21	22-Sep-23	
Tshwane University of Technology			23-Sep-21	22-Sep-23	
Cape Peninsula University of Technology			03-Jan-22	02-Jan-24	
Tshwane University of Technology		Internship Category A (University Placement) - 12 Months	23-Sep-21	22-Mar-23	
Cape Peninsula University of Technology			03-Jan-22	02-Jul-23	
University of Johannesburg		Graduate Internship	30-Sep-21	29-Sep-23	
North West University		Internship Category A (University Placement) - 12 Months	01-Nov-21	30-Apr-23	

Labour Unions: The NSDP encourages the support of worker-initiated training in the skilling of workers in broader sectoral policy and capacity to effectively engage in the workplace and broader economy.

TABLE 17: EXISTING LABOUR UNION PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
The National Union of Metalworkers of South Africa (NUMSA) DG2020/1323	Discretionary Grant funding support	Bursary: To address skills requirements, as well as promote research in the sector	15-Mar-21	15-Mar-23	To increase the throughput of students registered in high- demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.

SMMEs, Co-operatives, NPOs, NGOs and CBOs: 96 SMMEs were directly supported through bursary and skills programme funding for their workers, whilst others were provided with opportunities to host learners for work-integrated learning. CATHSSETA also appointed two (2) accredited training providers to upskill 96 SMMEs based in two (2) of the country's rural provinces. These SMMEs will be upskilled in the areas of new venture

creation and computer literacy, to use the skills acquired to grow and expand their business, thereby creating employment opportunities within their communities. CATHSSETA also supported four (4) co-operatives operating within its sub-sectors with funding for skills development initiatives. CATHSSETA supported nine (9) NPOs/NGOs to address skills requirements as well as to promote research in the sector.

TABLE 18: EXISTING SMME, CO-OPERATIVE, NPOS, NGO AND CBO PARTNERSHIPS

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
TV Funo Construction and Projects (Pty) Ltd	Discretionary Grant funding support	New Venture creation to use the skills acquired through this training intervention to empower small businesses in the sector.	03-May-21	03-Nov-23	Equipping beneficiaries with the relevant skills to grow and expand their business thereby creating employment opportunities within their communities.
Liyema Investment (Pty) Ltd			03-May-21	03-Nov-23	
Gadafi Constructions (Private Company)			03-May-21	03-Nov-23	
Brownstone Creek (Private Company)			03-May-21	03-Nov-23	
Tomiselusino (Pty) Ltd			03-May-21	03-Nov-23	
LTK Productions (Close Corporation)			03-May-21	03-Nov-23	
Vusisizwe African Enterprise (Private Company)			03-May-21	03-Nov-23	
Umnqophiso Sport Promotions (Private Company)			03-May-21	03-Nov-23	
MSK Lethu Trading and Projects (Private Company)			03-May-21	03-Nov-23	
Ahluma Solutions (Private Company)			03-May-21	03-Nov-23	
Pelinzo Trading (Pty) Ltd			03-May-21	03-Nov-23	
Emlanjeni Investment (Pty) Ltd			03-May-21	03-Nov-23	
Fuson Enterprises (Pty) Ltd			03-May-21	03-Nov-23	

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Rivha Shumi Development Primary Cooperative	Discretionary Grant funding support	Support skills development needs of entrepreneurs and cooperatives within its sub- sectors, with particular focus on the unemployed, youth, women, and people with disabilities.	17-Dec-21	17-Dec-22	Contributes to economic empowerment as a value proposition and not compliance matter in support of vulnerable groups and organisations
Youthtide Development			17-Dec-21	17-Dec-22	
Maximum Development Institute Primary Cooperative			28-Mar-22	28-Mar-23	
Jeleni Fresh			17-Dec-21	17-Dec-22	
Provincial Recreation Council North West (NPO)		Bursary: To address skills requirements, as well as promote research in the sector	28-Mar-22	28-Mar-24	To increase the throughput of students registered in high- demand occupations to provide a supply pipeline for the economy and labour market in response to the occupations in high demand list.
Wykes Foundation NPC			21-Feb-22	21-Feb-24	
Life Saving South Africa			11-Oct-21	10-Apr-23	
PB Global Projects (NPO)			28-Mar-22	28-Mar-23	
Saka Global Projects NPC			01-Nov-21	01-May-23	
Senzimehluko Youth Development			07-Feb-22	07-Feb-24	
House of Sports and Development Foundation (NPO)			28-Mar-22	28-Mar-24	
Makibelo Youth Skills Organisation NPO			01-Nov-21	01-May-23	
Kutlwano After Care Monday to Friday and Development of Children			21-Feb-22	21-Feb-24	

Partnerships with large employers in the sector including public entities: Employers in the sector play a significant role in not only providing CATHSSETA with data for skills planning purposes through the submission of Mandatory Grant applications but also through opening their workplaces as training spaces for learners to gain workplace experience through learnerships, apprenticeship programmes, skills programmes, internships and work-integrated learning. CATHSSETA signed Discretionary Grant funding agreements with a multiplicity of partners including government departments and institutions in the various sub-sectors as reflected in the table below.

TABLE 19: PARTNERSHIPS WITH LARGE EMPLOYERS IN THE SECTOR INCLUDING PUBLIC ENTITIES

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Peermont Global		Bursary: To address skills requirements, as well as promote research in the sector	1-Dec-20	1-Dec-22	Integrate learning through a combination of academic and work-related activities.
Burger King South Africa PTY LTD			1-Dec-20	1-Dec-22	
Grand Palace Trading (Pty) Ltd t/a Ghost Mountain Inn			1-Feb-21	1-Feb-23	
Tourvest Restaurant and Taverns			1-Dec-20	1-Dec-22	
Century City Centre and Hotel			1-Dec-20	1-Dec-22	
Emerald Safari Resort		WIL and Internship: To increase the pool of work ready graduates in occupations in high demand and priority occupations as outlined in the CATHSSETA SSP	1-Dec-20	1-Dec-23	To enhance the soft skills of labour market entrants and advance their theoretical knowledge with exposure in the workplace.
South African heritage Resources Agency			1-Dec-20	1-Dec-22	
Western Province professional Rugby (Pty)			15-Feb-21	15-Aug-23	
Sierra Park Burgers Hotel			15-Feb-21	15-Aug-22	
Department of Higher Education and Training	Career guidance support	To expose learners to career opportunities with the Arts, Culture, and Heritage sub-sector	31-Mar-21	31 Mar-22	Expose the unemployed to education or training opportunities offered in the sector to promote skills development and labour market access.
Department of Tourism	Career guidance support	To expose learners to career opportunities within the Tourism and Travel Services, and Hospitality sub-sectors	1-Apr-2021	31-Mar-23	To support the unemployed to access education or training opportunities, and employment thereof that will provide access to a source of income, social contact, and purposeful activity.

4.2.2 Successful Partnerships

The SETA has had significant success in implementing partnership projects in the sector. Over and above the partnerships outlined above, CATHSSETA continues to partner with the National Student Financial Aid Scheme (NSFAS) to increase the funds available for student loans and bursaries through the Scheme. In addition, in line with the White Paper on Post School Education's objective of expanding access and increasing diversity in the PSET sector, CATHSSETA entered into a R10 million contract to fund 80 TVET College students and 80 HEI learners studying towards qualifications in line with the occupations in high demand identified in the CATHSSETA SSP.

In the 2022/23 financial year the SETA has also partnered with sector employers to provide TVET lecturers with industry exposure through work-integrated learning for TVET lecturers. This programme is designed to

ensure that TVET lecturers develop expertise in both teaching their subjects and preparing their students for the demands of the workplace.

4.2.3 Problems with Partnerships

Postgraduate Bursaries: The main challenge the SETA has faced in promoting research at Postgraduate Level is the inability of students to keep to agreed-upon research areas of study. As a result, the delivery of findings to the SETA is delayed, which limits the usefulness of the findings, given the need for recent, up to date information for skills planning.

Qualification Review: Partnerships entered for the development and review of qualifications have also presented some challenges. Due to the voluntary nature of participation by industry, the finalisation of qualifications poses a challenge due to several reasons, namely, setting aside time for assigned tasks, travel and logistics, as well as delays in the signing of contracts. Sub-sector buy-in and budget constraints also pose a challenge to the finalisation of partnerships.

Public entities: Partnerships with public entities are unique. Certain public entities are often reluctant to fund projects, expecting 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.

TVET Colleges: The challenge the SETA faces with TVET Colleges is the lack of infrastructure geared towards responding to SETA requirements, for example, lack of capacity-enabling preparation of relevant documents for programme approval. Another challenge encountered during the implementation of the programme is delays in the recruitment of learners.

Co-operatives: As mentioned above, the SETA also experienced challenges with entering formal partnerships with co-operatives. Co-operatives are instrumental to the economic growth of rural and township economies. The SETA, through continued capacity-building support, plans to prioritise support for these institutions in the new financial year.

Bursaries: Since 2019/20 CATHSSETA changed its bursary funding strategy. Instead of providing yearly funding for bursary learners, the SETA is now funding the full qualification. However, in implementing this strategy over the past three (3) years, the SETA has had a challenge with the participation rate for learners continuing for the duration of their qualification. In analysing this programme, the SETA has observed that during DG allocations, HEIs hardly apply with the same learners from previous years. As a result, the intended purpose of funded learners for full qualifications is becoming challenging, and the SETA often has to fund bursary learners outside of the initial cohort of beneficiaries from the previous year.

To strengthen partnerships, the SETA must maintain current partnerships through focused engagements, and a clear definition of roles and responsibilities. To address the challenge of the 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.

During the 2016/17 period, additional offices were established at TVET Colleges, in five (5) provinces, to foster easy accessibility, and thus enable close communication. However, due to operational requirements fuelled by financial constraints, the SETA has had to reduce the number of offices operating from TVET colleges from the five established in the 2016/17 financial year to two (2) in the 2020/21 financial year. The SETA will continue to strengthen its relations with the remaining colleges through Discretionary Grant funding opportunities.

4.3 Planned Partnerships

The SETA will continue to partner with institutions in the PSET, sector employers, NGOs/NPOs, co-operatives, labour unions and private education and training providers for the achievement of the NSDP outcomes. New partnerships will include extending existing partnerships with institutions involved in sector research, WIL programmes, strengthening skills development initiatives, youth and women empowerment, and career guidance support.

TABLE 20: PLANNED PARTNERSHIPS

Name of Institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
TVET /CET Colleges	Infrastructure Development Projects ETD Practitioner Training for CET Adult Education Work Placements (Internships and WIL) Bursary funding	To fund the equipment required to enhance learning (practical component) for hospitality and arts and culture students.	1-Apr-21	31-Mar-23	Assisting the industry in being more competitive in terms of its facilitating infrastructure base, as well as boosting business related to infrastructure development, to diversify the economy.
		To support the CETs to embark on a journey to have these institutions accredited on CATHSSETA skills programmes.			
		To increase the number of youths engaging in AET programmes through funding			
Organised Labour	Training Interventions through Bursary and Skills Programme funding	To identify training needs, provide training and RPL	1-Apr-21	31-Mar-23	To improve the ability to integrate learning by combining academic and work-related activities.
National Student Financial Aid Scheme (NSFAS)	Bursary Funding	To provide funding particularly to students in the missing middle group. (i.e., those students whose parents' income is too high for normal NSFAS funding but too low for parents to qualify for loans)	1-Apr-21	31-Mar-23	To improve the ability to integrate academic learning and develop specific competencies and transferable skills.
SMMES, NGO/NPOs, Cooperatives	Training Interventions through workshops, Bursary and Skills Programme funding	To provide economic benefit through collaboration and economies of scale thereby reducing input, operational and distribution costs.	1-Apr-21	31-Mar-23	To increase the build content and skills and increasing the economic growth.
Sector employers, government departments and entities	Bursary funding	To open their workplaces as training spaces for school leavers and graduates to gain workplace experience through learnerships, apprenticeship programmes, skills programmes, internships and work integrated learning	1-Apr-21	31-Mar-23	Improve academic learning integration and create specialized talents and transferable skills.
		Employers also provide opportunities for their workers to participate in learnerships, skills programmes and bursary programmes.			

Name of institution/ Partner Organisation	Nature of Partnership	Objectives of Partnership	Start Date	Original End Date	Value of Partnerships
Universities and Universities of Technology	Research Output	To conduct labour market research and SSP development	1-Apr-2021	31-Mar-23	For the stakeholders (CATHSSETA and Universities) to gain a better understanding of basic job skills as well as a variety of soft and technical skills instilled within the beneficiaries.
	Bursary funding	To improve the relationship between the education and training and workplace by creating a skills pipeline where work ready graduates from HEIs are channeled to workplaces			
	Internship funding	To expose learners to career opportunities within the Tourism and Travel Services, and Hospitality sub-sectors			
Department of Tourism	Career guidance support		1-Apr-2021	31-Mar-23	To support the unemployed to access education or training opportunities, and employment thereof that will provide access to a source of income, social contact, and purposeful activity.

4.4 Successful Partnership Approach/Model

CATHSSETA partnerships are guided by the strategic priorities of the SETA outlined in the SSP for the 2020/21 – 2024/25 medium-term period. CATHSSETA's approach to partnerships and partnership models are outlined in the Discretionary Grant and Strategic Projects policies. Partnerships are formed with entities that express interest during the Discretionary Grant funding window, both for PIVOTAL and non-PIVOTAL programmes. For rural communities or remote or previously disadvantaged regions with limited resources required to access the opportunities presented by the SETA (for instance data and ICT equipment), a developmental approach and additional support is given in the form of capacity building initiatives.

4.5 Conclusion

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



CHAPTER 5: SETA MONITORING AND EVALUATION

5.1 Introduction

This chapter of the SSP reflects on the SETA achievement of strategic priorities. CATHSSETA is required to monitor and evaluate learning interventions, performance and achievement of predetermined objectives, on an annual basis. CATHSSETA's Monitoring and Evaluation (M&E) framework guides the SETA's monitoring and evaluation activities for managing performance, by monitoring the outputs and evaluating the outcomes outlined in the Strategic Plan and Annual Performance Plan. The data sources consulted for this chapter include the organisations' Annual Report and the Research Reports emanating from the studies the SETA has conducted in the previous financial year.

5.2 Sector Skills Planning Reflections

5.2.1 CATHSSETA Approach to Monitoring and Evaluation

CATHSSETA has a Unit responsible for M&E, within the Research, Monitoring and Evaluation Department. The Unit coordinates all M&E processes within CATHSSETA, from planning to reporting, covering both the core business and support functions. Currently, the Unit supports the SETA with evaluation reports on various skills development interventions; monitoring of performance against the entity's set targets; as well as consolidated M&E reports such as the Quarterly and Annual Reports. Outputs from the M&E Unit are also used by the Research, Planning and Performance Unit to inform skills planning.

In line with the NSDP's outcomes, M&E helps to provide an evidence base for CATHSSETA's resource allocation decisions and further assists in identifying how challenges ought to be addressed and successes replicated. CATHSSETA's Quarterly Monitoring Reports and Annual Reports are collated and analysed to assess the:

- Achievement of planned annual targets;
- Alignment of implemented skills development interventions against the PIVOTAL list from the previous SSP;
- The extent to which CATHSSETA learning programmes have addressed identified skills development priorities;
- The progress in the establishment of concrete partnerships;
- The improvement on the performance of training providers;
- Outcomes of collaborations with employer organisations; and
- Attainment of strategic outcomes.

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 process. They are captured in the SSP annual updates and further cascaded into the Strategic Plan, wherever applicable. The figure below illustrates the CATHSSETA Planning process that informs the M&E process. The SETA's M&E framework and plan describe the approach that the institution is to follow, to create and operate an M&E system that produces credible, accurate information, on an ongoing basis, that will be used to improve service delivery and governance. CATHSSETA M&E systems will be integrated with existing management and decision-making systems. M&E strategies will outline how M&E findings will inform strategic and operational planning, budget formulation and execution, as well as in-year and annual reporting.

FIGURE 14: PLANNING PROCESS



5.3 Scope of Monitoring and Evaluation

The M&E functions are as follows:

5.3.1 Monitoring

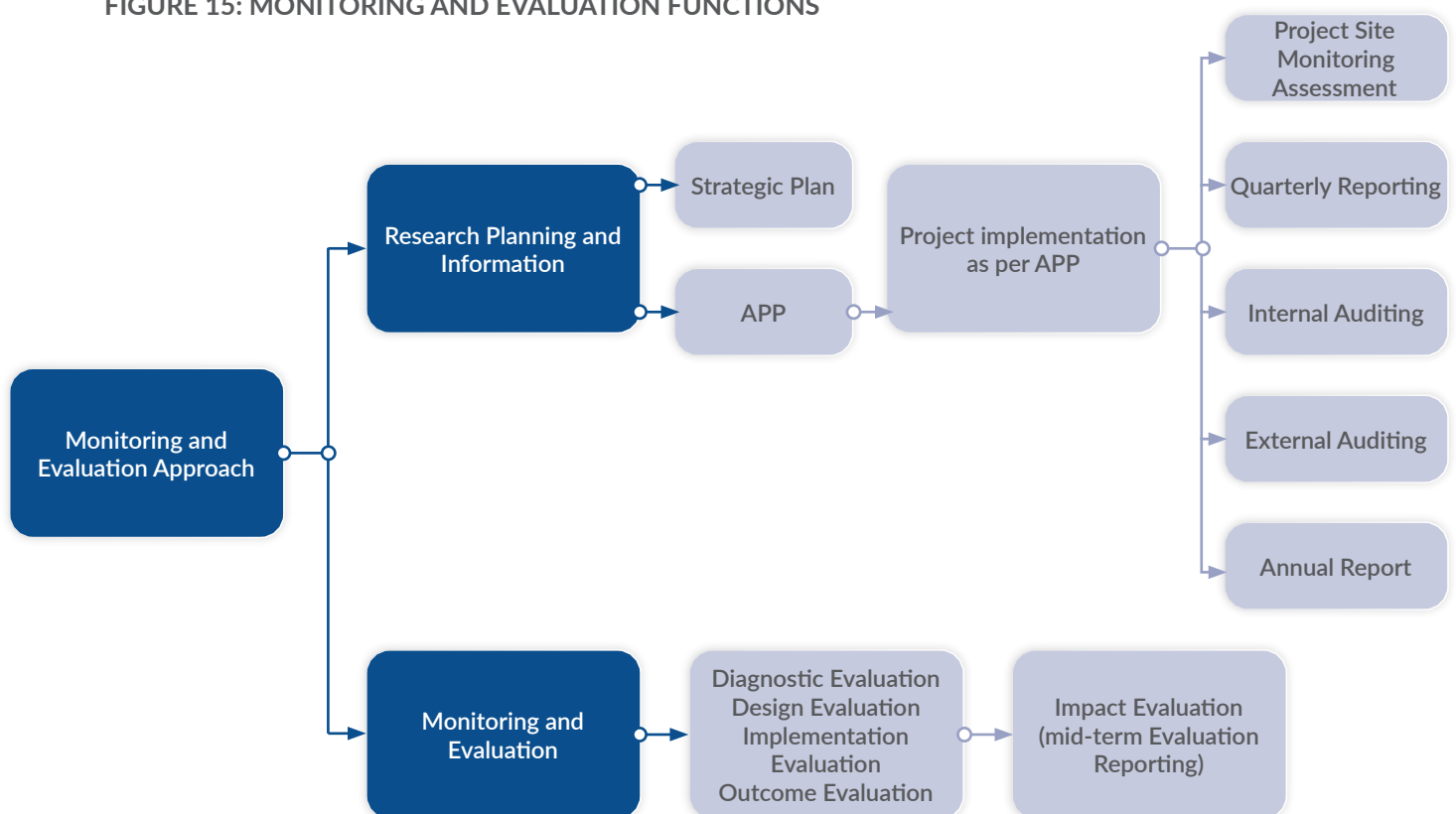
- 5.3.1.1 Internally, organisational programmes are monitored to ensure that they are on track - against key milestones and in terms of budget – and that, where challenges emerge, these can be identified and addressed. Monitoring functions are further supported by the internal audit function.
- 5.3.1.2 Monitoring is also conducted at intervention level to ensure compliance with set standards by all stakeholder groups. Site assessments are conducted to gather accurate and complete data to ensure there is a continuous monitoring of quality and standards of learning programmes before and during implementation, and to verify final results. These monitoring activities are internal controls set up to observe and systematically check progress.
- 5.3.1.3 Monitoring processes identify any red flags and highlight potential project risks that may emerge, which could potentially jeopardise the extent to which the project/programme will meet its intended outcomes.
- 5.3.1.4 The SETA has also appointed an external independent auditor to monitor the organisation's performance quarterly in line with the SETA's pre-determined targets.
- 5.3.1.5 DHET also plays a critical role in monitoring the SETA's performance quarterly. A quarterly monitoring report (QMR) is submitted to the department to report on progress against implementing development intervention in line with the Service Level Agreement the SETA has entered into with DHET.
- 5.3.1.6 Periodic reports are analysed to feed into a more in-depth evaluation process, which focuses on understanding whether the anticipated outcomes and impact have been realised.

5.3.2 Evaluation

- 5.3.2.1 Evaluation activities are predominantly carried out through the CATHSSETA Research Agenda with a focus on diagnostic, design, implementation, outcomes and impact studies.
- 5.3.2.2 The evaluation process supports learning, within the scope of CATHSSETA, of the ways in which projects could be designed and refined to better meet these outcomes and support the intended impact, as outlined and identified in the SSP.
- 5.3.2.3 The evaluation process also allows the CATHSSETA to consider which other projects need to be prioritised, if it is to meet its overarching strategic skills development goals for the sector, as identified in the SSP and the Strategic Plan.
- 5.3.2.4 Assesses the challenges identified during the implementation process, and ensure these challenges are addressed to improve implementation thereof and realign with set strategic priorities of the SETA.
- 5.3.2.5 Evaluation of set strategic objectives to determine whether SETA plans have been successful in achieving set goals over the five (5) years of implementation.

The figure below outlines the SETA's approach to M&E.

FIGURE 15: MONITORING AND EVALUATION FUNCTIONS



5.4 Previous SSP Strategic Priorities

The CATHSSETA SSP 2021/22 identified the following key development priorities and actions for the sector.

TABLE 21: PREVIOUS SSP STRATEGIC SKILLS PRIORITIES

No.*	Strategic Skills Priority (SSP)	Outcomes in the SP	Number of KPIs in the APP	KPIs Achieved
1	Fourth Industrial Revolution	Increased production of occupations in demand	1	100%
2	Training Provision	Improved the level of skills of the South African workforce	3	66%
		Support the growth of the Public College system	5	80%
3	Analysis of skills needs	Increased production of occupations in demand	1	100%
4	Increased Partnerships to include Worker initiated Interventions	Improved levels of skills in the South African workforce	1	100%
5	Transformation	Increased support to the growth of the public College system	1	100%
6	SMME Interventions and Green Economy (Resource Efficiency)	Transformational entrepreneurship and career development is enabled and supported in the sector	1	100%
7	Monitoring and Evaluation.	An ethically sound, effective and efficient institution that delivers on its mandate	3	100%
8	Addressing Occupational Shortages and Skills Gaps through E-Learning	Education linked to workplace	2	100%
		Improved levels of skills in the South African workforce	2	100%
		Increased access to occupationally-directed programmes within the sector.	3	100%
9	Technology Advancement to combat the impact of the Global Pandemic: Coronavirus - COVID-19	Increased production of occupations in demand	1	100%

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

Source: Draft Annual Report, 2021/22

5.5 Strategic Priorities Not Achieved

The following strategic skills priorities were not achieved in 2021/22 and the reasons for that are stated in the last column of table 22.

TABLE 22: STRATEGIC PRIORITIES NOT ACHIEVED

No.	Strategic Skills Priority	Outcomes in the SP	Reasons for deviation
2	Training Provision	Improving the level of skills of the South African workforce	This was implemented in the APP through the enrolment of employees in skills development interventions and worker-initiated training (federations/trade unions) interventions supported through capacity building. However, the targets were not fully achieved due to delayed project implementation.
		Support the growth of the public College system	The SETA had planned to partner with TVET and CET Colleges on various learning interventions. However, the targets were not met due to inadequate numbers of applications for CET programmes which resulted in multiple application windows. Also delayed implementation of projects.

Planned mechanisms to address Skills Priorities not achieved in the previous year are covered in detail in Table 23 below.

TABLE 23: PLANNED MECHANISMS FOR STRATEGIC PRIORITIES NOT ACHIEVED

No.	Strategic Skills Priority	Planned Mechanisms to Address the Skills Priorities Not achieved in the Previous Year
1	Training Provision	Early opening of special projects window in the 2022/23 Financial year

5.6 Interventions implemented in support of the ERRP Skills Strategy

The following interventions were implemented by CATHSSETA during the 2021/22 financial year in support of the ERSS:

- In July 2021, the CATHSSETA Board approved an allocation of funding for the Chef Artisan Programme in support of the ERRP. The programme supported 334 students at the second- and third-year levels of study, who were previously funded for only one year instead of the full duration of the programme.
- 110 TVET College learners were enrolled in the CATHSSETA China Project. The learners participated in a WIL programme in the fields of Hospitality, Tourism, Arts and Culture and Chef qualification in China. The SETA entered into additional contracts with TVET colleges in March 2022 to provide the learners with the additional six (6) months workplace exposure required to attain their qualifications linked to the China WIL programme.
- CATHSSETA further awarded R30 million to NSFAS for the provision of bursary funding to 396 learners at various public institutions of Higher Learning. In this project, NSFAS is expected to award bursaries to qualifying final year “missing middle” students studying for qualifications aligned to the CATHSSETA sub-sectors. The “missing middle” are students who come from working-class households that do not qualify for funds from NSFAS while at the same time not being able to afford higher education.

5.7 Plan of Action

5.7.1 NSDP 2030 Linked to SSP Priorities

The strategic skills priorities for 2021/22 have been identified, mapped and linked to the NSDP 2030 outcomes, (table 24).

TABLE 24: CATHSSETA SSP PRIORITIES LINKED TO NSDP

NSDP Outcomes	CATHSSETA-Linked Priorities
Outcome 1: Identify and increase production of occupations in demand	<ul style="list-style-type: none"> • Fourth Industrial Revolution; • Analysis of skills needs; and • and Monitoring and Evaluation.
Outcome 2: Linking education and the workplace	<ul style="list-style-type: none"> • Workplace-based Learning; and • Experiential learning; Mentoring and coaching.
Outcome 3: Improving the skills level of the South African workforce	<ul style="list-style-type: none"> • Qualification review.
Outcome 4: Support the increase in access to occupationally directed programmes	<ul style="list-style-type: none"> • Learning programmes; and • occupationally-directed programmes.
Outcome 5: Support the growth of the Public College system	<ul style="list-style-type: none"> • Training Provision; • TVET capacity-building; and • Transformation in the sector.
Outcome 6: Skills development support for entrepreneurship and cooperative development	<ul style="list-style-type: none"> • SMMEs support and entrepreneurship (informal traders).
Outcome 7: Encourage and support worker-initiated training	<ul style="list-style-type: none"> • Increased partnerships to include worker-initiated interventions.
Outcome 8: Support career development and placement services	<ul style="list-style-type: none"> • Priority 6: Transformation (TVET and CET capacity-building); and • Priority 4: Workplace-based learning and experiential learning.

5.7.2 Use of information from previous studies

The CATHSSETA has recognised the value of M&E and the role it plays in informing decision making in the planning life cycle. As a result, the SETA is embarking on a process of implementing a project which will be addressing the recommendations emanating from the China outcome evaluation report, which was carried out in the 2021/22 financial year. During the 2021/22 financial year the SETA also conducted the following studies:

- Track and Trace study of beneficiaries from the 2015/16 – 2018/19 financial years
- Outcome Evaluation of the Adult Education and Training programme
- Diagnostic Evaluation study of the Occupations in High Demand List

Findings and recommendations emanating from the above listed studies will inform the strategy of the organisation for the 2023/24 financial year.

5.8 Measures to Ensure that Current Set Priorities Are Met

The table below provides details of planned interventions for strategic skills priorities.

TABLE 25: ACTION PLAN

Skills Priority	Programme/ Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
Fourth Industrial Revolution	4IR strategy for skills development in the six CATHSSETA sub-sectors.	Commissioned research service provider to carry out 4IR study	Develop a strategy to address the identified skills implications of the 4IR on the sector	UPDATED
Training Provision	Assessment QCTO Joint Implementation Plan (JIP)	New	Joint Implementation Plan with QCTO on quality assurance functions - Assessment quality partner and qualification development role that CATHSSETA will fulfil	UPDATED
Analysis of skills needs	Research Projects and Qualifications Review	Research Progress Report in the Research Agenda	Update Research Agenda for evidence-based decision making and identification of skills needs	UPDATED
Increased Partnerships to include Worker-initiated Interventions	MoU to support worker-initiated training	Partner with TVET Colleges, Employers, and Universities	Partnerships aligned with worker-initiated training e.g., TVET lecturer development and bursary employed interventions	UPDATED
Transformation	Mentoring and coaching/TVET and CET capacity-building	Work Readiness Programme Workplace-Based Learning and experiential learning	New teaching and learning methods/ workplaces	UPDATED
SMME Interventions and Green Economy (Resource Efficiency)	SMME Skills Strategy	The strategy will be formulated as part of the 2022/23 Research Agenda	Develop skills development strategy for SMME, entrepreneurship, new enterprises, and informal traders	UPDATED
Monitoring and Evaluation	University Partnerships	New	Institutionalise and build the capacity of M&E within the organisation	UPDATED
Addressing Occupational Shortages and Skills Gaps through E-Learning	Learning Programmes	Learning programmes delivered in line with the e-learning policy and standards.	Provide Apprenticeship, Learnerships, WIL, Internships, Bursaries and Skills programmes opportunities	UPDATED

Skills Priority	Programme/ Project	Achieved/In Progress	Planned Measures	Link to NSDP Outcome
Technological advancement to combat the impact of the COVID - 19 Pandemic	TBC	New	The SETA aims to continuously engage with stakeholders, as part of the Research efforts the SETA undertakes to update	Technological advancement to combat the impact of the COVID - 19 Pandemic

5.9 Conclusion

Chapter 5 of the SSP outlined the SETA's approach to Monitoring and Evaluation. The chapter reflects on the SETA's achievement of strategic priorities, based on the previous year's Annual Reports and reports from tracer studies. Lastly, NSDP outcomes were linked to current priorities and actions plans were presented. The SETA needs to strengthen coordination and implementation of the M&E framework, including the training of staff on implementation tools.



CHAPTER 6: 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. 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 it is not a detailed strategic or operational plan. National strategies and plans have also been considered to ensure alignment with government priorities.

6.2 Key Skills Findings from Previous Chapters

The key findings from previous chapters have been summarised in the table below.

TABLE 26: SUMMARY OF KEY FINDINGS

CHAPTER	KEY FINDINGS
Chapter 1	<ul style="list-style-type: none"> The vast majority of entities in the sector (97%) are small entities. The majority of industries recorded an increased growth rate in the year 2021 as compared to 2020. This can be attributed to the economy recovering from the effects of the pandemic at its peak. South Africa's real GDP growth bounced back to 4.9% in 2021, driven primarily by a combination of base effects, strong commodity prices, and the gradual reopening of the economy after strict COVID-19 regulations and mobility restrictions. The Hospitality sub-sector employs the highest number of people in the sector, followed by Gaming and Lotteries. Arts and Culture employs the least number of people in the sector. The distribution of employees and employers is highest in Gauteng, Western Cape and KwaZulu-Natal provinces, with the Northern Cape having the least. There is a slight increase from previous years in terms of the number of employees who are Africans (78%) within the sector, followed by Coloured employees (10%), White (11%) and Indian/Asian (3%). Females make up 60% of employees in the sector, 54% of which are African females. The majority of employees fall into the Service and Sales occupational category (36%), followed by Elementary workers (19%) and Clerical Support workers (15%). 48% are classified as youth (less than 35 years). This is followed by 46% of employees between 35 and 55 years and 6% above 55 years. A total of 176 258 employees are employed in the sector. Consistent with the economic recovery trends post-COVID-19, there seems to be an increase in employment by 1% from the 2021/22 figure of 170 841.

CHAPTER	KEY FINDINGS
Chapter 2	<ul style="list-style-type: none"> The COVID-19 pandemic has accelerated existing trends in remote work, e-commerce, and automation, with approximately 25% more workers than previously estimated, potentially needing to switch occupations as a result. Findings from the CATHSSETA 4IR study revealed that the experiences of the sub-sectors with 4IR are vastly different, therefore, there should be tailored strategies for effective adoption in the sector. Employees within the sector require exposure to 4IR technologies to gain a better understanding and increase the rate of adopting these technologies. Technological developments have further resulted in the growth of the gig economy and workforce that enable transactions directly between providers and consumers. 4IR brings in new technologies and occupations, which will translate into new occupations, reshaping future skills needs and education and training requirements. Employers need a more flexible skills base which can adapt to competing environments. 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. Learners and educators need to be capacitated to keep abreast rapid technological advancements in the sector.
Chapter 3	<p>Occupational Shortages and Skills Gaps</p> <ul style="list-style-type: none"> The majority of employers indicated that the main reason vacancies are difficult to fill is due to a lack of suitably qualified candidates, as well as a lack of candidates with the required work experience. The most common skills gaps across all occupational groups are advanced computer IT and software; attention to detail; and customer service. This points to the transition towards a more customer-centric focus and creating positive experiences for customers. <p>Skills Supply</p> <ul style="list-style-type: none"> 80% of employees are in the middle-level skills band, between NQF levels 3-6. 80% of Chefs in the sector are African, followed by 11% Coloured, 7% White, and 2% Indian/Asian. <p>Supply and Demand</p> <ul style="list-style-type: none"> Graduates in the sector are generally viewed as not meeting employer expectations in terms of skills requirements. The sector perceives there to be a skills-mismatch between graduates and job requirements. To bridge the skills-mismatch between graduates and job requirements, the SETA needs to form strategic partnerships with the industry to ensure that industry requirements are aligned with qualifications and that providers are kept informed of these requirements.
Chapter 4	<p>CATHSSETA recognises the need to form partnerships with:</p> <ul style="list-style-type: none"> Public TVET Colleges and CETs HEIs, (UoTs and other PSET institutions) Labour Unions SMMEs, Co-operatives, NPOs, NGOs and CBOs Large employers and industry bodies within the sector <ul style="list-style-type: none"> Successful partnership models, which may be replicated, include qualifications review, research partnerships, as well as career guidance events that can inform existing and potential entrants of career opportunities and paths available in the sector. Further collaborative measures are required for qualification development, implementation of inter-seta qualifications, implementation of learning programmes, placement of learners in internships and capacitating the TVET sector.

CHAPTER	KEY FINDINGS
Chapter 5	<ul style="list-style-type: none"> Strategic skills priorities for the previous year were assessed, and those that were not achieved were indicated and action plans provided; Current priorities were included, together with proposed action plans; The SETA needs to strengthen the coordination and implementation of the M&E framework, including the training of staff on implementation tools.

6.3 Recommended Priority Actions

Key findings from the previous chapters and common feedback from stakeholder engagements have culminated in the key planned strategic priority actions as outlined below. In the sub-sections below, a comprehensive description of the key strategic actions planned is provided in response to the SETA's current external operating environment.

6.3.1 South African Economic Reconstruction and Recovery Plan

In support of the ERRP, the ERSS identifies the skills implications of the ERRP and explicitly outlines how the PSET system will respond to this demand in a manner that ensures that the skills that are required to implement this plan are available. The table below outlines the interventions CATHSSETA intends to address in support of the Plan and Strategy.

TABLE 27: CATHSSETA SUPPORT FOR THE ERRP

ERRP PRIORITY INTERVENTION	ERSS INTERVENTIONS	PRIORITY INTERVENTION PLANNED BY THE SETA
Priority intervention 3.4: Gender equality and economic inclusion of women and youth	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	CATHSSETA, through the implementation of its transformation targets as part of the Discretionary Grant funding criteria, allocates 60% to the youth, 1% to persons living with disabilities, and 65% to female beneficiaries.
Priority intervention 3.5: Support for the recovery and growth of the tourism, cultural and creative industries	Intervention Seven: Retraining/up-skilling of employees to preserve jobs	CATHSSETA conducted a study on the impact of COVID-19 which has assisted the SETA in determining the skills required for the recovery and re-orientation of identified sectors. The emerging skills and jobs highlighted in the study have been considered in this SSP update and will inform the SETA's planned actions.
Priority intervention 3.6: Green Economy interventions	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	<p>The SETA has identified occupations in shortage and possible interventions in support of the Green Economy:</p> <ul style="list-style-type: none"> Environmental Scientist Energy Engineer Energy Engineering Technologist Wind Turbine Power Plant Process Controller Water Plant Operator

ERRP PRIORITY INTERVENTION	ERSS INTERVENTIONS	PRIORITY INTERVENTION PLANNED BY THE SETA
N/A	Intervention One: Embedding skills planning into sectoral processes	CATHSSETA to actively participate in committees established to support planning and recovery in the sector.
	Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	Amending accreditation and qualification requirements for funding programmes identified as immediate priorities.
		Prioritise partnerships with HEIs and TVET Colleges to increase enrolments in immediate priority areas.
	Intervention Ten: Strengthening the post-school education and training system	As part of the 2022/23 research agenda, the SETA plans to develop an integrated CATHSSETA sector skills strategy and implementation plan, to respond to 4IR, including a detailed assessment of e-learning interventions to be carried out in achieving sub-sector competitiveness.

6.3.2 Fourth Industrial Revolution

Technological advancement and the 4IR have been identified as key change drivers influencing occupational patterns and training delivery in the sector. The technological advancement trend is critical for both skills supply and demand, and CATHSSETA needs to identify skills requirements, more precisely, for purposes of qualification review and priority skills identification across the sub-sectors.

6.3.3 SMME Interventions and Green Economy (Resource Efficiency)

SMMEs have been identified as a key component to advancing growth and development in South Africa. Based on the sector profile, the majority of entities in the sector are SMMEs, making up 96% of the CATHSSETA sector. In the context of high unemployment rate in the country, coupled with poverty and inequality, it becomes pertinent for the SETA to facilitate the empowerment of SMMEs through skills development programmes. The SETA needs to develop and implement a skills strategy for SMME development, entrepreneurship, new enterprises, cooperatives, and information traders. Through this strategy, the SETA should identify ways to expand its reach for small entities to secure funding for skills development initiatives in a way that is accessible and considers the challenges associated with owning a small business in the country.

6.3.4 Technological Advancement to Combat the Impact of the COVID-19 Pandemic

COVID-19 has been identified as another key change driver in the sector. Since the global outbreak of the pandemic and the enforcement of national lockdown regulations, there has been a growing dependence on technology to ensure business continuity and social integration. Despite the poor economic performance of the sector, for some businesses, social networking, e-commerce, and digital marketing, amongst other things, have been essential in minimising the impact of COVID-19. Having said that, there has been considerable coverage of the devastating effects of the pandemic on CATHSSETA's sub-sectors, however, a more detailed and scientific analysis of those effects from a skills development perspective is not readily available.

6.3.5 Sector Transformation

Based on the findings above, the sector is falling short of meeting the national disability equity target regarding the number of employees in the sector. People with disabilities tend to be disproportionately affected by the lack of enabling environments when trying to perform practical day-to-day tasks. Due to a lack of awareness,

the perceived burden of providing an inclusive environment can be a deterrent to some employers and training providers in the sector. This phenomenon extends to the ability of people with disabilities to access skills development opportunities. In addition, some sectors still have the majority of black people and in particular females, at the bottom of the ladder in terms of occupational levels. The SETA plans to establish partnerships with NGOs and CBOs that work with people with disabilities to increase support to this marginalised group by (a) identifying other such barriers to skills development opportunities for people with disabilities, (b) putting measures in place to mitigate these challenges, and (c) identifying measures to increase access to skills development opportunities to improve employability. The SETA will also partner with employers to train those employees that are semi-skilled and unskilled.

In addition to the key emerging strategic priorities, the SETA also recognises the importance of having operational strategic priority actions in line with its service offering, which include:

- Training provision;
- Analysis of skills needs;
- Increased partnerships to include worker-initiated interventions;
- Addressing occupational shortages and skills gaps; and
- Sector advancement.

The overall planned actions for current SETA Strategic Skills Priorities are summarised in table 28 below.

TABLE 28: SETA STRATEGIC SKILLS PRIORITIES

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
1. Fourth Industrial Revolution	Development of a skills strategy for the implementation of 4IR in the sector	4IR Skills Strategy through the Research Agenda
2. Training Provision	Assessment QCTO (JIP)	Engagement with QCTO, Joint Implementation Plan
3. Analysis of Skills Needs	Research projects and qualification review; ERSS Intervention Three: Increased access to programmes resulting in qualifications in priority sectors	Research projects articulated in the Research Agenda
4. Increased Partnerships to include Worker-initiated Interventions	Organised labour engagement	Initiate partnerships with organised labour to leverage established networks with members
5. Sector Advancement	Mentoring and coaching/TVET and CET capacity-building; ERSS Intervention Ten: Strengthening the post-school education and training system	New teaching and learning methods/ workplaces, WRP
6. SMME interventions and Green Economy (Resource efficiency)	Develop Skills Development Strategy for SMMEs, entrepreneurship, new enterprises and informal traders; ERRP Priority intervention 3.6 Green Economy interventions	Implement Skills Development Strategy for SMMEs, entrepreneurship, new enterprises and informal traders
7. Monitoring and Evaluation	Institutionalisation of M&E Framework and Plan	Elevate Monitoring and Evaluation

SETA STRATEGIC SKILLS PRIORITY ACTIONS		
Skills Priority	Program/Project	Planned Actions
8. Addressing Occupational Shortages and Skills Gaps	Learning Programmes	Support Apprenticeship Learnerships WIL and Internships Bursaries Skills programmes
9. Technological advancement to combat the impact of the COVID-19 Pandemic	Implement blended learning in the sub-sector; ERRP Priority intervention 3.5: Support for the recovery and growth of the tourism, cultural and creative industries	Develop an E-learning Strategy
10. Sector Transformation	ERRP Priority intervention 3.4: Gender equality and economic inclusion of women and youth; Partnership projects for transformation imperatives	Initiate partnerships with NGOs and CBOs to increase support for people with disabilities Upskilling of people in lower occupational categories

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 and through partnerships with national departments responsible for the economic sectors. The ERRP and the ERSS require CATHSSETA to review its partnership arrangement to respond to national skills priorities.

The National Department of Sport, Arts and Culture (DSAC), the Department of Tourism, the Department of Forestry, Fisheries and the Environment (DFFE), and the Department of Trade, Industry and Competition (DTIC), are custodians of the following sector strategies related to CATHSSETA:

TABLE 29: SECTOR STRATEGIES RELATED TO CATHSSETA

Sector Strategies	CATHSSETA Planned Action
National Cultural Industries Skills Academy, (NaCISA)	NaCISA is a special-purpose vehicle of the DAC and a central point for capacity building and skills development in the Arts, Culture and Heritage sub-sector. It is an incubator for almost all the skills that are needed to have an optimally functioning Arts, Culture and Heritage sub-sector. Through a joint implementation plan with the QCTO, CATHSSETA is making a concerted effort to ensure the relevance of qualifications that respondents to the skills needs of this sub-sector. These efforts are also aimed at encompassing elements of Travel and Tourism Services to deepen understanding of the interlinkages between the two (2) sub-sectors.
The National Sports and Recreation Plan (NSRP 2030)	In line with the NSRP, CATHSSETA plans to develop training and educational initiatives aimed at developing Sports, Recreation and Fitness personnel, particularly coaches and administrative and technical officials. The focus also encompasses developing financial, marketing and media skills. This will be achieved by enrolling targeted personnel in accredited education and training programmes.

Sector Strategies	CATHSSETA Planned Action
National Tourism Sector Strategy (NTSS)	Some of the key focus areas of the NTSS 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 of the sub-sector, with the emphasis being on developing and improving skills within Travel and Tourism Services. The SETA has identified several occupations such as ICT Systems Analysts, Market Research Analysts and Travel Consultants to be prioritised through Discretionary Grant funding.
Tourism Human Development Strategy	CATHSSETA plans to continuously address workplace skills gaps, particularly the strengthening of "soft skills", in collaboration with other key-role actors, such as Umalusi, TVET Colleges and others.

6.5 Conclusion

CATHSSETA has been deemed a crucial driver of skills development within our diverse sub-sectors. 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 is an important issue because of the large amounts invested. One single, stand-out achievement has been getting employers in the sector involved in accredited 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 2023/24*
Arts and Culture	2021-264201	Copywriter	Publicity Writer, Copy Editor, Advertising Writer	Bursary and Internship	7	16	17
	2021-251301	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
	2021-352103	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	Higher Certificate in Sound Production Bursary: Bachelor of Arts in Sound Production Leamership and Internship	4 - 7	8	8
	2021-343203	Visual Merchandiser	Display Decorator, Window Dresser	Bursary and Internship	7	8	8
	2021-263206	Heritage Consultant	n/a	Leamerships: National Certificate: Heritage Resource Management	7	8	8
	2021-343902	Light Technician	Lighting Electrician, Lighting Operator, Lighting Technician, Lighting Assistant, Lighting Director	Bursary and Internship: Higher Certificate in Film Production Bachelor in Film Production Leamership	4 - 7	4	4
	2021-216603	Multimedia Designer	Multimedia Artist, Instructional Designer, Digital Media Designer, Interactive Media Designer	Bursary and Internship: Higher Certificate in Digital Film Production	5 - 7	2	2
	2021-216601	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	Diploma/Bachelor: Digital Design/Media/ Graphic Design / Multimedia	2	2	2
	2021-333903	Sales Representative (Business Services)	Sales Representative (Printing), Sales Representative (Publishing), Advertising Sales Consultant, Print Cost Estimator, Business Services Officer, Sales Representative (Advertising)	Leamership: Customer Service	4	2	2
	2021-121905	Programme or Project Manager	Project Director	Leamership: Project Management Bursary: Diploma in Project Management	4 - 6	2	2

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-132401	Supply and Distribution Manager	Supply Chain Manager, Supply Chain Executive, Storage and Distribution Manager, Procurement Manager, Freight Forwarding Customs Clearing Manager, Acquisitions Manager, Depot Manager Supply Lead Manager, Parts Manager, Purchase Manager, Freight Manager, Goods Clearance Manager	Bursary: Diploma/Degree in Supply Chain Management Diploma in Logistics	7	2	2
	2021-511301	Gallery or Museum Guide	Museum or Gallery Attendant, Museum Host and Tour Coordinator, Gallery Assistant	Leamership and Workplace Experience Bursary and Internship: Museology/museum studies	4 - 7	2	2
	2021-652302	Fitter and Turner	Printers Mechanic, Industrial Mechanician	Leamership, apprenticeship and Workplace Experience	4	12	12
	2021-261901	Intellectual Property Advisor	Legislation Facilitator Intellectual Property Advisor, Arbitrator, Facilitator, Negotiator, Industrial Conciliator, Rulings Analyst, Mediator	Bursary: Law	7	7	7
	2021-352102	Camera Operator Film, Television or Video	Video Tape Operator, Videographer, Focus Puller (Film)	Leamership: National Certificate, Film and Television Production	5	4	4
	2021-216302	Industrial Designer	Product Designer, Textile Designer, wallpaper Designer, Furniture Designer, Industrial Graphic Designer, Jewellery Designer	Bursary and internship	5	3	3
	2021-121101	Finance Manager	Budgeting Manager, Internal Revenue Controller, Account Systems Manager, Revenue Assessment manager, Finance Administration Manager	Bursary and Internship	7	2	2
	2021-432201	Production Coordinator	Production Leader, Production Foreman, Distribution Controller, Production Planner, Logistics clerk	Bursary and Workplace experience	4	2	2
	2021-213307	Park Ranger	Game/Park Warden, Beach and Estuary Warden, Fish Warden, Wildlife Officer/Warden, Wildlife Conservationist	Leamerships: National Certificate - Nature Resource Guardianships Terrestrial	5	305	320
Conservation							

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-134901	Environmental Manager	Care Manager, Wildlife 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, Wildlife Protection Services Manager, Conservation Agriculture System Manager, Water Quality Manager	Bursary/Internships and Workplace Experience	6	117	123
	2021-211402	Hydrologist	Geophysicist, Geophysical Scientist, Physical Oceanographer, Seismologist, Marine Scientist	Bursary: Bachelor of Science Hydrology	7	10	11
	2021-335906	Environmental Practices Inspector	n/a	Learnership: National Certificate Environmental Practices Bursary and Internship: National Diploma in Environmental Science	6 - 7	4	4
	2021-314102	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	6 - 7	1	1
	2021-421202	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

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
Gaming and Lotteries	2021-342302	Outdoor Adventure Guide	Shark Swimming Guide, Snorkelling Guide, River Kayaking Guide, Diving Operator, Dolphin Swimming Guide, White-water Rafting Guide, Outdoor Adventure Leader, Hunting Guide, Kayaking Guide, Cycle Touring Guides, Team Building Operator, River Rafting Guide, Horse Riding Instructor, Mountain Guide, Adventure Tourism Operator, Hiking Guide, Adventure Safari Guide, Fishing Guide, Horse Trekking Guides, Bungee Jump Master, Sea Kayaking Guide, Outdoor Adventure Instructor, Outdoor Recreation Guide, Trekking Guide	Leamership: Nature Guide	4	2	2
	2021-211205	Climate Change Scientist	N/A	Bursary and Internship	7	2	2
	2021-242210	Business Administrator	N/A	Leamership: Business Management/ Administration	4	11	11
	2021-143101	Betting Agency Manager	Racing Betting Branch Manager, Tab Manager	Leamership: Generic Management	5	27	28
	2021-251201	Software Developer	Software Designer, ICT Risk Specialist, Software Architect, Information Architect Software, Software Engineer	Bursary: Bachelor's in computer science, Diploma in IT (Software development) Internship	6 - 7	27	28
	2021-351301	Network Technician	Network Support Technician	Bursary and Internship: Diploma in IT	6	17	18
	2021-141201	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 Leamership: Food and Beverage Studies/ Services	4 - 6	1249	1311
	2021-541402	Alarm, Security or Surveillance Monitor	Answering Service Operator, Security Monitor	Bursary/Internships and Workplace Experience	4	34	34

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-143102	Gaming Manager	Slots Technical Manager, Slots Manager, Gaming Promotions Manager, Gaming Administration Manager, Tables Manager, Cashier Manager Gaming Racetrack Operations Manager, Gaming Project Manager	Bursary and Internship: N6/ Diploma in Electronics	6	12	12
	2021-242211	Internal Auditor	Information Systems Auditor, ICT Internal Auditor, Audit Consultant, Internal Auditor	Bursary and Internship: Auditing/Information Systems	7	13	13
	2021-541902	Emergency Service and Rescue Official	Emergency Response Officer, Mine Rescue Service Worker, Rope Rescue Technician, Industrial Paramedic	Leamership: Certificate in Occupational Health and Safety (OHS) Bursary: Higher Certificate/ Diploma in Environmental Health and Safety	4 - 6	5	5
	2021-516401	Animal Attendant / Groomer	Pound Keeper, Boarding Kennel Attendant, Horse Groomer, Shearer, Pet Groomer, Animal Rescue Worker, Kennel Assistant	Leamership and Skills Programme	4	4	4
	2021-513201	Bar Attendant	Bartender, Barperson Waiter, Bar Operator, Bar Steward, Club Steward, Bar Hostess	Leamership and Skills Programme	4	4	4
	2021-351301	Computer Network Technician	Network Support Technician	Bursary and Internship: Diploma/Degree in IT	6 - 7	3	3
	2021-242101	Business Analyst	Commercial Analyst, Business Consultant, Business Coach,	Bursary and Internship	6 - 7	2	2
	2021-242204	Risk Manager	Corporate Treasurer	Bursary and Internship	7	2	2
	2021-421201	Bookmakers	Bookmaking Clerk, Horse Racing Analyst	Leamership	4	2	2

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
Hospitality	2021-343401	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	4	1220	1281
	2021-515101	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	Learnership/Skills Programme: Hospitality Management Bursary: Diploma in Hospitality Management/ Management Development Programme	2 - 6	1152	1210
	2021-141102	Guest House Manager	Bed and Breakfast Operator			501	526
	2021-141101	Hotel or Motel Manager	Lodge Manager, Boarding House Manager, Duty Manager (Hotel), Innkeeper, Hotelier, Resort Manager, Backpackers Manager, Hostel Manager			401	421
	2021-512101	Cook	N/A	Learnership/Skills Programme: Cook Convenience/Assistant Chef/Culinary/food and Beverages	2 - 4	140	147
	2021-513101	Waiter	Drinks 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	Learnership and Skills Programme	2 - 4	107	112
	2021-841201	Kitchenhand	Pantry Attendant, Sandwich/Salad Preparer, Kitchen Steward, Kitchen Assistant (Non-domestic), Dishwasher			102	107
	2021-513202	Barista	Coffee Maker			Skills Programme	2
	2021-311903	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	Learnership: National certificate: Food and beverage manufacturing technician Bursary and Internship: Diploma in Food Technology	4 - 6	32	34

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-422401	Hotel Receptionist	N/A	Skills Programme and Learnership: Hospitality Reception; WIL: Hospitality studies	2 - 4	20	21
	2021-121206	Health and Safety Manager	Safety, Health and Environmental (SHE) Manager	Learnership: National Certificate: Occupational, Health and Safety. Bursary: Diploma in Environmental Health and Safety	4 - 5	14	15
	2021-811201	Commercial Cleaner	School Cleaner, Workshop Cleaner, Factory Cleaner/Sweeper, Waterblaster, High Pressure Water Jetting Operators, Office Cleaner, Hotel/Motel Cleaner, Building Exterior/Interior Cleaner, Cleaner (Non-domestic)	Skills Programme	1	98	98
	2021-422206	Call or Contact Centre Agent	N/A	Learnership and skills programme: Contact Centre Operations/ Customer Service/Business Management/	4	6	6
	2021-252301	Computer Network and Systems Engineer	Network Programmer/Analyst, Network Engineer Computer Systems/Service Engineer, Communications Analyst (Computers), Systems Engineer, Computer Network Engineer, Systems Integrator, Network Support Engineer, Computer Systems Integrator, ICT Customer Support Officer	Bursary and Internship: Diploma/Degree in Computer Science/System Engineer	6 - 7	6	6
	2021-243204	Event Producer	Concert Promoter/Organiser, Meeting Planner Event Coordinator, Government, Protocol or Civic, Event Organiser, Event Director, Event Manager Specialist, Festival Coordinator, Conference and Event Organiser/Coordinator, Social/Life Cycle Organiser, Wedding Coordinator, Professional Conference Organiser, Sports Event Organiser	Learnership: Higher Certificate in Events Management	4	20	20
	2021-732101	Delivery Driver	Light Utility Vehicle (LUV) Driver, Van Driver, Grocery Deliverer, Fast Food Delivery Driver, Driver-messenger, Taxi Truck Driver, Meals on Wheels Driver, Armoured Car Driver	Skills Programme and Learnership: National Certificate in Professional Driving	2 - 4	50	50

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
Sport, Recreation and Fitness	2021-132102	Manufacturing Operations Manager	Industrial Production Manager, Plant Superintendent Processing Manager, Planning Manager (Manufacturing), Operations Manager (Production Works/Workshop Manager (Manufacturing), Processing Unit Manager, Distillery Manager, Plant Manager (Manufacturing)	Bursary and Internship: diploma in Operations Management	5 - 6	7	7
	2021-841101	Fast Food Cook	Fast Food Assistant, Short Order Cook, Takeaway Cook, Grill Cook, Spaza Shop Cook	Leamership: National Certificate, professional cookery	5	120	120
	2021-522301	Sales Assistant General	Telephone Salesperson, Supermarket Assistant, Cosmetic Sales Assistant, Retail Assistant, Perishable Sales Worker, Shop Assistant, Salesperson Fast Food Assistant, Hardware Sales Assistant	Leamership	4	100	100
	2021-143107	Fitness Centre Manager	Health Club Manager, Gym Manager, Fitness Centre Administrator, Sports Club Manager	Bursary and Internship: Diploma/Bachelor in Physiology/kinesiology Higher Certificate in Sport, Recreation and Fitness Management	6	219	230
	2021-342301	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	Leamership/Skills Programme: Certificate in Sport, Recreation and Fitness Management	5	659	692

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-342204	Sport Coach	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	Leamership: Further Education and Training Certificate: Sport Coaching: Juniors/Beginners	4	11	12
	2021-143108	Facility Centre Manager	Riding School Manager, Golf Course Manager, Gymnasium Manager, Sport Stadium Manager, Leisure Centre Manager, Indoor Sports Centre Manager (Squash, Tennis, Ten Pin Bowling etc), Aquatic Centre Manager	Bursary and Internship: Facility Management/ Sports and Recreation Management	6	2	2
	2021-264203	Sportswriter	Correspondent, Specialist Reporter, Beat Reporter	Bursary and Internship: Diploma in Journalism/ communication studies	6	2	2
	2021-651203	Fitter-welder	Welding Inspector: Welding Tradesperson, Arc Welder, Welder Operator, Solderer and Brazer	National Certificate: Welding Application and Practice	5	2	2
	2021-242101	General Accountant	Performance audit manager	Bursary: Bachelor of Commerce in accounting	7	2	2
	2021-671101	Electrician	Electrical Fitter, Winder Electrical Technician, Construction Electrician, Electrical Wireman, Electrical Contractor	Leamership: Certificate in Electrician	4	4	4
	2021-143902	Cleaning Services Manager	Cleaning Contractor	Leamership: National Certificate, Hygiene and Cleaning Supervision	4	2	2
	2021-224102	Sports Scientist	N/A	Bursary: Diploma/Degree in Sports Science/Sports Management	6 - 7	2	2

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
Tourism and Travel Services	2021-141201	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	Leamership: National Certificate - General Travel	4	683	717
	2021-122101	Sales and Marketing Manager	Key Account Manager, Insurance Sales and Marketing Manager, Business Development Manager, Business Support Manager	Bursary and Internship: Diploma/Degree in Marketing Management	6	177	186
	2021-122105	Customer Service Manager	Client Services Advisor, Client Services Manager/ Representative, Client Services Manager, Customer Services Engineer, Customer Care Manager/ Representative	Skills Programme and Leamership: Customer Service	4	53	56
	2021-333201	Events Manager	Functions Manager, Exhibition Organiser, Event Planner, Marketing Campaign Organiser, Conference and Event Organiser, 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: Higher Certificate: Events Management Diploma: Events Management	6	15	16
	2021-251102	Data Scientist	N/A	Bursary and Internship: Bachelor of Science in Data Science	7	2	2
	2021-431101	Accounts Clerk	Creditors Clerk, Accounts Payable or Receivable Clerk Debtors Clerk, Accounting Clerk, Account Coordinator/Controller, Billing Administrator/ Representative/Officer, Assets Clerk/Coordinator, Ledger Clerk Audit Clerk, Settlement Clerk/Officer	Leamership: National Certificate, Registered Accounting Clerk	4	8	8
	2021-523103	Ticket Seller	Airline Clerk, Booking Clerk, Reservations Clerk	Leamership	3	4	4

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
	2021-251101	ICT Systems Analyst	ICT Systems Specialist, ICT Business Systems Analyst, ICT Systems Strategist, Systems Programmer, ICT Systems Advisor, Computer Analyst ICT Systems Contractor, LAN / WAN Consultant, ICT System Designer, ICT Systems Coordinator	Bursary and Internship: Bachelor of Information Technology in Business Systems	7	7	7
	2021-243102	Market Research Analyst	Marketing Analyst, Market Researcher, Trade Marketing Analyst, Market Trends Consultant, Marketing Research Executive	Bursary and Internship: Bursary: Diploma Marketing research	6	2	2
	2021-332201	Commercial Sales Representative	Commercial Traveller, After-sales Service Adviser, Canvasser	Skills Programme and Learnership	3 - 5	2	2
	2021-252201	Systems Administrator	Computer System Coordinator, IT Information Systems Administrator, Network Administrator	Learnership: National Certificate, Information Technology Database Administration Bursary: Diploma in Information Technology in network design and Administration	4 - 6	2	2
	2021-243103	Marketing Practitioner	Marketing Officer, Marketing Specialist, Marketing Professional, Marketing Consultant	Bursary and internship: Marketing	7	7	7
ALL	2021-511302	Tour Guide	Regional Guide, Sightseeing Guide, Tour Escort, Tour Coordinator, Inbound Tour Operator, Tour Controller, Tour Leader, Tour Director	Bursary and Workplace experience: National Certificate, Tourist Guiding	4	2	2
	2021-862202	Handyperson	Handy Person, Hotel Yardperson, Hotel Useful, Handy Man	Workplace (SIPS)	3	93	98
	2021-134903	Small Business Manager	Owner Manager, Entrepreneurial Business Manager	Bursary: Management Development programme	6	88	92
	2021-441903	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

Sub-Sector	OFO CODE	Occupation	Specialisation/ Alternative Title	Intervention	NQF Level	Quantity Needed By The Sector	Quantity To Be Supported By SETA IN 2023/24*
ALL	2021-112101	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
	2021-733201	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

* Quantity to be supported by the SETA is subject to budget availability and approved Service Level Agreement with DHET



ANNEXURE 2: CONTINUOUS IMPROVEMENT PLAN

1. Introduction

The CATHSSETA Sector Skills Plan (SSP) Continuous Improvement Plan (CIP) aims to provide the Department of Higher Education and Training (DHET) with a guideline for the strategies that have been incorporated and employed by the Sector Education and Training Authority (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 the 2022/23 plans, executed for the current financial year, which are aimed at improving the quality and relevance of the SSP:

- Research Agenda and Strategy;
- Collaboration with Universities as well as Technical and Vocational Education and Training (TVET) Colleges;
- Improving Data Sources;
- Organising Framework for Occupations (OFO) and sector Professional, Vocational, Technical and Academic Learning Programmes (PIVOTAL) list;
- Developing Mechanisms for Skills Planning and Labour Market Intelligence Partnership (LMIP);
- Alignment with Government priorities;
- Research Capacity in the System;
- Career Advice System;
- The role of the Accounting Authority in the Development of the SSP; and
- Stakeholder engagement in the preparation of the SSP.

2. CIP Matters

The table below details CIP matters that the SETA has addressed during the 2022/23 – 2023/24 period and plans that the SETA aims to implement in the current financial year.

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<p>1. Research Agenda and Strategy</p>	<p>The CATHSSETA Research Agenda for the Financial Year 2022/23, focuses on the following topics:</p> <ul style="list-style-type: none"> • Tracer Study on Small, Medium and Micro Enterprises (SMMEs); • SMME Skills Strategy; • Mid-Term Review of CATHSSETA Strategic Plan; • Sector Analysis for Conservation, Hospitality, Tourism and Travel Services; • Fourth Industrial Revolution (4IR) Skills strategy; and • Organising Framework for Occupation (OFO) update. 	<p>CATHSSETA concluded the following research studies to inform strategic planning in the organisation:</p> <ul style="list-style-type: none"> • Tracking and Tracing of CATHSSETA beneficiaries of 2015/16 – 2018/19 to assess the impact of CATHSSETA-funded learning programmes on beneficiaries; • Impact of COVID-19 on CATHSSETA sub-sectors; • Sector Analysis of the Arts, Culture and Heritage and Sport, Recreation and Fitness sub-sector; • Feasibility of implementing e-learning in the sector; and • Impact of the 4IR and its implications for skills development in the sector. <p>Findings and recommendations emanating from the 2021/22 Research Agenda studies have been incorporated into the development of the 2023/24 SSP update.</p>	<p>CATHSSETA plans to appoint service providers to conduct the following studies:</p> <ul style="list-style-type: none"> • Tracer Study on SMMEs; • SMME Skills Strategy; • Mid-Term Review of CATHSSETA Strategic Plan; • Sector Analysis for Conservation, Hospitality, Tourism and Travel Services; • 4IR Skills strategy; and <p>In the 2022/23 financial year CATHSSETA plans to initiate partnerships with other public entities/government departments/higher education institutions aligned with the SETA's research priorities.</p> <p>CATHSSETA shall further establish a Research Reference Group to engage industry experts and researchers in the sector on research methodology, instruments, and reports as designed and produced by the SETA.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<p>2. Collaboration with Universities and TVET Colleges</p>	<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, and Experiential Learning, and to participate in the review of Sector-related Qualifications.</p> <p>To enhance service delivery and improve partnerships with TVET colleges, CATHSSETA has established regional offices situated on the premises of Northlink and Umgungundlovu TVET colleges.</p> <p>To improve the SETA's research capacity, CATHSSETA has signed an MoU with the North-West University to conduct joint research and development of projects.</p>	<p>In line with the White Paper for Post School Education and Training, 2023, on the objective of expanding access and increasing diversity in the PSET sector, CATHSSETA entered into a R10 million contract to fund 80 TVET College students and 60 HEI learners studying towards qualifications in line with the occupations in high demand identified in the CATHSSETA SSP.</p> <p>CATHSSETA funded TVET Colleges and CETs to upgrade the infrastructure used by students studying qualifications in the CATHSSETA sub-sectors. The infrastructure projects funded included the following: upgrade of the hospitality facility, renovation of the kitchen infrastructure for hospitality students and baking equipment.</p>	<p>The SETA will continue to partner with TVET colleges and higher education institutions for the achievement of the SETA's strategic priorities and NSDP outcomes.</p> <p>New partnerships will include extending existing partnerships with institutions involved in sector research, WIL programmes, strengthening skills development initiatives, youth and women empowerment, and career guidance support.</p> <p>CATHSSETA plans to initiate more research partnerships with Higher Education Institutions (HEIs) aligned with the SETA's research priorities. The SETA will also be establishing a research panel made up of Higher Education Institutions to assist in carrying out the Research Agenda for the next three (3) financial years.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
3. Improving Data Sources	<p>CATHSSETA has an electronic data management tool, the CATHSSETA Information Management System (CIMS), for the processing of Mandatory Grant applications. CIMS is also used as a data storage and reporting facility.</p> <p>CATHSSETA consulted various sources, including national data sources, the Higher Education Management Information System (HEMIS), maintained by the DHET, publications and reports of the World Travel and Tourism Council (WTTC), National Gambling Board (NGB), South African Tourism (SAT), Statistics South Africa and stakeholders from all sub-sectors.</p>	<p>National data sources including the HEMIS, maintained by DHET, publications and reports by the WTTC, the NGB and SAT, as well as research conducted by other government departments, national research institutions and industry publications were used to update the final 2023/24 SSP. The SETA also conducted the following research studies:</p> <ul style="list-style-type: none"> • Impact of 4IR on the six (6) sub-sectors within CATHSSETA • Impact of COVID-19 on CATHSSETA sub-sectors • Sector Analysis for Arts, Culture and Heritage (ACH), and Sport, Recreation and Fitness (SRF) sub-sectors • Feasibility Study: Implementing E-Learning in the Sector • Track and trace study of SETA beneficiaries. <p>As part of the SETA's research efforts, stakeholders are consulted in research projects that the SETA undertakes. Stakeholders are continually requested to provide input and improvements to better serve them.</p> <p>The research team further participated in the Mandatory Grant roadshows to ensure stakeholders are capacitated with not only the knowledge of completing applications but to further highlight the importance of submitting accurate quality data, which informs skills planning.</p> <p>Following the SSP draft submission, the SETA conducted stakeholder engagements between June and July 2022 for CATHSSETA to verify the draft findings of the SSP.</p>	<p>The SETA plans to continue to produce sector analysis reports, which are essentially the equivalent of mini SSPs for each of the six (6) CATHSSETA sub-sectors. This will ensure an even data representation across the six (6) sub-sectors, and it will provide the SETA with a comprehensive analysis of the sector.</p> <p>The SETA has partnered with North-West University and further plans to partner with more universities that conduct research within its sub-sectors. Universities further have a large repository of information and make information sharing possible.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<p>4. Organising the Framework for Occupations (OFO) and Sector PIVOTAL list</p>	<p>CATHSSETA complies with the use of OFO version 2019, which is the most current version.</p> <p>In February 2020, the Research, Planning Performance Unit conducted a Baseline Study to find out to what extent the CATHSSETA Sector understands the purpose of the OFO.</p> <p>The team used the platform to inform stakeholders about the importance of submitting the correct OFO codes and to capacitate stakeholders on the OFO Guide.</p>	<p>The use of the 2019 OFO codes is reflected in all applicable documents, including Skills in High Demand, the Sectoral Priority list, as well as Mandatory Grant Application data.</p>	<p>As part of the approved 2022/23 Research Agenda, the SETA will be conducting a study on the OFO which will be a qualitative analysis of current CATHSSETA occupations identified on the OFO (e.g., occupations, specialisations, descriptors) with respect to the six (6) CATHSSETA sub-sectors.</p> <p>The SETA, with the assistance of the research panel, will identify loopholes in the current CATHSSETA occupations, specialisations, and descriptors in preparation for the 2023 OFO update</p>
<p>5. Developing Mechanisms for Skills Planning and LMIP</p>	<p>CATHSSETA has developed and employs various mechanisms for skills planning, including increased partnership, stakeholder consultations, and increased research initiatives to assess the skills requirements of the sector and the impact of learning interventions.</p> <p>SETA identified various platforms to disseminate research recently undertaken in the sector.</p> <p>Internal stakeholders are consulted for their input, which also involves the translation of the Skills Development Priorities into Key Performance Indicators (KPIs) for the SETA.</p>	<p>Internal stakeholders, including the relevant governance structures and the Accounting Authority, have been consulted in the final update of the SSP and endorsed the document for approval.</p>	<p>Consult and solicit input through the relevant Board structures in preparation for the next SSP update.</p> <p>The Research team will participate in Mandatory Grant workshops to promote the importance of submitting quality Mandatory Grant data which is the primary data source for skills planning.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<p>6. Alignment with Government Priorities</p>	<p>CATHSSETA's strategic priorities are aligned and developed in line with the Primary Guiding Priorities of DHET, as well as taking into consideration sub-sector strategies and plans relevant to each of the sub-sectors.</p>	<p>The following interventions were implemented by CATHSSETA during the 2021/22 financial year in support of the Economic Reconstruction and Recovery Plan (ERRP):</p> <ul style="list-style-type: none"> • In July 2021, the CATHSSETA Board approved an allocation of funding for the Chef Artisan Programme in support of the ERRP. The programme supported 334 students at the second and third-year level of study, who were previously funded for only one (1) year instead of the full duration of the programme. • 110 TVET College learners were enrolled in the CATHSSETA China Project. The learners participated in a WIL programme in the fields of Hospitality, Tourism, Arts and Culture and Chef qualification in China. • CATHSSETA further awarded R30 million to National Students Financial Aid Scheme (NSFAS) for the provision of bursary funding to 396 learners at various public institutions of Higher Learning. In this project, NSFAS is expected to award bursaries to qualifying final-year "missing middle" students studying for qualifications aligned to the CATHSSETA sub-sectors. The "missing middle" are students who come from working-class households that do not qualify for funds from NSFAS while at the same time cannot afford higher education. 	<p>CATHSSETA continuously reviews all relevant strategies and plans and utilises all updates/changes to guide the development of SETA's strategic priorities.</p> <p>The SETA plans to continuously incorporate priority actions identified in the ERRP and the DHET Economic Recovery Skills Strategy in the update of the CATHSSETA 2023/24 Strategic Plan and Annual Performance Plan.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
7. Research Capacity in the System	<p>During the 2020/21 financial year, CATHSSETA went through an organisational realignment. The Research Agenda and Strategy currently fall within the scope of the Research, Planning and Performance unit under the Research, Monitoring and Evaluation department. The Unit consists of the Specialist: Research, Planning and Performance Analyst: Planning, Performance Coordination, and Analyst: Research and Sector Skills.</p>	<p>In April of the 2022/23 financial year, the SETA partnered with the North-West University to assist in carrying out the 2022/23 research agenda.</p>	<p>As part of increasing research capacity and improving data sources, CATHSSETA will be initiating partnerships and establishing a Research Panel in the 2022/23 financial year with HEIs and other research institutions in line with the research priorities of the SETA to provide additional research capacity.</p> <p>The SETA will also be establishing a Research Reference Group to guide sector research projects.</p>
8. Career Advice System	<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>During the last three (3) years, CATHSSETA has aimed to reach potential learners, to disseminate information on Learning Programmes.</p> <p>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, hosts the Annual National Tourism Careers Expo (NTCE) which creates a highly interactive platform for the promotion and identification of tourism careers, jobs and entrepreneurial prospects.</p>	<p>A total of six (6) Career Guidance Interventions were attended by CATHSSETA in 2020/21 due to COVID-19.</p> <p>CATHSSETA attended the annual NTCE that was held in NASREC in March 2022.</p>	<p>With the National State of Disaster lifted, 16 career guidance events are planned for the 2022/23 financial year.</p>

CIP MATTER	CURRENT STATUS	PROGRESS MADE	ACTION PLAN
<p>9. The role of the Accounting Authority in the Development of the SSP</p>	<p>The 2022/23 SSP was presented to the Accounting Authority, and inputs from the engagement have been taken into consideration and actioned before submission.</p> <p>Relevant Accounting Authority structures, such as the Governance and Strategy committee was consulted to provide input into the development of the final 2022/23 SSP. The role of the Governance and Strategy Committee is to provide expert advice on the sector, to facilitate and enable broad sub-sector specific stakeholder consultation and participation, and to give advice on priority skills' requirements for sub-sectors.</p>	<p>The Accounting Authority endorsed the submission of the 2022/23 SSP as per recommendations by the relevant committees.</p>	<p>The Governance and Strategy Committee and the Accounting Authority, are integral in providing relevant sector-specific insight and direction to the CATHSSETA and will continue to provide input and guidance in the implementation of the 2022/23 SSP.</p>
<p>10. Stakeholder engagement in the preparation of the SSP</p>	<p>Both internal and external stakeholders are consulted as part of the internal research process and/or research studies that have been commissioned from the service providers.</p>	<p>As part of its research efforts the SETA continuously engages the sector through survey questionnaires and in-depth interviews with key role players in the various sub-sectors. All research studies conducted during the 2021/22 financial year included the collection of primary data from different stakeholder groups in the sector.</p>	<p>SETA aims to continuously engage with stakeholders as part of the research efforts that it undertakes in the updating of sector information. Each of the research agenda studies planned by the SETA involves in-depth consultations with sector stakeholders to ensure the SSP is a true reflection of industry skills needs.</p>

3. Conclusion

This document has outlined the CIP matters and the plans the SETA has to address the issues identified. To validate the SSP draft finding for the 2023/23 financial year, the SETA facilitated stakeholder engagements in the form of qualitative focus group sessions and in-depth key informant interviews. This has also enhanced the SETA's data sources as well. The initiation 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 an Accounting Authority comprising government, sub-sector, employer, and labour organisation representatives. This SSP was presented to the Accounting Authority and its sub-committees for input and approval.

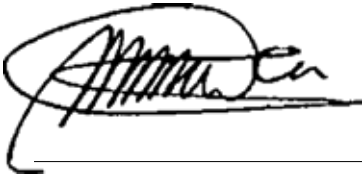


ANNEXURE 3: RESEARCH AGENDA

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 Research Agenda for the 2022/23 period.

Approved By:



Mr Marks Thibela
Chief Executive Officer



Mr David Themba Ndhlovu
Accounting Authority Chairperson

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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
4IR	Fourth Industrial Revolution
HEI	Higher Educational Institution
NSDP	National Skills Development Plan
NSDS	National Skills Development Strategy
OFO	Organising Framework for Occupations
PFMA	Public Finance Management Act No. 1 of 1999 as amended
PSET	Post-School Education and Training
SDA	Skills Development Act No. 97 of 1998 as amended
SETA	Sector Education and Training Authority
SMME	Small Micro and Medium Enterprise
SP	Strategic Plan
SSP	Sector Skills Plan
ToR	Terms of Reference
TVET	Technical and Vocational Education and Training
UoT	University of Technology

1. Introduction

- 1.1. CATHSSETA is a statutory body, established through the Skills Development Act No. 97 of 1998 as amended (SDA). It is a Schedule 3(a)-listed public entity, in terms of the Public Finance Management Act No. 1 of 1999 as amended (PFMA), and it is accountable to the 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.
- 1.2. Research is a key component in providing evidence to inform decision-making, policy review and strategy formulation, and to improve systems and services within the Sector Education and Training Authority (SETA). This Research Agenda seeks to respond to the Outcomes and Principles of the National Skills Development Plan (NSDP 2030).
- 1.3. The NSDP is underpinned by the following principles: (1) To situate the NDSP within an integrated Post School Education and Training (PSET) system; (2) To contribute to the country's socio-economic development objectives; (3) To advance an equitable and integrated system; (4) To promote greater inclusivity and collaboration; (5) To focus on a support system for learners and employers; (6) To place a strong emphasis on accountability; (7) To understand the demand for skills; (8) To steer supply: qualifications and provision; and (9) To steer supply funding mechanisms.
- 1.4. This Research Agenda also seeks to respond to the outcomes of the NSDP, which are: (1) To identify and increase the production of occupations in high demand; (2) To link education and the Workplace; (3) To improve the skills level of the South African workforce; (4) To increase access to occupationally-directed programmes; (5) To support the growth of the public college institution type as a key provider of skills required for socio-economic development; (6) To support skills development for entrepreneurship and cooperative development; (7) To encourage and support worker-initiated training; and (8) To support career development services. The Research Agenda is carried out by the Research, Monitoring and Evaluation Department of the CATHSSETA, and mostly, the Research, Planning and Performance unit.
- 1.5. The core function of the Research, Planning and Performance unit is to uplift the research and skills planning activities of CATHSSETA and to directly contribute to the establishment of a reliable institutional mechanism for skills planning both for the CATHSSETA sector and the country. The Unit plays an integral role in gathering statistical data and other relevant information about the labour market, skills needs and training provision. Such information is essential in planning, to meet the country's skills needs and guide investment in the provision of education and training. The culmination of research, monitoring and evaluation exercises is the production of the Strategic Plan (SP), Annual Performance Plan (APP) and Sector Skills Plan (SSP). It is the plan of the unit in the next financial year to formulate research partnerships as well as research reference groups to enhance the quality of the research products.

2. The Importance of Research

- 2.1. The research agenda contributes to providing sector-specific intelligence on the supply and demand of labour in the CATHSSETA sub-sectors, as well as other pertinent issues that are of interest to the SETA. Research is used as a planning tool and assists in the formulation of strategies, projects and interventions to ensure that the SETA is responsive to the needs of the sector and targeted beneficiaries. Through evaluation studies, the SETA is able to assess its performance against predetermined targets, including the implementation and outcomes of learning programmes.
- 2.2. A key research output of CATHSSETA is the SSP. It assists in outlining the occupational shortages list in the sector, which is prioritised in the scoping of projects on an ongoing basis. The SSP is also the foundation on which the SP and APP of the SETA are developed. The SSP is submitted, together with the SP and APP, as an annexure of the SETA documentation tabled in Parliament annually. The DHET SSP Framework and Requirements require the following from the SETA SSPs:
- Authoritative and focused research on the state of the skills market;
 - Production of skills intelligence to support growth and development;
 - Consistent, rich, and comparable understanding within the different economic sectors;
 - Participation by stakeholders in the development process;
 - Evidence-based research; and
 - Actionable interventions that make a difference to skills planning.

3. Purpose of the Research Agenda

- 3.1. This Research Agenda sets out the research activities of CATHSSETA for the period from the 1st of April 2022 to the 31st of March 2023. Research is a key component in providing evidence-based strategic planning and aligning CATHSSETA interventions to the outcomes and principles of the National Skills Development Plan (NSDP, 2030). The purpose of the Research Agenda is to help organise and prioritise research requests and activities, and to improve the quality of the data and information available within the CATHSSETA sector. It serves as a guide for the allocation of resources for research.

3.2. The Concept of Research

For the purposes of the Research Agenda, the term “research” is taken to mean rigorous and systematic enquiry and analysis. As such, research may be empirical or theoretical, quantitative, or qualitative and applied or basic. It involves the collection of data from various sources and analysing the same to reach certain conclusions.

3.3. The Nexus of Research Policy

- 3.3.1. The relationship between research, evidence-based policy decision-making, and practice is a complex one. How relevant knowledge is generated, disseminated, and institutionalised by both decision-makers and implementers needs to also be investigated. Research provides much-needed insight into the CATHSSETA sector, its workings, and skills requirements. The ability of research to influence policy and practice is often indirect and long-term. On a year-on-year basis, research makes a valuable contribution to the SETA's understanding of the sector, and broader post-school education and training system in South Africa. Research outputs contribute to ensuring that the SETA is working towards

increased access to quality and relevant skills development interventions, to fulfil the economic and social goals of inclusive participation, as set out in the National Development Plan (2030).

- 3.3.2. There is a need for a sustained dialogue between researchers and the users of research in cultivating a practice of employing research-based evidence in the policy process.

3.4. Research Capacity

- 3.4.1. The nature of research may vary in complexity and scale. CATHSSETA aims to achieve the priorities of its research themes/topics within the scope of its financial resources, as follows:

- Internal research: The Research, Planning and Performance unit as well as the Monitoring and Evaluation unit are responsible for conducting various research and evaluation studies within the internal capacity and budget of the SETA.
- Commissioned research: Research commissioned through the appointment of research partners and service providers, with Terms of Reference specified by CATHSSETA, as part of the research theme/topic/priority outlined in this Strategy.
- Research Partnerships: Research projects undertaken in partnership with other public entities or government departments aligned with CATHSSETA's research priorities. These entities could be other SETAs, parastatals or even universities. The partnerships could entail joint research projects, seminars and publications.
- Postgraduate Research Partnerships: Partnerships with public South African Universities by means of Memoranda 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, as well as to broader topics relevant to the CATHSSETA sector. CATHSSETA research partnerships will focus on proposing and supporting a university-based research programme that will:
 - o Refine and, where necessary, develop new methods for collecting sector skills information that can be used on an ongoing basis for improved skills planning;
 - o 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;
 - o Study particular issues that are currently proving to be bottlenecks, in relation to CATHSSETA and other post-school education and training institutions, and provide practical frameworks or guidelines wherever appropriate;
 - o Evaluate and pilot skills development initiatives to inform further roll-out, adaption or step-changes;
 - o Produce practical reports (in addition to academic theses) to inform sector skills development initiatives;
 - o Contribute to the strengthening of recognised Centres of Expertise in Human Capital Development within the respective sub-sectors;
 - o 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; and
 - o Disseminate information on achievements by the SETA, to showcase the SETA's work in the country.

4. Research Priorities

- 4.1. The 2020/21 – 2024/25 SSP has identified the following key skills development priorities for the sector:
- Fourth Industrial Revolution
 - Training provision
 - Analysis of skills needs
 - Increased partnerships to include worker-initiated interventions
 - Sector transformation
 - Small, Medium and Micro Enterprise (SMME) interventions and green economy (resource efficiency)
 - Monitoring and evaluation
 - Addressing Occupational Shortages and Skills Gaps
 - Technological advancement to combat the impact of the Covid-19 pandemic
- 4.2. All research conducted or commissioned by CATHSSETA is intended to feed into the SSP for strategic planning to address identified skills needs and constraints for effective recruitment, utilisation, and skills development. Table 1 below outlines the Research Agenda items that CATHSSETA intends to conduct in 2022/23.

TABLE 1: RESEARCH OUTPUTS

No.	Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Duration	Budget
	Tracer Study on SMME	The purpose of the study is to track and trace beneficiaries of the CATHSSETA-funded SMMEs training interventions to gather evidence on the impact of the intervention.	<ul style="list-style-type: none"> To gather primary data that evidence on the impact of the SMME support that CATHSSETA has provided to beneficiaries from the 2016/17 to 2019/20 financial years To determine the destinations of learners who have completed the learning intervention To determine the progression and benefits trends for those in entrepreneurship To solicit the views of beneficiaries (those who completed successfully) of the CATHSSETA programme, and how it can be improved To generate evidence of key achievements and challenges to inform the decision-making process for senior management and accounting authority on programme delivery mechanisms and how these can be improved in the future to ensure sustainability 	Commissioned	May – Dec 2022	R1 000 000
	SMME Skills Strategy	The purpose of the study is to ascertain the direction CATHSSETA needs to take in implementing SMME support	<ul style="list-style-type: none"> Investigate and make recommendations on SMME development strategy and action plans the SETA may implement in support of SMME development in the sector 	Commissioned	Dec-March 2023	R1 000 000

No.	Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Duration	Budget
	Mid-Term Review of CATHSSETA SP	The purpose of the mid-term review is to assess the implementation of the CATHSSETA 5-year strategy, and the progress made towards achieving the planned impact statements.	<ul style="list-style-type: none"> Assess the continued relevance of the five-year CATHSSETA strategy Determine the progress made towards achieving the CATHSSETA impact statements Make modifications to the current strategy to ensure the achievement of the impact statements within the lifetime of the strategy Provide the following recommendations: <ol style="list-style-type: none"> corrective actions to resolve outstanding issues and improve the SETA's performance for the remainder of the strategy duration. Assess the extent to which the broader policy environment remains conducive to replicating the lessons learnt from the strategy implementation and/or identifying exit strategies Establish the direction for the remaining duration of the strategy. 	Commissioned	May – Dec 2022	R1 000 000

No.	Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Duration	Budget
	Sector Analysis for Conservation, Hospitality, Tourism and Travel Services	Provide an in-depth analysis of the Conservation, Hospitality Tourism and Travel sub-sectors to understand their labour market profile and identify new trends and developments to inform CATHSSETA qualifications and programme offerings.	<ul style="list-style-type: none"> • Provide a detailed analysis of the economic and labour market outlook for the Conservation, Hospitality, Tourism and Travel Services sub-sectors; • Identify emerging trends and related occupational patterns and skills in the Conservation, Hospitality, Tourism and Travel Services sub-sectors; • Examine the employer profile of the Conservation, Hospitality, Tourism and Travel Services sub-sectors; • Examine the employee profile (demographics, skills, and educational levels) of the Conservation, Hospitality, Tourism and Travel Services sub-sectors; • Identify and provide analysis on the extent of key-role player participation in the Conservation, Hospitality, Tourism and Travel Services sub-sectors; and • Update of the stakeholder database for the Conservation, Hospitality, Tourism and Travel Services sub-sectors. 	Commissioned	May 2022 - Feb 2023	R1 500 000
	4IR Skills Strategy	Develop an integrated CATHSSETA sector skills strategy and plan, to respond to 4IR, including a detailed assessment of interventions to be carried out in achieving sub-sector competitiveness	<ul style="list-style-type: none"> • Develop a 4IR strategy for skills development in the six (6) CATHSSETA sub-sectors; • Recommend an organisational framework and mechanism to address 4IR occupational demands in the sector; • Identify and recommend solutions to obstacles that could impact the implementation of the 4IR skills strategy in the sector; and • Recommend how to address workforce readiness and preparedness for 4IR. 	Commissioned	July - Dec 2022	R500 000

No.	Name of Study	Purpose of the Study	Main Objectives of Study	Research Mechanism	Duration	Budget
	OFO Update	Qualitative analysis of current CATHSSETA occupations identified on the Organising Framework for Occupation (OFO) (e.g., occupations, specialisations, descriptors) in respect to the six CATHSSETA subsectors	<ul style="list-style-type: none"> • Qualitative assessment of the status of the OFO with respect to the six CATHSSETA sub-sectors; and • Identify loopholes in the current CATHSSETA occupations, specialisations, and descriptors in preparation for the 2023 OFO update. 	Internal	November 2022 – March 2023	R50 000
	2023/24 SSP Update	To develop an SSP within the DHET SSP Framework and Guidelines and to respond to NSDP outcomes and principles.	<ul style="list-style-type: none"> • Provide a detailed analysis of the economic and labour market profile for CATHSSETA sub-sectors; • Identify key drivers of change in the sector and their skills implication; • Analyse skills gaps and interventions aimed at addressing these skills shortages in the CATHSSETA sector; • Develop a list of scarce skills and occupations; • Drive the SETA's priority projects and guide grant allocations; and • Respond to socio-economic needs and national strategies and plans. 	Internal	March 2023 – August 2023	-

5. Research Funding and Procurement

- 5.1. The NSDP highlights the importance of partnering with higher education and research institutions, amongst others, for an evidence-based understanding of skills demand and supply in the sector.
- 5.2. CATHSSETA will explore and initiate partnerships with higher education and research institutions, to meet the research needs of the sector. The SETA will partner with other public entities/government departments/higher education institutions aligned with the SETA's research priorities.
- 5.3. CATHSSETA shall establish a Research Reference Group to engage industry experts and researchers in the sector on research methodology, instruments, and reports as designed and produced by the SETA. This will be done at no cost to the SETA.
- 5.4. 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 a University of Technology (UoT), to conduct sector-based research for CATHSSETA.
- 5.5. Research funding shall be sourced from the CATHSSETA Discretionary Grant.
- 5.6. Research projects shall be funded within minimum and maximum thresholds, subject to budgetary availability.
- 5.7. Funding of research shall be for research projects commissioned by CATHSSETA.
- 5.8. 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 and establish the minimum requirements for research projects as well as research costs to be covered by CATHSSETA.

6. Conclusion

This Research Agenda has been developed to address and support the eight (8) NSDP outcomes and the nine NSDP Principles, to set up a credible mechanism for skills planning for the CATHSSETA sector. The purpose is both to strengthen the organisation's research capacity and to ensure that CATHSSETA serves as a 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 that it rightfully is, in skills planning and development in the sector.

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