2023/24 SUMMATIVE RESEARCH PUBLICATION

FAST FACTS

HOW DOES THE W&RSETA USE THE FINDINGS AND RECOMMENDATIONS OF RESEARCH REPORTS?

The mandate of the SETAs must be seen within the broader vision of having an integrated, co-ordinated and articulated post-school education and training (PSET) system for improved economic participation and the social development of youth and adults.

The W&RSETA uses the findings and recommendations of research reports, for the following:
* Make strategic decisions and policy decisions.
* Compile strategic planning documents such as the sector skills plan, annual performance plan and strategic plan.
* Determine the skills priorities of the sector.
* Allocate funds and grants.
* Prepare for disruptions.
* Improve the SETA's service delivery.
* Evaluate the effectiveness of skills interventions and learning programmes.

WHO CAN BENEFIT FROM THIS PUBLICATION?

W&RSETA staff, decision-makers and policy-makers can benefit from this publication, as well as anyone with an interest or stake in the wholesale and retail sector. The broader wholesale and retail sector also stands to benefit from the findings and recommendations contained in this publication. The research in the publication provides labour market data and some insight into trends, possibilities, challenges and opportunities in the skills sphere.

WHY DOES W&RSETA INVEST IN RESEARCH?

The W&RSETA embraces the practice of conducting research in order to make informed decisions and to improve on its products and services to stakeholders within the sector. Fundamental to this practice is the assessment of the impact of projects that have been implemented by the SETA. Through impact assessments, the W&RSETA is able to judge the merit of both tangible and intangible benefits rendered through the research projects implemented.

WHAT IS THE ROLE / FUNCTION OF THE W&RSETA?

The functions and responsibilities of SETAs are set out in Chapter 3, section 10 of the Skills Development Act, 1998:
* Develop and implement a sector skills plan – to describe the trends in each sector, the skills that are in demand and to identify priorities for skills development.
* Develop and administer learning programmes, skills programmes and learnerships.
* Support the implementation of the National Qualifications Framework, on which any qualification or learning outcome can be registered.
* Undertake quality assurance on provision of learning in line with the Quality Council for Trades and Occupations (QCTO) requirements which include:
  * Accredit education and training providers
  * Monitor provision to ensure that programmes are being followed
  * Register assessors
  * Collaborate with other education and training quality assurers.
* Disburse levies collected from employers in their sector.
* Report on the efficient and effective use of funds governed by the Public Finance Management Act.

SUMMATIVE RESEARCH PUBLICATION

WELCOME TO THE 2023/24 W&RSETA SUMMATIVE RESEARCH PUBLICATION.

As we reflect on the significance of research within the Wholesale and Retail Sector, it becomes evident that our journey through the 2022 W&RSETA Research Conference marked a critical turning point in understanding how research, innovation, and data can shape the future. The inaugural conference illuminated key challenges, trends, and transformative opportunities that continue to resonate as we compile this 2023 summative publication.

The 2022 Research Conference presented a platform for thought-provoking dialogue that placed research at the centre of strategic action. It underscored the importance of treating SETAs as brands, emphasizing the need to connect meaningfully with our stakeholders by responding to their evolving aspirations. The role of research in ensuring that SETAs remain relevant and impactful was brought into sharp focus. This idea of connectivity, built on deep insights into stakeholder needs, laid the foundation for this current publication, a resource designed to make critical research more accessible and actionable across the sector.

Our discussions at the conference also highlighted the need for a nuanced understanding of regional economic and employment trends. With Gauteng, Kwa-Zulu Natal, and the Western Cape at the heart of South Africa's economic activity, we must align our efforts to target regional disparities, while focusing on one of the most urgent priorities: addressing youth unemployment, particularly among young Black African women. The emphasis on small businesses as engines of economic recovery further reinforced the need to support SMMEs, not just financially, but through skills development and technological adoption, a focus that this publication explores extensively.

In reflecting on the conference, the themes of creativity, innovation, and technological disruption emerged as pillars for the sector's future. Creativity is no longer a peripheral competency, but a central driver of innovation in retail, necessitating a shift in how we think about workplace environments and the skills needed for the future. Our reflections on the use of artificial intelligence and big data reaffirmed that personalization and data-driven decision-making are reshaping customer engagement, while ethical considerations around data usage and privacy must remain paramount. This publication captures these evolving trends, distilling key insights into practical strategies for the sector.

The 2022 conference was a reminder that the wholesale and retail sector is not immune to the rapid technological changes brought by the Fourth Industrial Revolution. The rise of e-commerce, the growing adoption of smart technologies, and the need for continuous reskilling are just a few of the challenges we must navigate. Our research findings delve deeply into these areas, offering critical guidance for how we can prepare both current and future workforces to thrive in this era of disruption.

The 2023 summative publication is more than just a collection of reports, it is a strategic tool designed to guide decision-making at all levels of the sector. The publication distils the essence of ten pivotal research reports, addressing key topics such as workplace-based learning, staff retention, the impact of COVID-19, and the opportunities arising from digitalization and the Fourth Industrial Revolution (4IR). These insights not only inform W&RSETA's strategic decisions and resource allocation, but also provide invaluable guidance to policymakers, industry stakeholders, and the broader sector.

In this era of rapid disruption, research is not merely reflective, but directive as it helps chart the path forward. By leveraging these findings, we aim to address critical sector priorities such as:

- Upskilling and reskilling the current workforce.
- Enhancing organizational resilience.
- Supporting SMMEs through targeted interventions that promote inclusive growth.

The upcoming 2024 Research Conference comes at a critical juncture for the sector. The disruptions brought about by the Fourth Industrial Revolution and digitalization are accelerating, making it imperative for the sector to evolve swiftly. This conference offers a timely opportunity to reflect on the progress made since 2022 and use the findings from the 2023 summative research as a strategic tool for the future. The research outcomes we have gathered will help ensure the sector remains adaptable, innovative, and future-focused.

One of the key insights from our past experience is that the dissemination of research outcomes is just as important as the research itself. It is essential that the findings from this summative publication reach all areas of the sector from SMMEs to large enterprises and are translated into practical, actionable strategies. These strategies will not only help current workforces thrive in this era of disruption, but also prepare the future workforce with the skills needed to meet emerging challenges. The research outcomes serve as a foundation for fostering:

- Innovation-driven growth: Embracing technology and digital skills.
- Inclusive development: Ensuring all enterprises benefit from these insights, regardless of size.

- Strategic partnerships: Creating opportunities for collaboration between academia, industry, and government to support transformative change.

These research outcomes not only inform W&RSETA's strategic decisions, but also serve as valuable tools for policymakers, industry stakeholders, and the broader sector. The insights contained here will serve as a roadmap for navigating the challenges ahead, ensuring that the sector remains at the forefront of skills development and transformation.

In closing, I extend my gratitude to all contributors and researchers whose work continues to shape the future of the wholesale and retail sector. The insights and recommendations outlined here will undoubtedly guide our sector towards resilience, innovation, and inclusive growth

Tom Mkhwanazi
Chief Executive Officer

CONTENTS

PART A

SUMMARIES OF RESEARCH REPORT

Part A provides a short summary of 10 research reports. We cover why the research was conducted; the findings of the research; and recommendations of the research team.

1. THE ECONOMIC AND SOCIAL IMPACT OF COVID-19 ON THE WHOLESALE AND RETAIL SECTOR

Research into the sector, with specific focus on labour market disruption
Conducted by: Redflank
Name of research paper: The economic and social impact of COVID-19 on the wholesale and retail sector
Published: March 2021
This study considers the economic and social impact of COVID-19 on the wholesale and retail sector. The state of the sector is gauged in terms of impact on business, business closures, responses to the pandemic, adoption of technology and the training required thereof to better understand key issues and opportunities.
NOTE: The recommendations made by the researchers were an integrated extrapolation from both research reports produced by Redflank (1. The economic and social impact of COVID-19 on the wholesale and retail sector; 2. Implications of 4IR on new jobs in e-commerce, digitisation, and innovation).

Findings of the research

- COVID-19 has had a significant impact, not only in accelerating the adoption of 4IR technologies, but also in forcing business closures. It resulted in employers retrenching a percentage of their staff in the motor vehicle sales and repair (25%), clothing retail (19%) and household equipment (13%) industries.

- At the retail sector level, 59.68% of respondents expect that the W&R sector may take between one and five years to recover. Respondents' outlook over the next 12 months is broadly positive (67.75%).

- The nature of reaching and interacting with customers has changed as more customers use online e-commerce platforms, remaining at a distance. Retailers' best chances at surviving public disasters like COVID-19 and the pace of accelerating technological change is to adopt hybrid business models with both physical and online presences.

- While 40% of respondents indicated that they are minimally or not using online channels at all, 38% of customers reach businesses by using a hybrid model of brick-and-mortar with e-commerce channels.

- There is also a relationship between technological acceptance, and the events brought about by the pandemic. The pandemic opened the eyes of many employees and customers to the benefits of using technology and the convenience thereof. But brick-and-mortar will be around for some time as South Africa's socio-economic factors naturally restrict a large percentage of the population in accessing online channels. This is due to poor infrastructure, high data costs, poor connectivity, and the cost of smart devices.

- Partnerships are key to unlocking the potential of 4IR, skills transfer and knowledge. Various stakeholders have suggested that it would be beneficial to attend conferences and workshops in order to understand the changes more fully being brought about by 4IR and how best to manage these changes.

- Given South Africa's socio-economic dilemma, a balancing act is needed where 4IR can play a central role through upskilling and reskilling for the new future economy and for jobs that are yet to be created, through transversal skills. But labour unions exert collective power over labour markets. Some employers have 4IR capabilities but are not implementing them due to restrictive interventions from labour unions.

- Numerous stakeholders cited the need for skills in change management practice and emotional intelligence (EQ) in order to manage the changes being brought about by 4IR. The key driver behind this suggestion from stakeholders appears to be that employees will need to buy in to the concept of 4IR technologies in order to find a space for them to still be productively employed. This will require the acquisition of new skills and the mindset of working with new technologies as opposed to resisting the change.

- South Africa is experiencing a general trend of reduced economic activity. This places all sectors at risk of facing a period of reduced expenditure. The retail and wholesale sectors have already experienced a period of

reduced activity and will need to protect themselves going forward. In order for South Africa to remain globally and locally competitive, 4IR becomes an inevitability.

- Stakeholders expressed positive views on the impact that 4IR is likely to have on employment. There is less certainty surrounding the impact that 4IR will have on economic growth, with many stakeholders indicating that the use of 4IR technologies, will provide them with the opportunity to gain experience

- 4IR is not likely to decrease jobs, but rather makes it possible for more orders and possibilities to be in effect. It makes sense that this benefit will be fully realised in a growing economy where demand for goods increases.

- Current training programmes prove inadequate as they have limited focus on responding to 4IR. They tend to take too long to develop in the wider context of rapid change. Electronic policy (e-policy) rigidity, reported by some respondents, has resulted in a slower uptake of e-learning due to strict requirements

- Customer service skills and other soft skills are a growing demand of 4IR yet lack consistent and up-to-date articulation in training programmes.

- It is best to start 4IR training at school level, as opposed to waiting until an individual enters the job market. To achieve this, school curricula should be designed with what the market may require in the next three to 10 years.

Recommendations of the research team

1.1. **Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot implement change within the retail and wholesale sectors, but it can function as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how manage the impact of 4IR. Change management should also be explored.

1.2. **Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.

1.3. **Share research findings with the Department of Basic Education for the structuring of school curricula** to accommodate 4IR-related job market requirements.

1.4. **Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.

1.5. **Offer training to employees on how better to understand the needs of their colleagues and customers,** as emotional intelligence (EQ) skills are in high demand.

1.6. **Create awareness among stakeholders on the employment possibilities** that new technologies make available.

1.7. **Consider school roadshow campaigns** to introduce learners to new prospective career paths in retail and wholesale.

1.8. **Promote use of 4IR technologies that increase efficiency and reduce costs,** like predictive analytics, in order to help protect employers in a difficult economic climate.

1.9. **Accelerate the process of updating or developing learning programmes** by improving consultative processes.

1.10. **Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.

1.11. **Hold roundtable discussions to see how 4IR can be driven and accelerated** to avoid a global digital divide.

1.12. **Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.

2. IMPLICATIONS OF 4IR ON NEW JOBS IN E-COMMERCE, DIGITISATION, AND INNOVATION

Research into the sector, with specific focus on labour market disruption
Conducted by: Redflank
Name of research paper: Implications of 4IR on new jobs in e-commerce, digitisation, and innovation
Published: March 2021
This study considers the implications of 4IR on new jobs in e-commerce, digitisation, and innovation on the wholesale and retail sector. The state of the sector is gauged in terms of adoption of technology and the training required thereof to better understand key issues and opportunities.
NOTE: The recommendations made by the researchers were an integrated extrapolation from both research reports produced by Redflank (1. The economic and social impact of COVID-19 on the wholesale and retail sector; 2. Implications of 4IR on new jobs in e-commerce, digitisation, and innovation).

Findings of the research

- A key concern surrounding 4IR is the impact that it might have on unskilled labour. This concern is valid due to the potential for 4IR technologies to undertake more repetitive and mundane tasks – thus replacing certain repetitive occupations. However, it has been noted that this impact may not be immediate in the South African context, due to the relative affordability for business of unskilled labour and socio-economic factors. In this regard, a W&R Stakeholder from a large retail chain indicated that they "…have the capabilities to automate but the challenge from an African point of view is that job creation is more of a priority, especially given the backdrop of socio-economic challenges and COVID-19."

- It is important to position individuals (especially unskilled labourers) in such a way that they will find employment when 4IR implementation properly takes hold in South Africa.

- There is a growing demand for skills that relate to computer literacy, data analysis and management, cyber security, cloud computing and general analytical skills. These are the foundational technological bases that are needed for artificial intelligence, machine learning and automation.

- The top 5 technologies currently deployed, as indicated by employers, are:
    o Cloud Computing (Big data processing, storage, backup, remote working)
    o Cyber security (Hardware, software, or electronic data protection)
    o E-commerce (Omni-channel, social media, mobile channel)
    o Digitisation (Omni-channel integration, paperless processes, digital twin)
    o Advanced Analytics (Big data, consumer insights, business intelligence, dashboards)

- The following 4IR technologies were indicated as not being implemented at all:
    o Automated cashier machines (Seamless checkout, DIY)
    o Applied Robotics (Automation, quality management, always-on operations)
    o Artificial Intelligence (Chatbots, outlier detection, process automation, reconciliation)
    o Virtual Reality (Product immersion, product experience)
    o Augmented Reality (Product immersion, product experience)

- There will be a push for using social media channels to drive sales and a strong demand for professions that are in data analytics, and cyber security. The top 5 occupations that were highlighted the most were:
    o Online Marketing (90.63%)
    o Data analysts / business analyst (87.50%)
    o Cyber security specialists (83.33%)
    o Developers (Clouds, Database, General IT) (81.25%)
    o Social media specialists (81.25%)
    o Automation specialists (78.13%)

- Many stakeholders indicated that training and education are key to both protecting jobs and taking advantage of 4IR in order to grow businesses and the economy. There appears to be a recognition that 4IR will impact the type of jobs available and the labour force (both skilled and unskilled) will need to be trained in preparation for this. For example, a previously unskilled labour force participant may need to be upskilled to become a machine operator.

- 65% of respondents indicated that they do not have training programmes centred around digitisation and innovation. This is therefore also an area where the SETA can intervene to bolster 4IR skills and knowledge in the sector.

- Respondents suggested other possible key areas of SETA interventions:

  o   Promote private-public partnerships (84.38%)
  o   Vendors and providers (81.25%)
  o   Basic digital skills (80.65%)
  o   Grow grassroots skills (78.13%)
  o   Focus on 4IR specific training (78.13%)

- Funding for data and devices must be provided in order to promote 4IR and emerging technology adoption.

- Comments were made around changing some SETA institutional processes to accommodate more digitally friendly ways of training, so that a fully digital and online e-learning process can be implemented.

Recommendations of the research team

2.1. **Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can function as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.

2.2. **Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.

2.3. **Share research findings with the Department of Basic Education for the structuring of school curricula** to account for 4IR-related job market requirements.

2.4. **Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.

2.5. **Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.

2.6. **Create awareness among stakeholders on the employment possibilities** that new technologies make available.

2.7. **Consider school roadshow campaigns** to introduce learners to new prospective career paths in retail and wholesale.

2.8. **Promote use of 4IR technologies that increase efficiency and reduce costs**, like predictive analytics, in order to help protect employers in a difficult economic climate.

2.9. **Accelerate the process of updating or developing learning programmes** by improving consultative processes.

2.10. **Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.

2.11. **Hold roundtable discussions to see how 4IR can be driven and accelerated** to avoid a global digital divide.

2.12. **Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.

3. RISE OF E-COMMERCE IN SOUTH AFRICA: A POSITIVE SPIN-OFF OF COVID-19

Research into the sector, with specific focus on labour market disruption
Conducted by: Durban University of Technology (DUT)
Name of research paper: Rise of e-commerce in South Africa: a positive spin off of COVID-19
Published: April 2022

The COVID-19 pandemic drove wholesalers and retailers to re-engineer their operations to ensure that their businesses generate revenue and stay afloat. This study investigates the remarkable digital transformation in the W&R sector, with enterprises of all sizes transitioning to online shopping and e-commerce.

Findings of the research

- Digital transformation has become the order of the day and is critical for business survival. Retailers traditionally relied on the appeal of their location to attract customers. With the pandemic, retailers were forced to rework their business models, redesign their operations and transition to online marketing and sales.
- E-commerce has taken the distance out of retail – physical location no longer binds consumers. Businesses in this sector can now reach potential customers worldwide without substantial investment in infrastructure.
- Every aspect of wholesale and retail is impacted by technology. It is not easy to generalise enterprise technology needs, however, due to the diversity of businesses. Companies such as Takealot, Checkers, Pick n Pay, and Woolworths constantly adapt their approach to meet new consumer habits and keep their platforms consumer-centric.
- The South African e-commerce market achieved US$3bn in net sales in 2019 and is forecasted to grow by 13% on average between 2019 and 2024.
- Twenty-two million consumers were shopping online in 2020. This number is expected to grow by 44% and 32 million users by 2024. Ongoing concerns about COVID-19 and the convenience of online shopping are key drivers of future online shopping
- By 2020, South Africa had a 50% to 70% increase in e-commerce usage, online retailing, click and collect, and streaming.
- Clothing, electronics, footwear, household appliances and health products are among the most popular categories in South Africa's online market, with groceries having grown by 54% since 2019.
- Technology is effectively levelling the playing field. A small corner shop has the means to compete with global multinationals through the worldwide web. It is thus urgent to enable SMMEs to transition to online platforms, supported by skills training.
- The biggest risk in online shopping is cyber security threats. Poor security discourages consumers. The protection of personal and financial data is paramount.
- Digital transformation and adaptation are critical for W&R businesses. A transformation in skills development is therefore equally important. Deloitte's Global State of the Consumer Tracker indicated that 55% of South Africans are concerned about losing their jobs due to the online shift.
- It was estimated that by 2030, about 230 million jobs in Africa would require some form of digital skills. Without properly skilled workers, the uptake of the digital economy will be difficult.

Recommendations of the research team

3.1. **Source short courses for enhancing digital skills** in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.
3.2. **Employees' data analytics, data science, and cloud computing skills should be developed** to manage the enormous data volumes.
3.3. **Skills in the use of blockchain, especially for cyber security, should be developed** to address this skills gap.
3.4. **Conduct workshops with companies** to share e-commerce and online shopping trends.
3.5. **Engage universities and TVET colleges to review their curricula** to include digital skills.
3.6. **Encourage companies to consider the digital short courses** for mandatory grant training investments.

Research into the sector, with specific focus on labour market disruption

Conducted by: Durban University of Technology

Name of research paper: Factors affecting staff retention and turnover in the wholesale and retail sector in South Africa

Published: April 2022

This research study explores employee retention strategies that can potentially be applied in large, medium and small wholesale and retail (W&R) business enterprises characterised by high labour turnover, which is a constant source of consternation.

Findings of the research

- The high employee turnover in W&R is a source of consternation. Retail employees leave their positions at four times the rate of other industries. This translates into huge hiring and training costs for recruiting new employees.
- Retail employee turnover is expensive. The highest turnover rates are for hourly employees; 65% of them will leave their jobs for greener pastures, and it costs 16% of their annual salary to replace them. There is also the toll on morale that comes from watching co-workers come and go so frequently.
- The wholesale and retail trade are the biggest employer of people in South Africa, employing 22.8% of the labour force. It is the third-largest contributor to the South African Gross Domestic Product (GDP).
- The labour market performance of W&R since 2017 has been on a downward trend. In 2017, the sector employed 1 536 million workers. By Q4:2021, employment declined to 1 268 million. It is a loss of 268 000 (17.44%) jobs.
- Retailing is associated with store-based activities, requiring minimal training, poor working hours, low compensation, dull work content, and limited advancement. These associations arise from a stereotypical image that is challenging to change. Therefore, retailing finds it difficult to compete with other sectors for talent.
- The risk of turnover is distributed unevenly across occupations. Cashiers, drivers, supervisors, hand labourers, packers, handlers, sales assistants and stock clerks are high-risk occupations.
- Atypical employment conditions deter prospective jobseekers. Atypical employment takes the form of casual, temporary, short-term contracts, and temporary work. Another form of atypical employment is labour brokering, where a labour broker holds the contract with the worker instead of the employer. In this way, the employer does not employ "workers" who are "working" in their stores. In atypical employment, workers do not receive the minimum social benefits in the Basic Conditions of Employment Act. It is common among the retail chains to employ "permanent" part-time, casual and temporary workers, including supervisors and managers.
- Casualisation is so embedded in the sector that large retailers can staff stores using only casual labour, including supervisors, for extended trading periods. Merchandising is outsourced. The job is tedious and does not require skilled employees. Large retailers design the packing and merchandising centrally, and merchandisers do the work of aisle attendants. The job is casual. Workers are not paid for additional work hours and do not have key performance targets. Job rotation is employed to minimise wages.
- Wage rates for most retail workers, especially in lower occupational categories, are stubbornly low. Even the minimum weekly wage rates set by the Department of Employment and Labour are low. There is also a tendency for small enterprises to pay below the minimum wage. Part-time, casual and temporary workers are not guaranteed minimum working hours per week or month. Non-compliance to wage agreements is rife, especially among small and informal enterprises.
- Retail establishments work long hours. There is a lack of provision for safe and reliable transport for late night and early morning shifts. It is very problematic since the country is crime-ridden, and workers are prone to being victims of robberies, hijackings and violent crime.
- Volume retailing is typified by downgraded job quality, faster work pace, tighter work constraints, and a customer service ethos that demands even more flexible working practices (irregular hours, involuntary part-time, longer than 9-hour working days). Workers report not having enough time to do their jobs and complain of chronic understaffing.

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- Work-related mental stress and psychological problems affect all categories of retail workers. With job insecurity in the sector, psychosocial risks take a toll on many employees.
- Manual handling and shelf-stacking are daily activities for several retail occupations. These workers are prone to musculoskeletal disorders due to repetitive actions in the long term.
- Work schedules disrupt the work-life balance because retail and checkout assistants often work 9 to 12 hours a day. Their hours might not be the same for two consecutive days. The unpredictable busy and quiet times and staff absences mean working overtime at short notice. Although collective agreements provide that Sunday work is voluntary, there are often tacit pressures on workers to work on Sundays.
- Women are the most vulnerable group in the workforce. More women work as temporary workers. They are least likely to be unionised, and they work fewer hours per week on average. They are most vulnerable to retrenchments.
- Foreign nationals were most vulnerable to exploitation. Over 50% of workers reported working more than 15 hours per day, seven days a week. Some were earning as little as R400 per month. Employees did not have written employment contracts, and all worked for cash wages.

Recommendations of the research team

4.1. **Conduct workshops with W&R enterprises** to make them aware of job retention strategies at firm-level. This research study is the antecedent for developing the workshop pack, including a workbook.

4.2. **Offer a management development training project for managers** to acquire the following skills to support employee retention:
   o Interpersonal relationships
   o Communication
   o Management practices
   o Performance evaluation
   o Listening
   o Negotiation
   o Coaching and mentoring
   o Team work
   The above themes should be modularised.

4.3. **Develop a user-friendly guideline or reference manual that can assist small informal sector enterprises** to register their enterprises and comply with the relevant statutes for doing business. The following issues should be addressed:
   o Business registration
   o Basic Conditions of Employment Act
   o Occupational Health and Safety Act
   o Tax registration and Unemployment Insurance Fund (UIF)
   o Working conditions
   o Sectoral Determination
   The above themes should be modularised.

4.4. **Create awareness of Decent Work protocols** by hosting workshops for employers and employee unions.

4.5. **Adopt a Code of Conduct** for Decent Work.

4.6. **Develop W&R business case studies of good employee retention practices** in South Africa.

4.7. **Investigate** non-compliant labour practices.

4.8. **Conduct a labour turnover study** in the W&R sector in terms of the following business categories:
   o Wholesalers
   o Large retailers
   o Medium-sized retailers
   o Small retailers
   o Micro-enterprises (informal sector)

4.9. **Encourage businesses to offer wellness programmes** to employees to reduce turnover and prevent burnout.

5. WORKPLACE BASED LEARNING (WBL): TRACER STUDY - LEARNERSHIPS

Impact of projects

Conducted by: Quest Research Services (QRS)

Name of research paper: Workplace Based Learning (WBL): Tracer Study - Learnerships

Published: September 2021

The survey explored the educational paths of beneficiaries, with the aim of deriving recommendations that will assist W&RSETA in implementing responsive interventions and programmes for the learnership.

Findings of the research

- The W&RSETA WBL learnership programmes were effective in providing beneficiaries with the necessary skills, knowledge, and experience to gain access to job opportunities. Through the learnerships, WBL completers were provided with learning-rich environments that resulted in the development of specific skills required in the workplace.

- The 25–34 years age group has the highest number of WBL participants. It is worth noting, however, that according to Statista.com, (2020), the age group under 25 has the highest unemployment rate in South Africa, at around 63.2%.

- The majority of WBL participants had a matric or Grade 12 education. Over 75% of the 18–24 age group had completed matriculation / Grade 12; however, their participation in the programme is incredibly low at this age, only to increase when they reach the ages of 25–34 years.

- WBL learnerships promoted career development, particularly in terms of broadening knowledge of available career paths. When it comes to soft skills such as communication and leadership, however, the WBL curriculum falls short.

- While beneficiaries have relevant skills for entering the labour market, a lack of employment opportunities prevents them from effectively applying their knowledge and skills. This indicates that, while the learnerships were successful in providing skills, their ultimate goal of reducing unemployment was not fully met.

- The increase in both full-time and part-time employment demonstrates that WBL learnerships are not only effective in achieving the W&RSETA mandate, but also contribute to the reduction of unemployment if job opportunities are consistently available.

- Less than 1% of learnership graduates were able to start their own businesses after completing the programme. This statistic reflects a lack of entrepreneurial development. Establishing and maintaining businesses after completion is important in the sector because it can be a vehicle for job creation and alleviate the high unemployment rates, even if one does not find work.

- The COVID-19 pandemic has had a significant impact on unemployment and slowed the issuance of certificates.

- Literature review and general perceptions from employer participants indicated that the WBL programmes appear to be used as stepping stones for other prospects because they are deemed insufficiently lucrative.

- One identified gap is that digital transformation is moving faster than the industry can keep up with technological advances. As a result, there is a skills shortage, which WBL does not address.

- This finding complements a PwC study in 2018 of global manufacturing companies whose key findings showed that there were no Digital Champions among the South African companies that participated in the survey. And South Africa was lagging on path towards digitisation.

- Employers' survey findings revealed that employers are attempting to foster robust partnerships with training providers to facilitate a better curriculum within WBL programmes.

Recommendations of the research team

5.1. **Manage and share a database of WBL graduates with companies in the wholesale and retail sectors** to encourage graduate uptake and ensure the relevance of skill development.

5.2. **Incentivise or encourage WBL graduates to volunteer at training providers**. This will help to bridge the gap between qualification and employment as well as enable the ability to apply new knowledge in the workplace.

5.3. **Enforce and improve W&RSETA certification policy and procedures** to expedite the issuance of certificates and avoid delays in job applications.

5.4. **Establish a system for conducting bi-annual tracer studies** to assess the success rate and efficacy of the learnerships. As a result, impact evaluation and planning should be addressed beyond NSDS III.

5.5. **Expand access to skills development beyond specialised skills** in order to ensure comprehensive skills development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.

5.6. **Bolster partnerships with co-operatives and communities, specifically, the Community Retail Development Programme (CRDP)**, to include more low-income urban communities and extend the training curriculum to include entrepreneurship. This will improve positive outcomes of WBL programmes as entrepreneurship in urban communities will promote competitiveness and further grow the local 'Township' economy.

5.7. **Implement an aggressive WBL awareness strategy** to increase the visibility of the W&RSETA in communities while also targeting the 18–24 age group. Candidates in their early twenties have a better chance of finding work than those in other age groups. This strategy will address the possibility of low visibility, as evidenced by the fact that most of the programme recruitment is through referrals, and will target the 18–24-year age group so that they are engaged early on and do not waste 4 to 5 years attempting to establish themselves only to pitch up when they are 25 and above for the WBL programme.

5.8. **Engage more with larger companies** because they have the potential to employ many learners. Shoprite, for example, employs over 140 000 people. Such large corporations and SMEs should be more involved in and encouraged to participate in W&RSETA WBL programmes.

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6. IMPACT EVALUATION STUDY ON THE YOUTH FOCUS PROJECT

Impact of projects

Conducted by: Urban-Econ Development Economists (Urban-Econ) in collaboration with Urban-Econ: NIKELA (Nikela)

Name of research paper: Impact evaluation study on the Youth Focus Project

Published: March 2023

This study assesses the Youth Focus Project (2018/2020) implemented by W&RSETA in terms of the project's impact on beneficiaries, efficiency, and effectiveness, as well as consider the key strengths and weaknesses of the project and provide recommendations for the future.
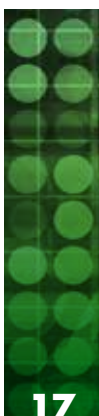
Findings of the research

- The project enabled 402 beneficiaries to obtain an occupational qualification. Overall, 91% of beneficiaries are satisfied with the learnership and the skills they learnt. Out of the total number of respondents, *77%* felt that the learnership equipped them to work in the wholesale and retail sector, and 82% felt that it provided them with the necessary skills to seek employment.

- A primary goal of the project was improving beneficiaries' self-esteem and confidence. This goal was achieved, as many beneficiaries reported learning several skills which positively impacted their self-esteem.

- Most beneficiaries complained that they did not receive certificates of participation from the W&RSETA. This made it difficult to seek and secure employment.

- The relationship between the training providers (TVET colleges) and W&RSETA was positive. However, the relationship between the training providers and the industry (specifically, host employers) was challenging throughout the project.

- The total unit cost per learner in the project was R23 401 per learner. The unit cost per learner who completed the project was R34 228 (1: 0.68). The cost per learner employed as a result of the programme was R110 414 per learner (1: 0.21).

- The project aligned with three NSDS III goals and strategic objectives:
  - o Increased access to occupational programmes.
  - o Growth of the public TVET system.
  - o Addressing numeracy and literacy levels.

- The Youth Focus Project aligned with five W&RSETA goals and strategic objectives, namely:
  - o Creating a culture of lifelong learning.
  - o Addressing historical imbalances in the wholesale and retail sector.
  - o Facilitating funding and accessibility to industry needs.
  - o Aligning with national development strategies to foster skills development in the wholesale and retail sectors.
  - o Achieve the AET L1, 18.2 targets.

Strengths	Weaknesses
• Positive relationships between the training providers and W&RSETA. • Adequate quality assurance provided by W&RSETA. • Open communication and monthly meetings initiated by W&RSETA. • Adequate resources provided by W&RSETA for the training providers. • The positive relationship between the beneficiaries and the mentors/facilitators helped beneficiaries stay resolute. • Beneficiaries received regular stipends (71% noted receiving regular and adequate stipends). • Mentorship in the host employer stores for beneficiaries helped make the experience beneficial and enjoyable.	• Lack of adequate administration staff at W&RSETA affected time-frames and caused delays for both the W&RSETA and the training providers. • The administrative tasks were not adequately outlined by W&RSETA, which resulted in confusion and errors. Beneficiaries did not receive certificates. • Challenging relationships between training providers and host employers. • Lack of student support provided by training providers at the TVET colleges. • Beneficiaries experienced challenges with transport and the resources available to beneficiaries to work. • The abrupt shut-down of the project due to COVID-19 regulations was a challenge, exacerbated by a lack of communication on the part of the W&RSETA.

Recommendations of the research team

6.1. **Keep accurate, up-to-date, and ongoing records** of beneficiaries.

6.2. **Conduct tracer/impact studies** closer to project completion dates.

6.3. **Take more time to train and brief training providers**, so that all stakeholders know precisely what is required by W&RSETA.

6.4. **Ensure colleges are well equipped and aware of the kind of project the Youth Focus Project is**, and the challenges and requirements of a project of this nature.

6.5. **Assist training providers in securing host employers** for beneficiaries.

6.6. **Ensure training providers receive the necessary funding for the project on time**, allowing the training providers to begin the training effectively.

6.7. **Supply more W&RSETA administration staff** on projects of this nature.

6.8. **Consider offering higher NQF level qualifications** in the Youth Focus Project.
Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.

6.9. **Issue certificates to beneficiaries promptly** on completion of the project.

6.10. **Keep an open line of communication with beneficiaries throughout the duration of the project** to communicate any challenges or changes.

6.11. **Reinstate the Youth Focus Project**, considering its positive reception, beneficial impact, and abrupt shutdown.

7. IMPACT EVALUATION STUDY ON THE RURAL AREAS LEARNERSHIP (INFORMAL SMALL BUSINESS PRACTICE)

Impact of projects

Conducted by: Urban-Econ Development Economists (Urban-Econ) in collaboration with Urban-Econ: NIKELA (Nikela)

Name of research paper: Impact evaluation study on the Rural Areas Learnership (Informal Small Business Practice)

Published: March 2023

This study considers numerous aspects of the Rural Areas Learnership (Informal Small Business Practice 2018/19) implemented by W&RSETA. This includes an investigation of the project's efficiency and effectiveness in terms of its goals and inputs, and outputs.
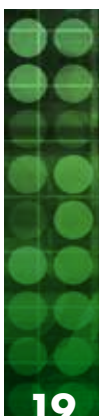
Findings of the research

- The project enabled 457 beneficiaries to obtain an occupational qualification. Overall, the programme appears to have improved the skills and knowledge of beneficiaries in the sector, with 96% of the respondents saying that they learned more about the wholesale and retail industry through the learnership. A total of 68% of beneficiaries said they now have increased career opportunities, and 92% noted that they feel prepared to start and run a small business after completing the learnership.

- In addition to the work-based skills obtained, the beneficiaries reported having found personal value, growth and development through the Rural Areas Learnership.

- The goal to help beneficiaries obtain employment was achieved as the number of employed beneficiaries has increased from 2% to 16% since the project's conclusion.

- In terms of the goal to grow the SMME environment, the number of self-employed individuals has also risen from 17% to 28% since the learnership ended, indicating success in helping beneficiaries embark on their business ventures.

- In terms of introducing more individuals into the wholesale and retail sector and growing local rural economies, the results are mixed. The ratio of beneficiaries who were funded to the number of beneficiaries currently working in the wholesale and retail sector is only 1:0,16. This is not a very favourable result. However, of the 28% self-employed beneficiaries, 84% of the businesses are in the wholesale and retail sector. This indicates a positive upswing of beneficiaries entering the sector as more businesses get started and grow.

- The total unit cost per learner in the project is R54 000. The unit cost per learner who completed the project was R54 236 (1: 0.99). This indicates a positive input-to-outcome ratio, at almost 1: 1 or 100%.

- The cost per learner employed as a result of the programme was R195 597 (1: 0.28). This is calculated to the number of learners currently employed since the completion of the project in 2019. The unit cost per learner currently employed in the wholesale and retail sector was R331 010 (1: 0.16); this is less positive. However, the project aimed to encourage beneficiaries to start their businesses, which can be challenging and take slightly longer to find employment traditionally.

- The project aligned with three NSDS III goals and strategic objectives:
  - Increasing access to occupationally directed programmes.
  - Expanding the public TVET system for sector, local, regional, and national needs requirements.
  - Encouraging more efficient and effective use of workplace skills development.
  - Encouraging and assisting small enterprises, cooperatives and worker-initiated NGO and community training initiatives.

- The Rural Areas Learnership aligned with three W&RSETA goals and strategic objectives, namely:
  - Establishing a skilled and competent workforce in the wholesale and retail sector.
  - A skilled, lively SMME and co-operative sector.
  - Addressing historical imbalances in the wholesale and retail sector.

Strengths	Weaknesses
- Positive relationships between the training providers and W&RSETA. - W&RSETA provides adequate quality assurance. - Open communication is provided to the training providers and W&RSETA, and between beneficiaries and traditional leaders and authorities. - Positive relationships between the beneficiaries and the mentors/facilitators. - Fewer drop-offs due to resolute learners. - Stipends were received on time and regularly. - The vital and informative implementation phase of the project.	- The project's duration was insufficient for the beneficiaries to fully absorb and translate the skills training and mentorship to their business ventures. - The administrative tasks in the contract stage of the project (in terms of which training providers were appointed and the subsequent information) was not expressed in an adequate time limit. - The numeracy and literacy skills of the beneficiaries are not always adequate at the outset of the project. - Mentors, facilitators and training providers paid inadequate attention to discussing the challenges of running a small business in a rural context. - Beneficiaries experienced challenges with transport, the resources available to beneficiaries to work and inadequate stipends. - Lack of support after the closure of the project in terms of business monitoring.

Recommendations of the research team

7.1. **Keep accurate, up-to-date, and ongoing records** of beneficiaries.

7.2. **Conduct workplace mentoring training sessions** to guide mentors and supervisors on their roles and responsibilities, orientate them on the programme and provide guidelines regarding the required training for beneficiaries based on the project's goals.

7.3. **Lengthen the running period of the Rural Areas Learnership** as it is currently not long enough for the beneficiaries to absorb the training and mentorship and apply it to their business ventures.

7.4. **More attention should be paid to mentors, facilitators, and training providers** to discuss the challenges of running a small business in a rural context, specifically.

7.5. **Be more attentive to deadlines** in the project allocation and contract phase of the project.

7.6. **Ensure that beneficiaries are fully aware of what is required** in the project and are well informed about what the project entails.

7.7. **Implement constant follow-ups with beneficiaries during the project** to allow them to raise concerns or pose questions.

7.8. **Provide post-programme support** to beneficiaries.

7.9. Consider **raising the stipend amount**.

7.10. **Provide adequate and comfortable venues** within which training is provided.

8. LINKING EDUCATION AND WORK: PROVIDER, EMPLOYER AND LEARNER PERCEPTIONS OF PREPARATION FOR AND THROUGH WORK

Improving service delivery

Name of research paper: Linking education and work: provider, employer and learner perceptions of preparation for and through work

Conducted by: Dem Tse Trading

Published: March 2022

The study sought to better understand the possibilities, challenges and opportunities that education-for- and-through work present to the W&R sector. This provides a good background to improve the sector's ability to link education and the workplace.

Findings of the research

- All stakeholders who participated in this research study agree that there is a link between training and workplace skills requirements.

- The training provided is considered adequate but can be improved with some adjustments and additions to the programmes.

- Some learners find it difficult to secure work-based learning, a component of their studies. Practical experience is a vital component for an employee to be more effective and productive at a workplace. However, because of the costly nature of experiential learning given the limited budget of most training providers, the consequence usually is that most trainers end up resorting to concentrate more on theory with minimal experiential learning.

- All the interviewed stakeholders agreed that experiential learning is an important component of training programmes as it gives real experience of what happens in the industry.

- Most learners find it difficult to penetrate the job market after graduation. More than 26% of the graduates who participated in the study are unemployed.

Recommendations of the research team

8.1. **Foster partnerships with industry to align their skills needs and tertiary training** as it enhances one's employability when equipped with the right skills and knowledge.

8.2. **Encourage entrepreneurship training as part as part of all courses** to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.

8.3. **Foster dialogue on enhancing the training by tertiary institutions** to provide input into the development of training materials.

8.4. **Ensure that learners complete the requisite practical learning on time** by facilitating WBL placements.

8.5. **Set mandatory experiential and theory ratios for all courses enforced by a strict monitoring framework** to minimise the risk of an umbrella ratio which may be detrimental to the end goal of producing a graduate well prepared for the workplace.

8.6. **Implement flexible short courses that can accommodate those who are already employed** to enhance their skills through further education and training.

8.7. **Empower trainers in monetary or material terms so that they are better able to maintain the ratios of experiential learning to theory**, especially for some courses that are supposed to be conducted at a 70:30 ratio of experiential learning to theory.

8.8. **Enforce the teaching of soft skills** like people skills, dispute resolution, customer service, team building, communication and presentation skills. These should be part of the training over and above other business courses like finance, business management, human resources and purchasing, among others.

9. TRANSFORMATION TO ADVANCE BUSINESS SUSTAINABILITY AND RESILIENCE, WITH A FOCUS ON BUILDING ENTREPRENEURSHIP

Improving service delivery

Conducted by: Impact Advantage

Name of research paper: Transformation to advance business sustainability and resilience, with a focus on building entrepreneurship

Published: February 2022

This study explores transformation as a tool to advance business sustainability and resilience, with a focus on entrepreneurship development in the ongoing improvement of sector-wide skills development.

Findings of the research

- Resilience relates to the ability to recover from external shocks; sustainability relates to the ability to "remain in business."

- Resilient enterprises "bounce back" from adversity, while sustainable enterprises create value for which the market continues to pay (note that resilience can be negative, i.e., when enterprises "bounce back" to undesirable conditions). Both of these aspects are rooted in the establishment of a well-managed enterprise that can generate income and accumulate surplus resources.

- Entrepreneurial development has personal, organisational (enterprise), and technology dimensions.

- Successful entrepreneurs are visionary, network for access to resources, are innovative in their responses to adversity, manage operations, and are keen to develop their skills. Their personal characteristics do not seem to differ much across sectors, but different characteristics come to the fore in different enterprise growth phases.

- Entrepreneurs adopt technology in line with their enterprise growth path and business maturity. Technology adoption is broad, but simplistic. Resource availability and connectivity impede adoption

- Successful entrepreneurs adopt technology for diversification and automation; technology has been leveraged by successful enterprises to diversify markets and facilitate remote work during lockdown.

- With some exceptions (e.g., COVID-19 response) most development programmes do not focus on resilience and sustainability per se, but rather focus on the development of healthy, well-functioning enterprises.

- Key to the development of healthy enterprises are development programmes that include education and training as part of a holistic model of enterprise development, alongside mentoring, coaching, and connecting businesses to resources and network.

- Skills and business support needs can broadly be grouped into six areas:
  o Business and technical skills: Strategy and leadership, business management, general management, financial management, retail management, marketing and sales, and people skills.

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- o Business development: Access to support network, access to markets, and customer and stakeholder relationship management.
- o Business resources: Financial support (access to working capital), facilities and equipment, specialised facilities (like transport and storage), access to raw materials, technology, and skilled personnel.
- o Entrepreneurial support: People "walking with you;" mentorship, advice, coaching, and holistic support.
- o Business operations: Knowledge of business processes (production, sourcing), understanding the value chain, business optimisation and supply chain development.
- o Catalysing support: Established, dependable, and credible business support programmes.

Recommendations of the research team

9.1. **Focus on both enterprising and functional (business and technical) skills development**, with ongoing mentoring, coaching, and business support.

9.2. **Provide skills development specific to the business and support the business in the context of its development path.** The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.

9.3. **Shift from the current fragmented approach to integrated, holistic development programmes** in order to respond to the W&RSETA mandate.

9.4. **Break overall goals down to the realities of the current status of entrepreneurial development when defining goals and impacts**. The primary objective should be the development of sustainable, well-functioning enterprises, which will in turn contribute to secondary objectives such as job creation.

9.5. **Mitigate resource constraints by ringfencing development efforts to specific areas** and subsectors within which targeted interventions with sustained benefits can be initiated. Resources for entrepreneurial development are limited and fragmented, while the need is widespread and significant.

9.6. **Deliver impactful development in partnership with other stakeholders**. This involves consultation with sub-sector and regional stakeholders (for the design of programmes), partnerships with stakeholders who have developed their capability to deliver holistic programmes, and partnerships for the development of a national strategy for SMME development in the W&R sector.

- • First steps to achieve this are to:
  - o Map the landscape of role players who can contribute to the delivery of integrated, holistic SMME development
  - o Define workable models of engagement (e.g., what will the role of the W&RSETA be relative to the service providers; establish panel of service providers)
  - o Identify and engage stakeholders for the development of a national strategy for retail SMME development.

9.7. **Streamline the interface of stakeholder engagement around entrepreneurial development**, with a view of unlocking potential. Strong delivery models through partnerships could streamline entrepreneurial engagement. A number of stakeholders keen to collaborate with the W&RSETA on entrepreneurial development, found engagement difficult. The same holds for engagement with entrepreneurs, who have expressed similar experiences.

10. STRATEGIC REVIEW OF SUITABLE LEARNING PROGRAMMES AND INTERVENTIONS FOR THE EMPLOYED AND UNEMPLOYED

This research study undertook a strategic evaluation of suitable learning interventions for the employed and unemployed, and culminated in key aspects that influence fund allocation, a high-level allocation model, and research (data collection) instruments.

Findings of the research

- The W&R sector employed approximately 3.32 million people in 2020, of which 2.155 million were in formal employment, accounting for approximately 22% of the formal labour force. This workforce often works long hours but has low productivity and transformation in the workplace has been slow.

- The New Growth Plan targets 1.2 million workers for certified on-the-job skills improvement programmes annually from 2013, which implies that every SETA should co-finance training for approximately 10% of the workforce annually (DHET, 2019). In the case of the W&RSETA, this would require training of approximately 332 000 workers annually. However, in 2019/20 the W&RSETA trained only 30 774 learners, which included employed as well as unemployed learners.

- In order to address skills shortages that are holding back economic growth, the DHET has directed that at least 80% of the discretionary funds should be spent on PIVOTAL programmes that focus on scarce and critical skills needs. Training for scarce skills often involves high-level qualifications that require a number of years of training as well as workplace integrated learning.

- During stakeholder consultations, employers expressed their need for NQF learnerships to improve employees' qualifications for career development and succession planning, while training providers cited a high demand for learnerships to enable unemployed youth to acquire the skills and qualifications required for employment.

- The total number of learners increased by 246% from 8 897 in 2017/18 to 30 774 in 2019/20, resulting in an overall increase in uptake. The percentage of uptake increased for critical skills, occupational skills for employed learners and NQF 5 training for unemployed learners. Although the percentage of uptake decreased for occupational skills, NQF 3 and NQF4 for unemployed learners, and NQF 5 for employed learners, the number of learners increased

- Retailers cited lack of time as the main reason (permanent) staff could not attend NQF levels 2 to 5 training or did not complete their training as they were needed on the floor. This gave rise to a higher demand for occupational training, which takes less time and enables staff to perform their tasks better. Sometimes companies have to forfeit allocations because of pressing business priorities.

- There is a need to upskill more senior staff (NQF 3 – 5) to enable them to become supervisors and managers, but companies stated that it was difficult to obtain grants. They would also like to plan career development, which included an annual progression of staff (staff pipeline) from one NQF level to the next; however, this does not currently happen, due to certification delays.

- A number of the companies are of the opinion that much of the training is too generic and/or out-dated. Some of the large retailers have therefore developed their own customised in-house NQF levels 2 to 5 training.

- Many companies are manufacturers and wholesalers or retailers and therefore have training needs that fall under more than one SETA, while some businesses have specific training needs related to their products.
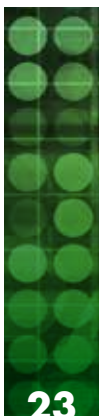
- Four prominent categories of training needs were mentioned by numerous stakeholders, namely: (1) occupational health and safety, (2) digital literacy, (3) financial literacy, and (4) soft skills.

- Specific training needs and differences in training needs across provinces were discussed with focus group participants. Participants felt that retail stores have similar skills needs everywhere, and that the differences in retail skills needs were bigger between sectors (e.g., fuel and food) than between provinces. However, the following important differences between urban and rural areas/provinces were pointed out:

  - There are fewer (large) businesses in rural areas and therefore fewer learnership opportunities.
  - Programmes related to culture differ between provinces.
  - There is a need to provide training in local languages rather than in English in some rural areas.
  - Training should be customised with examples that are relevant to culture and area.
  - The educational level / basic entry level is lower in rural areas owing to shortcomings in the education system. Learners might therefore not meet the entry-level requirements for training and would require access to adult basic education or a bridging course to improve literacy and numeracy.
  - Financial literacy is lower in rural areas.
  - Digital literacy is lower in rural areas – leaners need to be shown how to switch on a computer and operate a mouse.
  - Youth in rural areas often lack confidence – there is a need to build their self-esteem and confidence first.
  - There is a need to expand informal-level training for youth in rural villages to develop entrepreneurship so that they do not have to relocate to a city to find employment.
  - Informal traders in remote areas lack opportunities and need more support.

- Some companies find it difficult to source accredited training providers for their specific training needs, for example, to train team leaders and managers in areas such as procurement, receiving, sales, and logistics.

- Retailers' satisfaction with training providers varies widely. While there are many excellent training providers, there are also some who provide poor or inappropriate skills training or do not complete the training on time. Retailers would prefer a list of reputable accredited training providers who are situated nearer to them and can address their training needs.

- Some stakeholders felt that it would be beneficial to extend the learnerships for the unemployed with another year to enable them to complete NQF level 3 before employing them. Some companies indicated that they struggle to find suitable candidates for the unemployed learnerships. Candidates need to be screened carefully to make sure that they are interested in the training rather than the stipend.

- Many stakeholders feel that W&RSETA processes are too complicated and time consuming and require too much paperwork and duplication. This results in some companies not applying or no longer applying for grants.

- Retailers report long delays in W&RSETA processes, such as no contracts for learners after four months, which result in learners dropping out of the system. Training providers complain about waiting more than a year for learning programmes to be approved. These delays are due to the W&RSETA experiencing capacity and system constraints but lead to retailers discontinuing their participation. Improved turnaround time for grant allocation, contracting, and claims are required.

- Delays in payment cause the most frustration. Many examples have been cited where companies had to wait months or even years for grants to be paid, while they have to pay the learners their stipends in the meantime. They feel that they are acting like a bank for the W&RSETA, as they have to pay the stipends from their own funds, although they can use the grant for future learners. When learners do not receive their stipends, training providers or SLOs get accused of stealing the money. Learners and SMMEs then drop out of the system because they think it is a scam.

- Delays in payment put a lot of strain on training providers as they have to pay their trainers, pay for venues and catering, print training materials, and others. This results in training providers not completing training on time due to lack of funds, and in good training providers leaving the market place.

- The learners experience delays of up to three years in receiving their certificates once they have completed their training. Companies sometimes have to promote people before they have received their qualifications.
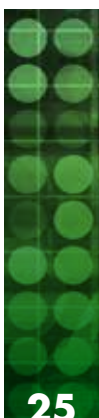
As the period between training and verification is too long, the learnerships are not signed off in time and the company does not receive payment. It results in learners not being able to progress to the next NQF level the following year, as they are still on the W&RSETA system and therefore cannot register. Learners then have to take a "gap year" which breaks their momentum and motivation and interrupts the company's staff pipeline. This makes learners reluctant to register for learnerships.

- The W&RSETA has been establishing a new online portal which should have streamlined these processes and eliminated the delays. It is understood that the intention was to be able to upload all documents and then track the documents and payments through the system. However, the system is not fully functional yet. This reflects poorly on SLOs and SDFs, because their clients think that they are not doing their work.

- Stakeholders' customer service experience of the W&RSETA offices varies widely. Some report good response rates from helpful staff at regional/provincial offices, while others are highly frustrated with the total lack of response and support.

- The research on entrepreneurial development programmes for SMMEs, micro enterprises, and informal traders (research publication 9) has shown that entrepreneurs need mentoring, coaching, and business development support over a period of at least one year in addition to training, which significantly increases the funding requirement per entrepreneur. This will impact the split of discretionary funds between PIVOTAL programmes and non-credit bearing programmes.

Recommendations of the research team

10.1. **Establish and manage a training pipeline** that enables learners to progress through the various NQF levels in consecutive years until they have mastered the required skills and obtained their qualifications.

10.2. **Reduce the administrative burden**, the timeline from recruitment to training, delays in payment and certification, and align training programmes with retailers' skills planning cycles, to encourage more retailers to apply for and accept grants, especially NQF learnerships.

10.3. **Set up a national steering committee**, comprising large and small employers, SLOs, SDFs and training providers, to streamline and redesign some of the W&RSETA processes and oversee the implementation of the new processes.

10.4. **In the rural provinces, give attention to AET and bridging courses** (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education. This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area.
  - o It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.

10.5. **Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.

10.6. **Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities.
  - o Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.

10.7. **Undertake a forecasting (***foresighting***) exercise with CEOs and industry experts in the W&R sector to gain insight into their strategic planning** and future skills needs. This should inform future training provision and other medium- and long-term interventions.

10.8. Based on the recommendations of the forecasting (*foresighting*) exercise, the **Skills Value Chain approach should be completed** by developing and delivering modern, up-to-date curricula and training programmes to

equip employees with knowledge and skills for agility in the fast-changing W&R sector. Assistance should be provided to the CET and TVET colleges, including the newly established Retail Occupational Skills Centres, for expanding their capabilities to provide these training programmes.

10.9. **Improve the HTFV training pipeline by introducing longer planning cycles for NQF training**, for example two- or three-year cycles, to encourage employers to send their workers for NQF training. Create a mechanism to assist employers to be able to release staff from the floor for NQF training, for example, by providing the employer with an intern to take on some of the tasks of the staff member on training.

    o   This could potentially be done in collaboration with other initiative such as the YES programme.

PART B

THEMATIC OVERVIEW OF THE FINDINGS AND RECOMMENDATIONS

Part B provides an overall summary of the findings and recommendations. The information is clustered according to themes.

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THEME 1: SKILLS DEVELOPMENT AND TRAINING PROGRAMMES

Skills development is the core business of the SETA, so research undertaken into any aspect of the SETA's operations and outcomes will necessarily have to look into the skills development and training programmes initiated by the authority and managed by it.

The research papers reviewed in this publication all touch on this topic in some way and, accordingly, their recommendations are intended to achieve the broad goal set out in Outcome 1 of the W&RSETA Sector Skills Plan: An efficient and effective organisation with good corporate governance.

The SETA's skills and development programmes support the majority of the specific outcomes set out in the plan.

The research primarily focuses on the effectiveness of skills development and training programmes managed by the SETA, with a particular emphasis on Work-Based Learning (WBL) learnership programmes. The research findings indicate that these programmes have been successful in equipping beneficiaries with the necessary skills, knowledge, and experience to gain access to job opportunities.

The majority of the participants in these programmes had a matric or Grade 12 education. Participation in the programme is low in the younger age groups, only increasing at the ages of 25-34 years.

The research highlights the importance of digital transformation and adaptation for W&R businesses. Deloitte's Global State of the Consumer Tracker indicated that 55% workers in the sector are concerned about losing their jobs due to the online shift of retail activities.

It is estimated that by 2030, some 230 million jobs in Africa will require digital skills. Without that, the uptake of the digital economy will be difficult. This underscores the need for a transformation in skills development to keep pace with the digital shift.

The W&R SETA WBL learnership programmes have enabled 457 beneficiaries to obtain an occupational qualification. The programmes appear to have improved the skills and knowledge of beneficiaries in the sector, with 96% of the respondents saying that they learned more about the wholesale and retail industry through the learnerships.

Furthermore, 68% of beneficiaries said they now have increased career opportunities, and 92% noted that they feel prepared to start and run a small business after completing the learnership.

In addition to the work-based skills obtained, the beneficiaries reported having found personal value, growth, and development through the Rural Areas Learnership. The goal to help beneficiaries get employment was achieved to an extent, as the number of employed beneficiaries increased from 2% to 16% since the project's conclusion.

The research did, however, identify challenges in securing work-based learning opportunities and in getting jobs, once qualified. There are administrative inefficiencies and inadequate support for small business owners in rural areas.

The recommendations for improving the training programmes include integrated development programmes, strategic partnerships, training on change management, 4IR technology, and enhancing emotional intelligence.

In summary, the research provides a comprehensive analysis of the W&RSETA WBL learnership programmes, highlighting their successes, challenges, and areas for improvement.

It underscores the importance of skills development in the current digital age and the need for continuous improvement and adaptation of training programmes to meet the evolving needs of the job market.

Linked to W&RSETA outcomes

OUTCOME 2:

An integrated career guidance programme

OUTCOME 3:

Development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 4:

Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme

OUTCOME 5:

Increased access to wholesale and retail occupationally directed programmes

OUTCOME 6:

Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 8:

An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.4.	**Provide training to employees** on change management techniques in addition to equipping employees with technical skills required to manage 4IR technologies.
1.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.
1.8.	**Promote use of 4IR technologies that increase efficiency and reduce costs**, like predictive analytics, in order to help protect employers in a difficult economic climate.
1.9.	**Accelerate the process of updating or developing learning programmes** by improving consultative processes.
1.10.	**Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
1.12.	**Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.
2.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
2.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.
2.8.	**Promote use of 4IR technologies that increase efficiency and reduce costs**, like predictive analytics, in order to help protect employers in a difficult economic climate.
2.9.	**Accelerate the process of updating or developing learning programmes** by improving consultative processes.
2.10.	**Introduce and/or emphasise unit standards for soft skills to improve learners' employability**. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
3.1.	**Source short courses for enhancing digital skills** in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.
3.2.	**Employees' data analytics, data science, and cloud computing skills should be developed** to manage the enormous data volumes.

	Recommendations
3.3.	**Skills in the use of blockchain, especially for cyber security**, should be developed to address this skills gap.
3.5.	**Engage universities and TVET colleges to review their curricula** to include digital skills.
3.6.	**Encourage companies to consider the digital short courses** for mandatory grant training investments.
5.1.	**Manage and share a database of WBL graduates with companies in the wholesale and retail sector** to encourage graduate uptake and ensure the relevance of skill development.
5.2.	**Incentivise or encourage WBL graduates to volunteer at training providers**. This will help to bridge the gap between qualification and employment as well as enable the ability to apply new knowledge in the workplace.
5.4.	**Establish a system for conducting bi-annual tracer studies to assess the success rate and efficacy of the learnerships**. As a result, impact evaluation and planning should be addressed beyond NSDS III.
5.5.	**Expand access to skill development beyond specialised skills** in order to ensure comprehensive skill development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.
5.6.	**Bolster partnerships with cooperatives and communities, specifically, the Community Retail Development Programme (CRDP)**, to include more low-income urban communities and extend the training curriculum to include entrepreneurship. This will improve positive outcomes of WBL programmes as entrepreneurship in urban communities will promote competitiveness and further grow the local 'township' economy.
5.7.	**Implement an aggressive WBL awareness strategy** to increase the visibility of the W&RSETA in communities while also targeting the 18–24 age group. Candidates in their early twenties have a better chance of finding work than those in other age groups. This strategy will address the possibility of low visibility, as evidenced by the fact that most of the programme recruitment is through referrals, and will target the 18–24-year age group so that they are engaged early on and do not waste 4 to 5 years attempting to establish themselves only to pitch up when they are 25 and above for the WBL program.
5.8.	**Engage more with larger companies** because they have the potential to employ many learners. Shoprite, for example, employs over 140 000 people. Large corporations and large SMEs should be more involved in, and encouraged to participate in, W&RSETA WBL programmes.
6.8.	**Consider offering higher NQF level qualifications in the Youth Focus Project**. Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.
6.11.	**Reinstate the Youth Focus Project**, considering its positive reception, beneficial impact, and abrupt shutdown.
7.2.	**Conduct workplace mentoring training sessions** to guide mentors and supervisors on their roles and responsibilities, orientate them on the programme and provide guidelines regarding the required training for beneficiaries based on the project's goals.
7.3.	**Lengthen the running period of the Rural Areas Learnership** as it is currently not long enough for the beneficiaries to absorb the training and mentorship and apply it to their business ventures.

Recommendations	
7.4.	**More attention should be paid to mentors, facilitators, and training providers** to discuss the challenges of running a small business in a rural context, specifically.
7.7.	**Implement constant follow-ups with beneficiaries during the project** to allow them to raise concerns or pose questions.
7.8.	**Provide post-programme support** to beneficiaries.
7.9.	Consider **raising the stipend** amount.
7.10.	**Provide adequate and comfortable venues** within which training is provided.
8.1.	**Foster partnerships with industry to align their skills needs and tertiary training** as it enhances one's employability when equipped with the right skills and knowledge.
8.2.	**Encourage entrepreneurship training as part as part of all courses** to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.
8.3.	**Foster dialogue on enhancing the training by tertiary institutions** to provide input into the development of training materials.
8.4.	**Ensure that learners complete the requisite practical learning on time** by facilitating WBL placements.
8.5.	**Set mandatory experiential and theory ratios for all courses enforced by a strict monitoring framework** to minimise the risk of an umbrella ratio which may be detrimental to the end goal of producing a graduate well prepared for the workplace.
8.6.	**Implement flexible short courses that can accommodate those who are already employed** to enhance their skills through further education and training.
8.8.	**Enforce the teaching of soft skills** like people skills, dispute resolution, customer service, team building, communication and presentation skills. These should be part of the training over and above other business courses like finance, business management, human resources and purchasing, among others.
9.1.	**Focus on both enterprising and functional (business and technical) skills development**, with ongoing mentoring, coaching, and business support.
9.2.	**Provide skills development specific to the business and support the business in the context of its development path**. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
9.3.	**Shift from the current fragmented approach to integrated, holistic development programmes** in order to respond to the W&RSETA mandate.
9.4.	**Break overall goals down to the realities of the current status of entrepreneurial development when defining goals and impacts**. The primary objective should be the development of sustainable, well-functioning enterprises, which will in turn contribute to secondary objectives such as job creation.
9.5.	**Mitigate resource constraints by ringfencing development efforts to specific areas** and subsectors within which targeted interventions with sustained benefits can be initiated. Resources for entrepreneurial development are limited and fragmented, while the need is widespread and significant.

Recommendations	
9.6.	• Define workable models of engagement (e.g., what will the role of the W&RSETA be relative to the service providers; establish panel of service providers) **Deliver impactful development in partnership with other stakeholders**. This involves consultation with sub-sector and regional stakeholders (for the design of programmes), partnerships with stakeholders who have developed their capability to deliver holistic programmes, and partnerships for the development of a national strategy for SMME development in the W&R sector. First steps to achieve this are to: • Identify and engage stakeholders for the development of a national strategy for retail SMME development. • Map the landscape of role players who can contribute to the delivery of integrated, holistic SMME development
9.7.	**Streamline the interface of stakeholder engagement around entrepreneurial development**, with a view of unlocking potential. Strong delivery models through partnerships could streamline entrepreneurial engagement. A number of stakeholders keen to collaborate with the W&RSETA on entrepreneurial development, found engagement difficult. The same holds for engagement with entrepreneurs, who have expressed similar experiences.
10.1.	**Establish and manage a training pipeline** that enables learners to progress through the various NQF levels in consecutive years until they have mastered the required skills and obtained their qualifications.
10.4.	**In the rural provinces, give attention to AET and bridging courses** (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education. This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area. It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.
10.5.	**Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	**Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.8.	Based on the recommendations of the forecasting (foresighting) exercise, the **Skills Value Chain approach should be completed** by developing and delivering modern, up-to-date curricula and training programmes to equip employees with knowledge and skills for agility in the fast-changing W&R sector. Assistance should be provided to the CET and TVET colleges, including the newly established Retail Occupational Skills Centres, for expanding their capabilities to provide these training programmes.

THEME 2: MODULARISATION OF TRAINING

Long-format specialised programmes that combine the attainment of qualifications with the requisite experiential learning usually lead to an employable workforce.

However, the research under review suggests that there is a place for modularisation of training programmes. The research leans towards the introduction of shorter modules that serve particular purposes.

Skills that go beyond the specialised skills of a qualification can be taught this way. Examples cited include teaching more generic life skills like Emotional Intelligence and concern for Occupational Health and Safety. To accommodate technology advances, research suggests that modules on, for example, 4IR technologies, managing Big Data and digitalisation be included in programmes. This is in line with Outcome 3 in the W&RSETA Sector Skills Plan which requires training providers to be responsive to changing technology.

Outcome 6 in the W&RSETA Sector Skills Plan requires support for emerging and entrepreneurial businesses. That is best served through modular training. Similarly, Outcome 8 speaks to an agile, responsive workforce. The research suggests that shorter modules make it possible for already employed workers to take time off to get up to speed.

The research discusses the concept of modularisation of training programmes, focusing on the need for shorter, more specific modules that cater to the evolving needs of the workforce.

The research suggests that while long-term, specialised programmes are essential for creating an employable workforce, there is a growing need for more flexible, modular training programmes that can be tailored to specific needs and can be easily updated as technology and industry requirements change.

The findings section discusses the benefits and shortcomings of WBL learnerships. While they promote career development and broaden knowledge of available career paths, they fall short in teaching soft skills such as communication and leadership. Both hard and soft skills are important in the digital age, with technical skills like data science, cloud computing, and artificial intelligence being the new currency. However, these hard skills alone are not sufficient, and the human element, represented by soft skills, is equally important.

The importance of change management techniques and emotional intelligence in the evolving digital economy is highlighted. It is suggested that employees be able to manage change effectively and demonstrate emotional intelligence to succeed in this new environment.

The research also addresses the need for training programmes tailored to the unemployed youth and micro enterprises, to help them gain the skills they need to participate in the digital economy. It suggests rethinking planning cycles for training, with longer planning cycles allowing for better anticipation of future skills needs.

The research identifies a gap in the pace of digital transformation, which is moving faster than the industry can keep up with, resulting in a skills shortage. It also notes a lack of entrepreneurial development, with less than 1% of learnership graduates able to start their own businesses after completing the programme.

The research concludes by discussing the need for robust partnerships between employers and training providers to facilitate a better curriculum within WBL programmes.

It suggests that attending conferences and workshops could be beneficial to understand the changes brought about by 4IR and how best to manage these changes.

Linked to W&RSETA outcomes

OUTCOME 3:

Development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances

OUTCOME 4:

Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme

OUTCOME 5:

Increased access to wholesale and retail occupationally directed programmes

OUTCOME 6:

Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 8:

An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
1.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.
1.10.	**Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
2.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
2.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.
2.10.	**Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
3.1.	**Source short courses for enhancing digital skills** in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.
3.2.	**Employees' data analytics, data science, and cloud computing skills should be developed** to handle the enormous data volumes.
3.3.	**Skills in the use of blockchain, especially for cyber security, should be developed** to address this skills gap.
4.3.	**Develop a user-friendly guideline or reference manual that can assist small informal sector enterprises** to register their enterprises and comply with the relevant statutes for doing business. The following issues should be addressed: • Business registration • Basic Conditions of Employment Act • Occupational Health and Safety Act • Tax registration and Unemployment Insurance Fund (UIF) • Working conditions • Sectoral Determination The above themes should be modularised.

	Recommendations
5.5.	**Expand access to skills development beyond specialised skills** in order to ensure comprehensive skill development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.
8.2.	**Encourage entrepreneurship training as part as part of all courses** to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.
8.6.	**Implement flexible short courses that can accommodate those who are already employed** to enhance their skills through further education and training.
9.2.	**Provide skills development specific to the business and support the business in the context of its development path**. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
10.5.	**Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	**Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.9.	**Improve the HTFV training pipeline by introducing longer planning cycles for NQF training**, for example two- or three- year cycles, to encourage employers to send their workers for NQF training. Create a mechanism to assist employers to be able to release staff from the floor for NQF training, for example, by providing the employer with an intern to take on some of the tasks of the staff member on training. This could potentially be done in collaboration with other initiative such as the YES programme.

THEME 3: JOB RETENTION STRATEGIES

It is essential that skilled and experienced workers remain in the sector. Outcome 8 of the W&RSETA Sector Skills Plan calls for a skilled, agile and responsive workforce that is able to meet emerging skills needs.

Outcome 6 is about support for emerging entrepreneurs. The research recommends that by creating conditions for decent work, and through supplying effective guidance and mentorship, worker satisfaction can improve – leading to greater retention.

It is also important, research suggests, to build job pathways for senior staff through appropriate training and succession planning strategies.

The research delves into the challenges and strategies related to job retention in the retail sector, with a particular focus on work-life balance, the vulnerability of certain groups, the importance of resilience and sustainability, and the impact of technological changes.

The research begins with the disruption of work-life balance due to irregular and long work schedules. Retail workers often work 9 to 12 hours a day, with little consistency from day to day. The unpredictability of busy and quiet times, coupled with staff absences, often leads to overtime work at short notice. Despite collective agreements regarding Sunday work, there is often pressure on workers to work on Sundays.

The research further identifies women and foreign nationals as the most vulnerable groups in the workforce. Women are more likely to work as temporary workers and are the most vulnerable to retrenchments. Foreign nationals, on the other hand, are more prone to exploitation, with over 50% of workers reporting that they work more than 15 hours per day, seven days a week, often for meagre wages.

The concepts of resilience and sustainability are introduced. Resilient enterprises are those that can recover from external shocks, while sustainable enterprises create value that the market continues to pay for. Both these aspects are rooted in the establishment of a well-managed enterprise that can generate income and accumulate surplus resources.

The third theme revolves around job retention strategies. It is important for skilled and experienced workers remaining in the sector. The research suggests that creating conditions for decent work, providing effective guidance and mentorship, and building job pathways for senior staff through appropriate training and succession planning strategies can improve worker satisfaction and lead to greater retention.

The findings section discusses the changing nature of customer interaction due to the rise of online e-commerce platforms. It suggests that retailers' best chances at surviving challenges like COVID-19 and the pace of accelerating technological change is to adopt hybrid business models, involving both physical and online presences.

The importance of partnerships for unlocking the potential of the fourth industrial revolution (4IR), skills transfer, and knowledge is also highlighted.

Some challenges facing beneficiaries of the training include insufficient project duration, inadequate administrative training, low numeracy and literacy skills, lack of attention to the challenges of running a small business in a rural context, and lack of support once the intervention ends. It also points out the high employee-turnover in the retail sector, which leads to high hiring and training costs, and takes a toll on morale.

In summary, the research provides an overview of the challenges and strategies related to job retention in the retail sector. It underscores the importance of creating a balance between work and life, protecting vulnerable groups, fostering resilience and sustainability, and adapting to technological changes.

It also highlights the need for effective job retention strategies, including creating decent work conditions, providing guidance and mentorship, and building job pathways for senior staff.

Linked to W&RSETA outcomes

OUTCOME 3:

Development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances

OUTCOME 4:

Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme

OUTCOME 6:

Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 7:

Capacitated trade unions within the wholesale and retail sector

OUTCOME 8:

An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
2.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
4.1.	**Conduct workshops with W&R enterprises to make them aware of job retention strategies** at firm-level. This research study is the antecedent for developing the workshop pack, including a workbook.
4.2.	**Offer a management development training project for managers** to acquire the following skills to support employee retention: • Interpersonal relationships • Communication • Management practices • Performance evaluation • Listening • Negotiation • Coaching and mentoring • Team work The above themes should be modularised.

Recommendations	
4.3.	**Develop a user-friendly guideline or reference manual that can assist small informal sector enterprises** to register their enterprises and comply with the relevant statutes for doing business. The following issues should be addressed: • Business registration • Basic Conditions of Employment Act • Occupational Health and Safety Act • Tax registration and Unemployment Insurance Fund (UIF) • Working conditions • Sectoral Determination The above themes should be modularised.
4.4.	**Create awareness of Decent Work protocols** by hosting workshops for employers and employee unions.
4.5.	**Adopt a Code of Conduct** for Decent Work.
4.7.	**Investigate** non-compliant labour practices.
4.8.	**Conduct a labour turnover study** in the W&R sector in terms of the following business categories: • Wholesalers • Large retailers • Medium-sized retailers • Small retailers • Micro-enterprises (informal sector)
4.9.	**Encourage businesses to offer wellness programmes** to employees to reduce turnover and prevent burn-out.
5.2.	Incentivise or encourage WBL graduates to volunteer at training providers. This will help to bridge the gap between qualification and employment as well as enable the ability to apply new knowledge in the workplace.
5.6.	**Bolster partnerships with co-operatives and communities, specifically, the Community Retail Development Programme (CRDP),** to include more low-income urban communities and extend the training curriculum to include entrepreneurship. This will improve positive outcomes of WBL programmes as entrepreneurship in urban communities will promote competitiveness and further grow the local 'Township' economy.
5.7.	**Implement an aggressive WBL awareness strategy** to increase the visibility of the W&RSETA in communities while also targeting the 18–24 age group. Candidates in their early twenties have a better chance of finding work than those in other age groups. This strategy will address the possibility of low visibility, as evidenced by the fact that most of the programme recruitment is through referrals and will target the 18–24 age group so that they are engaged early on and do not waste 4 to 5 years attempting to establish themselves only to pitch up when they are 25 and above for the WBL programme.
6.8.	**Consider offering higher NQF level qualifications in the Youth Focus Project.** Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.
6.11.	**Reinstate the Youth Focus Project**, considering its positive reception, beneficial impact, and abrupt shutdown.

	Recommendations
7.2.	**Conduct workplace mentoring training sessions** to guide mentors and supervisors on their roles and responsibilities, orientate them on the programme and provide guidelines regarding the required training for beneficiaries based on a project's goals.
7.3.	**Lengthen the running period of the Rural Areas Learnership** as it is currently not long enough for the beneficiaries to absorb the training and mentorship and apply it to their business ventures.
8.2.	Encourage entrepreneurship training as part as part of all courses to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.
9.1.	**Focus on both enterprising and functional (business and technical) skills development**, with ongoing mentoring, coaching, and business support.
10.6.	**Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.9.	Improve the HTFV training pipeline by introducing longer planning cycles for NQF training, for example two- or three- year cycles, to encourage employers to send their workers for NQF training. Create a mechanism to assist employers to be able to release staff from the floor for NQF training, for example, by providing the employer with an intern to take on some of the tasks of the staff member on training. This could potentially be done in collaboration with other initiative such as the YES programme.

THEME 4: IMPROVING THE HTFV TRAINING PIPELINE

The ultimate goal of skills development is to produce workers who are employable. This means that they need to have both the requisite and appropriate qualifications and the sufficient experience required to do the job.

A number of the research projects under review deal with the matter of ensuring that programmes are in place to address the employability imperative, particularly in the hard-to-fill vacancy (HTFV) areas.

In some cases, research recommends implementing retention and job pathway strategies. in other cases, research recommends addressing life skills such as work-life balance and instances where workers may feel vulnerable, with the aim of eliminating the factors that lead to high turnover rates.

Outcome 8 in the W&RSETA Sector Skills Plan calls for an appropriately skilled workforce and a skills pool able to meet sector's current and emerging skills needs. A functioning 'employability' pipeline is an essential element in this regard.

The research reveals that while beneficiaries have the relevant skills for entering the labour market, a lack of employment opportunities prevents them from effectively applying their knowledge and skills. This indicates that while some learnerships were successful in providing skills, their ultimate goal of reducing unemployment was not fully met.

A significant gap identified is the rapid pace of digital transformation, which is outpacing the industry's ability to keep up with technological advances. This has resulted in a skills shortage, which work-based learning (WBL) does not address.

The content also highlights the relationship between technological acceptance and the events brought about by the pandemic. The pandemic made many employees and customers aware of the benefits of using technology. However, due to socio-economic factors, a large percentage of the South African population is restricted from accessing online channels.

Stakeholders suggest attending conferences and workshops to better understand and manage the changes brought about by 4IR. However, South Africa's socio-economic dilemma requires a balancing act where 4IR can play a central role through upskilling and reskilling for the new future economy and for jobs that are yet to be created through transversal skills.

It also discusses the role of labour unions, which exert collective power over labour markets. Employers have 4IR capabilities but are not implementing them due to restrictive interventions from labour unions. This finding aligns with a 2018 PwC study, which showed that there were no Digital Champions among the South African companies that participated in the survey, indicating that South Africa was lagging on the path towards digitisation.

The research reveals that employers are attempting to foster robust partnerships with training providers to facilitate a better curriculum within WBL programmes. The training provided is considered adequate, but it can be improved with some adjustments and additions to the programmes.

A key issue highlighted is the difficulty learners face in securing work-based learning, a vital component of their studies. Due to the costly nature of experiential learning and the limited budget of most training providers, trainers often resort to focusing more on theory with minimal experiential learning. However, all interviewed stakeholders agreed that experiential learning is a crucial component of training programmes as it provides real-life industry experience.

Research reveals that most learners find it difficult to penetrate the job market after graduation. More than 26% of the graduates who participated in the study, remain unemployed.

This underscores the need for more effective strategies and programmes to bridge the gap between skills acquisition and employment, particularly in the context of HTFVs.

Linked to W&RSETA outcomes

OUTCOME 3:

Development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 4:

Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme

OUTCOME 6:

Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 5:

Increased access to wholesale and retail occupationally directed programmes

OUTCOME 8:

An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.2.	Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
1.4.	Provide training to employees on change management techniques in addition to equipping employees with technical skills required to manage 4IR technologies.
1.5.	Offer training to employees on how better to understand the needs of their colleagues and customers, as emotional intelligence (EQ) skills are in high demand.
1.9.	Accelerate the process of updating or developing learning programmes by improving consultative processes.
1.10.	Introduce and/or emphasise unit standards for soft skills to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
1.11.	Hold roundtable discussions to see how 4IR can be driven and accelerated to avoid a global digital divide.
2.2.	Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
2.4.	Provide training to employees on change management techniques in addition to equipping employees with technical skills required to manage 4IR technologies.
2.5.	Offer training to employees on how better to understand the needs of their colleagues and customers, as emotional intelligence (EQ) skills are in high demand.
2.9.	Accelerate the process of updating or developing learning programmes by improving consultative processes.
2.10.	Introduce and/or emphasise unit standards for soft skills to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
2.11.	Hold roundtable discussions to see how 4IR can be driven and accelerated to avoid a global digital divide.
3.1.	Source short courses for enhancing digital skills in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.

Recommendations	
3.2.	Employees' data analytics, data science, and cloud computing skills should be developed to handle the enormous data volumes.
3.3.	Skills in the use of blockchain, especially for cyber security, should be developed to address this skills gap.
3.4.	Conduct workshops with companies to share e-commerce and online shopping trends.
3.5.	Engage universities and TVET colleges to review their curricula to include digital skills.
3.6.	Encourage companies to consider the digital short courses for mandatory grant training investments.
5.1.	Manage and share a database of WBL graduates with companies in the Wholesale and Retail sectors to encourage graduate uptake and ensure the relevance of skill development.
5.4.	Establish a system for conducting bi-annual tracer studies to assess the success rate and efficacy of the learnerships. As a result, impact evaluation and planning should be addressed beyond NSDS III.
5.5.	Expand access to skills development beyond specialised skills in order to ensure comprehensive skills development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.
5.7.	Implement an aggressive WBL awareness strategy to increase the visibility of the W&RSETA in communities while also targeting the 18-24 age group. Candidates in their early twenties have a better chance of finding work than those in other age groups. This strategy will address the possibility of low visibility, as evidenced by the fact that most of the programme recruitment is through referrals and will target the 18–24-year age group so that they are engaged early on and do not waste 4 to 5 years attempting to establish themselves only to pitch up when they are 25 and above for the WBL programme.
6.5.	Assist training providers in securing host employers for beneficiaries.
7.5.	Be more attentive to deadlines in the project allocation and contract phases of the project.
8.1.	Foster partnerships with industry to align their skills needs and tertiary training as it enhances one's employability when equipped with the right skills and knowledge.
8.4.	Ensure that learners complete the requisite practical learning on time by facilitating WBL placements.
8.6.	Implement flexible short courses that can accommodate those who are already employed to enhance their skills through further education and training.
9.1.	Focus on both enterprising and functional (business and technical) skills development, with ongoing mentoring, coaching, and business support.
9.2.	Provide skills development specific to the business and support the business in the context of its development path. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
9.3.	Shift from the current fragmented approach to integrated, holistic development programmes in order to respond to the W&RSETA mandate.
9.4.	Break overall goals down to the realities of the current status of entrepreneurial development when defining goals and impacts. The primary objective should be the development of sustainable, well-functioning enterprises, which will in turn contribute to secondary objectives such as job creation.

Recommendations	
10.1.	**Establish and manage a training pipeline** that enables learners to progress through the various NQF levels in consecutive years until they have mastered the required skills and obtained their qualifications.
10.4.	**In the rural provinces, give attention to AET and bridging courses** (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education. This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area. It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.
10.5.	**Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	**Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.9.	**Improve the HTFV training pipeline by introducing longer planning cycles for NQF training**, for example two- or three- year cycles, to encourage employers to send their workers for NQF training. Create a mechanism to assist employers to be able to release staff from the floor for NQF training, for example, by providing the employer with an intern to take on some of the tasks of the staff member on training. This could potentially be done in collaboration with other initiative such as the YES programme.

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THEME 5: EVALUATION OF SKILLS INTERVENTIONS

Among the research topics under review are topics relating directly to the evaluation of certain W&RSETA programmes. They make specific recommendations aimed at improving the impact of those interventions.

In line with the outcomes contained in the W&RSETA Sector Skills Plan, effective skills interventions are at the heart of the SETA's business and most of the research papers include an aspect of programme evaluation. The outcomes that stand out are, among others, Outcome 1: an efficient and effective organisation; Outcome 5: increased access to programmes; and Outcome 8: an appropriately skilled workforce.

The findings reveal that the W&RSETA's Work-Based Learning (WBL) learnership programs have been effective in equipping beneficiaries with the necessary skills, knowledge, and experience to secure job opportunities. These programs have to a degree created learning-rich environments that have facilitated the development of specific skills required in the workplace.

The majority of WBL programme participants fall in the 25–34 age bracket. It is significant that the under-25 age group, which has the highest unemployment rate in South Africa (63.2%), has a low participation rate in these programmes.

The W&RSETA has aligned its programmes with national development strategies to foster skills development in the wholesale and retail sector. It is aligned to Adult Basic Education and Training targets. The relationship between the training providers and the SETA has been positive, with open communication and monthly meetings. The SETA has provided adequate resources and quality assurance to the training providers.

The beneficiaries' relationship with their mentors or facilitators has been positive, helping them stay dedicated to the programme. Most beneficiaries are paid monthly stipends, and the mentorship provided in the host employer stores made the experience beneficial and enjoyable.

However, there were some challenges. A lack of adequate administration staff at W&RSETA affected timeframes and caused delays. The administrative tasks were not clearly outlined, leading to confusion and errors, and beneficiaries did not receive their certificates on time. There were challenging relationships between training providers and host employers, and the student support provided by training providers at the technical and vocational education and training (TVET) colleges was insufficient.

Beneficiaries also faced challenges with transport and other resources required for work. The abrupt shutdown of the project due to COVID-19 regulations, exacerbated by a lack of communication from the W&RSETA at the time, was another significant challenge.

The majority of WBL participants had a matric or Grade 12 education, with over 75% of the 18–24 age group having completed matriculation. However, their participation in the programme was incredibly low at this age-level, only to increase when they reached the ages of 25–34 years.

The WBL learnerships promoted career development, particularly in terms of broadening awareness of available career paths. However, the WBL curriculum fell short in terms of soft skills such as communication and leadership.

While beneficiaries gained relevant skills for entering the labour market, a lack of employment opportunities prevented them from effectively applying their knowledge and skills. This indicates that while the learnerships were successful in providing skills, their ultimate goal of reducing unemployment was not fully met.

The increase in both full-time and part-time employment does, however, demonstrate that WBL learnerships are effective in achieving the W&RSETA mandate and also in contributing to the reduction of unemployment – but only if job opportunities are consistently available.

Less than 1% of learnership graduates were able to start their own businesses after completing the programme. This statistic reflects a lack of entrepreneurial development. Establishing and maintaining businesses after completion is

important in the sector because it can be a vehicle for job creation and alleviate the high unemployment rates, even if one does not find work in established retail outlets.

In conclusion, while the W&RSETA's skills interventions have been effective in equipping beneficiaries with necessary skills and knowledge, there are areas that need improvement, particularly in terms of administrative efficiency, student support, and entrepreneurial development.

Linked to W&RSETA outcomes		
OUTCOME 1: An efficient and effective organisation with good corporate governance	**OUTCOME 5:** Increased access to wholesale and retail occupationally directed programmes	**OUTCOME 4:** Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme
OUTCOME 6: Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy	**OUTCOME 8:** An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs	

	Recommendations
1.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
1.2.	**Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
1.3.	**Share research findings with the Department of Basic Education for the structuring of school curricula** to account for 4IR-related job market requirements.
1.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
1.6.	**Create awareness among stakeholders** on the employment possibilities that new technologies make available.
1.7.	**Consider school roadshow campaigns** to introduce learners to new prospective career paths in retail and wholesale.
2.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.

	Recommendations
2.2.	**Partner with other SETAs and formulate a coherent approach to dealing with 4IR-related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
2.3.	**Share research findings with the Department of Basic Education** for the structuring of school curricula to account for 4IR-related job market requirements.
2.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
2.6.	**Create awareness among stakeholders on the employment** possibilities that new technologies make available.
2.7.	**Consider school roadshow campaigns to introduce learners** to new prospective career paths in retail and wholesale.
3.6.	**Encourage companies to consider digital short courses** for mandatory grant training investments.
5.4.	**Establish a system for conducting bi-annual tracer studies to assess the success rate and efficacy of the learnerships.** As a result, impact evaluation and planning should be addressed beyond NSDS III.
6.2.	Conduct **tracer/impact studies closer to project completion** dates.
6.3.	**Take more time to train and brief training providers**, so that all stakeholders know precisely what is required by W&RSETA.
6.4.	**Ensure colleges are well equipped** and aware of the kind of project the Youth Focus Project is, and the challenges and requirements of a project of this nature.
6.8.	**Consider offering higher NQF level qualifications in the Youth Focus Project**. Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.
6.9.	**Issue certificates** to beneficiaries promptly on completion of the project.
6.10.	**Keep an open line of communication with beneficiaries** throughout the duration of the project to communicate any challenges or changes.
6.11.	**Reinstate the Youth Focus Project**, considering its positive reception, beneficial impact, and abrupt shutdown.
7.3.	**Lengthen the running period of the Rural Areas Learnership** as it is currently not long enough for the beneficiaries to absorb the training and mentorship and apply it to their business ventures.
7.4.	**More attention should be paid to mentors, facilitators, and training providers** to discuss the challenges of running a small business in a rural context, specifically.
7.5.	**Be more attentive to deadlines** in the project allocation and contract phase of the project.
7.6.	**Ensure that beneficiaries are fully aware of what is required** in the project and are well informed about what the project entails.
7.7.	Implement constant follow-ups with beneficiaries during the project to allow them to raise concerns or pose questions.

	Recommendations
7.8.	Provide **post-programme support to beneficiaries**.
7.9.	Consider **raising the stipend** amount.
7.10.	**Provide adequate and comfortable venues** within which training is provided.
8.5.	**Set mandatory experiential and theory ratios for all courses** enforced by a strict monitoring framework to minimise the risk of an umbrella ratio which may be detrimental to the end goal of producing a graduate well prepared for the workplace.
8.7.	**Empower trainers in monetary or material terms** so that they are better able to maintain the ratios of experiential learning to theory, especially for some courses that are supposed to be conducted at a 70:30 ratio of experiential learning to theory.
8.8.	**Enforce the teaching of soft skills** like interpersonal skills, dispute resolution, customer service, team building, communication and presentation skills. These should be part of the training over and above other business courses like finance, business management, human resources and purchasing, among others.
9.1.	**Focus on both enterprising and functional (business and technical) skills development**, with ongoing mentoring, coaching, and business support.
9.2.	**Provide skills development specific to the business** and support the business in the context of its development path. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
9.3.	**Shift from the current fragmented approach** to integrated, holistic development programmes in order to respond to the W&RSETA mandate.
9.4.	Break overall goals down to the realities of the current status of entrepreneurial development when defining goals and impacts. **The primary objective should be the development of sustainable, well-functioning enterprises**, which will in turn contribute to secondary objectives such as job creation.
9.5.	**Mitigate resource constraints by ringfencing development efforts to specific areas** and subsectors within which targeted interventions with sustained benefits can be initiated. Resources for entrepreneurial development are limited and fragmented, while the need is widespread and significant.
9.6.	**Deliver impactful development in partnership with other stakeholders**. This involves consultation with sub-sector and regional stakeholders (for the design of programmes), partnerships with stakeholders who have developed their capability to deliver holistic programmes, and partnerships for the development of a national strategy for SMME development in the W&R sector. First steps to achieve this are to: **Map the landscape of role players who can contribute** to the delivery of integrated, holistic SMME development **Define workable models of engagement** (e.g., what will the role of the W&RSETA be relative to the service providers; establish panel of service providers) **Identify and engage stakeholders for the development of a national strategy** for retail SMME development.

	Recommendations
9.7.	**Streamline the interface of stakeholder engagement around entrepreneurial development,** with a view of unlocking potential. Strong delivery models through partnerships could streamline entrepreneurial engagement. A number of stakeholders keen to collaborate with the W&RSETA on entrepreneurial development, found engagement difficult. The same holds for engagement with entrepreneurs, who have expressed similar experiences.
10.1.	**Establish and manage a training pipeline** that enables learners to progress through the various NQF levels in consecutive years until they have mastered the required skills and obtained their qualifications.
10.2.	**Reduce the administrative burden**, the timeline from recruitment to training, delays in payment and certification, and align training programmes with retailers' skills planning cycles, to encourage more retailers to apply for and take up grants, especially NQF learnerships.
10.3.	Set up a national steering committee, comprising large and small employers, SLOs, SDFs and training providers, to **streamline and redesign some of the W&RSETA processes** and oversee the implementation of the new processes.
10.4.	**In the rural provinces, give attention to AET and bridging courses** (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education. This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area. It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.
10.5.	**Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	**Roll out basic digital skills training on a large scale across the board**, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.7.	**Undertake a forecasting (*foresighting*) exercise with CEOs and industry experts** in the W&R sector to gain insight into their strategic planning and future skills needs. This should inform future training provision and other medium- and long-term interventions.

THEME 6: ENHANCING W&RSETA'S SERVICE DELIVERY

Efficient and effective delivery of skills development is a core function of the W&RSETA. Any research undertaken on behalf of the organisation must be done with the goal of improved service delivery in mind.

Outcome 1 of the Sector Skills Plan calls for an efficient and effective organisation with good corporate governance. Should that goal be attained, then good service delivery will necessarily follow.

The recommendations of the reviews, evaluations and investigations contained in the 10 research papers under review overwhelmingly point towards a need for improvement in the SETA's offerings.

While the training supported by the SETA is deemed adequate, there is room for improvement. A key issue identified is the difficulty learners face in securing work-based learning, a crucial component of their studies. The costly nature of experiential learning and the limited budget of most training providers often result in a focus on theory over practical experience.

A significant delay in the issuance of certificates, sometimes up to three years, is another problem highlighted. This delay disrupts the progression of learners to the next NQF level and hampers a company's staff pipeline. It also leads to a break in learners' momentum and motivation, making them hesitant to register for learnerships.

W&RSETA has been working on a new online portal to streamline these processes and eliminate delays. However, the system is not yet fully functional, which reflects poorly on SLOs and SDFs as their clients perceive them as "not doing their work".

The customer service experience of stakeholders at the W&RSETA offices varies widely. Some report good response rates from helpful staff, while others express frustration with the lack of response and support.

Retailers' satisfaction with training providers also varies. While some providers offer excellent training, others provide poor or inappropriate skills training or fail to complete the training on time. Retailers prefer a list of reputable accredited training providers who are situated nearer to them and can address their training needs.

Some stakeholders suggest extending the learnerships for the unemployed by another year to enable them to complete NQF level 3 before employing them. However, companies struggle to find suitable candidates for these learnerships. Candidates need to be screened carefully to ensure they are interested in the *training* rather than in the *stipend*.

Many stakeholders find SETA processes too complicated and time-consuming, requiring excessive paperwork and duplication. This complexity discourages some companies from applying or reapplying for grants. Retailers report long delays in the SETA's processes, such as the absence of contracts for learners after four months, leading to learners dropping out of the system.

Training providers complain about waiting more than a year for learning programmes to be approved. These delays, due to the SETA's capacity and system constraints, result in retailers discontinuing their participation. Improved turnaround time for grant allocation, contracting, and claims are required.

W&RSETA's service delivery can be improved in certain areas, including the following: provide more practical training, issuance certificates at a faster pace, offer a fully functional online portal, provide better customer service, select more reputable training providers, extend the duration of learnerships for the unemployed, simplify processes, and have quicker turnaround times.

These improvements are crucial for the SETA to fulfil its core function of efficient and effective skills development.

Linked to W&RSETA outcomes		
OUTCOME 1: An efficient and effective organisation with good corporate governance	**OUTCOME 6:** Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy	**OUTCOME 7:** Capacitated trade unions within the wholesale and retail sector
OUTCOME 4: Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme		**OUTCOME 8:** An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
1.2.	**Partner with other SETAs and formulate a coherent approach to dealing with 4IR-related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
1.3.	**Share research findings with the Department of Basic Education** for the structuring of school curricula to account for 4IR-related job market requirements.
1.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
1.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers**, as emotional intelligence (EQ) skills are in high demand.
1.6.	**Create awareness among stakeholders** on the employment possibilities that new technologies make available.
1.7.	**Consider school roadshow campaigns** to introduce learners to new prospective career paths in retail and wholesale.
1.8.	**Promote use of 4IR technologies** that increase efficiency and reduce costs, like predictive analytics, in order to help protect employers in a difficult economic climate.
1.11.	**Hold roundtable discussions to see how 4IR can be** driven and accelerated to avoid a global digital divide.
1.12.	**Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.
2.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.

	Recommendations
2.2.	Partner with other SETAs and formulate a coherent approach to dealing with 4IR-related skills as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
2.3.	Share research findings with the Department of Basic Education for the structuring of school curricula to account for 4IR-related job market requirements.
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2.11.	Hold roundtable discussions to see how 4IR can be driven and accelerated to avoid a global digital divide.
2.12.	Streamline W&RSETA digitisation processes in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.
3.1.	Source short courses for enhancing digital skills in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.
3.2.	Employees' data analytics, data science, and cloud computing skills should be developed to handle the enormous data volumes.
3.3.	Skills in the use of blockchain, especially for cyber security, should be developed to address skills gaps.
3.4.	Conduct workshops with companies to share e-commerce and online shopping trends.
3.5.	Engage universities and TVET colleges to review their curricula to include digital skills.
3.6.	Encourage companies to consider the digital short courses for mandatory grant training investments.
4.1.	Conduct workshops with W&R enterprises to make them aware of job retention strategies at firm-level. This research study is the antecedent for developing the workshop pack, including a workbook.

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	Recommendations
4.3.	Develop a user-friendly guideline or reference manual that can assist small informal sector enterprises to register their enterprises and comply with the relevant statutes for doing business. The following issues should be addressed: • Business registration • Basic Conditions of Employment Act • Occupational Health and Safety Act • Tax registration and Unemployment Insurance Fund (UIF) • Working conditions • Sectoral Determination The above themes should be modularised.
4.4.	Create awareness of Decent Work protocols by hosting workshops for employers and employee unions.
4.5.	Adopt a Code of Conduct for Decent Work.
4.6.	Develop W&R business case studies of good employee retention practices in South Africa.
4.7.	Investigate non-compliant labour practices.
4.8.	Conduct a labour turnover study in the W&R sector in terms of the following business categories: • Wholesalers • Large retailers • Medium-sized retailers • Small retailers • Micro-enterprises (informal sector)
5.1.	Manage and share a database of WBL graduates with companies in the wholesale and retail sectors to encourage graduate uptake and ensure the relevance of skill development.
5.2.	Incentivise or encourage WBL graduates to volunteer at training providers. This will help to bridge the gap between qualification and employment as well as enable the ability to apply new knowledge in the workplace.
5.3.	Enforce and improve W&RSETA certification policy and procedures to expedite the issuance of certificates and avoid delays in job applications.
5.4.	Establish a system for conducting bi-annual tracer studies to assess the success rate and efficacy of the learnerships. As a result, impact evaluation and planning should be addressed beyond NSDS III.
5.5.	Expand access to skills development beyond specialised skills in order to ensure comprehensive skills development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.
5.6.	Bolster partnerships with co-operatives and communities, specifically, the Community Retail Development Programme (CRDP), to include more low-income urban communities and extend the training curriculum to include entrepreneurship. This will improve positive outcomes of WBL programmes as entrepreneurship in urban communities will promote competitiveness and further grow the local 'Township' economy.

	Recommendations
5.7.	**Implement an aggressive WBL awareness strategy** to increase the visibility of the W&RSETA in communities while also targeting the 18–24 age group. Candidates in their early twenties have a better chance of finding work than those in other age groups. This strategy will address the possibility of low visibility, as evidenced by the fact that most of the programme recruitment is through referrals and will target the 18–24 age group so that they are engaged early on and do not waste 4 to 5 years attempting to establish themselves only to pitch up when they are 25 years old and above for the WBL program.
5.8.	**Engage more with larger companies** because they have the potential to employ many learners. Shoprite, for example, employs over 140 000 people. Large corporations and large SMEs should be more involved in and encouraged to participate in W&RSETA WBL programmes.
6.1.	Keep accurate, up-to-date, and ongoing records of beneficiaries.
6.2.	Conduct **tracer/impact studies closer to project completion dates**.
6.3.	**Take more time to train and brief training providers**, so that all stakeholders know precisely what is required by W&RSETA.
6.4.	**Ensure colleges are well equipped** and aware of the kind of project the Youth Focus Project is, and the challenges and requirements of a project of this nature.
6.5.	Assist training providers in securing host employers for beneficiaries.
6.6.	**Ensure training providers receive the necessary funding** for the project on time, allowing the training providers to begin the training effectively.
6.7.	Supply **more W&RSETA administration staff** on projects of this nature.
6.8.	**Consider offering higher NQF level qualifications in the Youth Focus Project**. Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.
6.9.	**Issue certificates** to beneficiaries promptly on completion of the project.
6.10.	**Keep an open line of communication with beneficiaries** throughout the duration of the project to communicate any challenges or changes.
6.11.	**Reinstate the Youth Focus Project**, considering its positive reception, beneficial impact, and abrupt shutdown.
7.1.	**Keep accurate, up-to-date, and ongoing records** of beneficiaries.
7.2.	**Conduct workplace mentoring training** sessions to guide mentors and supervisors on their roles and responsibilities, orientate them on the programme and provide guidelines regarding the required training for beneficiaries based on the project's goals.
7.3.	**Lengthen the running period of the Rural Areas Learnership** as it is currently not long enough for the beneficiaries to absorb the training and mentorship and apply it to their business ventures.
7.4.	**More attention** should be paid **to** mentors, facilitators, and training providers to discuss the **challenges of running a small business in a rural context, specifically.**
7.5.	Be **more attentive to deadlines** in the project allocation and contract phase of the project.
7.6.	**Ensure that beneficiaries are fully aware of what is required** in the project and are well informed about what the project entails.

Recommendations	
7.7.	**Implement constant follow-ups with beneficiaries** during the project to allow them to raise concerns or pose questions.
7.8.	Provide **post-programme support** to beneficiaries.
7.9.	Consider **raising the stipend** amount.
7.10.	**Provide adequate and comfortable venues** within which training is provided.
8.1.	**Foster partnerships with industry to align their skills needs and tertiary training** as it enhances one's employability when equipped with the right skills and knowledge.
8.2.	**Encourage entrepreneurship training as part as part of all courses** to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.
8.3.	**Foster dialogue on enhancing the training by tertiary institutions** to provide input into the development of training materials.
8.4.	**Ensure that learners complete the requisite practical learning on time** by facilitating WBL placements.
8.5.	**Set mandatory experiential and theory ratios for all courses** enforced by a strict monitoring framework to minimise the risk of an umbrella ratio which may be detrimental to the end goal of producing a graduate well prepared for the workplace.
8.6.	**Implement flexible short courses** that can accommodate those who are already employed to enhance their skills through further education and training.
8.7.	**Empower trainers in monetary or material terms** so that they are better able to maintain the ratios of experiential learning to theory, especially for some courses that are supposed to be conducted at a 70:30 ratio of experiential learning to theory.
8.8.	**Enforce the teaching of soft skills** such as interpersonal skills, dispute resolution, customer service, team building, communication and presentation skills. These should be part of the training over and above other business courses like finance, business management, human resources and purchasing, among others.
9.1.	**Focus on both enterprising and functional (business and technical) skills development**, with ongoing mentoring, coaching, and business support.
9.2.	**Provide skills development specific to the business and** support the business in the context of its development path. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
9.3.	**Shift from the current fragmented approach to integrated, holistic development programmes** in order to respond to the W&RSETA mandate.
9.4.	Break overall goals down to the realities of the current status of entrepreneurial development when defining goals and impacts. **The primary objective should be the development of sustainable, well-functioning enterprises**, which will in turn contribute to secondary objectives such as job creation.
9.5.	**Mitigate resource constraints** by ringfencing development efforts to specific areas and subsectors within which targeted interventions with sustained benefits can be initiated. Resources for entrepreneurial development are limited and fragmented, while the need is widespread and significant.

	Recommendations
9.6.	Deliver impactful development in partnership with other stakeholders. This involves consultation with sub-sector and regional stakeholders (for the design of programmes), partnerships with stakeholders who have developed their capability to deliver holistic programmes, and partnerships for the development of a national strategy for SMME development in the W&R sector. First steps to achieve this are to: • Map the landscape of role players who can contribute to the delivery of integrated, holistic SMME development • Define workable models of engagement (e.g., what will the role of the W&RSETA be relative to the service providers; establish panel of service providers) • Identify and engage stakeholders for the development of a national strategy for retail SMME development.
9.7.	Streamline the interface of stakeholder engagement around entrepreneurial development, with a view of unlocking potential. Strong delivery models through partnerships could streamline entrepreneurial engagement. A number of stakeholders keen to collaborate with the W&RSETA on entrepreneurial development, found engagement difficult. The same holds for engagement with entrepreneurs, who have expressed similar experiences.
10.1.	Establish and manage a training pipeline that enables learners to progress through the various NQF levels in consecutive years until they have mastered the required skills and obtained their qualifications.
10.2.	Reduce the administrative burden, the timeline from recruitment to training, delays in payment and certification, and align training programmes with retailers' skills planning cycles, to encourage more retailers to apply for and take up grants, especially NQF learnerships.
10.3.	Set up a national steering committee, comprising large and small employers, SLOs, SDFs and training providers, to streamline and redesign some of the W&RSETA processes and oversee the implementation of the new processes.
10.4.	In the rural provinces, give attention to AET and bridging courses (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education. This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area. It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.
10.5.	Address the high demand for occupational health and safety training, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	Roll out basic digital skills training on a large scale across the board, but especially to unemployed youth, micro enterprises, and informal traders, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.7.	Undertake a forecasting (foresighting) exercise with CEOs and industry experts in the W&R sector to gain insight into their strategic planning and future skills needs. This should inform future training provision and other medium- and long-term interventions.
10.8.	Based on the recommendations of the forecasting (foresighting) exercise, the Skills Value Chain approach should be completed by developing and delivering modern, up-to-date curricula and training programmes to equip employees with knowledge and skills for agility in the fast-changing W&R sector. Assistance should be provided to the CET and TVET colleges, including the newly established Retail Occupational Skills Centres, for expanding their capabilities to provide these training programmes.

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THEME 7: RESPONDING TO LABOUR MARKET DISRUPTIONS

The COVID-19 pandemic of 2020 and 2021, with its lockdowns and work-from-home requirements, had a profound disrupting effect on all aspects of the South African economy, including wholesale and retail businesses.

A major development, according to the research, was a rapid expansion of online shopping, with its technological and logistical challenges. At the same time, 4IR technology has taken root more firmly.

Several of the research papers under review delve into the skills development implications of those disruptive developments and suggest interventions that can address them.

The research identifies a gap in the pace of digital transformation, which is moving faster than the industry's ability to keep up with technological advances. This has resulted in a skills shortage, which Work-Based Learning (WBL) does not address.

Stakeholders have highlighted the need for skills training in change management practices and emotional intelligence (EQ) to manage the changes brought about by 4IR. The acquisition of new skills and a mindset of working with new technologies, rather than resisting change, is essential for employees to remain productively employed.

South Africa is experiencing a general trend of reduced economic activity, putting all sectors at risk of facing a period of reduced expenditure. The retail and wholesale sectors have already experienced a period of reduced activity and they will need to protect themselves going forward. To remain globally and locally competitive, the adoption of 4IR technologies becomes inevitable.

Stakeholders have expressed positive views on the impact that 4IR is likely to have on employment. However, there is less certainty surrounding the impact that the technology will have on economic growth. Many stakeholders indicate that if businesses can use 4IR technologies, they will grow. They believe that 4IR is not likely to decrease jobs, in fact, it will make it possible for more orders and sales. This benefit will be fully realised in a growing economy where demand for goods increases.

Current training programmes are inadequate as they have limited focus on responding to 4IR. They tend to take too long to develop in the wider context of rapid change. Policy rigidity, according to some of the research, has resulted in a slower uptake of e-learning. The need for customer service and other soft skills increase as 4IR technology grows.

The research suggests that it is best to start 4IR training at school level, as opposed to waiting until an individual enters the job market. To achieve this, school curricula should be designed what the market may require in mind. The abrupt shut-down of skills training due to COVID-19 regulations was a challenge, exacerbated by a lack of communication on the part of the SETA.

In conclusion, the South African labour market is facing significant disruptions due to the COVID-19 pandemic and the advent of 4IR. To navigate these challenges, a strategic response is needed that focuses on developing relevant skills, embracing 4IR technologies, modernising learning programmes, and enhancing soft skills.

By implementing these interventions, South Africa can position itself competitively in the global economy and effectively respond to labour market disruptions.

Linked to W&RSETA outcomes

OUTCOME 1:

An efficient and effective organisation with good corporate governance

OUTCOME 3:

Development and support of training providers and the higher education, TVET and CET sectors to enable their responsiveness to changing occupations and technological advances

OUTCOME 4:

Sector responsive research agenda that supports and informs the establishment of impact geared W&R skills development programme

OUTCOME 5:

Increased access to wholesale and retail occupationally directed programmes

OUTCOME 7:

Capacitated trade unions within the wholesale and retail sector

OUTCOME 6:

Growth focused skills development and entrepreneurship development support for emerging entrepreneurs, cooperative sector and small, medium and informal business enterprises to enhance their participation in the mainstream economy

OUTCOME 8:

An appropriately skilled, agile and responsive workforce and skills pool able to meet the W&R sector current and emerging skills needs

Recommendations

1.1.	**Uphold the good practice of arranging stakeholder forums** where sector specific updates are provided, and knowledge is shared. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
1.2.	**Partner with other SETAs and formulate a coherent approach to dealing with 4IR related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
1.3.	**Share research findings with the Department of Basic Education for the structuring of school curricula** to account for 4IR-related job market requirements.
1.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
1.5.	**Offer training to employees on how better to understand the needs of their colleagues and customers,** as emotional intelligence (EQ) skills are in high demand.
1.6.	**Create awareness among stakeholders on the employment possibilities** that new technologies make available.
1.7.	**Consider school roadshow campaigns** to introduce learners to new prospective career paths in retail and wholesale.

	Recommendations
1.8.	**Promote use of 4IR technologies that increase efficiency and reduce costs**, like predictive analytics, in order to help protect employers in a difficult economic climate.
1.9.	**Accelerate the process of updating or developing learning programmes** by improving consultative processes.
1.10.	**Introduce and/or emphasise unit standards for soft skills** to improve learners' employability. Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
1.11.	**Hold roundtable discussions to see how 4IR can be driven and accelerated** to avoid a global digital divide.
1.12.	**Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.
2.1.	**Uphold the good practice of arranging stakeholder forums where sector specific updates are provided, and knowledge is shared**. The W&RSETA cannot effect change within the retail and wholesale sectors by itself, but it can act as the catalyst for stakeholders to connect with each other, learn from each other, and share experiences as to how they are managing the impact of 4IR. Change management should also be explored.
2.2.	**Partner with other SETAs and formulate a coherent approach to dealing with 4IR-related skills** as there may be a significant overlap in challenges and opportunities being faced across sectors. This would further the principle of "increasing collaboration between the skills system, government and industry" encapsulated in the NSDP.
2.3.	**Share research findings with the Department of Basic Education** for the structuring of school curricula to account for 4IR-related job market requirements.
2.4.	**Provide training to employees on change management techniques** in addition to equipping employees with technical skills required to manage 4IR technologies.
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2.9.	**Accelerate the process of updating or developing learning programmes** by improving consultative processes.
2.10.	**Introduce and/or emphasise unit standards for soft skills to improve learners' employability.** Short programmes can fill this void while programmes are reassessed to include more emphasis on soft skills.
2.11.	**Hold roundtable discussions to see how 4IR can be driven and accelerated** to avoid a global digital divide.

	Recommendations
2.12.	**Streamline W&RSETA digitisation processes** in a way that reduces physical paper requirements and moves towards a fully-featured system of e-learning.
3.1.	**Source short courses for enhancing digital skills** in data science, cloud computing, artificial intelligence, blockchain, robotics, machine learning, Big Data and data analytics.
3.2.	**Employees' data analytics, data science, and cloud computing skills** should be developed to handle the enormous data volumes.
3.3.	**Skills in the use of blockchain**, especially for cyber security, should be developed to address this skills gap.
3.4.	Conduct workshops with companies to **share e-commerce and online shopping trends.**
3.5.	**Engage universities and TVET colleges to review their curricula** to include digital skills.
3.6.	**Encourage companies to consider digital short courses** for mandatory grant training investments.
4.1.	**Conduct workshops with W&R enterprises to make them aware of job retention strategies** at firm-level. This research study is the antecedent for developing the workshop pack, including a workbook.
4.2.	**Offer a management development training project for managers** to acquire the following skills to support employee retention: • Interpersonal relationships • Communication • Management practices • Performance evaluation • Listening • Negotiation • Coaching and mentoring • Team work The above themes should be modularised.
4.6.	**Develop W&R business case studies of good employee retention practices** in South Africa.
4.9.	**Encourage businesses to offer wellness programmes** to employees to reduce turnover and prevent burnout.
5.2.	**Incentivise or encourage WBL graduates to volunteer at training providers.** This will help to bridge the gap between qualification and employment as well as enable the ability to apply new knowledge in the workplace.
5.5.	**Expand access to skills development beyond specialised skills** in order to ensure comprehensive skills development for participants. Industry 4.0 digital economy skills need be integrated into the curriculum, and, to enhance employability, both entrepreneurial and soft skills should be developed. Conflict resolution, effective communication, and customer service training are examples of soft skills for the retail industry.
5.8.	**Engage more with larger companies** because they have the potential to employ many learners. Shoprite, for example, employs over 140 000 people. Large corporations and large SMEs should be more involved in and encouraged to participate in W&RSETA WBL programmes.

Recommendations	
6.5.	**Assist training providers in securing host employers** for beneficiaries.
6.6.	**Ensure training providers receive the necessary funding for the project on time**, allowing the training providers to begin the training effectively.
6.8.	**Consider offering higher NQF level qualifications in the Youth Focus Project.** Beneficiaries and training providers alike suggest extending the project to provide up to an NQF Level 4 qualification, so that beneficiaries are not limited to the level of qualification they may need or want to work towards.
7.6.	**Ensure that beneficiaries are fully aware** of what is required in the project and are well informed about what the project entails.
7.8.	**Provide post-programme support** to beneficiaries.
7.9.	**Consider raising the stipend** amount.
8.1.	**Foster partnerships with industry to align their skills needs and tertiary training** as it enhances one's employability when equipped with the right skills and knowledge.
8.2.	**Encourage entrepreneurship training as part as part of all courses** to encourage learner to venture into business after graduation rather than leaning on the expectation of being employed.
8.3.	**Foster dialogue on enhancing the training by tertiary institutions** to provide input into the development of training materials.
8.6.	**Implement flexible short courses that can accommodate those who are already employed** to enhance their skills through further education and training.
8.7.	**Empower trainers in monetary or material terms** so that they are better able to maintain the ratios of experiential learning to theory, especially for some courses that are supposed to be conducted at a 70:30 ratio of experiential learning to theory.
8.8.	**Enforce the teaching of soft skills** like interpersonal skills, dispute resolution, customer service, team building, communication and presentation skills. These should be part of the training over and above other business courses like finance, business management, human resources and purchasing, among others.
9.1.	**Focus on both enterprising and functional (business and technical) skills development,** with ongoing mentoring, coaching, and business support.
9.2.	**Provide skills development specific to the business and support the business in the context of its development path**. The delivery of generic training programmes is inefficient. Entrepreneurs require development as and when they need it, and development should be reinforced by practical implementation.
9.3.	**Shift from the current fragmented approach to integrated, holistic development programmes** in order to respond to the W&RSETA mandate.
9.4.	**Break overall goals down to the realities of the current status of entrepreneurial development** when defining goals and impacts. The primary objective should be the development of sustainable, well-functioning enterprises, which will in turn contribute to secondary objectives such as job creation.
9.5.	**Mitigate resource constraints by ringfencing development efforts** to specific areas and subsectors within which targeted interventions with sustained benefits can be initiated. Resources for entrepreneurial development are limited and fragmented, while the need is widespread and significant.

	Recommendations
9.6.	**Deliver impactful development in partnership with other stakeholders**. This involves consultation with sub-sector and regional stakeholders (for the design of programmes), partnerships with stakeholders who have developed their capability to deliver holistic programmes, and partnerships for the development of a national strategy for SMME development in the W&R sector. First steps to achieve this are to: • **Map the landscape of role players who can contribute** to the delivery of integrated, holistic SMME development • **Define workable models of engagement** (e.g., what will the role of the W&RSETA be relative to the service providers; establish panel of service providers) • **Identify and engage stakeholders for the development of a national strategy** for retail SMME development.
9.7.	**Streamline the interface of stakeholder engagement around entrepreneurial development**, with a view of unlocking potential. Strong delivery models through partnerships could streamline entrepreneurial engagement. A number of stakeholders keen to collaborate with the W&RSETA on entrepreneurial development, found engagement difficult. The same holds for engagement with entrepreneurs, who have expressed similar experiences.
10.2.	**Reduce the administrative burden, the timeline from recruitment to training, delays in payment and certification, and align training programmes with retailers' skills planning cycles**, to encourage more retailers to apply for and take up grants, especially NQF learnerships.
10.3.	**Set up a national steering committee**, comprising large and small employers, SLOs, SDFs and training providers, to streamline and redesign some of the W&RSETA processes and oversee the implementation of the new processes.
10.4.	In the rural provinces, **give attention to AET and bridging courses (funded through the NSF) to improve literacy and numeracy, build learners' confidence and self-esteem, and compensate for the poor level of education.** This will enable more learners to qualify for W&RSETA training. Training should be provided in the local language of the area. It would be beneficial to assist employers with a list of reputable training providers in their area who have local knowledge.
10.5.	**Address the high demand for occupational health and safety training**, including first aid, firefighting, and health and safety in the workplace, in the short term. It is especially important in the fuel retail sector but is mandatory for all businesses and has become even more prominent owing to the COVID-19 pandemic.
10.6.	**Roll out basic digital skills training on a large scale across the board, but especially to unemployed youth, micro enterprises, and informal traders**, to enable them to access online training and other information that could lead to employment or income generating opportunities. Unemployed youth would also benefit from life skills such as how to be a responsible citizen and employee, which would make them more trainable and employable.
10.7.	**Undertake a forecasting (*foresighting*) exercise with CEOs and industry experts in the W&R sector** to gain insight into their strategic planning and future skills needs. This should inform future training provision and other medium- and long-term interventions.
10.9.	**Improve the HTFV training pipeline by introducing longer planning cycles for NQF training**, for example two- or three-year cycles, to encourage employers to send their workers for NQF training. Create a mechanism to assist employers to be able to release staff from the floor for NQF training, for example, by providing the employer with an intern to take on some of the tasks of the staff member on training. This could potentially be done in collaboration with other initiative such as the YES programme.

ANALYSIS AND CONCLUSION

Part C sheds light on how the W&RSETA, and the wholesale and retail sector can benefit from the research conducted over the past three years. The focus is on how to make optimal use of the findings and recommendations of the research reports using a practical, non-academic approach.

ANALYSIS

The global COVID-19 pandemic, with its lockdowns and – in this country – restrictions on the sale of alcohol and tobacco (among other non-essential goods) had a profound effect on the wholesale and retail sector.

In effect, it turned the industry on its head and accelerated the trend, which was already emerging, towards online shopping and delivery of goods to customers. It also sped up the digitisation of processes and services that allows people to work from home in big numbers.

When things settled down once the pandemic had passed, a hybrid model of shopping emerged: much of the old brick and mortar operations remained intact (due to economic and technological reasons) together with most of the major retail players also having to offer online shopping services.

This naturally had an effect on the skills required in the sector and the W&RSETA has had to look seriously at adapting its programme offering.

While some of the research papers under review in this publication began before the pandemic, the trends outlined above had already begun by then and some of the research reports are almost prophetic in their calling for a new way of doing things.

As a result, while the topics of the research vary from analysis of past projects to an analysis of future trend in digitisation and the adoption of emerging 4IR technologies, there are common threads that emerge, and the value of undertaking such research in the first instance lies in calling for an adjustment of the SETA's skills development offerings to meet the emerging challenges.

Those commonalities are summarised in the seven themes drawn out of the research that are the subject of Part B of this document.

While, in general, the themes have in common an affirmation that the SETA is producing a skilled workforce that is capable of operating in the wholesale and retail sector, most of them also highlight the challenges that have gone with a rapidly changing operating environment in the sector – not the least of which have been disruptions caused by the COVID-19 pandemic and the adaptations that traders were forced to make.

At the same time – and in some ways accelerated by the COVID-19 experience – there have been major technological advances. These include the development of online shopping management systems and the adoption of aspects of 4IR by operators in the sector.

Consequently, existing skills interventions must change, and new skills interventions are required.

At the same time, the research has shown that there are other challenges around the W&RSETA's programmes and operations, and its service delivery. Several of the research papers evaluated the workplace-based learning (WBL) aspect of learnerships and skills development programmes and concluded that this an obstacle in the way of establishing a pipeline of employable workers entering the sector.

The SETA's own processes and circumstances sometimes contribute to the problem. For example, the research found, among other things, that there was a delay in issuing certificates, that programmes were either too long or too short to be practical and that there was lack of post-programme support for graduates.

Then there are the sector-wide challenges of not having enough WBL places available at businesses to allow for the experiential learning part of the qualifications to take place; along with an inability to attract younger people (the 18 to 24 age group is under-represented); and a disturbingly high turnover-rate in the existing workforce.

It will always be a challenge to keep skills training interventions relevant when dealing with rapidly changing subject matter. A number of the research papers made this point when looking at the need for the transfer of digital and 4IR skills. Part of the problem is that certified skills development programmes are historically long and multi-faceted.

One of the threads to emerge is a call for the modularisation of the learning content, and the introduction of shorter courses to address particular skills shortages that have been identified. Such a development will help to keep content up to date. It will also make it possible for already employed workers to take time off to attend short courses.

Such a methodology can be used to address the challenges presented by hard-to-fill vacancies (HTFV) in certain areas. It is difficult to find candidates who have the required qualification and the necessary experience to fill certain positions and specific skills development interventions that do not form part of longer, formal learning programmes can address this.

Staff retention was an issue identified in the research. It consists of two types, namely (a) the rapid turnover of workers at the entry level and (b) the tendency for more senior level workers to leave before that can step onto the management advancement ladder. The former is due, according to the studies, to poor working conditions and vulnerability, while the latter points to a lack of succession planning and poorly designed job pathways. Both issues will require interventions based on skills training and it is suggested that the SETA look at its offerings with that in mind.

Shorter programmes and modularisation could also address two other issue that are common in the research: the need for training in non-specific life skills areas; and the small numbers of graduates who are able to successfully establish their own enterprises.

The research revealed a need for generic life-skills components to be introduced into all learning programmes. These would include things like life-work balance, time management and emotional intelligence.

Less that 1% of skills programmes graduates go on to start their own small businesses, according to one of the research projects, and in the light of the inevitable job shrinkage as technology develops, that is a problem. There was a call, in several of the papers for aspects of entrepreneurial skills development to be introduced in all of the SETA's training offerings.

Entrepreneurial development goes beyond the technical skills required for competence in the various work areas in the sector and, it is suggested, expert input is needed to complement the existing workplace specific programmes.

CONCLUSION

The ultimate aim of the National Skills Development Strategy is to transform the economy. Empowering workers through skills development will make them employable and, in turn, the businesses in the sectors that the SETAs serve will benefit from having a consistent flow of suitably qualified candidates for the positions they need to fill, and that will lead to them thriving.

In a low-growth economy such as ours, in which the job market is shrinking, and with businesses not always having the capacity to provide the workplace-based learning positions or the mentorship support required to have the learnership model operating optimally, it is not easy to achieve that ultimate aim.

These challenges apply to all sectors of the economy, including the wholesale and retail sector. There have been other factors facing this sector in particular. The COVID-19 pandemic, while it affected the entire economy, was particularly harmful to retail and wholesale. Lockdowns and sales restrictions forced the businesses in the sector to change drastically, with the introduction of online shopping increasing rapidly. The technology required to drive e-commerce was quickly developed and adopted, threatening jobs and requiring specialised skills.

The range of research projects commissioned by the W&RSETA in the cycle under review concluded that, under the circumstances, the organisation has done well in fulfilling its role of supplying a skilled workforce for the sector. There have been many projects and many workers have been trained through them. There are some vacancies that have been difficult to fill but, in general, the labour requirements of the businesses in the sector have been met.

Where there have been challenges, they have been beyond the control of the SETA, notably in the case of the COVID-19 pandemic and the technology-rich responses to it.

There have, however, been challenges that could be addressed by the SETA. The W&RSETA Sector Skills Plan addresses many of these and the recommendations offered under the seven themes outlined in this document relate to the outcomes outlined in the plan.

The main reason for undertaking research is to highlight the shortcomings and to make recommendations to address them in the years to come. This summative publication has gone some way towards achieving this goal.

ABBREVIATIONS AND ACRONYMS

4IR	4th Industrial Revolution
AI	Artificial Intelligence
APP	Annual Performance Plan
CPD	Continuous Professional Development
CV	Curriculum Vitae
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
ETQA	Education and Training Quality Assurance Body
GDP	Gross Domestic Product
HE	Higher Education
HEI	Higher Education Institution
HET	Higher Education and Training
HIV/AIDS	Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome
HTFV	Hard to Fill Vacancy
ICT	Information and Communication Technology
ILO	International Labour Organisation
ISCO	International Standard Classification of Occupations
ISO	International Organization for Standardisation
LRA	Labour Relations Act (1995)
NDP	National Development Plan
NGO	Non-Governmental Organisation
NQF	National Qualifications Framework

NSDP	National Skills Development Plan
NSDS	National Skills Development Strategy
OFO	Organising Framework for Occupations
PIVOTAL	Professional, Vocational, Technical and Academic Learning
QCTO	Quality Council for Trades and Occupations
SAQA	South African Qualifications Authority
SDA	Skills Development Act
SDF	Skills Development Facilitator
SETA	Sector Education and Training Authority
SLA	Service Level Agreement
SLO	Skills Liaison Officer
SME	Small and Medium Enterprise
SMME	Small, Medium and Micro Enterprises
SP	Strategic Plan
SSP	Sector Skills Plan
TVET	Technical and Vocational Education and Training
UIF	Unemployment Insurance Fund
W&RSETA	W&R Sector Education and Training Authority
WIL	Work-Integrated Learning
WSP	Workplace Skills Plan

GLOSSARY OF TERMS

4IR	The transition of industry and society from labour-intensive manufacturing practices and organisations to online-based services that centre around connectivity, and digital hardware and software.
Artificial intelligence	The ability of a digital computer or computer-controlled robot to perform tasks commonly associated with intelligent beings. The term is frequently applied to the project of developing systems endowed with the intellectual processes characteristic of humans, such as the ability to reason, discover meaning, generalise, or learn from experience.
Augmented reality and virtual reality	Augmented reality adds digital elements to a live view, often by using the camera on a smartphone. Examples of augmented reality experiences include Snapchat lenses and the game Pokémon Go. Virtual reality implies a complete immersion experience that shuts out the physical world. Using VR devices, users can be transported into several real-world and imagined environments.
Automation	The conversion of certain manufacturing and service-oriented processes from requiring human labour to being conducted by machines and digital programmes.
Benchmark	A standard by which performance may be measured and by which we can make comparisons in determining what constitutes good career guidance.
Beneficiary	A person or group of people that receive help or advantage from something.
Brick-and-mortar	The form of the traditional, physical retail outlet as seen in shopping malls, where an in-person exchange is required between the consumer and the retailer.
Career	The sequence and variety of work roles, which one undertakes throughout a lifetime to actualise one is potential. (Source: Hong Kong Education Bureau).
Career counselling	An intensive interactive verbal communication process through which a qualified careers counsellor discusses career and study options with another individual or group.
Career development	A lifelong process of planning one's work future and acquiring the necessary skills to progress.
Career education	The providing of information particular to a career. Career education is different from career guidance, but a subcomponent of career guidance.
Career guidance	Services intended to assist people, of any age and at any point throughout their lives to make educational, training, and occupational choices, and to manage their careers.
Career information	Information relating to careers, study options, financial aid, study skills, employment opportunities, and any other related information that assists an individual to make an accurate career choice.
Career path	A structured, purposeful approach to achieve one's career plan.
Career planning	A scenario planning and goal setting activity that sets out specific tasks to be achieved as part of a process to advance one's career.
Careers 4.0	Industry 4.0 involves digitalising manufacturing and business processes. Industry 4.0 offers a vast breadth of career opportunities in a range of different fields.
Careers Matrix	The Careers Matrix (Updated 05 August 2019) is a document in an MS Excel spreadsheet format, which shows the clustering of skills programmes aligned to OFO occupations.
Cashless	The action of relying largely or entirely on monetary transactions that use electronic means rather than cash.

GLOSSARY OF TERMS

Casual employees	There is no definition for 'casual' workers in current legislation in South Africa. The Basic Conditions of Employment Act of 1983 referred to casual labourers, but the more recent Act from 1997 does not define this term. When using the term 'casual' in this document, we mean anyone employed part-time or temporarily, within an enterprise.
Consumer	The end-user of a product or service who is willing pay a certain fee for the associated benefit. Consumers are increasingly taking the form of online shoppers in need of digital services and products.
Customer experience	The entirety of the interactions a customer has with a company and its products.
Cybercrime	Criminal activity (such as fraud or theft) committed using a computer, especially to illegally access, transmit, or manipulate data.
Decent work	Decent work is described as, "opportunities for women and men to obtain decent and productive work in conditions of freedom, equity, security, and human dignity." Decent Work has subsequently become the organising framework for ILO activities.
Digital applications	A broad term refers to any application software that can be used by a computer, mobile device, or tablet to perform useful tasks.
Digital divide	The economic, educational, and social inequalities between those who have computers and online access and those who do not.
Digital retail marketing	The use of the Internet, mobile devices, social media, search engines, and other channels to reach consumers.
E-commerce	Electronic commerce is a type of business model that lets businesses and individuals buy and sell things over the internet.
Education and Training Quality Assurance Body	The ETQA within the SETA monitors and audits the achievements in terms of standards or qualifications registered on the NQF. The ETQAs accredits providers of education and training.
E-retail	The transition of traditional retail outlets onto online platforms, allowing consumers to conduct their purchases in a virtual environment that requires no physical presence on behalf of the consumer.
External stakeholder	Individuals who have an interest in the decisions or activities of an organisation but are not responsible for the outcomes of those decisions or activities.
Globalisation	The continual spread of humanity and digital industry that meshes the cultural and societal identities of certain groups into a larger, worldwide group of urban-dwelling digital users.
Hard to Fill Vacancies	HTFVs are composed of the W&R scarce and critical skills as identified in the W&RSETA SSP.
Indicium	The Indicium SETA management system is intended for stakeholders to upload the ATR/WSP reports and information on discretionary grant interventions.
Innovation	The creation of a new way of doing something, whether the enterprise is concrete or abstract. It refers to either something new or to a change made to an existing product, idea or field.
Internal stakeholder	Individuals who have an interest in the decisions or activities of an organisation and are responsible for the outcomes of those decisions or activities.
Internet of Things	Refers to a system of interrelated computing devices, mechanical and digital machines provided with unique identifiers and the ability to transfer data over a network without requiring human-to-human or human-to-computer interaction.

Job	A set of tasks and duties performed, or meant to be performed, by one person, including for an employer or in self-employment (ISCO 2018).
Machine learning	Machine learning is a method of data analysis that automates analytical model building. It is a branch of artificial intelligence based on the idea that systems can learn from data, identify patterns, and make decisions with minimal human intervention.
Machine-to-machine communication	Machine learning is a method of data analysis that automates analytical model building. It is a branch of artificial intelligence based on the idea that systems can learn from data, identify patterns, and make decisions with minimal human intervention.
Mobile commerce	Mobile shopping or m-commerce, is used by people who use smartphones to identify the best deals, compare products and prices, and order while on the go.
National Qualifications Framework	The NQF is the system that records the level of learning achievement arranged in ascending order from 1 to 10.
Occupation	A set of jobs whose main tasks and duties are characterised by a high degree of similarity (International Labour Organisation). Occupations are organised into groups according to skill level and skill specialisation (ISCO 2018).
Occupational qualification	A generic term for all qualifications (and part-qualifications) registered with the QCTO. A qualification that consists of a minimum of 25 credits associated with a trade, occupation or profession. It results from work-based learning, consists of three components (knowledge, practical skills and work experience) and has an external summative assessment.
Omnichannel	A cross-channel content strategy that organisations use to improve their user experience and drive better relationships with their audience across various points of contact (e.g., online, in a physical shop, or by mobile).
Organising Framework for Occupations	The OFO is a coded occupational classification system that is a key tool used by the Department of Higher Education and Training (DHET) for identification, reporting, and monitoring of skills demand and supply in the South African labour market (DHET website).
Organogram	An organogram shows the management structure of a company, the responsibilities of each department, the relationships of the departments to each other, and the hierarchy of management (Collins Dictionary).
Outsourcing	Outsourcing refers to the process where workers in a standard employment relationship get reduced, especially in a business's non-core services. The point is that a relationship of subcontracting is created between the core business and a contractor or satellite enterprise.
Primary research	The acquisition of insights via the direct contact of and interaction with individuals who are knowledgeable in a particular topic. Consumer panels, in-depth interviews, and online surveys are examples of primary research methods.
Qualifications Management Board of the W&RSETA	The QMB serves a quality assurance role for the W&RSETA for 'historical' unit standards-based programmes. Representative members of the W&RSETA sector involved in the recommending which qualifications are approved to become listed on the matrix.
Qualitative data	This type of data is non-statistical and is typically unstructured or semi-structured in nature. This data is not necessarily measured using hard numbers used to develop graphs and charts. Instead, it is categorised based on properties, attributes, labels, and other identifiers.

GLOSSARY OF TERMS

Quantitative data	This type of data is statistical and is typically structured in nature – meaning it is more rigid and defined. This type of data is measured using numbers and values, which makes it a more suitable candidate for data analysis.
Retail ethnography	Retail ethnography is the study of the behaviour and responses of consumers in a retail environment. It studies the way people react to products and services, their interaction with objects in the retail setting, their speech and emotions, and their experiences during the use of a product or service. It explores the factors which influence these behaviours, practices and reactions, and aims to discover consumer perceptions through the perspective of the consumer.
Secondary research	The acquisition of insights via channels that have reworked, repositioned and republished information that was originally a primary source. Government publications, industry reports and news articles are examples of secondary research sources.
Shared economy	The acquisition of products and services needed by a consumer via a rental or sharing model, instead of purchasing and owning. This is exemplified by peer-to-peer interactions on designated platforms.
Skills	Skills are the expertise or talent needed to do a job or task. Job skills allow you to do a particular job and life skills help you through everyday tasks.
Skills programme	A skills programme is an occupation-based learning programme aimed at building skills, and which incorporates at least one-unit standard. It is registered by a SETA and delivered by an accredited training provider, and it leads to a qualification registered on the NQF (PSETA).
Social media marketing	The use of social media websites and social networks to market a company's products and services.
Stakeholder	The International Organization for Standardization (ISO) defines a stakeholder as an "individual or group that has an interest in any decision or activity of an organisation."
Subcontracting (Labour)	Subcontracting means the contracting out 'non-core services,' such as security, merchandising (shelf packer) and cleaning, to labour brokers or labour agencies. Subcontracting implies an indirect form of employment of people by companies through labour brokers. Labour broking or agency labour is based on the contract whereby an agency recruit's employees and then places them at the disposal of a user company to perform a task.
Supply chain	A network between a company and its suppliers to produce and distribute a specific product to the final buyer.
Technology	The application of scientific knowledge to the practical aims of human life or, as it is sometimes phrased, to the change and manipulation of the human environment. Commonly also understood as a manner of accomplishing a task, especially using technical processes, methods, or knowledge.
Temporary and part-time	The common forms of temporary employment are direct fixed term contracts and temporary employment through specialised agencies (agency labour). In the case of a fixed-term contract, the contract is defined by certain conditions (for example, expiry dates or the finishing of a particular task). Temporary employees are employees who do not have a permanent (open-ended) contract, including participants in special employment programmes.

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