



JOB OPPORTUNITIES AND UNEMPLOYMENT

IN THE SOUTH AFRICAN LABOUR MARKET

2017 – 2018





labour

Department:
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JOB OPPORTUNITIES AND UNEMPLOYMENT

IN THE SOUTH AFRICAN LABOUR MARKET

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EXECUTIVE SUMMARY

The Department of Labour has continuously produced this report in order to provide a comprehensive overview of the South African labour market trends, particularly on the demand and supply-side in line with the development trends of the skills in high demand versus the skills supply. This report clearly puts together job vacancy advertised data, e.g., skills required by various industries and profile of the unemployed skills to examine the prospect of matching skills to available job opportunities in the financial year 2017/18.

As it is now known, high rate of unemployment in South Africa as compared to other emerging markets has been a source of great frustration to policy makers. Most of analysts argued that the slow growth in the real Gross Domestic Product (GDP) which has remained far below 5% since the 2008/9 recession, does not provide much prospects to deal with the triple challenges of unemployment, poverty and inequality in the short-run.

In addition, the South African active labour market policies should reflect and come to terms with the fact that the world of work is changing and align their employment creation policies and strategies with business objectives. The Fourth Industrial Revolution (FIR) will probably come with technology changes that will continue to demand new skills. Education institutions must perhaps design a curriculum that encourages critical thinking, creativity as well fast-track the acquisition of digital and Science, Technology, Engineering and Mathematics (STEM) skills to match the way people will work and collaborate when the FIR is fully there.

HIGHLIGHTS IN 20 17 – 20 18

- Regarding the official statistics, the unemployment rate in the country has decreased by 1.0% from 27.7 % in March 2017 to 26.7 % in March 2018 but remains very high
- There were 48 309 job vacancy advertised captured by the Department of Labour from both the Info-Desk and the Pnet data sources during 2017/18 financial year. This implies that the South African business cycle and other exogenous factors underline these major changes that are expressed through the company's desire to recruit new manpower or not for the production of goods and services to sustain the economic growth in the country
- Overall, 39% of the total job advertised vacancies as captured in the Department of Labour database were attractive to those with degree or diploma educational achievements, followed with those with grade 12 at 25 % in the financial year 2017/18
- The number of job vacancy advertised constantly declined in from the first to the fourth quarter of 2017/18 financial year. Sales and marketing managers were occupations in high demand followed by the software developers, shop sales assistants and retail and wholesale trade managers. Software developer's occupations were demanded in the professional occupational group. It can be seen that information technology creates jobs in the development of websites and apps
- Gauteng had a high demand for almost all occupations followed by the Western Cape province in the following occupations: beauticians, marketing professionals, retail and wholesale trade managers, Software developers etc.
- Out of the total 817 239 work-seekers in the Department of Labour in 2017/18, the Gauteng province had registered the highest at 24.2 % and the lowest was registered in the Northern Cape Province at 3.2 %. it was followed by the KwaZulu-Natal with (16%), Western Cape, Eastern Cape and Free State provinces which registered (11.8%), (11.3%) and (11%) respectively. While the overall placement rate stood at 6.5 % (or 53 601), the provincial placement rates varied over time.
- There were 661 432 ordinary Unemployment Insurance (UI) claims created in 2017/18. The trade industry (44.8%) followed by the agriculture (10.5%), manufacturing (10.5%) and the construction (9.2%) industries constituted approximately 75% of the total ordinary UI claims created in 2017/18 financial year as a result of dismissals or retrenchments etc
- Since 2013, more students enrolled in the Science, Engineering and Technology (SET) field, followed by the business and management and other humanities fields of study. Interestingly, in South Africa the HEMIS database results show that the country had only recorded an average of 20 % of graduates in each year (2014-2016) of student enrolments
- The impact of this trend is that the slow economic growth observed in the performance of the real Gross Domestic Product (GDP) cannot be sustainable in line with the expansion of labour force in the country over time. In other words, the job opportunities are limited and not sufficient to absorb a large number of new entrants in the labour market in particular those who have not worked in the past five years
- In conclusion, the statistics of registered work-seekers are almost 17 times more than the number of job vacancies advertised that were recorded in the Department of Labour. This supports the argument that the labour force is expanding rapidly at the rate probably higher than employment creation in the country.

INTRODUCTION

Since the dawn of democracy in 1994, the South African Government has formulated policies such as the Reconstruction and Development Programme (RDP) which was aimed to redress the inherited gross inequalities of apartheid: socially, economically and spatially. In 1996 the Growth, Employment and Redistribution (GEAR) strategy replaced the RDP. The policy was formulated to stimulate faster economic growth which was required to provide resources to meet social investment needs. In 2005, GEAR was replaced by the Accelerated and Shared Growth Initiative for South Africa (ASGISA). The policy envisioned to reduce poverty by 2010 and halving unemployment by 2014 from the 28 % in 2004 to 14 % by 2012; and also recognised that the policies implemented to address these issues needed to be at the forefront of economic policy decision making. ASGISA was replaced with New Growth Path (NGP) in 2010. The NGP was envisioned to accelerate growth in the South African economy, and to do so in ways that rapidly reduce poverty, unemployment and inequality. To help overcome these structural challenges and contribute to the achievement of higher levels of economic growth, NGP was seen as a necessary policy. In early 2013, the Government has introduced the National Development Plan (NDP), Vision -2030 as South Africa's long-term socio-economic development roadmap. NDP is viewed as a policy blueprint for eliminating poverty and reducing inequality and unemployment in South Africa by 2030.

However, all these policies formulated in the past twenty years impacted "little" in the living conditions of people that is to ensure that South Africa's human resources are employed, promote sustainable livelihoods and improve social conditions to alleviate poverty. Today, unemployment is still high at 26.7% in March 2018 because employers are unable to find people with the relevant skills that they need to fill new opportunities or vacancies. A general trend observed is that South Africa is faced with a challenge of oversupply of unskilled labour and an undersupply of qualified and skilled labour. In contrast, specific skills and tertiary qualifications have and will become a key competitive advantage during the Fourth Industrial Revolution (FIR) era. For example, business leaders are struggling with demand for productivity and innovation that can be filled only by people with the right skills.

Following this, the South African active labour market policies should reflect and come to terms with the fact that the world of work is changing and align their employment creation policies and strategies with business objectives. The FIR comes with technology changes that will continue to demand new skills. The skills mismatch will probably accelerate, worsening the imbalance between skills supply and demand as the new markets rise and the nature of work shifts. To build a pipeline of future skills, education institutions must design a curriculum that encourages critical thinking, creativity as well fast-track the acquisition of digital and Science, Technology, Engineering and Mathematics (STEM) skills to match the way people will work and collaborate in the FIR¹.

OBJECTIVE OF THE REPORT

This report aims to provide vacancies data and inform policymakers and all other stakeholders, e.g., researchers and NGOs etc., responsible for employment creation about the gap that exists in profiling those who demand for labour and those who supply of labour in the South African labour market within the financial year 2017/18. A better understanding of the statistical trend will help policy makers to develop sustainable labour market interventions to improve the current situation in the labour market. The report includes, amongst other, the demand-side information related to the number of vacancies by occupational group, education, province and industry using the Standard Industrial Classification (SIC).

On the supply-side, the Unemployment Insurance Funds (UIF) data was used. This analysis mainly consisted of ordinary unemployment claims created by province, age, educational level, and the reasons for termination in commercial employment. The analysis of work-seekers as extracted from the Department of Labour Employment Services System for South Africa (ESSA) is also covered. It is presented here in terms of work-seekers placed or referred in registered employment opportunities, number of individual immigrant work permit's applications received and recommended and number of Private Employment Agencies (PEA) registered on ESSA.

To some extent, the report also includes external data such as the Quarterly Labour Force Survey (QLFS) and the post-school education and training in South Africa to examine the trends regarding the labour demand and supply under the reporting period.

¹ Samans, R., & Zahidi, S., (2017), The future of Jobs and Skills in Africa. Preparing the region for the Fourth Industrial Revolution, May 2017.

DATA COLLECTION METHOD

This report has a particular emphasise on the job vacancy data collection method. Historically, vacancy data was from newspaper advertisements dated back in 2000. It started as a monthly count of newspaper advertisements. In 2003, the weekly count of vacancy data was introduced and was combined with the collection of job vacancy advertisements from all major provincial newspapers. The job vacancy data was disaggregated by occupation, industry and province.

There were several contributing factors to the termination of collecting vacancy data advertised in newspapers. Firstly, the collection and processing of the data was a costly manual process. Secondly, over the years there was a significant growth in the number of jobs advertised online. This shift to online advertising meant a newspaper based series no longer provided an accurate count of job vacancies advertised. The newspaper advertised jobs steadily decreased while at the same time online job advertisements increased continually. The shift from print to online vacancy advertising made historical newspaper vacancy series redundant since the detailed occupational breakdown was also required to make the data useful to policy makers.







SECTION ONE
JOB VACANCY TREND ANALYSIS

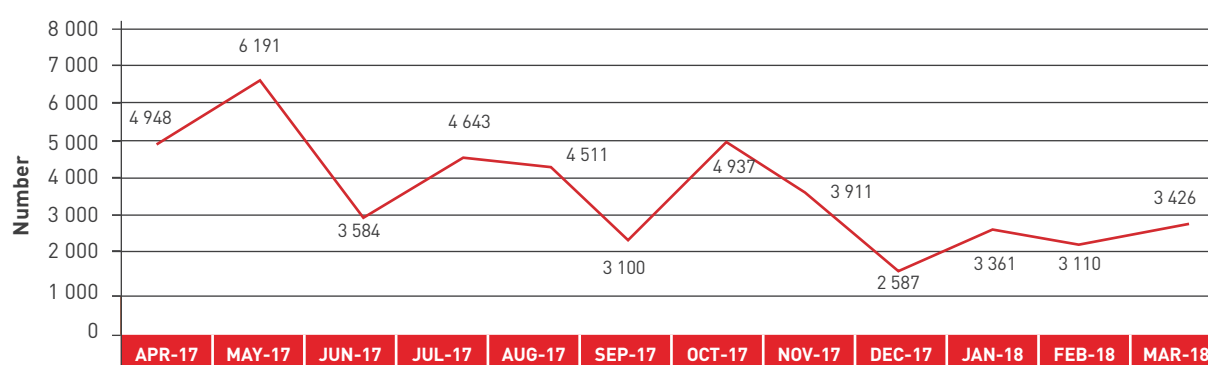
JOB VACANCY TREND ANALYSIS

An analysis of the job vacancy as collected and processed by the Department of Labour in the 2017/18 financial is presented in this section. As explained above, job vacancy statistics are used to analyze and monitor the development of the labour market, e.g., the demand-side at national and international level. The job vacancy rates may, in part, reflect the unmet demand for labour, as well as potential mismatches between the skills and availability of those who are unemployed and those sought by employers. The vacancy statistics are also regarded as the key indicators for an assessment of the business cycle and for a structural analysis of the economy.

1.1 JOB VACANCIES BY ORGANIZING FRAMEWORK OF OCCUPATION (OFO)

Overall, the total number of job vacancy advertised captured in the 2017/18 financial year was 48 309 vacancies at an average of 4 026 job vacancy per month.

Figure 1: Total number of job vacancies advertised by month, 2017/18



Source: Department of Labour, Job Opportunities Index database, 2017/18

The number of job vacancies advertised and captured by the Department of Labour during 2017/18 financial year is presented in **Figure 1**. The highest number of job vacancies advertised from both Pnet and Info-Desk data sources are shown in May 2017 at 6 191 vacancies and the lowest number was in December 2017 at 2 587 vacancies. The trends in the number of job vacancies advertised simply indicates that each month is unique as per the need of the company which could be based on the turnover, new skills capacity needed, productivity growth etc.

Table 1: Percentage change of Job vacancy advertised by occupational group (OFO), 2017/18

OCCUPATIONS	Q1	Q2	Q1-2 % CHANGE	Q3	Q2-3 %CHANGE	Q4	Q3-4 % CHANGE
Managers	2 770	2 463	-11.1%	2 710	-10.0%	1 785	-34.1%
Professionals	4 615	4 688	1.6%	3 578	-23.7%	3 346	-6.5%
Technicians	3 455	1 735	-49.8%	1 557	-10.3%	2 196	41.0%
Clerical Support Workers	1 391	1 285	-7.6%	1 722	34.0%	1 058	-38.6%
Services and Sales Workers	1 251	958	-23.4%	1 162	21.3%	981	-15.6%
Skilled Agricultural	616	437	-29.1%	414	-5.3%	300	-27.5%
Plant and Machine Operators	180	158	-12.2%	137	-13.3%	153	11.7%
Elementary workers	445	530	19.1%	155	-70.8%	78	-49.7%
Grand Total	14 723	12 254	-16.8%	11 435	-6.7%	9 897	-13.4%

Source: Department of Labour, Job Opportunities Index database, 2017/18.

Table 1 shows a constant decline in the number of job vacancies advertised from the first to the fourth quarters of 2017/18 financial year. Almost 30.5% of the total job vacancies captured were in quarter one (April to June 2017) of 2017/18 financial year. At this time, the official unemployment rate was at 27.7% and approximately 83 000 individuals had given up to actively searching for work and they reported to be discouraged work-seekers. Interestingly, by occupational category using OFO, the demand for elementary work was more at 19.1% in quarter two as compared to quarter one, for clerical support workers was 34% more in quarter three than in quarter two and for technicians, it was 41% more in quarter four as compared to quarter three of 2017/18 financial year.

The demand for labour in the skilled agricultural and plant and machine operators were less attractive in all quarters where the decline in the number of job vacancies advertised was most prominent in the skilled agricultural occupation in all quarters of 2017/18. This implies that the South African business cycle and other exogenous factors underline these major changes that are expressed through the company's desire to recruit new manpower or not for the production of goods and services to sustain the economic growth in the country.

Table 2: Educational requirements as per job vacancy advertised by occupational group, 2017/18

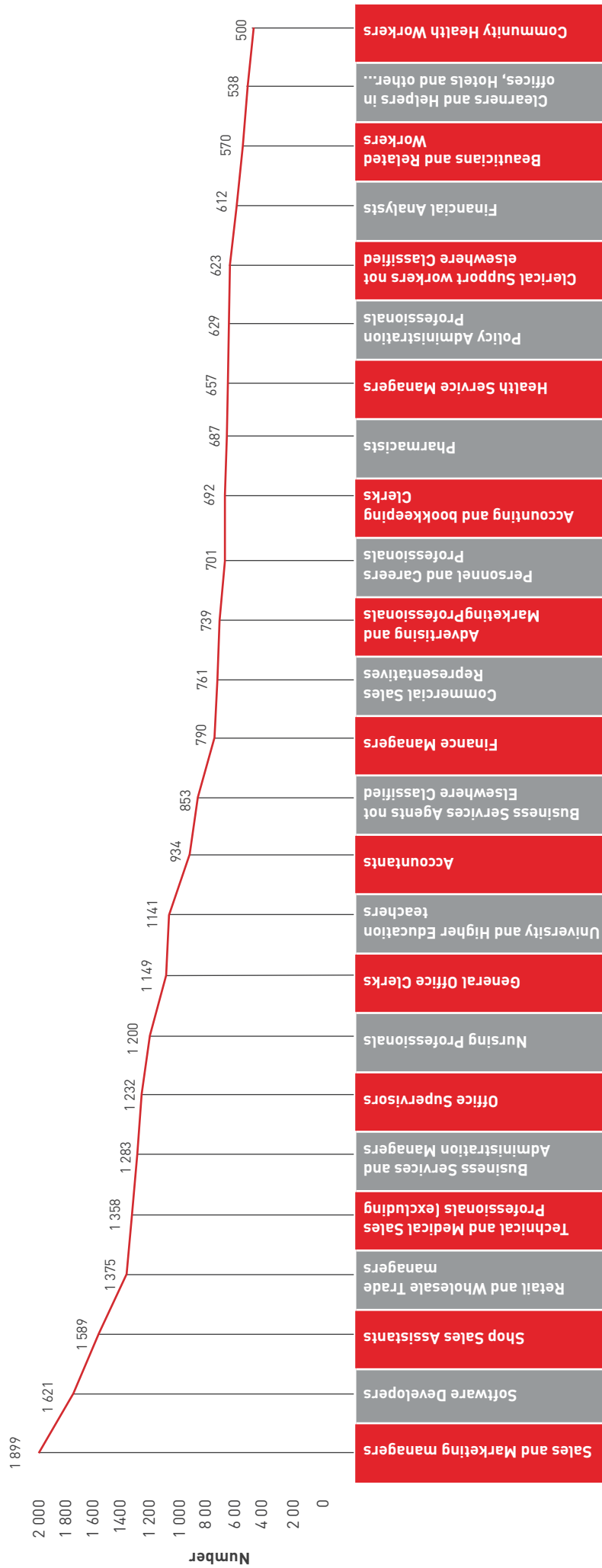
EDUCATIONAL REQUIREMENTS	MANAGERS	PROFESSIONALS	TECHNICIANS	CLERKS	SERVICES AND SALES WORKERS	SKILLED AGRICULTURAL	PLANT AND MACHINE OPERATORS	ELEMENTARY WORKERS	TOTAL
Post graduate qualification	568	1 213	123	59	16	7	5	7	1 998
Degree or diploma	4 637	8 566	3 064	1 544	468	268	64	46	18 657
Vocational training and certification	480	1 032	815	268	340	841	92	98	3 966
Grade 12	1 610	2 588	3 312	2 575	1 171	267	225	197	11 945
Less than grade 12	20	27	80	54	546	143	148	759	1 777
Not specified	2 413	2 801	1 549	956	1 811	241	94	101	9 966
Total	9 728	16 227	8 943	5 456	4 352	1 767	628	1 208	48 309

Source: Department of Labour, Job Opportunities Index database, 2017/18.

Table 2 shows the educational requirements as per the occupational category of the job vacancy advertised in the financial year 2017/18. While managerial and professional occupations continued to attract more people with degree and diploma, those with less than matric educational achievements could found themselves suitable for elementary and services and sales workers' occupations in the same period. Those with grade 12 educational achievements were also relevant across all occupations but they were predominantly attractive for technical occupation. Furthermore, the vocational training and certification was also relevant for professional, technical and skilled agricultural occupations.

Overall, 39% of the total jobs advertised as captured in the Department of Labour database were attractive to those with degree or diploma educational achievements, followed with those with grade 12 at 25% in the financial year 2017/18.

Figure 2: Occupations that were in high demand as per the job vacancy advertised, 2017/18



Source: Department of Labour, Job Opportunities Index database, 2017/18 (Excluding vacancies with less than 500)

Figure 2 shows the occupations that were in high demand during the 2017/18 financial year. Out of the 48 309 job vacancies advertised, the following vacancies were, in descending order (from →1 000 to ←=500), in high demand: the sales and marketing managers followed by the software developers, shop sales assistants and retail and wholesale trade managers. While the shape of the industry will always be changing, the overall occupations in demand and requirements remain the same, as technology-driven approaches continue to gain interest with most of the organisations.

1.2 JOB VACANCIES BY INDUSTRY (STANDARD INDUSTRIAL CLASSIFICATION (SIC))

Table 3: Number of job vacancies advertised by industry and province, 2017/18

INDUSTRY	EASTERN CAPE	FREE STATE	GAUTENG	KWAZULU-NATAL	LIMPOPO	MPUMALANGA	NORTH WEST	NORTHERN CAPE	WESTERN CAPE	GRAND TOTAL
Agriculture	134	111	330	88	53	71	115	25	231	1 158
Mining	11	5	184	25	152	53	646	82	40	1 198
Manufacturing	321	35	1 296	447	66	98	78	23	350	2 714
Utilities	18	7	273	135	5	14	38	5	61	556
Construction	117	23	431	83	67	140	52	5	111	1 029
Trade	531	335	4 346	862	586	323	346	112	2 407	9 848
Transport	148	61	1 102	418	41	69	56	8	340	2 243
Finance	1 245	218	7 364	1 609	408	323	268	98	2 638	14 171
Community	3 825	1 028	6 407	1 601	570	89	1 031	243	572	15 366
Private household	0	0	22	1	0	0	3	0	0	26
Grand Total	6 350	1 823	21 755	5 269	1 948	1 180	2 633	601	6 750	48 309

Source: Department of Labour, Job Opportunities Index database, 2017/18

According to **Table 3**, the community industry advertised more than one third (31.8%) of the total job vacancies advertised and it had the highest number with 15 366 job vacancies advertised in the financial year 2017/18. This was followed by the finance (29.3%) and trade industry (20%) of the total job vacancies advertised over the same period. By province, the highest number of job vacancies advertised was in Gauteng at 21 755 (45%), followed by the Western Cape at 7 650 (14%) and the Eastern Cape at 6 350 (13.1%) of vacancies.

The demand for labour in the following provinces: Eastern Cape, Free State, Limpopo, North West, KwaZulu-Natal and Northern Cape, were mostly dominated with the job vacancies from the community industry. However, the Gauteng, KwaZulu-Natal (again), Mpumalanga and Western Cape provinces displayed demand for labour (job vacancies advertised) in the finance industry. Then, the Limpopo, Mpumalanga and Western Cape provinces have also shown high demand for labour in the trade industry in the financial year 2017/18.

The trend confirms the main economic industries, e.g., community, finance and trade industries that have probably sustained employment creation under the reporting period.

The impact of this trend is that the slow economic growth observed in the performance of the real Gross Domestic Product (GDP) cannot be sustainable in line with the expansion of the labour force in the country over time. In other words, the job opportunities are limited and not sufficient to absorb a large number of new entrants in the labour market in particular those who have not worked in the past five years.

Table 4: Number of job vacancies advertised by industry and educational requirements, 2017/18

INDUSTRY	DEGREE OR DIPLOMA	GRADE 12	LESS THAN GRADE 12	NOT SPECIFIED	POST GRADUATE QUALIFICATION	VOCATIONAL TRAINING AND CERTIFICATION	TOTAL
Agriculture	455	384	8	140	34	137	1 158
Community	7 462	3 427	1 536	934	1 207	800	15 366
Construction	453	193	1	135	14	233	1 029
Utilities	235	127	17	84	17	76	556
Finance	5 407	3 440	44	3 706	383	1 191	14 171
Manufacturing	1 151	636	4	423	97	403	2 714
Mining	375	190	11	180	31	411	1 198
Private household	15	6	0	1	2	2	26
Transport	776	708	94	397	72	196	2 243
Trade	2 328	2 834	62	3 966	141	517	9 848
Total	18 657	11 945	1 777	9 966	1 998	3 966	48 309

Source: Department of Labour, Job Opportunities Index database, 2017/18.

Table 4 shows that job vacancies advertised that were advertised in the community industry required persons to have passed a degree or a diploma, grade 12, post graduate, vocational training and certification and less than grade 12 studies. The trend was also the same in the trade industry. These two were the only industries where all advertised job vacancies attracted all educational categories in 2017/18. On the other hand, job vacancies advertised in finance industry required more people who have passed a degree or a diploma, grade 12, post graduate and the vocational studies. It is also interesting to see that vocational training and certification, e.g., artisanal skills were in high demand for a person to be employed in the mining and manufacturing industries over the same period.

Overall, 38.6% of the total job vacancies advertised in 2017/18 required people with degree or diploma educational achievements. This implies that there is a shift to a more educated labour force leading to an increasing share of high-skilled jobs in the economy². The impact in the labour market is that those with less than grade 12 educational achievements will probably remain unemployed in the long-run as it was also noted that the FIR will also bring its own labour market challenges.

² Department of Planning, Monitoring and Planning and all, Overcoming Poverty and Inequality in South Africa, An Assessment of drivers, constraints and Opportunities, March 2018 (International Bank for Reconstruction and development, The World Bank, p.79



SECTION TWO
TRENDS IN THE LABOUR FORCE USING OTHER
LABOUR MARKET DATA SOURCES

TRENDS IN THE LABOUR FORCE USING OTHER LABOUR MARKET DATA SOURCES

Employment has increased by 165 000 over the past year, but it has not been rapid enough to absorb the 2.2 million new entrants into the labour market in March 2018. The official unemployment rate has therefore also decreased by 1.0 percentage point from 27.7% in March 2017 to 26.7% in March 2018 as per the latest Quarterly Labour Force Survey (QLFS) data but the unemployment rate remains very high.

A study reported in a working paper on the South African labour market shows two problematic trends that contribute to the unemployment crisis. The first is that having a grade 12 no longer leads to better labour-market opportunities. This statement suggests that people who do not have a post-matric qualification have low chances of finding work. Their education and skills levels are not high enough to meet the current and future skills requirement of the labour market. Second, there is no longer a guarantee that it will be easier to find a job in South Africa's two most developed provinces such as the Western Cape and Gauteng. The official unemployment rate in the Gauteng was 28.6% higher when compared with a few of the country's poorer provinces. While the Western Cape had the high unemployment rate of 19.7%, although it was the lowest unemployment rate as compared to other provinces³.

2. 1. LABOUR MARKET INFORMATION BASED ON ADMINISTRATIVE DATA

2.1.1. Public Employment Services data

The Public Employment Services (PES) branch in the Department of Labour plays an important role by assisting work-seekers to obtain jobs and employers to fill their vacancies. There are several good arguments for the provision of employment services. By transmitting information, they can contribute to labour-market efficiency and transparency. PES can also promote equity in access to the labour market and help the disadvantaged workers in rural areas to find employment. Furthermore, in countries that have an unemployment benefit system like South Africa, public employment services, if well designed and implemented, can play an important role in verifying eligibility for receiving benefits and reduce costs associated with unemployment through ensuring rapid matches⁴.

Despite the importance of the PES as a search channel, very little is known about its impact on the labour market. It has shown that unemployment benefit recipients, low skilled workers, long-term unemployed and workers with few job opportunities were more likely to use PES⁵.

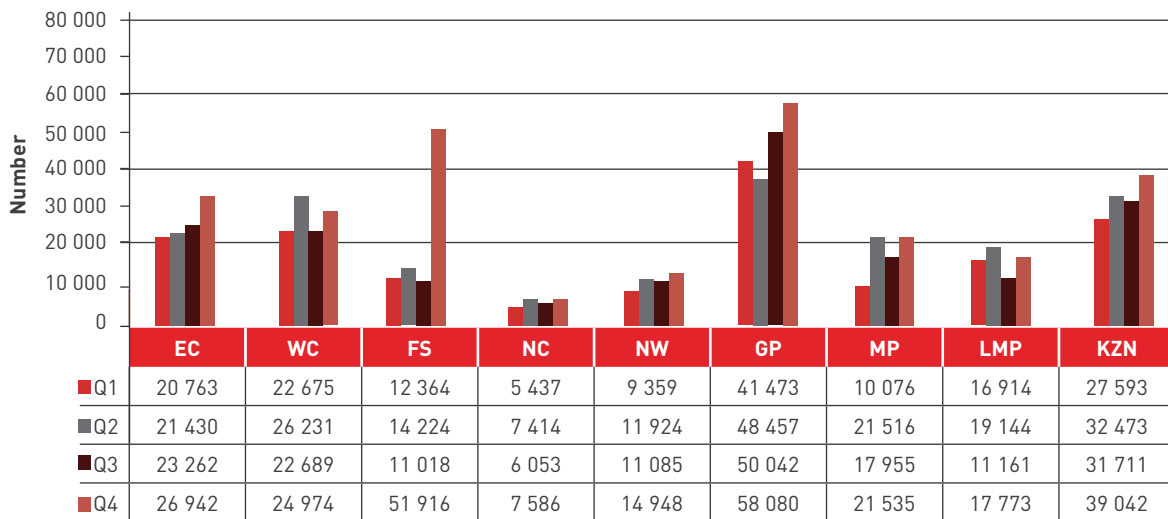
Thus, PES is bound to stay the test of time in order to adapt to changing the South African labour market realities for the foreseeable future and help render organisations affected by labour demand and supply more efficient through greater rationalisation of activities and services provided.

3 Derek Yu, Atoko Kasongo and Mariana Moses, The Conversation. How two crucial trends are affecting unemployment in South Africa.. April 2016. <https://theconversation.com/how-two-crucial-trends-are-affecting-unemployment-in-south-africa-56296>.

4 Open knowledge repository: Public Employment Services: Functions and Innovations. <https://openknowledge.worldbank.org/handle/10986/11814>

5 Holzner, C., & Watanabe, M., Understanding the Role of Public Employment Services: Theory and Empirical Evidence, December 11, 2015.

Figure 3: Work-seekers registered on Employment Services System for South Africa (ESSA), 2017/18

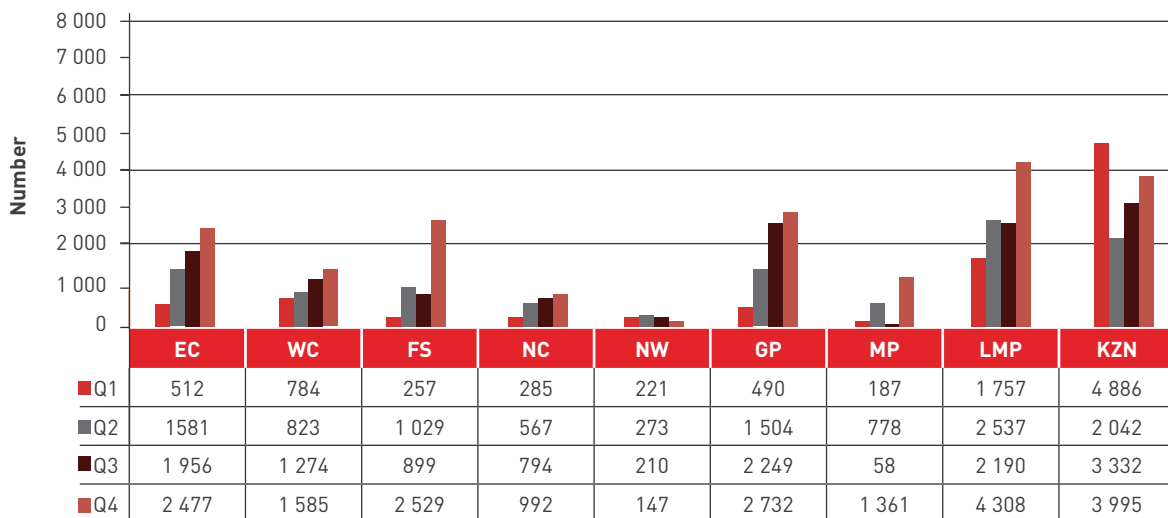


Source: Department of Labour, Annual Administrative Statistics, 2017

According to **Figure 3**, out of the total registered work-seekers (817 239) in the Department of Labour, Gauteng had registered the highest at 24.2% and the lowest was in the Northern Cape province at 3.2% in 2017/18 financial year. It was followed by the KwaZulu-Natal with (16%), Western Cape, Eastern Cape and Free State provinces which registered (11.8%), (11.3%) and (11.0%) respectively.

Quarterly analysis, on the other side, shows that about 34% of work-seekers were registered in quarter four of 2017/18 financial year. It constituted the highest and the lowest was recorded in quarter three of the same period. When looking at the impact in the labour market, the statistics of registered work-seekers are almost 17 times more than the number of job vacancies advertised that were recorded in the Department of Labour. This supports the argument that the labour force is expanding rapidly at the rate probably higher than employment creation in the country. The majority of those who are reported to be unemployed are those with low skills and limited experience. Therefore, the triple challenge of unemployment, poverty and inequality in the South African labour requires, double efforts from all key partners in the development of employment policies.

Figure 4: Work-seekers placed in registered employment opportunities on ESSA, 2017/18



Source: Department of Labour, Annual Administrative Statistics, 2017

Figure 4 shows the number of placed work-seekers in employment opportunities by province using the Department of Labour data. While the overall placement rate in 2017/18 financial year stood at 6.5% (or 53 601), the provincial placement rates varied over the same period. In the Limpopo province, almost 17% (10 792) of the provincial registered work-seekers (64 992) were offered employment opportunities through the Department of Labour. It was almost 10% placement rates in the KwaZulu-Natal and Northern Cape from the total registered work-seekers

in each of the province. The lowest placement rates of work-seekers were recorded in the following provinces: Gauteng (3.4%), Mpumalanga (3.5%) and North West (1.8%) over the same period.

Quarterly analysis shows quarter four of 2017/18 recorded the highest rate (37.5%) of work-seekers who were placed in employment opportunities and the lowest (17.5%) was recorded in quarter one over the same period.

2.1.2. Unemployment Insurance Funds (UIF) data

Involuntary job loss and unemployment can have devastating impact both on a household and the general economy. The loss of income has an immediate effect in the reduction of consumer spending. A household that endures unemployment is likely to cut spending, often in excess of the loss of income due to the uncertainty and the resumption of spending can lag after the return of income. For this reason, the government introduced the training layoffs scheme which is financed by the National Skills Fund and the Sector Education and Training Authorities (SETA's). It offers a further alternative to retrenchment and, while the workers forfeit their wages during the lay-off period, they qualify for payment of up to 75% of their basic wage payable for a maximum of six months⁶. The scheme is available to vulnerable workers who would otherwise have lost their employment due to retrenchments.

Table 5: Ordinary Unemployment Insurance (UI) claims by industry, 2017/18

INDUSTRY	APR-JUN 2017	JUL-SEP 2017	OCT-DEC 2017	JAN-MAR 2018
Agriculture	25 766	13 052	16 980	13 972
Mining	2 576	3 386	8 374	5 101
Manufacturing	16 599	18 143	19 530	15 062
Construction	14 531	16 176	16 693	13 162
Trade	72 357	77 795	80 294	66 039
Transport	9 280	10 266	9 390	8 157
Finance	12 097	11 727	13 211	10 787
Community	12 999	13 118	12 130	11 975
Private Household	2 873	2 646	2 538	2 650
Total	169 078	166 309	179 140	146 905

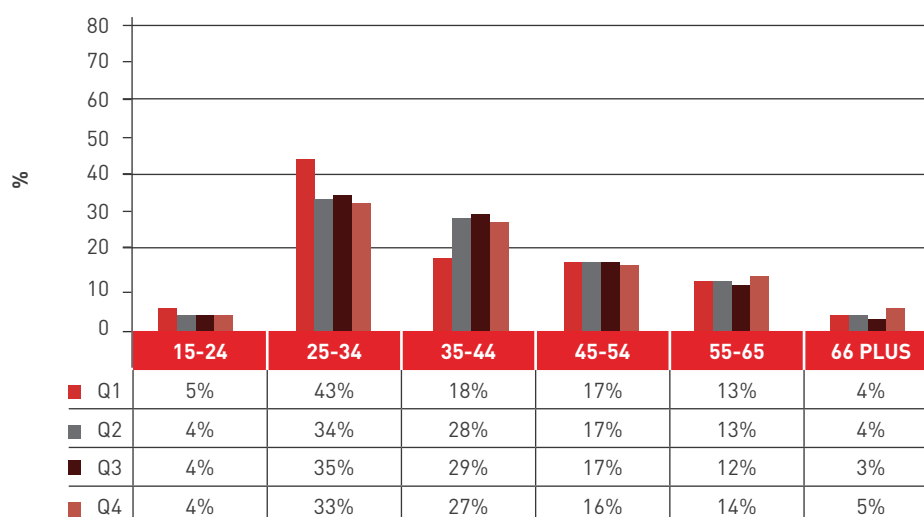
Source: Department of Labour, UIF database, 2017/18

Table 5 shows the distribution of ordinary UI claims created by industry per quarter in the financial year 2017/18. The trade industry (44.8%) followed by the agriculture (10.5%), manufacturing (10.5%) and the construction (9.2%) industries constituted approximately 75% of the total ordinary UI claims created in 2017/18 financial year as a result of dismissals or retrenchments etc. Not surprisingly, the trade industry has also shown the high demand for labour in terms of the proportion of job vacancy advertised over the same period. This trend signals the persistence of short-term employment contracts in the labour market, e.g., casualization. In this spirit, the official statistics confirm that 14% of the total employees (13 964 000) in March 2018 have reported to have limited employment contract and 60% of them only contributed to Unemployment Insurance Fund (UIF).

In addition, the Quarterly analysis shows, on the other hand, that quarter three (27.1%) recorded more ordinary UI claims as compared to other quarters of 2017/18.

6 EE publishers, the training of lay-off scheme. 29 June 2016, <https://www.ee.co.za/article/taining-lay-off-scheme.html>

Figure 5: Ordinary UI claimants by age group, 2017/18

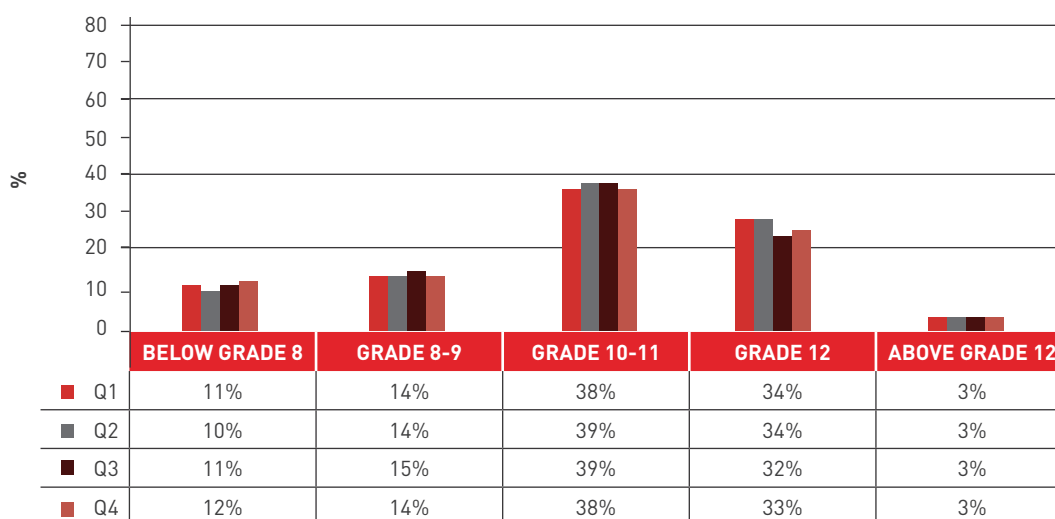


Source: Department of Labour, UIF database, 2017/18

When you disaggregate UI claims data by age group, **Figure 5** shows the highest Percentage of ordinary UI claims was originated from the age group of 25 – 34 years with an average of 36% in 2017/18 financial year. This is in line with the boiling and heated debates that had attracted the Government’s attention to initiate job creation programmes such as the wage subsidy programmes to reduce the high unemployment rate among youth in the country.

The impact of this statistical trend is derived through a large number of registration of work-seekers in the ESSA system where the low placement rate has also been recorded in 2017/18. Altogether, the statistical variation in these numbers can also explain the growth in the labour force in particular the high or low unemployment levels in the country.

Figure 6: Educational level of ordinary UI claimants, 2017/18

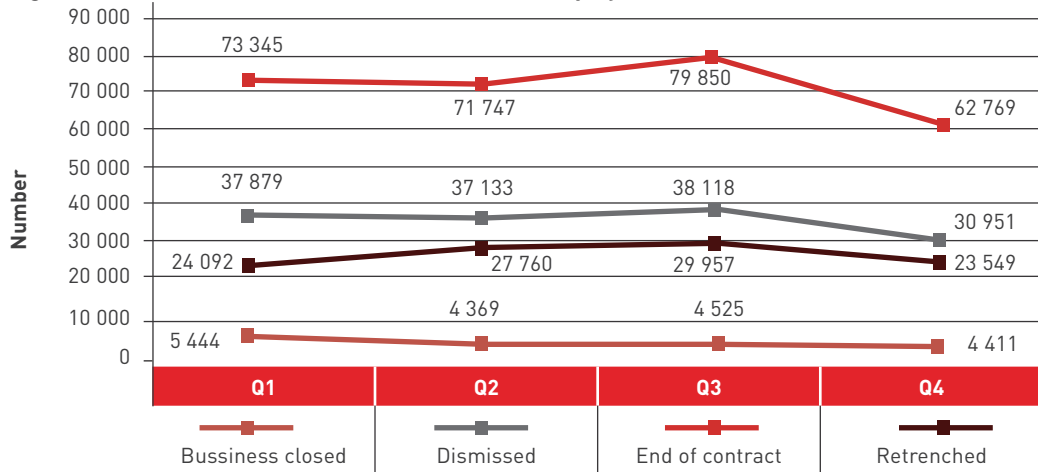


Source: Department of Labour, UIF database, 2017/18

The dynamics and challenges in the supply side of labour are also captured in **Figure 6** where the educational qualifications of the ordinary UI claimants are examined. The results simply illustrate that the majority of UI claimants were youth (25-34 years), with low educational qualifications (Grade 10-11, Grade 12) and reported that end of contract was the main reason for claiming UI benefits. This is not well aligned with the demand for labour requirements as detailed in the number of job vacancies advertised above.

Thus, one of the notable gaps is the probability of having more people to fall into long-term unemployment because of the possibility of a mismatch between the skills acquired and supplied in the South African labour market. The prioritisation of youth employment programmes as reflected in a number of policies including the NDP and the Mid-Term Strategic Framework (MTSF) by the South African Government could be supported towards the FIR.

Figure 7: Reasons for termination in commercial employment, 2017/18



Source: Department of Labour, UIF database, 2017/18 (excluding others)

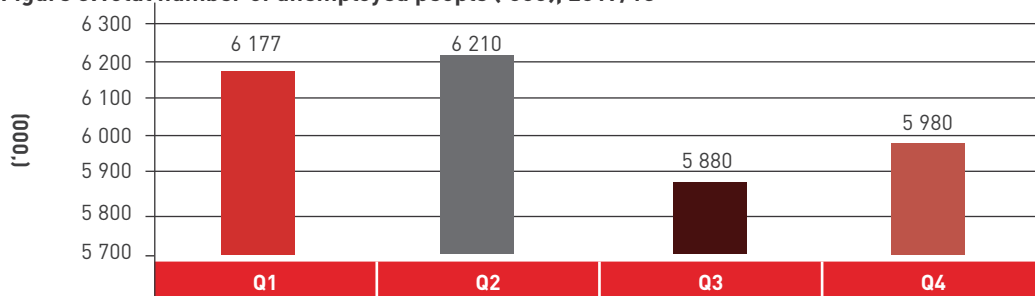
Figure 7 shows that more than half (52%) of the ordinary UI claimants reported that end of contract employment was the main reason for applying for short-term financial relief (ordinary UI) benefits. It constituted the largest group of beneficiaries and the lowest was for those who reported that business closed (3.4%) was the reason for termination in commercial employment in 2017/18 financial year.

Quarterly analysis shows that end of employment contract for UI claims decreased by 17 081 claims between quarter three and four of 2017/18 after they rose by 8 103 between quarter two and three of 2017/18. On the other hand, the retrenchment UI claims constantly increased (5 865) between quarter one to three before they dropped by 6 408 between quarter three and four of 2017/18. The dismissed and the business closed UI claims also decreased in the fourth quarter after they increased in the third quarter of 2017/18 financial year.

2.2. LABOUR MARKET INFORMATION BASED ON SURVEY DATA

For the purpose of this section, the focus is on the unemployed statistics as part of the available pool of unemployed persons to respond to the number of job vacancies advertised as recorded by the Department of Labour in the country in the 2017/18 financial year.

Figure 8: Total number of unemployed people ('000), 2017/18



Source: Statistics South Africa, Quarterly Labour Force Survey, P0211, March 2018 (Using the official definition of the unemployment)

According to Figure 8, the only quarter that recorded a decrease in the level of unemployment was October to December 2017 (Q3) by 330 000 while other quarters recorded an increase of unemployment levels in the 2017/18 financial year. The highest increase of (100 000) in the level of unemployment was recorded in January to March 2018 (Q4) and in July to September 2017 (Q2), it increased by (33 000). Overall, the unemployment level is approximately 6 million in the country while less job vacancies advertised were recorded over the same period. These statistics remain alarming for the South African Government in light of the new dawn since December 2017 at the national presidential elective conference of the ruling party.

Table 6: Educational level of the unemployed people, 2017/18

Highest level of education	Apr-Mar 2017	Jul -Sep 2017	Oct-Dec 2017	Jan-Mar 2018
('000)				
No Schooling	72	76	60	64
Primary incomplete	361	354	360	361
Primary completed	278	252	220	210
Secondary not completed	2 901	2 881	2 689	2 749
Secondary completed	2 014	2 095	2 021	2 057
Tertiary	513	513	488	493
Other	39	39	44	47

Source: Statistics South Africa, Quarterly Labour Force Survey, P0211, March 2018 (excluding others)

With the high level of unemployment by March 2018, people who did not complete secondary education and those who completed secondary education were most likely to be unemployed. **Table 6** shows that in July to September 2017, unemployment levels of people who completed secondary school picked up by 81 000 before they declined by 74 000 in October to December 2017. On the other hand, unemployment level of people who did not complete secondary education picked up by 60 000 in March 2018. The trends in unemployment levels in the country confirm the expansion of the labour force which is quite significantly higher than the number of job opportunities created in the financial year 2017/18. Significant to note is that, the labour absorption rates in the country needs to improve from the current situation (43.5% in March 2018) in order to redress the imbalances that sustain the poverty and inequality over time.

Table 7: Unemployed people by age group, 2017/18

Years	Apr-Mar 2017	Jul -Sep 2017	Oct-Dec 2017	Jan-Mar 2018
('000)				
15-24	1 552	1 444	1 365	1 381
25-34	2 399	2 454	2 397	2 413
35-44	1 450	1 478	1 343	1 363
45-54	623	663	636	668
55-64	153	171	140	154
Total	6 177	6 210	5 880	5 980

Source: Statistics South Africa, Source: Statistics South Africa, Quarterly Labour Force Survey, P0211, March 2018

According to the Quarterly Labour Force Survey results, 63.4% of the total unemployed were youth (15-34 years) in March 2018. This is mostly 2.3 times the national average of 26.7% unemployment rate in the same period. The vulnerability of youth is a grave concern when one considers the high rate of youth not in employment, education and training (NEET). In March 2018, the NEET rate for youth aged 15-24 was at 32.4% (2% more than in quarter two of 2016). Thus, there is a need for robust response by the South African Government⁷ to find ways of reducing youth unemployment in the country in line with the NDP, Vision 2030.

According to **Table 7**, unemployment levels had increased in all age groups between October to December 2017 and January to March 2018. The highest increase of unemployment level was seen in the 45-54 years' age group (32 000) followed by the 35-44 years' age group (20 000) and the third highest of was seen in the 15-24 age group (16 000).

⁷ Slow economic growth that has stubbornly maintained the labour absorption rate below the international standards, above 60% and poor educational outcomes should be the main focus of the government.





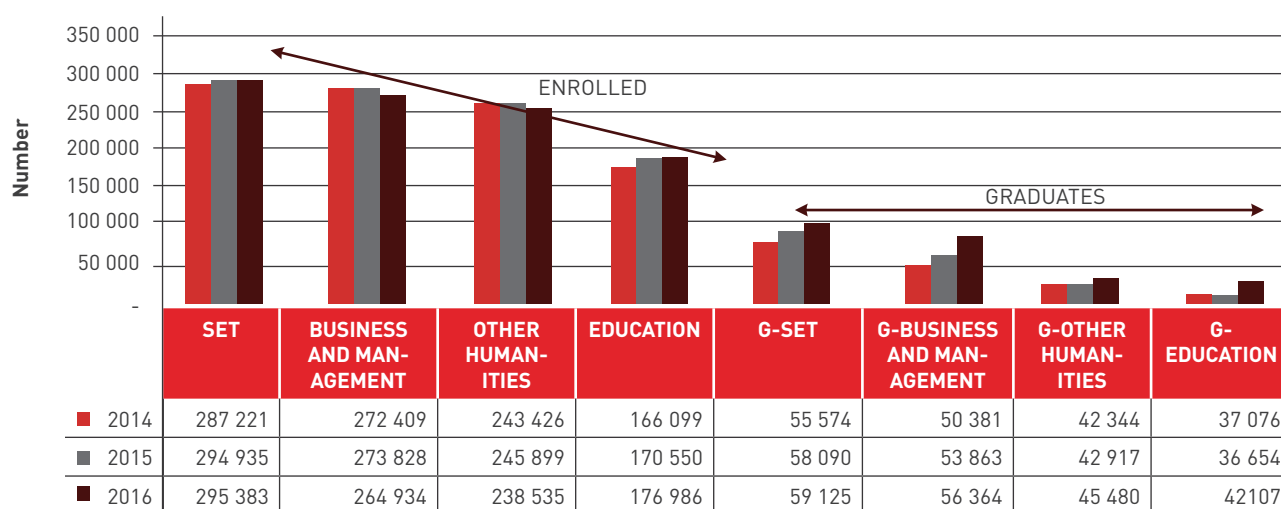
SECTION THREE
TRENDS IN THE POST-SCHOOL EDUCATION
AND TRAINING IN SOUTH AFRICA

TRENDS IN THE POST-SCHOOL EDUCATION AND TRAINING IN SOUTH AFRICA

3. 1. HIGHER EDUCATION

The Department of Higher Education and Training (DHET) seeks to improve the capacity of the Post-School Education and Training (PSET) system to meet the skills and developmental needs of the country. At present, supposed academic subjects have been given priority, with ‘softer’ subjects such as the Arts and technology increasingly marginalised. Yet in the not too distant future, the whole approach will probably have to be turned as the skills inherent in these subjects become more valued. The emphasis will be on developing basic life skills and the pursuit of leisure as opposed to a career based approach. To ignore the fast changing world that is happening outside education is to build up a whole stack of problems for future generations. From its present narrow focus, education will have to return being both broad and balanced if it is to meet the needs of society and the economy of the future, e.g., FIR.

Figure 9: Number of students enrolled and graduates from Public HEI’s by major field of study, 2014 to 2016

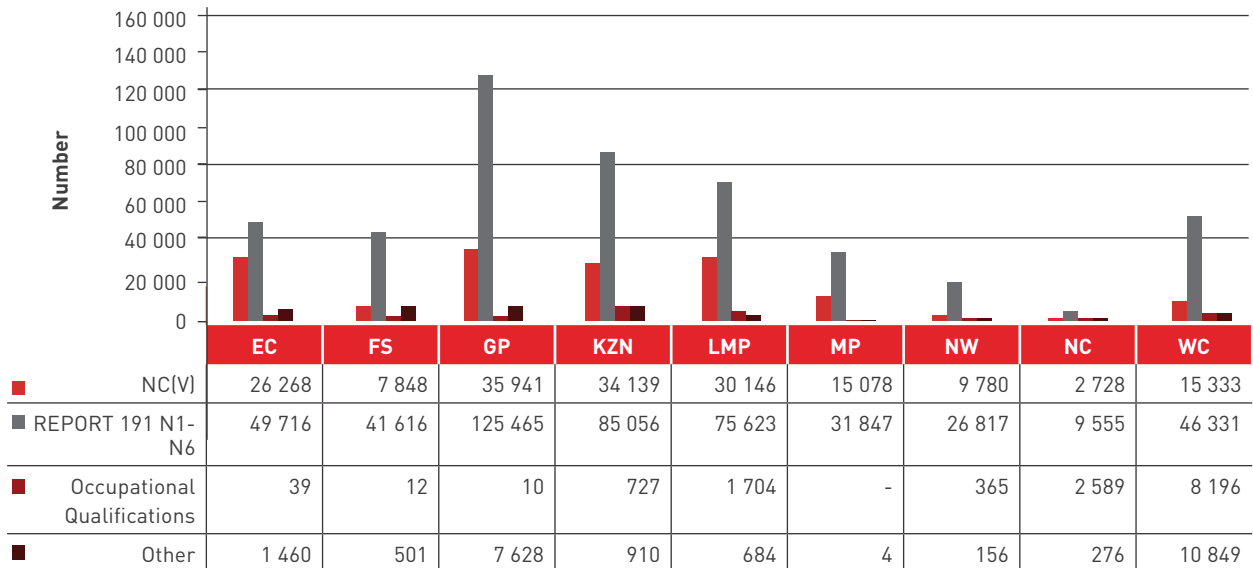


Sources: DHET, Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database (Data extracted in October 2017)

Figure 9 shows the distribution of student enrolments and graduates in the public HEI’s by major field of study from 2014 to 2016. The majority of student enrolments were in the Science, Engineering and Technology (SET) followed by the Business and Management field of study for the period 2014–2016. In 2016, almost 24% of those students who enrolled in education field of study have graduated, 20% of graduated from those who enrolled in Business and management and 21% graduated from those who enrolled in other humanities field of study over the same period.

Interestingly, in South Africa the HEMIS database results show that the country had only recorded an average of 20% of graduates in each year (2014-2016) of student enrolments. While it is below the standard, it becomes critical to look at the implication of the missing students who could not complete their studies in line with the current challenge of unemployment in the South African labour market.

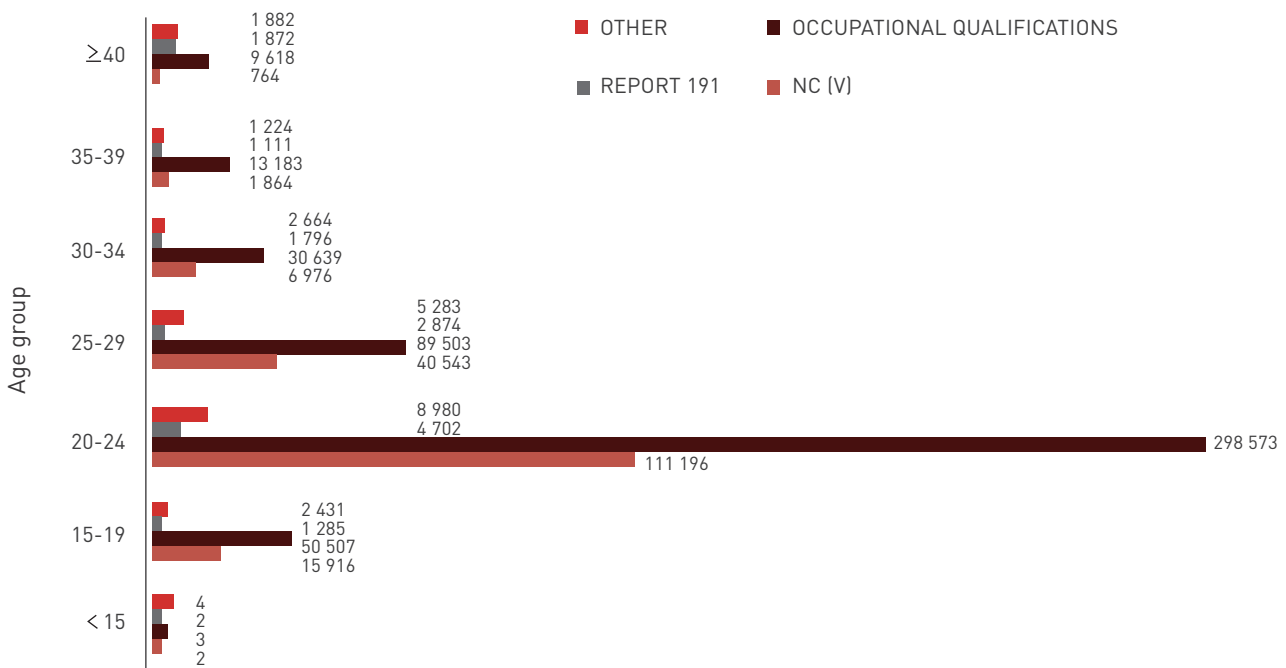
Figure 10: Number of students enrolled in TVET⁸ colleges by qualifications and province, 2016



Sources: DHET, Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database (Data extracted in October 2017)

According to **Figure 10**, during 2016, over half of student enrolments in TVET were from Gauteng (24.0% or 169 044), KwaZulu-Natal (17.1% or 120 832) and Limpopo (15.3% or 108 157). The Northern Cape enrolled the least number of students (2.1% or 15 148). The majority of students enrolled for Report 191 (69.7%) followed by NC(V) programmes (25.1%), with Gauteng contributing the most in total enrolments for these programmes (25.5% or 125 465 for Report 191 and 20.3% or 35 941 for NC(V)). Students enrolled for 'other' qualifications were 22 468 in 2016, with more than 80% of them in the Western Cape (10 849) and Gauteng (7 628). Even though lower student enrolment was reported for occupational qualifications, Western Cape contributed largely to enrolment in this programme (60.1% or 8 196).

Figure 11: Number of students enrolled in TVET colleges by qualification category and age group, 2016/17



Sources: DHET, Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database (Data extracted in October 2017)

Figure 11 shows that students enrolled at TVET colleges in 2016 were mostly youth, with 95.5% (673 868) between the ages 15-34 years. The largest enrolment was observed for youth aged 20-24 years (60.0% or 423 451), followed by those aged 25-29 years old (19.6% or 138 203) and declined for the older age groups. Regardless of age group, the majority of students enrolled for Report 191, with the highest proportion among those aged 20-24 years⁹.

⁸ Technical and vocational education and training colleges

⁹ DHET, Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database, 2018, p.34

3.2. ARTISANS

The Skills Development Act, 1998 defines an artisan as a person who has been certified as being competent to perform a listed trade. Artisan entrepreneurship is recognised as an engine for poverty reduction and economic development in the South African labour market. The production of few certified skilled manual trades such as electricians, plumbers, Millwright etc. had hindered the establishment of entrepreneurship. This is also considered as one of the engines of job creation, poverty reduction and economic development¹⁰.

Table 8: Total number of learners entering artisanal learning programmes, 2014/15-2016/17

SETA	2014/15	2015/16	2016/17
AGRISSETA	244	347	227
CATHSSETA	840	514	683
CETA	2 104	1 737	2 024
CHIETA	2 164	3 372	4 263
EWSETA	507	1 378	1 287
FOODBEV	70	45	178
FP&M SETA	958	459	419
HWSETA	109	119	87
INDLELA	7 122	5 734	7 311
LGSETA	754	1 020	888
MERSETA	7 606	8 130	8 038
MQA	2 621	1 848	1 978
PSETA	48	33	34
SASSETA	539	467	401
SERVICES	761	1 127	1 416
TETA	1 579	1 778	1 314
W&RSETA	276	532	269
Total	28 302	28 640	30 817

Sources: DHET, *Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database* (Data extracted in October 2017)

Table 8 shows that the total number of learners entering artisanal learning programmes in the 2016/17 financial year was 30 817. This represents an increase of approximately 9% from 2014/15 and 7.6% from 2015/16 financial year. The 2016/17 cohort indicates that, MERSETA recorded the highest number of persons who entered artisanal learning programmes with 8 038 learners, followed closely by INDLELA which recorded 7 311 learners and it increased by 1 577 learners when compared to the previous financial year. PSETA (34 learners) and HWSETA (87 learners) recorded the lowest number of learners entering artisanal learning programmes.

INDLELA and MERSETA have been recording a high number of learners entering artisanal learning programmes throughout the period under review. However, MERSETA recorded a decrease of 92 learners between the 2015/16 and 2016/17 financial years. TETA and W&RSETA recorded the largest decrease in the number of learners during the same period (464 and 263 respectively).

¹⁰ Jonas, P., *The changing World of Work and its impact on jobs in the future*, 2017.

Table 9: Number of learners completing artisanal learning programmes by Special Infrastructure Projects (SIPs) scarce skills and gender, 2016/17

Trade	Female	Male	Total
Electrician	1 019	3 656	4 675
Welder	335	1 244	1 579
Mechanical Fitter	246	1 525	1 771
Diesel Mechanic	162	1 648	1 810
Boiler Maker	134	1 062	1 196
Automotive Motor Mechanic	91	1 177	1 268
Plumber	175	1 064	1 239
Fitter and Turner	58	402	460
Millwright	124	680	804
Bricklayer	91	176	267
Carpenter	88	143	231
Rigger	33	705	738
Joiner	-	14	14
Total	2 556	13 496	16 052

Sources: DHET, *Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database, p.94* (Data extracted in October 2017)

Out of 23 617 of learners entering artisanal learning programmes by special infrastructure projects scarce skills, 68% of learners have completed in the programme in 2016/17. Amongst females, 53.2% have completed the programmes from the total female learners who entered the same programme in 2016/17 financial year.

Table 9 indicates that, overall, training in scarce and critical trades makes up the lion's share of all trade related training in the country. The results in the table above provide a clear indication that the scarce and critical trades (as per the 2016/17 SIPs report) makes up 75.7% of the trades reported on artisan-related training completed with females making up 16.0% and males 84.1% of the SIPs scarce skills trades. More men completed artisanal learning programmes compared to women.

The gender difference was more pronounced in the Electrician trade, where 2 637 more men completed the programme compared to women. The smallest gender differences were recorded in the Bricklayer and Carpenter trades¹¹.

11 DHET, Op. cit., p.94

Table 10: Number of artisans certificated by SETAs and INDLELA by economic sector, 2016/17

SETA	ECONOMIC SECTORS	2015/16	2016/17
AGRISETA	Agriculture	186	219
CATHSSETA	Culture, Arts, Tourism, Hospitality and Sport	1	1
CETA	Construction	582	1 058
CHIETA	Chemicals	861	1 020
EWSETA	Energy and Water	1 170	993
FOODBEV	Food Processing	-	14
FP&M SETA	Fibre Processing and Manufacturing	106	106
HWSETA	Health and Welfare	79	73
INDLELA	Non-SETA Candidates	3 791	3 692
LGSETA	Local Government	98	233
MERSETA	Manufacturing & Engineering	6 600	7 061
MQA	Mining and Minerals	2 056	1 974
PSETA	National and Provincial Government	29	14
SASSETA	Safety and Security	21	133
SERVICES	Services Sector	928	1 271
TETA	Transport	1 402	1 541
W&R SETA	Wholesale and Retail SETA	-	3
Total		17 910	19 406

Source: DHET, Statistics on Post-School Education and Training in South Africa, 2016 HEMIS database, p.91

A total of 19 406 artisans were issued with national trade certificates by SETA's and INDLELA during the 2016/17 financial year as shown in **Table 10**. The number reflects an 8.4% (1 496) increase in the number of artisans certificated in the 2016/17 compared with 2015/16 financial year. In both financial years, the share of artisans certificates issued was relatively larger in the MERSETA (Manufacturing and Engineering), INDLELA (Non-SETA Candidates) and MQA (Mining and Minerals) as compared to other SETA/ Economic sectors.



SECTION THREE
CONCLUSION

CONCLUSION

The statistical information as captured in this report alluded to the fact that the South African labour market has to transform rapidly to embrace the FIR. Unfortunately, the trend in the demand for labour and supply of labour has shown that the labour market is still owing to firstly close the gap that exists currently in line with the mismatch between the skills required in the economy and supplied. This is a genuine concern in most of emerging economies but the lower absorption rate in South Africa is still alarming in particular with the youth joblessness with low educational achievements. The high share of high skilled jobs in the economy has been shown in this report based on the high number of occupations in demand recorded in 2017/18 financial year.

Secondly, it is important to emphasise that the statistical information as covered in this report remain useful for policy makers and points to the risk of "broken" confidence to reach the NDP targets by 2030. Therefore, there is probably a need to stress again to policy makers to consider some changes in the structure of the labour market in the context of high unemployment rate in the country. Lastly, the Department of Labour has also a critical role to play to deal with the challenge of high number of registered work-seekers into ESSA against the lower placement rates reported across labour centers.

As with all the other industrial revolutions, it is important to note that jobs lost in traditional areas will be replaced by new ones although extreme fewer. Currently, the education system is struggling to meet the growing demand for expertise in the emerging digital economy. It is forever reactive to the changing demands of the labour market and is not pro-active to the labour market.



**RECOMMENDATIONS AND
REFERENCES**

RECOMMENDATIONS

- Policy makers need to act now to introduce reforms that will shift the economic focus by preparing for the changes that automation and other technological developments will probably bring;
- Encourage establishment of small business growth and entrepreneurial opportunities; Policy makers should consider investment that drives jobs like encouraging the establishment of new business through entrepreneurship;
- Reform in South Africa's education system may possibly provide the only sustainable solution. It is important to reduce the number of poorly educated people by improving school resources and quality of education¹².

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¹² The conversation. How two crucial trends are affecting unemployment in South Africa? April 11, 2016.



ANNEXURE

ANNEXURE

TABLE 11: HIGHLY DEMANDED OCCUPATIONS BY PROVINCE 2017/18

OCCUPATIONS	EASTERN CAPE	FREE STATE	GAUTENG	KWAZULU-NATAL	LIMPOPO	MPUMALANGA	NORTH WEST	NORTHERN CAPE	WESTERN CAPE	GRAND TOTAL
Accountants	108	15	498	85	37	17	26	8	140	934
Accounting and Bookkeeping Clerks	110	11	365	82	21	10	6	8	79	692
Advertising and Marketing Professionals	28	11	379	84	47	17	16	8	149	739
Beauticians and Related Workers	20	21	226	37	17	18	14	13	204	570
Business Services Agents not Elsewhere Classified	111	27	391	87	8	20	22	6	181	853
Business Services and Administration Managers not Elsewhere Classified	186	32	647	118	38	24	41	14	183	1 283
Cleaners	236	78	48	0	0	0	158	18	0	538
Clerical Support Workers not Elsewhere Classified	27	35	226	236	6	17	31	9	36	623
Commercial Sales Representatives	189	9	282	36	149	7	15	8	66	761
Community Health Workers			6	494						500
Finance Managers	111	45	440	63	29	20	21	4	57	790
Financial Analysts	26	3	358	118	7	7	17	4	72	612
General Office Clerks	31	59	374	133	335	20	77	23	97	1 149
Health Service Managers	32	15	476	66	4	13	5	2	44	657
Nursing Professionals	559	6	366	60	122	21	36	7	23	1 200
Office Supervisors	868	10	232	30	4	10	28	6	44	1 232
Personnel and Careers Professionals	87	8	353	64	13	17	71	4	84	701
Pharmacists	41	18	351	35	18	28	22	9	165	687
Policy Administration Professionals	21	12	416	61	11	2	31	6	69	629
Retail and Wholesale Trade Managers	82	45	548	159	50	64	60	26	341	1 375
Sales and Marketing Managers	95	36	1 103	199	27	60	39	15	325	1 899
Shop Sales Assistants	40	139	513	194	75	71	49	10	498	1 589
Software Developers	29	15	942	86	6	11	24	4	504	1 621
Technical and Medical Sales Professionals (Excluding ICT)	67	30	704	152	62	43	35	21	244	1 358
University and Higher Education Teachers	150	72	494	156	23	6	167	2	71	1 141







**JOB OPPORTUNITIES
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