

2020

Conceptual Framework for the 2020 National List of Occupations in High Demand, List of Priority Occupations, and Critical Skills List

Labour Market Intelligence
research programme

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TABLE OF CONTENTS

List of figures	iv
List of tables	iv
Glossary of terms and concepts	1

PART 1

INTRODUCTION 2

1.1 Rationale	3
1.2 Context	3
1.3 Purpose	4

PART 2

THE 2020 LIST OF OCCUPATIONS IN HIGH DEMAND 5

2.1 Background	6
2.2 Key research question	6
2.3 Purpose of the list	6
2.4 Dimensions of the list	7

PART 3

THE LIST OF PRIORITY OCCUPATIONS 8

3.1 Background	9
3.2 Definition and purpose of the list	9
3.3 Rationale	10
3.4 Key research question	10
3.5 Dimensions of the list	10

PART 4

THE CRITICAL SKILLS LIST 12

4.1 Background	13
4.2 Definition and purpose of the list	13
4.3 Rationale	14
4.4 Key research question	14
4.5 Dimensions of the list	14

PART 5

CONCEPTUALISING THE LINKS BETWEEN THE THREE LISTS 16

PART 6

REFERENCES 20

List of figures

Figure 1:	Stylised conceptual outline of priority occupations	11
Figure 2:	Conceptual outline of the DHA's CSL	15
Figure 3:	Conceptualising the links between the three lists	17

List of tables

Table 1:	Summary of the three lists	17
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Glossary of terms and concepts

Critical skills	“Skills that are regarded, through labour market availability and analysis, to be critical for improvement in economic growth and without which certain projects and work could not be undertaken, as well as high level skills that will enhance the skills pool in the economy which in turn will encourage and potentially accelerate growth in the economy” (DHA, personal communication, 26 November 2019). ¹
Emigration	From the perspective of the country of departure, the act of moving from one’s country of nationality or usual residence to another country, so that the country of destination effectively becomes one’s new country of usual residence (International Organisation for Migration, 2019, p. 62).
Immigration	From the perspective of the country of arrival, the act of moving to a country other than one’s country of nationality or usual residence, so that the country of destination effectively becomes one’s new country of usual residence (International Organisation for Migration, 2019, p. 101).
Migration	The movement of persons away from their place of usual residence, either across an international border or within a state (International Organisation for Migration, 2019, p. 135).
Occupation	A set of jobs whose main tasks and duties are characterised by a high degree of similarity (skill specialisation). The occupations identified in the Organising Framework for Occupations (OFO) therefore represent categories that could encompass a number of jobs or specialisations: e.g., the occupation “general accountant” would also cover the specialisation “debt manager” (DHET, 2015, p. 6).
Occupations in high demand	Those occupations that show relatively strong employment growth, are expected to be in demand in the future, are experiencing shortages in the labour market, and are required for key public and private planned economic growth interventions.
Priority occupations	Occupations that are key for economic growth and societal development.
Skill	The ability to carry out the tasks and duties of a given job. Two dimensions of skill are used to arrange occupations into groups. These are skill level and skill specialisation (DHET, 2015, p. 6).

¹ Critical skills are defined in this way to align with the Department of Home Affairs’s specific usage. This usage may differ from how the term is applied in other contexts.

PART 1

Introduction



1.1 Rationale

The identification of skills needs is an important task for skills planning. Moreover, understanding occupational dynamics and labour market requirements is vital for meeting the goals of the National Development Plan, the New Growth Path, and the Industrial Policy Action Plan. The Department of Higher Education and Training (DHET) has a crucial role to play both in identifying the key occupations that will support these policy initiatives and in improving the responsiveness of the post-school education and training system (PSET) in relation to the skills needs of the economy.

As part of its five-year Labour Market Intelligence (LMI) research programme, the DHET has commissioned research to inform the publication of the National List of Occupations in High Demand (“list of OIHD”), the List of Priority Occupations (“LPO”), and, on behalf of the Department of Home Affairs (DHA), the Critical Skills List (“CSL”). Each of these lists of occupations will be published every two years.

1.2 Context

To date, the list of OIHD has been published three times, with the most recent version gazetted in 2018. The list is compiled with the primary purpose of improving the responsiveness of the PSET system in relation to the needs and broader developmental objectives of the country. It is intended to support enrolment planning, the prioritisation of resources, qualification development, and career guidance within the PSET system. Employers (public and private), employer organisations, professional bodies, trade unions, and research organisations are also encouraged to use the list as a resource in the provision of education and training programmes.

The LPO will be published for the first time in 2020. The concept of priority occupations is relatively new and forms part of the DHET’s intention to formulate a Priority Skills Plan. Priority occupations are distinct from occupations in high demand in that they reflect a few focused priority occupations that are needed for economic growth in identified priority sectors and that are being targeted through specific government interventions. Thus, while there is overlap between priority and high-demand occupations, the subset of priority occupations is expected to be more reflective of current and planned industry and public sector investments.

The CSL for the DHA is another new feature of the labour market intelligence landscape in South Africa. The DHA defines critical skills as those skills that contribute to growth, or whose absence would limit growth. While the DHA has, in the past, made use of critical skills lists in prioritising work visas and work permits, it is now moving towards a points-based immigration system. In order to attract skilled migrants for occupations that require a high level of skills, however, the DHA still intends to supplement its points-based system with the CSL. The task of the DHET, in terms of the MOA between the Director General of the DHET and the Director General of the DHA, is to prepare a research report on critical skills, including a list of critical skills. This project therefore provides a research report as well as the 2020 CSL, for submission to the DHA. As with the LPO, there is some overlap between the CSL and the list of OIHD, with the occupations on the CSL ultimately forming a subset of the broader list of OIHD.

1.3 Purpose

The aim of this paper is to outline the conceptual framework² underpinning each of the three lists of occupations. Particular attention will be paid to how the relevant definitions both overlap and differ from one another. The target audience for this paper is policymakers and planners at the DHET who have been tasked with compiling these lists and ensuring that they feed into policy and planning processes.

The concepts described in this paper have been informed, in large part, by the following:

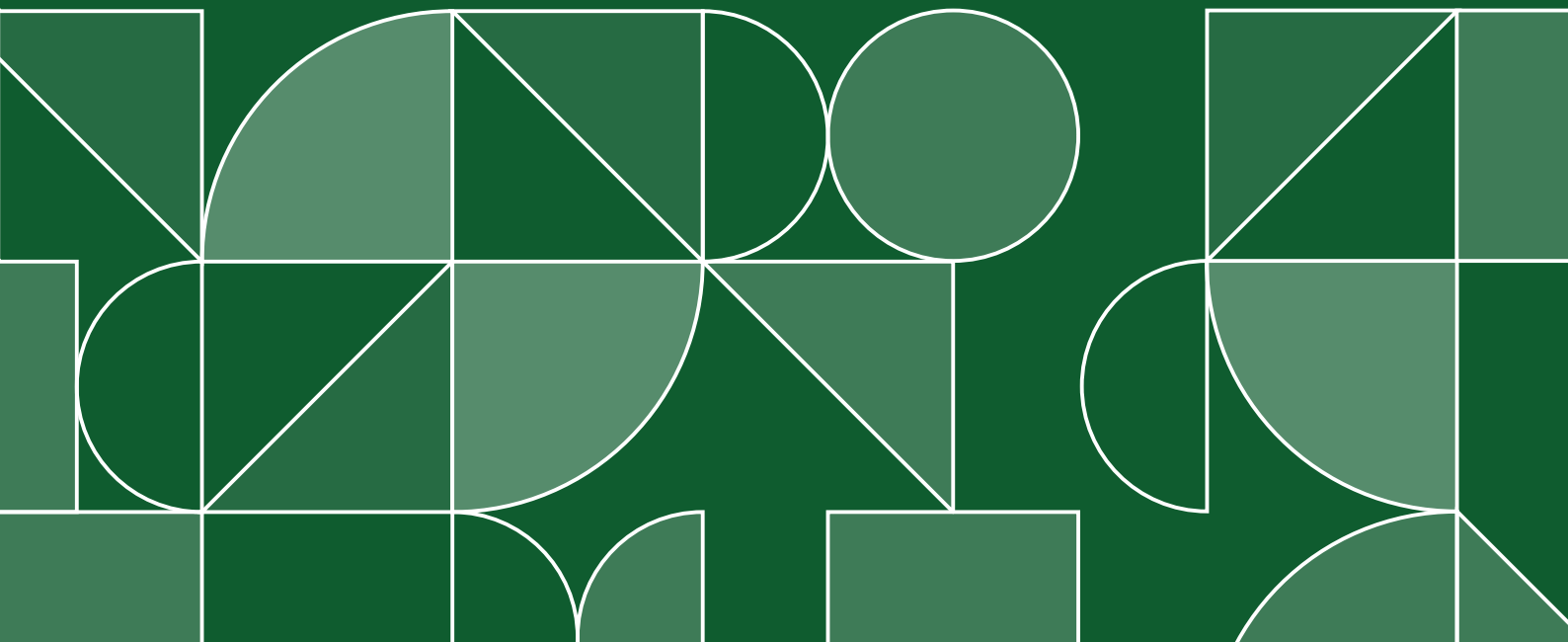
- A workshop hosted by the DHET and the University of Cape Town's Development Policy Research Unit on 3–4 June 2019 in Pretoria.
- A series of meetings between the research team and the DHET.
- A formal review of the 2018 list of OIHD's methodology, conducted by DNA Economics (DNA Economics, 2020).
- Engagement with the following external stakeholders:
 - The Department of Trade and Industry (DTI), driven by Steven Hanival.
 - The Human Resource Development Council of South Africa's Skills Task Team, chaired by Carmel Marock.
 - Business Process Enabling South Africa and the Jobs Summit Secretariat, in the form of a brainstorming meeting.
- A review of updated methodology reports published by the UK's Migration Advisory Committee (MAC) and Australia's National Institute of Labour Studies (NILS).
- Consultations with the DTI and the DHA.
- A review of recent South African and international literature and documents.

The next section of this paper provides a definition of and conceptual framework for occupations in high demand. Section 3 introduces the concept of priority occupations and describes the key conceptual components of this category of occupations. Section 4 then outlines the rationale for the CSL and the definition of occupations used in this list. Finally, Section 5 discusses the overlaps and differences between the definitions of these three groups of occupations.

² A detailed methodology report, identifying how each of the occupational lists will be compiled and operationalised, will follow.

PART 2

The 2020 List of Occupations in High Demand



2.1 Background

Following on from earlier reports on the South African list of OIHD (see Reddy et al., 2017), occupations in high demand in the 2020 list are defined as those occupations that show relatively strong employment growth, are experiencing shortages in the labour market, are expected to be in demand in the future, and are important for public and private sector strategic interventions.

In operationalising this definition, past reports have identified occupations as being in high demand if they:

- Have shown relatively strong employment growth over the past eight years (2010–2017);
- Are currently showing relatively strong employment growth;
- Are expected to show relatively strong employment growth in the future;
- Are experiencing shortages in the labour market; or
- Are new and are expected to emerge in the near future as a result of innovation, technological advancements, the development of new industries, or government’s strategic priorities.

2.2 Key research question

Which occupations in the South African labour market demonstrate evidence of high levels of demand?

2.3 Purpose of the list

The purpose of the list of OIHD is to inform planning within PSET institutions and to inform career guidance for learners and work seekers.

2.4 Dimensions of the list

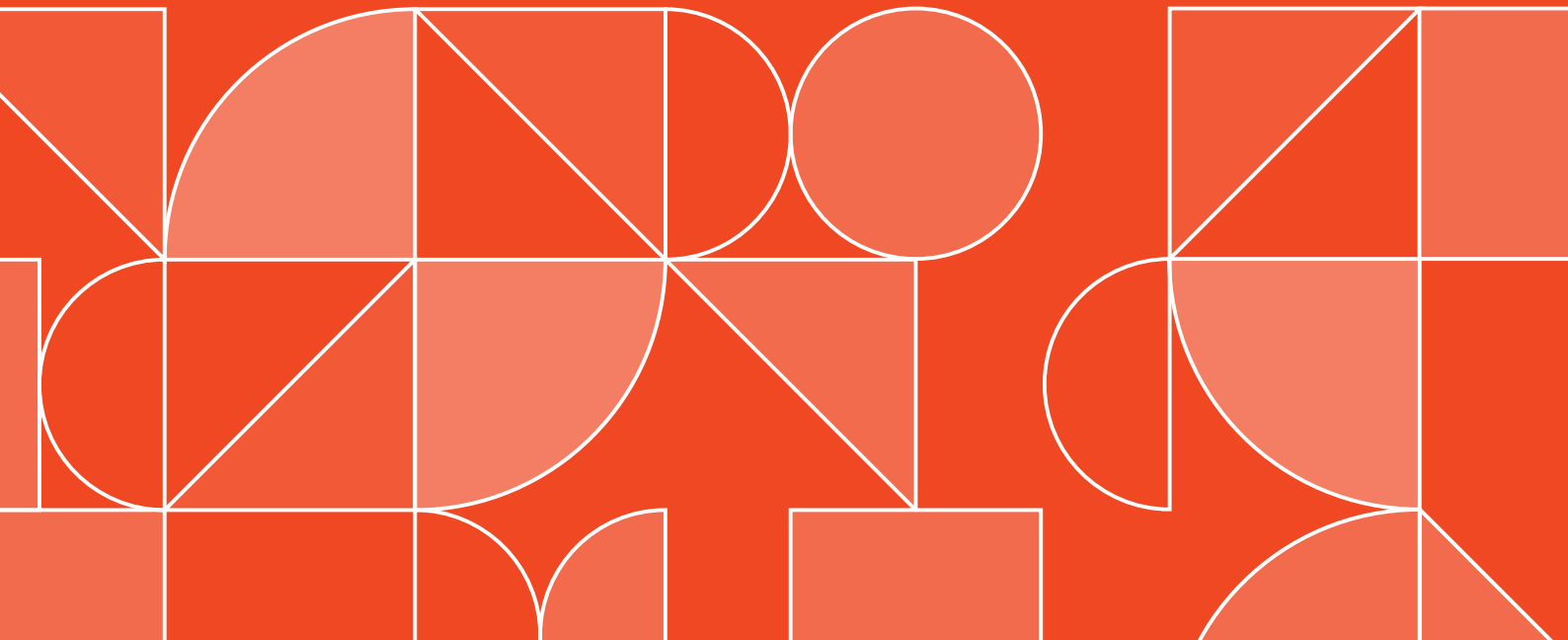
In line with the 2018 list of OIHD (Reddy et al., 2017) and recent methodological innovations (MAC, 2010, 2019; OECD, 2017), as well as the broader international and South African literature (Shah and Burke, 2003; Kraak, 2005; Daniels, 2007; Powell, Paterson, and Reddy, 2014; Reddy and Powell, 2015; Campbell, 2016; Reddy et al., 2016), occupations in the 2020 list of OIHD can, again, be conceptualised along four dimensions:

- **Wage pressure.** Upwards wage pressure over time is one characteristic of occupations that are in high demand (and where demand is currently likely, or likely in the future, to outstrip supply). One possible outcome of rising demand or a mismatch between demand and supply is that employers may raise wages for a particular occupation in order to address the relative gap in supply. This dimension is related to the basic principles of supply and demand and therefore serves as a signal that demand is increasing relative to supply. In pure labour market terms, then, upwards wage pressure is conceptually linked with rising demand (relative to supply). **Mechanism: supply + demand.**
- **Vacancy pressure.** Vacancy pressure is also a component of labour market shortages. Conceptually, if occupations are hard to fill over an extended period of time or if the number of vacancies for an occupation increases at a relatively high rate, then this is a signal that demand is greater than supply. Therefore, while shortages are distinct from demand (i.e., shortages could be triggered by the supply side alone), a conceptualisation of occupations in high demand should include a dimension that considers the balance between demand and supply explicitly. **Mechanism: supply + demand.**
- **Employment pressure.** Employment growth is a crude, but potentially useful, signal of increasing demand. Measured in either relative or absolute terms, employment pressure adds a “pure” signal of demand to the conceptualisation of occupational demand, since it shows that a particular occupation is growing faster than the average or typical occupation. As a component of demand, employment pressure does not signal whether demand is being matched by supply, but it does provide a conceptually appealing aspect of occupational growth for the definition and measurement of occupational demand. In other words, it is difficult (but not impossible) to conceptualise occupational demand without at least some indicator of occupational growth. (For a detailed overview, see MAC, 2019.) **Mechanism: demand.**
- **Strategic pressure.** The fourth conceptual dimension is strategic pressure. Government and private industry priorities and strategic plans can be conceptualised as indicators of future demand. Even if they do not materialise (e.g., public infrastructure projects), there is increasing acknowledgement that private sector and governmental priorities and strategic plans should be conceptualised as a key component of occupational demand (see NILS, 2013). **Mechanism: demand.**

The list of OIHD is, therefore, a broad list of occupations that are experiencing high or growing demand, that are potentially experiencing shortages (i.e., demand is greater than supply), and that hold current and future strategic importance to government or the private sector (or both). Such a list is necessarily long and comprehensive, since the default position is to err on the side of inclusion. In other words, there are not necessarily any limits placed on the length of the list of OIHD, and the final six-digit OFO list is determined by a data-driven approach. The emphasis on the different dimensions of the list is derived from both an equal weighting approach and a data-driven methodology. Conceptually, this means that the list of OIHD is shaped, in large part, by the labour market signals that are accessible to the research team and that are measurable. This approach is bolstered by a qualitative validation process that confirms the identified occupations through other mechanisms, such as secondary research and stakeholder consultations.

PART 3

The List of Priority Occupations



3.1 Background

The South African government's Medium-Term Strategic Framework tasks the DHET with developing a Priority Skills Plan, as a means of ensuring that the unavailability of appropriate and priority skills is not a constraint on economic growth. During his 2018 State of the Nation Address, President Cyril Ramaphosa outlined his plans for both a jobs summit and an investment summit, which he framed as measures to set the country on a new growth path marked by higher levels of employment and transformation. The 2018 Jobs Summit and the 2018 Investment Summit both looked at what South Africa as a country needs to do to ensure that its economy grows and becomes more productive, that companies invest on a far greater scale, that workers are better equipped, and that its economic infrastructure is expanded. The Jobs Summit as well as the Investment Summit hinged on a reimagined industrial strategy as the central vehicle for diversifying the economy, developing and investing in targeted sectors, and creating jobs by targeting labour-intensive sectors and small business and co-operative development. Priority economic sectors were identified as the basis for this reimagined industrial policy framework.

The LPO that the DHET will produce as part of its major LMI research programme will respond to the skills needs identified as essential for the growth of these priority economic sectors, as well as for the growth of initiatives such as the Special Economic Zones Programme ("SEZ programme") and Operation Phakisa. This list of occupations that are a priority for economic growth and societal development in South Africa will be used to prepare the Priority Skills Plan. The Priority Skills Plan aims to be highly directed and focused: targeted funding, focused and collective effort, strong co-ordination, and tight monitoring will help ensure the adequate supply of priority occupations. Thus, the LPO is designed to guarantee that the education system responds to the skills needs identified for the growth of key priority sectors.

3.2 Definition and purpose of the list

The LPO consists of occupations that are key to ensuring the successful implementation of the government's economic/industrial strategy. The DHET will produce the LPO with the goal of responding to the skills needs identified for the growth of the priority economic sectors, the SEZ programme, and Operation Phakisa projects.

The purpose of the LPO is to inform the development of the Priority Skills Plan, enable the growth of priority sectors in the economy, and boost job creation by ensuring that South Africans – particularly young South Africans – have the skills that they need to be absorbed into high-potential growth sectors.

3.3 Rationale

It is imperative to ensure, first, that South Africa has the skills that are required for economic growth and, second, that skills (or the lack thereof) are not a constraint to the economic and societal development of the country in the short to medium term. The LPO will serve as a lever to unblock structural or other bottlenecks within the PSET arena that are limiting human capital development, where applicable. It will supply adequate skills to identified growth sectors as a way to enable their expansion, and it will make sure that the South African education and training system is responsive to the needs of the economy and society.

3.4 Key research question

What are the priority occupations needed to ensure the successful development of the government's priority economic sectors and special projects (including SEZ and Operation Phakisa projects) and to promote economic growth and societal development?

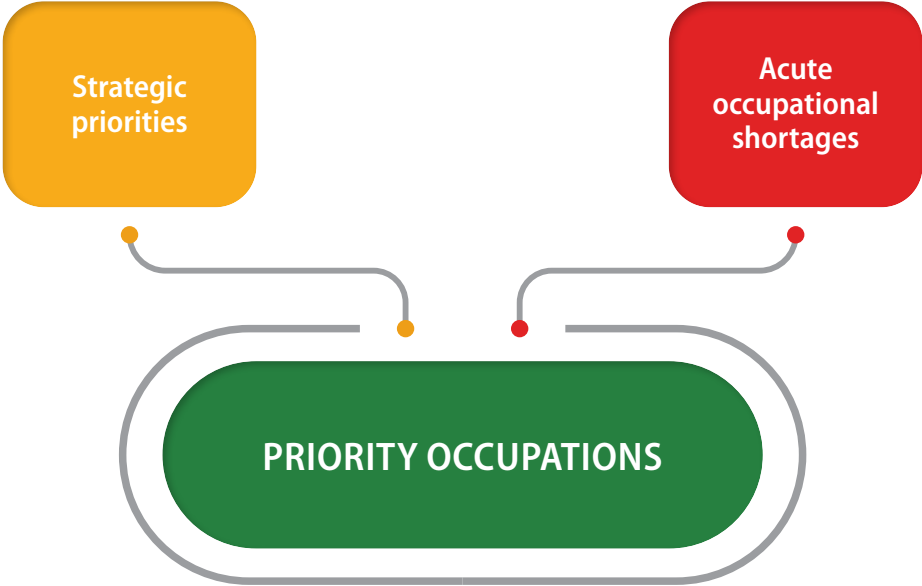
3.5 Dimensions of the list

This section describes the approach that will be adopted to identify priority occupations. Priority occupations will include current, intermediate, and future occupational needs. They will span all levels of South Africa's National Qualifications Framework (NQF). The LPO needs to be relatively short, not exceeding 25 occupations, since targeted and focused interventions will be developed in response to the identified priorities. Consequently, the occupations on the LPO should be identifiable through the following two dimensions (see also Figure 1 below):

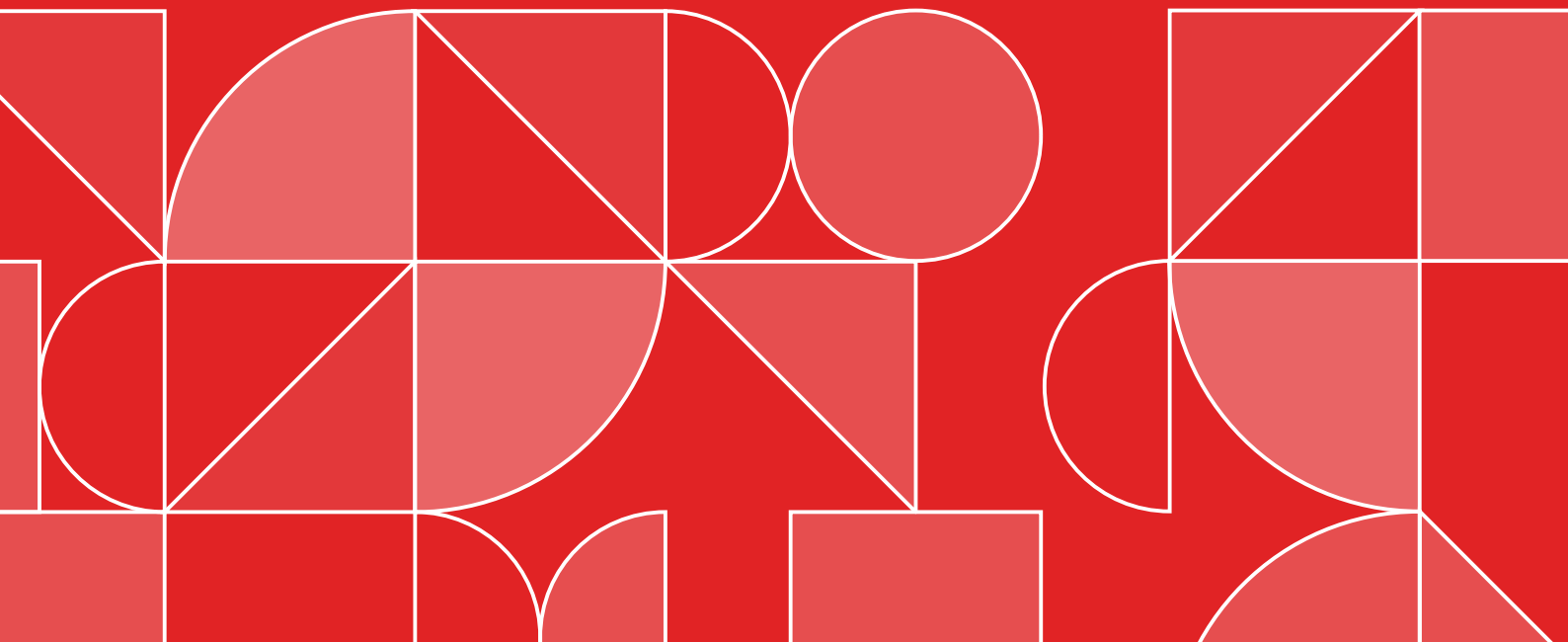
1. **Acute shortages.** First and foremost, occupations on the LPO are only those for which there is strong evidence of occupational shortage in the South African labour market. This might include long-term shortages, hard-to-fill vacancies, or large increases in the number of vacancies over time relative to the number of suitable job applicants per vacancy. These occupations must be associated with the government's priority economic sectors.
2. **Strategic priorities linked to public and private growth initiatives.** In addition to being associated with occupational shortage, occupations on the LPO must be identified as strategic priorities for public and private sector investments. These would include, to the extent that they have been identified, occupations that are crucial for the priority economic sectors, the SEZ programme, and Operation Phakisa projects. The Sector Education and Training Authorities' (SETAs') Pivotal Skills Lists will be used as data sources.

The LPO will include occupations with both a short lead time and a long lead time. Those with a short lead time are those for which the existing PSET system has capacity to address current and future demand and/or the current shortages. Those with a long lead time are those for which the PSET system is not currently capable of meeting demand or addressing existing shortages. In this way, the LPO can be a longer-term vehicle for addressing occupational shortages, including those that immigration attempts to mitigate in the short-term through the CSL.

FIGURE 1: Stylised conceptual outline of priority occupations



The Critical Skills List



4.1 Background

The Minister of Home Affairs is required, in terms of Sections 19(4) and 27(a)(ii) of the Immigration Act (No. 13 of 2002), to determine the skills or qualifications deemed to be critical for the Republic of South Africa, in relation to an application for a critical skills visa or a permanent residence permit. Additionally, the 2017 White Paper on International Migration stipulates that the DHA should publish a list of critical skills from time to time after consultation with the Department of Employment and Labour (DEL), the DTI, and the DHET. The DHA gazetted its last critical skills list in 2014. In April 2019, the DHA approached the DHET for assistance with the development of the 2020 CSL. This request was undertaken in the context of the LMI research programme that the DHET has initiated, since there is a strong association between labour market research and the identification of critical skills. The government is conscious of the need for the CSL to be credible, authentic, and scientific in terms of its methodology and approach – hence its emphasis on an evidence-driven approach to the development of the list.

As per the MOA between the Director General of the DHET and the Director General of the DHA, the DHET will produce a research report that will include the methodology and the evidence-based CSL. The DHET will collaborate with the DHA in the planning and organisation of all stakeholder engagements pertaining to the report. The DHA will gazette the CSL, as required by legislation. Thus, the gazetting of the CSL is the responsibility of the Minister of Home Affairs.

4.2 Definition and purpose of the list

The CSL for the DHA is a key feature of the labour market intelligence landscape in South Africa. The DHA defines critical skills as

skills that are regarded, through labour market availability and analysis, to be critical for improvement in economic growth and without which certain projects and work could not be undertaken, as well as high level skills that will enhance the skills pool in the economy which in turn will encourage and potentially accelerate growth in the economy. (DHA, personal communication, 26 November 2019)

In essence, critical skills refer to occupations with vacancies that are hard to fill (occupational shortages), occupations that are associated with high levels of education/high-level skills, and occupations whose absence would limit economic growth. The purpose of the CSL is to inform the recruitment of critically skilled foreign nationals into the South African labour market.

4.3 Rationale

The CSL aims to identify occupations for which it is sensible to recruit through the immigration system (as opposed to capacity being developed through the South African PSET system). In other words, the skills needed for the occupations on this list can be sourced from other countries, with minimal risk of disrupting local labour and training markets (see NILS, 2013). More practically, these are occupations for which employers “cannot adequately make alternative arrangements through using South Africans in the position” in the short term (Taylor, 2014, p. 7).

4.4 Key research question

Which critical occupations are needed for the country’s strategic priorities, are experiencing shortages in the South African labour market, require high-level skills, and require a long lead time to develop or replace?

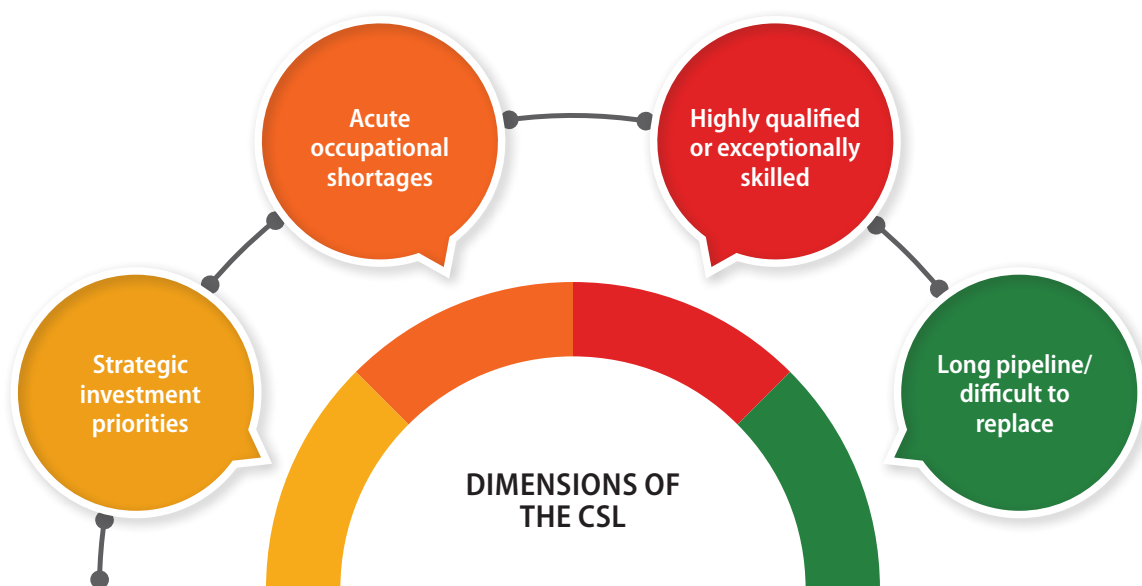
4.5 Dimensions of the list

This section describes the approach that will be adopted to identify critical skills for the DHA for 2020. Given the need to identify occupations for which the recruitment of non-South Africans is the best option, the occupations on the DHA list should be selected through the following dimensions (see also Figure 2 below):

1. **Acute shortages.** Occupations on the CSL, like those on the LPO, are only those for which there is strong evidence of occupational shortage in the South African labour market. This might include long-term shortages, hard-to-fill vacancies, or large increases in the number of vacancies over time relative to the number of suitable job applicants per vacancy.
2. **Strategic priorities linked to public and private growth initiatives.** In addition to being associated with occupational shortage, occupations on the CSL must be identified as strategic priorities for public and private sector investments, much like those on the LPO. These would include, *inter alia*, occupations that are crucial for the priority economic sectors, as well as for the SEZ programme and Operation Phakisa projects.
3. **Highly qualified or exceptionally skilled workers.** Occupations on the CSL are those associated with NQF Level 5 and above and/or those that are likely to require some level of tertiary or post-school education and training. Registered trades, as per Government Gazette No. 35625 of 2012 (Government of South Africa, 2012), that are experiencing shortages and that are linked to growth initiatives should be identified, instead, through their placement on the list of OIHD and through trade test requirements (where applicable).

4. **Long lead time to mitigation and redress.** For occupations on the CSL, a long lead time is required for the development of a supply pipeline. The demand for these occupations could not, therefore, be met in the short-term through the existing PSET system. Relevant occupations might be those whose anticipated training times exceed a certain threshold, or else those for which the median or modal number of years of education is equivalent to more than three years of post-school education and training. Registered trades that are experiencing shortages and linked to growth initiatives are exempt from this requirement.

FIGURE 2: Conceptual outline of the DHA's CSL



It is important to acknowledge here that the DHA has a number of discretionary steps at its disposal that can be used to grant exemptions for work visas (e.g., through applications from employers). The CSL is therefore not intended to be exhaustive, or inclusive of all the skills and occupational competencies that are required in South Africa. Rather, the list is intended to be concise, with a particular focus on those occupations/skills that, if lacking, can have the effect of limiting growth and those that require exceptional skills or advanced qualifications. In short, the DHA does not just consider occupational shortages when identifying the skills that should be recruited through the immigration process.

Exceptional skills are distinct from qualifications to some extent, but it is useful to note that the traditional shortages in the South African labour market are in the fields of accounting, law, medicine, engineering, and finance (BusinessTech, 2014). Notably, occupations in these fields are typically affiliated with long qualification times, professional bodies, and/or formal licensing and registration bodies. As such, these types of occupations should be given particular consideration when “exceptional skills” are measured. The prioritisation of exceptional-skill occupations is important to the DHA’s objective of changing the shape of the South African labour market and importing skills that are generally acknowledged to be crucial to economic growth. To the extent that there is evidence that employers are unable to recruit employees in these occupations from the South African labour pool, they should be included on the short CSL for the DHA.

Conceptualising the links between the three lists



Given the definitions and conceptual frameworks underpinning the three lists being produced under the auspices of the DHET’s LMI research programme, it is expected that there will be substantial overlap between the lists. Figure 3 below illustrates the way in which the three different groups of occupations relate to one another. As the diagram suggests, the list of OIHD is overarching and consists of a large number of occupations, with the exception of elementary occupations (ranked by their scores on a statistical index). Meanwhile, the LPO and the CSL contain smaller groups of occupations and are positioned at the edge of the conceptual boundaries of the definition of occupations in high demand, because they are inputs into the final list of OIHD. In other words, priority occupations and critical skills are subsets of occupations in high demand and also expand the final list of OIHD. However, the three lists also serve different purposes. Table 1 below provides a detailed comparison of the lists on the basis of purpose, dimensions, size, and application.

FIGURE 3: Conceptualising the links between the three lists

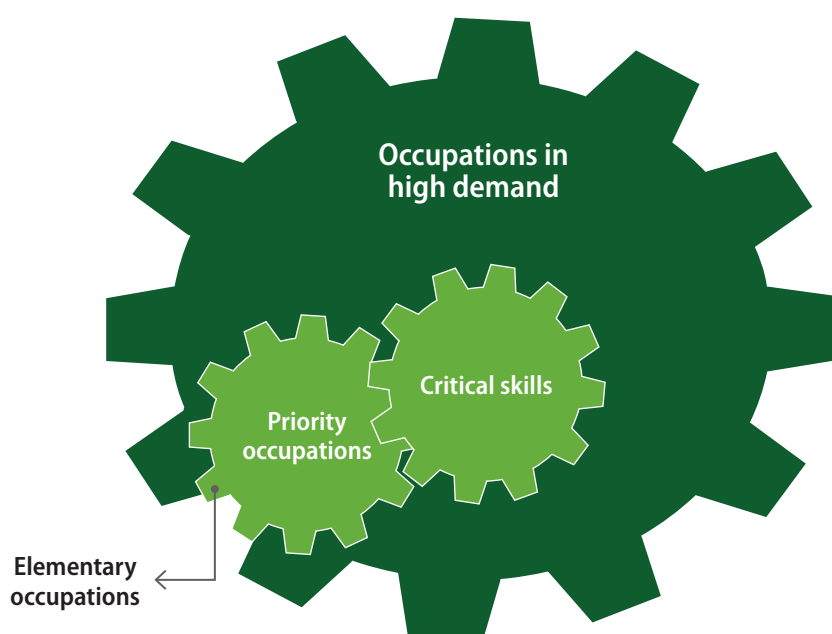


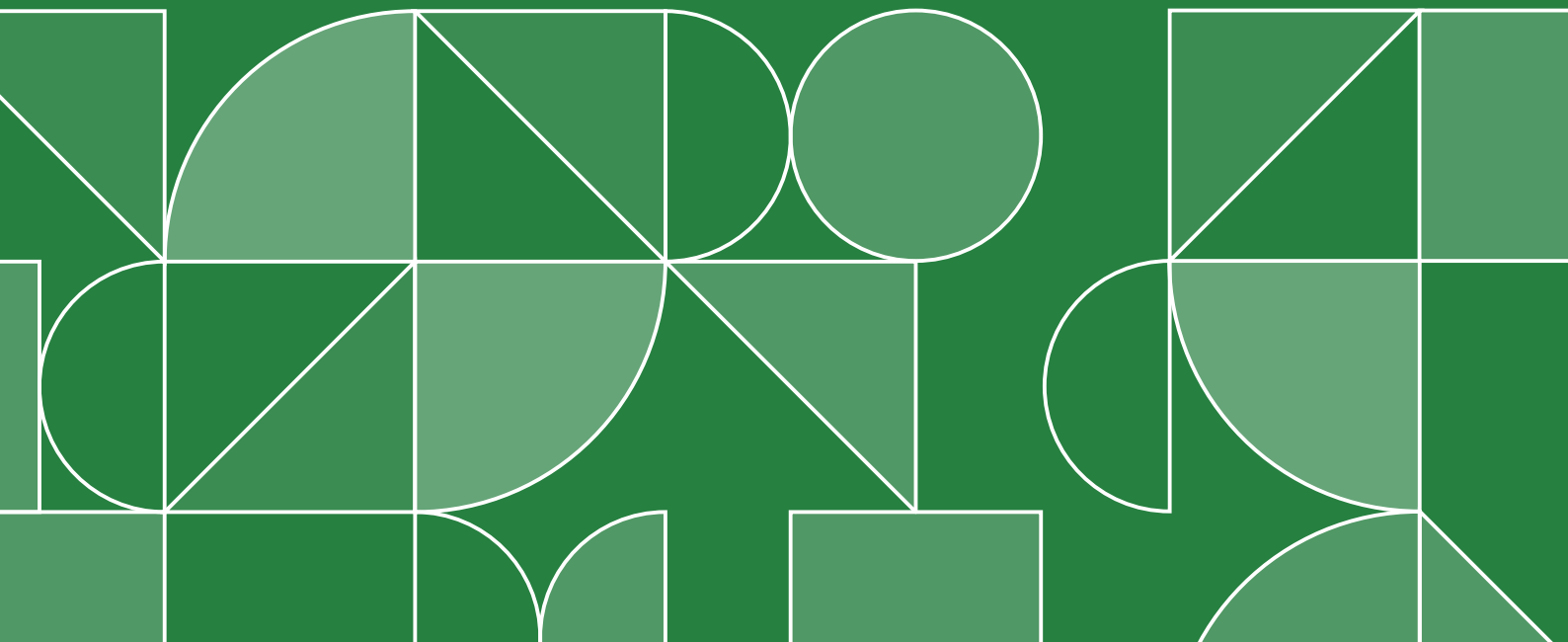
TABLE 1: Summary of the three lists

	LIST OF OIHD	LPO	CSL
DEFINITION	<p>Consists of occupations for which labour market demand is high and growing (excluding elementary occupations). Demand for occupations is measured by:</p> <ul style="list-style-type: none"> • Growth in the number of vacancies and the average duration of vacancies; • Growth in wages; • Growth in the number employed and the average duration of employment; and • The importance of particular occupations for South African strategic priorities. 	<p>Consists of occupations specifically required by the priority and growth sectors identified as part of the re-industrialisation of the South African economy, to enable these sectors’ expansion.</p>	<p>Consists of occupations specifically required in the short term that cannot be produced in time domestically.</p>

	LIST OF OIHD	LPO	CSL
PURPOSE	<p>The list of OIHD is one piece of evidence (among many) that informs planning for the PSET system. The list achieves the following:</p> <ul style="list-style-type: none"> Assists in developing new qualifications for occupations that are shown to be in high demand, while also signalling whether existing qualifications require updating or changing based on the market's demand for labour Acts as a sign-post for enrolment planning (assists in the process of streamlining efficiencies within the PSET system by outlining methods to produce higher-quality graduates and best leverage the PSET system) Informs career guidance for learners and work-seekers 	<p>The LPO is one piece of evidence (among many) that informs the Priority Skills Plan of the national government. This plan is intended to detail the nature, extent, and timing of the interventions required by the PSET system to ensure the supply of labour market participants with the ability to be absorbed into priority occupations (those seen as key for government and its development strategies).</p>	<p>The CSL is the main tool used to inform the recruitment of critically skilled foreign nationals where the South African market is unable to create such skills in the short-term.</p>
DIMENSIONS	<ul style="list-style-type: none"> Wage pressure Vacancy pressure Employment pressure Strategic pressure (public and private) 	<ul style="list-style-type: none"> Acute shortages Strategic priorities linked to public and private growth initiatives 	<ul style="list-style-type: none"> Acute shortages Strategic priorities linked to public and private growth initiatives Highly qualified or exceptionally skilled workers Long lead time to mitigation and redress
POTENTIAL USERS	<ul style="list-style-type: none"> The DHET PSET institutions SETAs NGOs and NPOs engaged in career guidance The National Skills Fund (NSF) The Quality Council for Trades and Occupations (QCTO) Learners, graduates, and work-seekers Social partners representing business, labour, and the community 	<ul style="list-style-type: none"> The DHET The NSF The QCTO SETAs Other government departments at the national, provincial, and local level Social partners representing business, labour, and the community 	<ul style="list-style-type: none"> The DHA The DTI The DEL The DHET Social partners representing business, labour, and the community
TIMEFRAME	<ul style="list-style-type: none"> Medium to long term 	<ul style="list-style-type: none"> Short, medium, and long term 	<ul style="list-style-type: none"> Short term

	LIST OF OIHD	LPO	CSL
SIZE	The list of OIHD will be comprehensive. It will include all occupations in the CSL and the LPO, with the exception of elementary occupations.	The LPO should not exceed 25 occupations.	The CSL will be restricted to those occupations for which there is evidence that it is sensible to address occupational demand through the country's immigration system.
NOT INTENDED FOR THE FOLLOWING	<ul style="list-style-type: none"> • Not intended to signal shortages (i.e., not a scarce skills list) • Not intended to be used as a critical skills list by the DHA 	<ul style="list-style-type: none"> • Not intended to be the exclusive input for enrolment planning or career advice • Not intended to be used as a critical skills list by the DHA 	<ul style="list-style-type: none"> • Not intended to signify the total skills needs of the country

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