



ANALYSIS of ICT-ENABLED YOUTH EMPLOYMENT in GHANA, KENYA, and SOUTH AFRICA

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ABBREVIATIONS

ACS	Australian Computer Society
B-BBEE	Broad-based Black Economic Empowerment
BPO	Business Process Outsourcing
CSP	Community, Social and Personal Services
DHET	Department of Higher Education and Training
DPRU	Development Policy Research Unit (University of Cape Town)
FET	Further Education Training
FTE	Full-time Equivalent
FETI	Further Education Training Institute
FGD	Focus Group Discussion
HSRC	Human Sciences Research Council
HR	Human Resources
ICT	Information Communication Technology
IYF	International Youth Foundation
KII	Key Informant Interview
NEU	Network Empowering the Unemployed
NSF	National Skills Fund
PPP	Public-Private Partnership
RYS	Rapid Youth Survey
SETA	Sector Education Training Authority
SME	Small to Medium-sized Enterprise

EXECUTIVE SUMMARY

The International Youth Foundation (IYF) is pleased to submit this paper on the ‘Analysis of Growth Sectors for ICT-enabled Youth Employment in South Africa’ to the Rockefeller Foundation, as part of the broader, three-country study to assess promising growth sectors and quality ICT-enabled job opportunities for youth in sub-Saharan Africa. To support this effort, IYF partnered with Khulisa Management Services to carry out primary research in South Africa, aimed at identifying and examining quality ICT-enabled employment opportunities for youth in key growth sectors, the skills required for youth to access these jobs, and training initiatives that are helping to address identified skills gaps.

In carrying out this research, IYF and Khulisa took a dual-client approach to better understand:

- ICT-enabled employment opportunities and skills required for youth to access these positions;
- The characteristics, aspirations, and challenges of vulnerable youth, ages 18-29; and
- Training initiatives and platforms that could be leveraged for a digital jobs initiative in South Africa

Key findings and recommendations from the study include:

Sectors & occupations: The key economic growth sectors offering ICT-enabled employment opportunities to South African youth include: 1) BPO / call centers; 2) financial services; 3) ICT services; and 4) retail. As the researchers considered a broader view of ‘ICT-enabled employment’ amongst employers, the study led to the identification of a diverse range of associated occupations, including technical ICT positions, call center staff, customer and client service, human resources, and managers. To successfully deliver a digital jobs initiative at scale, stakeholders may therefore want to look both at positions that require basic and advanced ICT skills.

Quality of ICT-enabled employment: Based on IYF’s definition of decent work and the weighted priorities of interviewed youth, the financial service sector appears to offer the highest quality ICT-enabled employment, followed by the ICT services sector, and then retail. The BPO / call center sector appeared to offer lower quality employment, though it is also the easiest sector for youth to access ICT-enabled jobs (followed by retail), requiring less prior work experience and qualifications. The BPO / call center sector may be able to better leverage its accessibility by helping youth employed in the sector to develop transferable skill sets, and to better understand other careers and industries in which those skills are relevant and marketable. In this way, the BPO sector could position itself as key entry-level job experience for longer-term ICT-enabled employment.

Skills gaps and training needs: Key barriers that employers face in hiring youth for ICT-enabled jobs are a lack of basic ICT skills and poor life skills or workforce readiness. Beyond ICT services, only the BPO sector indicated high levels of projected future demand for ICT specialists. Of those specialist ICT positions that exist across all sectors, employers face challenges in recruiting qualified youth.

Training providers and initiatives: There are a range of public, private and civil society training providers in South Africa, which are increasingly collaborating through innovative public-private partnerships (PPPs). These national platforms could be leveraged for a digital jobs initiative, and there is also the opportunity to reach greater scale through collaboration with the public Further Education Training (FET) college system, including through PPPs with civil society and the private sector to strengthen the system. Related, there is a need for further corporate involvement and buy-in to a digital jobs initiative, particularly in less traditionally ICT-specific sectors, such as retail.

1. INTRODUCTION

IYF was commissioned by the Rockefeller Foundation to conduct a comparative analysis of high-growth economic sectors that have potential for providing quality employment opportunities to youth in South Africa, as part of a broader three-country study. In carrying out the study, IYF has placed a particular emphasis on identifying growth sectors and quality ICT-enabled occupations accessible to youth, including vulnerable youth (ages 18-29), as well as identifying the most critical skills gaps, support and pathways that youth need to successfully access these opportunities.

In the South African context, IYF drew on secondary data to identify significant projected ICT-enabled employment demand within the ICT services sector, as well as demand in other non-ICT specific sectors. The study therefore examined related opportunities for youth in the following sectors:

- 1) Business Process Outsourcing (BPO) and domestic-oriented call centers;
- 2) Financial services;
- 3) ICT services; and
- 4) Retail.

Informed by IYF's secondary research into South African growth sectors, Khulisa Management Services carried out the primary research portion of the study, with substantial guidance and support from IYF. Researchers administered key informant interviews (KIIs) with employers and training stakeholders, and facilitated focus group discussions (FGDs) with employed and unemployed youth, complemented by quantitative surveys.

2. METHODOLOGY

2.1 PRIMARY DATA COLLECTION SAMPLE

Researchers conducted primary research in the Greater Johannesburg Metropolitan Region—the economic hub of South Africa (and the continent), given the dominant representation of the four target sectors in this metropolitan region (further explained in Section 3.2).

This study aimed to identify broad trends across the four sectors in terms of ICT-enabled employment quality and skill gaps, complemented by perspectives from individual employers and youth, and verified by secondary data, when available. No single data point, however, should be taken as representative of the sector as a whole; rather, aggregate trends are what this study aimed to identify and highlight.

In carrying out the study, researchers used the following data collection methods and sample sizes:

- Employer Key Informant Interviews (KIIs): 21 interviews
- Training Stakeholder KIIs: 4 interviews
- Focus Group Discussions (FGDs): 5 FGDs with 48 youth participants in total
- Rapid Youth Surveys (RYSs): 48 surveys

For the Employer KIIs, researchers interviewed a total of 21 employers, five each in the BPO / call center, financial services and ICT services sector, and six employers in the retail sector. Researchers administered the Employer KII using an interview guide consisting of 26 quantitative questions and five open-ended questions (See Appendix B—Data Collection Tools), with interviews conducted both in-person and telephonically. Employer KIIs were targeted towards HR Directors, Managing Directors, Talent and Recruitment Executives, and other HR and training staff with sufficient knowledge regarding employment practices, employee benefits and salaries, and future recruitment demand.

Researchers also administered a Training Stakeholder KII using an interview guide consisting of nine open-ended questions; all interviews were conducted in-person. Training initiatives targeted were those operating nationally and training youth for employment in at least one of the four sectors examined in this study.

To understand the needs and views of youth, researchers facilitated five FGDs—one in each target sector and one with unemployed youth—using a discussion guide exploring employment quality, opportunities for advancements, perceived skills gaps, and other topics. In total, 48 youth participated in the FGDs (48 percent young women). Immediately following the FGDs, researchers also administered a RYS to each participant, using a quantitative data collection instrument. All FGDs were facilitated by the same researcher to ensure standardization of delivery and analysis.

In terms of the FGD participant profile, all were below the age of 29, with the 78 percent between the ages of 18 and 24. The researchers targeted youth employed in ICT-enabled jobs, in both entry-level and mid-level positions (though it was generally easier to access to entry-level youth in all sectors). In the BPO / call center and ICT services sectors, all FGD participants were employed in ICT-enabled employment. In the financial services and retail sectors, FGD participants were employed in occupations that employers identified as ICT-enabled (see Section 3.4 for further details), including accountants, training managers, and team leaders.

2.2 CHALLENGES

The key challenge faced in administering the Employer KII was a general unwillingness from employers to participate in the research, compounded by difficulties in identifying the most relevant person to interview, HR staff often requiring senior management approval before participating in the study, and some distrust from smaller enterprises. The researchers overcame these challenges by drawing on their networks of employers with whom they have an existing relationship, and also linking with employers participating in youth training initiatives. In the future, it is recommended to more effectively communicate the aims of the study to participating employers and ensure there is a post-study information dissemination plan. Sufficient time to schedule and secure appointments, including allowing time for rescheduling when necessary, is also recommended.

Researchers also faced challenges in administering the youth FGDs included the general unavailability of employed youth to participate in the study, together with employers' unwillingness to allow employees to disclose company information. It was also difficult to arrange up to ten youth from one business at a time during company hours, or after-hours without providing incentives to youth. In the future, it is recommended to initiate the Employer KIIs first, and inquire during those interviews if the employer can assist with youth FGDs, and also budget for incentives for youth participation (but only provide after first discussing with the employer).

3. COUNTRY CONTEXT

Youth unemployment is a major challenge in South Africa. While the youth population growth rate has slowed, it was rapid during the previous two decades, and the economy was unable to create sufficient jobs for all new labor market entrants. The global economic downturn post-2008 further exacerbated an already challenging situation. Between 2008 and 2012 alone, the expanded youth unemployment rate increased by 5.4 percent per year, rising from 3.9 million unemployed youth to 4.8 million unemployed youth during the four year period (DPRU, 2012). Of the 6.8 million individuals unemployed in South Africa in 2012 (using the expanded definition), 70 percent were youth.

The youth unemployment challenge, while problematic in the short-term, also has long-term employment implications. Three out of five unemployed people under the age of 35 years report never having worked before, in contrast to 17 percent of unemployed people above 35, a difference of 44 percentage points (DPRU, 2012). As the Development Policy Research Unit (DPRU, 2012) notes, “long-term unemployment such as this has important negative consequences for future employability, as workers' skills are eroded through lack of opportunity to exercise them, while technological change may make the existing skills of the long-term unemployed obsolete”. Essentially, unemployment during youth threatens to create a lifetime trajectory of unemployment and underemployment.

Complicating the situation further are the gendered and racial dimensions of youth unemployment in South Africa. The International Labour Organization (2011) found that the percentage of young men aged 15 to 24 who are neither in school nor employed reached 30 percent in 2010, compared to 38 percent for

young women. When employed, women in South Africa earn on average 33 percent less than men. In addition to gender disparities, DPRU (2012) noted key racial disparities, with a 50 percent unemployment rate for black youth aged 15 to 34, compared to a 12 percent unemployment rate amongst white youth.

Despite these challenges, there are clear opportunities to expand youth employment in South Africa. South Africa is a middle-income, emerging market that ranks as the largest economy in sub-Saharan Africa based on GDP (US\$384 billion in 2012), with a significant services sector (constituting 65 percent of the GDP) and manufacturing sector (constituting 32 percent of the GDP). Due to its economic positioning on the continent, South Africa is host to the regional and continental headquarters of a large number of multi-national corporations. In addition, a significant number of South African financial services, retail and manufacturing firms operate across the continent, where they continue to expand their presence and operations. Supporting this economy is a modern infrastructure system, along with well-developed financial, legal, communications, energy and transport sectors.

Public spending, post-apartheid, also has a strong pro-poor orientation, which the government is increasingly leveraging to address the challenge of youth unemployment. Critical policies and institutions in this regard include the Skills Development Act, Broad-Based Black Economic Empowerment (B-BBEE) act, Sector Education Training Authorities (SETAs) and the Youth Employment Accord, all of which aim to support the public and private sectors to better train and place youth into employment. These frameworks are further supported by public funds for youth employment initiatives, such as the National Skills Fund (NSF), Jobs Fund and SETA grants, combined with training initiatives managed by a robust civil society and the public Further Education Training (FET) system.

4. ICT-ENABLED EMPLOYMENT: DEFINITION, SECTORS & OCCUPATIONS

Key findings

- **Sectors:** The key economic sectors offering ICT-enabled employment opportunities for youth in South Africa, based both on overall levels of employment as well as growth projections, include: 1) BPO / call centers; 2) financial services; 3) ICT services; and 4) retail.
- **Geographic distribution:** As with the more generalized geographic distribution of employment opportunities in South Africa, ICT-enabled employment opportunities are most prevalent in the metropolitan areas of Johannesburg, Cape Town and Durban. A digital jobs initiative could therefore aim to reach areas where there is the greatest demand, or conversely could aim to also reach smaller metropolitan areas to expand ICT-enabled job opportunities and training initiatives for youth that may otherwise not have access to such employment or services.
- **Occupational demand:** Using a broad and open definition of 'ICT-enabled employment' during employer interviews revealed a range of demand for positions in different occupational categories, including technical ICT positions, as well as call center staff (across all sectors) and customer & client services. At the mid-level, there was a marked demand across all sectors for managers and team leaders with ICT skills.

4.1 DEFINITION OF ICT-ENABLED EMPLOYMENT

There is no one set definition for ICT-enabled employment, nor is 'ICT-enabled employment' the only term to describe these types of positions. The Rockefeller Foundation, for example, uses the term 'digital jobs' to describe employment "created through the application of ICT to a new or existing activity or process, [which] generally include performing information-based tasks that build the individual's capacity for future work" (Harji, et al, 2012). Further, the Rockefeller Foundation notes that "a digital job can be distinguished from other jobs such as manufacturing because the core product produced by a digital jobs worker is information or knowledge, as opposed to physical objects or services."

A 2002 study by Access Market International used the term 'ICT-users' when analyzing trends and skill gaps in South Africa's ICT labor market, with an 'ICT-user' defined as "an employee that uses a computer

as an integral part of their job function.” Using this broader definition, the study found that 28 percent of all employees in the South African formal economy are ICT users (2.1 million ICT users in total), a proportion that has almost certainly increased in the decade that has since followed that study.

The Australian Computer Society (ACS)’s (2012) description of ICT-enabled employment falls somewhere in between the more focused information-oriented digital jobs definition used by Rockefeller, and the very broad definition used by Access Market International. ACS uses the term ‘ICT employment’ to describe employment in five groupings: 1) providers of ICT goods and services; 2) purchasers and users of ICT goods and services, including government and the private sector; 3) trainers, teachers and researchers in ICT; 4) people who provide technical support to ICT, such as electronics specialists; and 5) people working in call centers, publishing and graphic design.

In carrying out this study, IYF opted for a broader understanding of the term, in order to identify ICT-related employment that may offer opportunities at-scale for South African youth. Researchers, however, did not offer a specific definition when conducting Employer KIIs and FGDs, and instead used practical examples from the three aforementioned definitions. The aim, therefore, was to better understand what employers and youth in South Africa consider to be ICT-enabled employment, and to understand where the main growth opportunities are based on their understanding, along with the skills required to access these positions.

4.2 KEY SECTORS FOR ICT-ENABLED EMPLOYMENT

As summarized by the Human Sciences Research Council, et al (2008), when identifying sectors with ICT-enabled employment opportunities and future growth potential, it is possible to use two approaches. The first approach, and the one most widely used, entails examining the ICT sector specifically as the unit of analysis. The second approach is to identify ICT-enabled employment opportunities and economic growth potential across the entire economy, as workers that use ICT skills regularly are employed not only in the ICT sector, but across all sectors. Instead of emphasizing the sector as the unit of analysis, this second approach uses occupational categories as the unit of analysis.

Given that this study aims to identify the most promising ICT-enabled employment opportunities for youth in South Africa, including those that can offer opportunities at-scale, research was not limited to just the ICT sector. Conducting primary research across all economic sectors, however, was not feasible, nor necessary to identify key growth opportunities and trends. This study instead uses a blend of the two aforementioned approaches, by first drawing on secondary research to identify those sectors in the South African economy that offer the greatest number of ICT-enabled employment opportunities and growth rates, and by then conducting more detailed primary research of ICT-enabled employment opportunities for youth within the selected sectors.

To first identify target sectors for analysis, it is necessary to first understand the composition of youth employment in South Africa and growth trends in these sectors. Unique to most other sub-Saharan African countries, the formal sector in South Africa accounts for the vast majority of youth employment. As indicated by the University of Cape Town’s Development Policy Research Unit (2012), nearly three-quarters of both youth and non-youth are employed in the formal sector. As shown in Figure 3.1, wholesale and retail, community, social and personal services (CSP)¹ and financial services—together which are broadly termed the service sector—account for 58 percent of youth employment in the formal sector. ‘Other’ industries, estimated to account for 29 percent of formal sector youth employment, are also primarily located in the services sector, given that the manufacturing sector and the primary sector (agriculture, fishing and mining) only account for 15 percent of formal sector youth employment combined.

¹ The CSP services sector is diverse and includes: public administration; health and social care services; waste collection and treatment; services of membership organizations; recreational services; and domestic services.

Figure 3.1: Proportional representation of employed youth in South Africa's economy
(developed by IYF with information from DPRU, 2012)



In terms of growth trends, youth employment in the manufacturing sector contracted by an average of 5 percent per annum between 2008 and 2012, nearly double the rate of contraction compared to adult employment in the sector, likely due both to the economic downturn that resulted in retrenchment of less skilled employees, combined with technological shifts in the sector that are leading to a greater preference for more skilled staff. During the same period, employment growth in the services sector was a net positive for both youth and adults.

It is clear then that the service sector offers the highest absolute numbers of employment opportunities for youth in South Africa, and is also growing faster than the manufacturing sector (which has contracted significantly since 2008). The primary sector, while important in rural areas, offers much smaller levels of overall employment opportunities for youth.

Within the service sector, this study specifically examined ICT-enabled job opportunities for youth within the BPO / call center, financial services, ICT services and retail sectors. The reasoning for the selection of these four industries is as follows:

- **BPO / call centers:** In South Africa, the BPO / call center industry continues to grow rapidly, having increased from 185 centers in 1997, to 653 in 2004, to an estimated 1,500 centers in 2010 (Pandy and Rogerson, 2012). It is important to note that in South Africa, two-thirds of call center operations are for inbound customer services, which generally serve the domestic market and are often located within retail, financial services, hospitality, telecommunications and health sector firms (C3 Africa Research, 2008).

The South African government, however, is intent on expanding BPOs serving international markets, with “much of South African government policy towards promoting the call center industry based, either implicitly or explicitly, on trying to replication India’s success in attracting large internationally-oriented call centers” (Benner, et al, 2007). Related, Frost & Sullivan (2012) predict rapid employment increases in South Africa, with a projected full-time equivalent (FTE) increase from 10,000 in 2010 to 40,000 FTEs in 2015, primarily through BPO operators establishing new or additional presence in the country. ICT-enabled employment opportunities for youth within the BPO / call center industry are well-documented globally, and the South African government has “explicitly built a BPO sector with the intent of having a social impact and employing youth,” including through “significant investment in training of high school graduates in low employment areas [for BPO employment]” (Rockefeller Foundation, 2011). The BPO sector has therefore been developed with an explicit aim to offer ICT-enabled employment opportunities to vulnerable youth.

- **ICT services:** South Africa is the 20th largest consumer of IT products and services in the world, and is recognized for its leadership in the field of electronic banking services (MICT SETA, 2013). There

are several multinational IT firms operating subsidiaries in South Africa, including Dell, IBM, Intel, Microsoft, Novell, Samsung and Unisys.

Within South Africa, the ICT sector is defined as comprising the following five subsectors: advertising; electronics manufacturing; electronic media and film; telecommunications; and ICT services. This study's focus specifically on the ICT services subsector is due largely to its dominance within the broader ICT sector, employing 53 percent of all individuals within the industry (MICT SETA, 2013). The ICT services subsector, which is characterized by a large number of small enterprises, is also projected to produce the most new employment within the broader ICT sector. Overall employment grew by 5.1 percent per annum between 2008 and 2012, second only to advertising, which only employs 12 percent of the broader sector's employees (MICT SETA, 2013). HSRC, et al (2008) also noted that between 1996 and 2005, the ICT services grew the fastest when compared to telecommunications and electronics manufacturing, averaging 3.4 percent per annum, while the other two sectors contracted.

- **Financial services & retail sectors:** Borat (2012) notes that aggregate employment growth in post-apartheid South Africa has been driven by the financial services and retail sectors, accounting for close to 2.3 million of the 3.4 million new jobs created in South Africa between 1995 and 2009. As noted in Figure 3.1 above, the retail sector and financial services sector are the first and third largest employers of youth in the country, respectively.

In terms of ICT-enabled employment opportunities in these two sectors, a 2002 study by Access Market International found that the financial services and retail sectors have the highest percentage of employees that use a computer as an integral part of their daily job, at 51 percent and 46 percent, respectively. By 2004, nearly 75 percent of employees in the Computer Professional occupational category, and 70 percent of employees in the Computer Associate Professional occupational category were employed in the financial services sector (HSRC, et al, 2008). Given the overall importance of these financial services and retail in the South African economy and in employing youth, combined with their high levels of ICT-enabled employees, IYF deemed it crucial to include these two sectors in this study.

4.3 GEOGRAPHIC LOCATION FOR ICT-ENABLED EMPLOYMENT

When examining the geographic distribution of ICT professionals in South Africa's labor market, one study (HSRC, et al, 2008) found that nine out of every ten computer professionals are located in one of three provinces: Gauteng (55 percent); Western Cape (23 percent) and KwaZulu-Natal (11 percent). These three provinces also contain South Africa's three largest cities: Johannesburg, Cape Town and Durban, respectively. These patterns are also maintained when examining sectoral distributions of workers. The Everest Group (2012) notes, for example, that BPO employees are found primarily in Western Cape, Gauteng and KwaZulu-Natal provinces, illustrating the dominance of these three provinces (and three aforementioned cities) in the South African economy and labor market.

4.4 ICT-ENABLED OCCUPATIONS (EMPLOYER-IDENTIFIED)

During the study, researchers interviewed key HR stakeholders across the four target sectors, and inquired which ICT-enabled positions they envision as having the highest recruitment demand over the next several years. The question was open-ended, and did not provide a specific definition for ICT-enabled employment, thereby allowing employers to suggest positions they deemed relevant across a range of occupational categories.

Key trends from employers' responses at the entry-level (Table 3.1) included:

- **BPO / call centers & ICT services** Employers in the BPO / call center and ICT services industries identified a range of entry-level ICT technical positions as having high levels of projected demand. These results are made somewhat inclusive, however, by the findings discussed later in Table 5.1, in which employers in the BPO sector do not indicate a large demand, in general, for technical ICT skills at the entry-level. This discrepancy is likely due to the job forecasting that is associated with

information in Table 3.1 below, while responses in Table 5.1 were primarily focused on current skills gaps. Respondents from all four sectors also identified high demand for call center staff, demonstrating both the cross-sectoral nature of the call center industry in South Africa, as well as its continued rapid growth. Few employers identified data management occupations.

- **Financial services & retail:** Reflecting the more customer and client-oriented nature of these two sectors, employers identified a high number of human resources and administrative positions, as well as customer / client service positions as ICT-enabled occupations with projected high demand.

Table 3.1: Entry-level ICT-enabled positions most in-demand (employer-identified)

Occupation Type	BPO / Call Centers	Financial Services	ICT Services	Retail
Data management	-	<ul style="list-style-type: none"> • Data analysts 	-	<ul style="list-style-type: none"> • Data capture • Merchandise control
ICT Technical Specialists	<ul style="list-style-type: none"> • Desktop engineers • IT setup • Desktop support • IT hardware support • System developers • Business analysts 	<ul style="list-style-type: none"> • IT systems • Software developers 	<ul style="list-style-type: none"> • Technician • Desktop engineer • Entry-level engineer • Technical specialist • IMB software • Network technician • CCT technician • Software developer 	-
Human Resources & Administration	-	<ul style="list-style-type: none"> • Trainee Chartered Accountants • Personal assistants 	-	<ul style="list-style-type: none"> • HR staff • Administrative staff • Finance clerks
Customer / Client Services & Marketing	<ul style="list-style-type: none"> • Call center staff 	<ul style="list-style-type: none"> • Call center staff • Field agents • Retail finance staff 	<ul style="list-style-type: none"> • Help desk 	<ul style="list-style-type: none"> • Customer care • Communication • Service desk • Marketing assistant • Buyer's assistant
Other	<ul style="list-style-type: none"> • All positions requiring telephones 	<ul style="list-style-type: none"> • Graduate entry positions 	-	<ul style="list-style-type: none"> • Graduate trainee

When considering ICT-enabled employment opportunities for youth, it is important to also look at mid-level positions, in order to determine opportunities for career advancement. Employment opportunities requiring intermediate skill levels are also increasingly prevalent in the South African labor market, following a gradual but market shift toward skilled employment and are therefore important to consider when designing youth employment initiatives (Bhorat and Oosthuizen, 2007).

At the mid-level, employers in this study identified the following ICT-enabled positions across a range of occupation types (Table 3.2 below). Key trends included:

- **Cross-cutting:** With the exception of the ICT services sector, there appears to be a lower projected demand of ICT-specialist positions, and no employer reported demand for data managers. Demand is

greater in positions that may not be considered 'ICT-enabled' at first glance, such as Supervisors and Assistant Managers (BPO / call center sector), Team Leaders and Division Managers (financial services sector), and Store Managers and Training Managers (retail sector). This marked demand at the mid-level suggests that employers deem ICT skills as critical for successful managers.

- **ICT services sector:** This sector continued to show strong differentiated demand for ICT technical specialists at the mid-level.

Table 3.2: Mid-level ICT-enabled positions most in-demand (employer-identified)

Occupation Type	Call Centers	Financial Services	ICT Services	Retail
Data management	-	-	-	-
ICT Technical Specialists	-	-	<ul style="list-style-type: none"> • Server & network specialists • Systems architects • Customer IT engineers • Infrastructure • Applications developer 	<ul style="list-style-type: none"> • Desktop support • Network engineers
Human Resources & Administration	<ul style="list-style-type: none"> • HR staff • Internal Compliance • Operations managers 	<ul style="list-style-type: none"> • Qualified Chartered Accountants 	<ul style="list-style-type: none"> • Receptionists • Personal assistant 	<ul style="list-style-type: none"> • Finance staff • HR staff
Customer / Client Services & Marketing	<ul style="list-style-type: none"> • Call center managers 	<ul style="list-style-type: none"> • Call center • Sales & customer service staff • Senior business managers 	<ul style="list-style-type: none"> • Sales • Referral 	<ul style="list-style-type: none"> • Buyers
Other	<ul style="list-style-type: none"> • Training developers • Area-specific managers • Assistant managers • Supervisors 	<ul style="list-style-type: none"> • Project managers • Team leaders • Division managers 	<ul style="list-style-type: none"> • Strategist • Security manager 	<ul style="list-style-type: none"> • Planners • Section heads • Garment techno-logistics • Business intelligence specialists • Store, area & regional managers • Division managers • Training managers • Assistant managers

5. ICT-ENABLED EMPLOYMENT: QUALITY

Key findings

- **Definition:** While young people's perception of quality employment dimensions did not challenge IYF's definition, many youth placed a greater weighting on salary than other dimensions. If youth had clearly mapped their career path though, opportunities for advancement also became a critical quality employment dimension, often with greater weighting than salary.
- **Highest Ranked Sector:** When compared to the other three sectors, employers in the financial services sector reported offering the highest average level of earnings, benefits and employment stability, while also providing youth good opportunities for advancement, all of which led to high levels of satisfaction amongst youth employed in the industry. As described in Section 5.3, however, the financial services sector also requires the highest levels of previous experience and educational qualifications for employment at the entry-level.
- **Importance of Career Advancement:** Despite the ICT services sector offering relatively lower levels of benefits than the financial services and retail sectors, interviewed youth employed in ICT services reported the highest levels of job satisfaction, which seemed to be linked to a strong degree of confidence in future career opportunities. Perceived opportunities for advancement also led to relatively high levels of satisfaction amongst youth interviewed in the retail sector, despite employers reporting relatively lower entry-level salary and benefits.
- **Opportunities in the BPO / Call Center Sector:** As described in Section 3.2, the BPO / call center sector is creating significant numbers of entry-level ICT-enabled employment in the country, including for vulnerable youth, and there are projected skills shortages at the team leader and management level, indicating that there are opportunities for career advancement within the sector. Relative to the other sectors, however, BPO / call center employers reported providing amongst the lowest level of salaries and benefits for entry-level ICT-enabled employees, and youth employed in the sector reported few perceived opportunities for career advancement.

Youth employment in the BPO sector, therefore, could potentially be better leveraged in two ways: 1) continuing to provide accessible, ICT-enabled employment opportunities for youth, while helping these youth to develop transferable skill sets that will facilitate access to continued ICT-enabled employment in other sectors; and 2) better communicating career opportunities within the expanding BPO sector, and supporting promising youth to access these positions.

5.1 DEFINING QUALITY EMPLOYMENT

Drawing on the International Labor Organization's (ILO) decent work framework, IYF measures quality employment elements using seven key criteria:

- 1) **Adequate earnings and productive work:** Jobs should provide adequate income, and employees should have access to job-related training to support and improve their productivity.
- 2) **Social security:** Adequate coverage of unemployment, health and pension insurance.
- 3) **Stability and security of work:** Employees have access to an employment contract of at least one year.
- 4) **Opportunities for advancement:** Employees have access to professional development opportunities.
- 5) **Decent hours:** Jobs should involve neither excessive nor insufficient hours. Hours are not involuntarily asocial and employees have access to paid maternity leave.
- 6) **Equal opportunity and treatment in employment:** Equal access (particularly in terms of gender) to specific jobs, pay and professional advancement opportunities.
- 7) **Safe work environment:** Safety within the workplace, and position-related safety issues outside of the workplace (e.g., safe travel to work/home for those working night shifts).

Researchers drew on the above criteria when measuring quality employment for ICT-enabled employment in the target sectors. During the FGDs, the researchers also asked youth “what constitutes a good job”. While youth generally voiced key words such as ‘happiness’ and ‘growth,’ the conversation often centered on salary (i.e. adequate earnings), with youth expressing that a good salary is very important to them right now, or a key goal to strive towards. Interestingly, amongst those youth who had clearly mapped their career path, opportunities for advancement often came across as a more important consideration than salary.

Youth also reported the following as important attributes of quality employment, though less frequently than salary and opportunities for advancement:

- Fulfilling a relevant purpose (i.e. productive work);
- Work-life balance (i.e. decent hours);
- Enjoyment of one’s work.

Lastly, youth did not intuitively include ‘stability’ in their definitions of quality employment. When probed, most indicated that job stability is more of a bonus than a necessity, as professional growth allows them to access opportunities with other employers. Taken together, the responses from young people interviewed indicate that the most important quality employment variables are remuneration and opportunities for advancement, followed by serving a purpose, having a work-life balance, and enjoying one’s work.

The responses from youth did not require a revision of IYF’s definition of ‘decent work,’ but the weighting of priorities, particularly salary and opportunities for advancement, are important to note.

5.2 ADEQUATE EARNINGS

As indicated in Table 4.1 below, employers in the financial services sector reported paying highest overall salaries to entry-level staff in ICT-enabled positions, with 40 percent reporting that their staff earn between R12,001 and R16,000, while employers in the BPO / call center and retail sectors reported paying the lowest salaries to entry-level employees (100 percent reporting that their staff earn less than R8,000 per month). Reported entry-level salaries in the ICT sector, however, were also not substantially higher than those in the BPO / call center and retail sectors. The figures from the BPO sector match industry surveys from Western Cape province, in which they found that entry-level BPO agents earned an average of R3,500 – R4,500 per month, while those working in domestically-oriented call centers earned an average of R6,500 per month (BPeSA, 2012).

As expected, all employers pay higher salaries to mid-level employees, though in the retail sector the increase is relatively small, with interviewed employers indicating that 100 percent of mid-level, ICT-enabled employees earn R12,000 or less per month.

Table 4.1: Average monthly salary for ICT-enabled jobs (percentage of employers’ selection)

Average pay (ZAR)	BPO / Call Centers		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
≤4000	20%	-	20%	-	-	-	60%	-
4,001 – 8,000	80%	-	-	-	80%	-	40%	80%
8,001 – 12,000	-	40%	20%	20%	20%	-	-	20%
12,001 – 16,000	-	20%	40%	-	-	40%	-	-
16,001 – 20,000	-	20%	-	-	-	40%	-	-
20,001 – 24,000	-	-	-	40%	-	20%	-	-
>24,000	-	20%	20%	40%	-	-	-	-
Total	100%	100%	100%	100%	100%	100%	100%	100%

As indicated earlier, youth often raised the importance of salaries in FGDs. Current salary levels were less important, however, to those youth who had clearly mapped their career path, indicating that awareness of professional development opportunities, and how to access those opportunities, may reduce anxiety associated with entry-level salary levels. Training initiative stakeholders also offered similar opinions, with one Training Manager stating, “I don’t think a salary of R500 per month is bad as long as there are opportunities for that employee to grow over time rather than remain static.” Training stakeholders therefore place a great emphasis on supporting youth to map their career paths, and related how to be proactive in achieving their professional and personal development goals.

5.3 SOCIAL SECURITY BENEFITS

As shown in Table 4.2 below, employers in the financial services sector reported providing the greatest average level of benefits, both at the entry-level and mid-level. The financial services sector was also the only sector in which at least one employer reported offering every listed benefit to entry-level staff. The ICT services and BPO / call center sectors reported the lowest average level of benefits, at 40 percent and 38 percent, respectively.

The size of ICT service firms (most of which are SMEs) likely reduces the overall level of benefits that they are able to provide to employees, which is particularly evident for health benefits (20 percent reported that they provide for entry-level staff) and pension / provident funds (0 percent provide for entry-level staff).

Interestingly, 60 percent of interviewed ICT service sector employers reported offering tuition reimbursement for entry-level staff, higher than all other sectors, which indicates that the sector may place a particular emphasis on professional development. Only 20 percent of BPO / call center sector respondents reported offering tuition reimbursement to entry-level employees, the lowest rate amongst the four sectors, indicating that the sector may be less supportive in supporting young employees to access professional development opportunities.

Table 4.2: Entry-level Benefits (percentage of employers’ selection)

Q: Do you provide?	BPO / Call centers		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
Paid leave	80%	80%	100%	100%	100%	100%	83%	83%
Health benefits	40%	60%	100%	100%	20%	40%	83%	83%
Pension / provident fund	40%	100%	80%	80%	-	20%	67%	83%
Year-end bonus	-	40%	20%	20%	40%	40%	33%	33%
Performance bonus	40%	60%	80%	80%	100%	100%	50%	50%
Unemployment insurance	80%	80%	80%	100%	40%	40%	50%	33%
Tuition reimbursement	20%	40%	40%	40%	60%	60%	33%	33%
Transport allowance	40%	0%	40%	20%	40%	40%	17%	33%
Meal subsidy	40%	50%	40%	60%	-	-	33%	33%
13th check	-	-	20%	20%	-	-	-	17%
Average %	38%	51%	60%	62%	40%	44%	45%	48%

As a comparison, Table 4.3 below shows the benefits that youth employed in ICT-enabled positions reported that they receive. In each sector, the overall level of benefits that youth reported receiving was lower than the level of benefits that employers reported providing, with particularly stark differences in the BPO/ call center and retail sectors. There is no clear explanation for these differences, but it is possible that the study’s youth sample is not representative of actual employer benefit trends. In addition, many South African employers utilize labor brokers to employ entry-level staff (in which case the labor broker provides benefits rather than the business where the employee works), which may account for

these differences, particularly in the two sectors (BPO / call centers and retail) with the lowest entry-level entrance requirements.

As will be highlighted later in this section though, interviewed youth perceived the BPO / call center and retail sectors to offer the lowest quality of ICT-enabled employment, views that may be reinforced by a perceived or real lack of benefits in these sectors.

Table 4.3: Entry-level Benefits (percentage of employed youth's selection)

Q: Do you receive?	BPO / call center	Financial services	ICT services	Retail
Paid leave	60%	100%	78%	-
Health benefits	10%	22%	33%	-
Pension / provident fund	20%	33%	22%	-
Year-end bonus	30%	-	11%	-
Performance bonus	20%	11%	22%	70%
Unemployment insurance	30%	67%	33%	-
Tuition reimbursement	10%	-	11%	-
Transport allowance	-	89%	22%	-
Meal subsidy	-	78%	78%	-
13th check	10%	-	-	30%
Average %	19%	40%	31%	10%

5.4 STABILITY AND SECURITY OF WORK

As indicated in Table 4.4 below, the financial services sector had the highest percentage of employers (60 percent) reporting that they provide contracts 12 months or longer to entry-level staff working in ICT-enabled positions, followed by the BPO / call centers (40 percent) and ICT services (40 percent). Only 17 percent of retail employers reported providing contracts 12 months or longer to entry-level staff. For mid-level positions in all sectors (except retail), the majority of employers reported providing contracts 12 months or longer in duration. In retail, however, only 17 percent of employers indicated that they provide similar contracts to mid-level staff, indicating that positions in the retail industry may offer less job security than other sectors.

Table 4.4: Average length of contracts per sector and level (percentage of employers' selection)

Length of contract	BPO / Call Center		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
2 – 3 months	20%	-	20%	20%	20%	-	17%	33%
4 – 11 months	20%	20%	-	-	20%	-	17%	-
≥ 12 months	40%	80%	60%	80%	40%	80%	17%	17%
Other	20%	-	20%	-	20%	20%	50%	50%
Total	100%	100%	100%	100%	100%	100%	100%	100%

During discussions with BPO / call center employees, it emerged that many of their contracts were of a specific kind referred to as full-time temporary positions, which means they are hired for a potential full-time basis, though the company may not require them for that total amount of time. BPO / call center employees raised concerns around this contracting arrangement, as it results in an unstable and

unpredictable monthly salary. This contracting mechanism was not mentioned by youth employed in any of the other sectors.

5.5 OPPORTUNITIES FOR ADVANCEMENT

Interviewed youth working in ICT-enabled positions in the financial services, ICT services and retail sectors all felt that there were clear opportunities for growth and development within their sectors, and they showed evidence of having clearly mapped their career paths. There was some disagreement among FGD participants as to whether they had the necessary skills for advancement, but most of the participants felt that they were learning the required skills on the job. As one participant from the ICT services sector noted; "...you know, that you learn literally consistently, constantly learning within the company. What I'm saying is, generally yes I have the skills to grow." In the retail sector, youth reported that they often work longer hours, and receive fewer benefits than youth in other sectors, but that they are certain their efforts will be rewarded through opportunities for advancement.

Youth working in the BPO / call center industry, however, felt that there are limited opportunities for growth within their industry, primarily due to limited mid-level positions. As an example cited, each call center requires a large pool of call center agents, but requires few team leaders. This perception, however, may not necessarily match growth trends in the industry, with Willcocks et al (2012) noting that there is a looming skills shortage for middle management and team leaders in the rapidly expanding BPO sector in South Africa, which matches the projected demand for BPO / call center managers and team leaders that employers identified in Table 3.2. Contracts within the call center industry seem to offer less stability than other sectors, however, which may aid in the perception amongst youth that there are fewer opportunities for advancement. This perception is potentially also compounded by few employers in the sector offering tuition reimbursement benefits.

5.6 DECENT HOURS

Youth employed in financial services, ICT services and retail sectors raised little concern with their work hours. Rather, most participants expect to work longer hours at this stage in their career, in order to further their professional development. As one youth stated, "...it all boils down to what you are willing to do at the end of the day." Some youth employed in call centers, however, reported that they often work extra hours, including over lunch breaks, but are not paid overtime.

While concerns have been raised in other countries about the working hours of call centers to serve markets in other time zones, this does not appear to be a major issue in South Africa, and was not raised by youth during the FGDs. This correlates with C3 Africa Research's 2008 study, in which they found that only 24 percent of surveyed call centers in South Africa operated on a 24-hour / 7-days per week schedule. Such figures may increase, however, as South Africa increasingly attracts multi-national BPO firms and the share of domestically-oriented call centers within the broader industry begins to decrease.

5.7 EQUAL OPPORTUNITY

Researchers asked employers whether they face encounter gender disparities regarding staff recruitment. Only two employers (both in the ICT services sector) felt that there are fewer female applicants. Once hired, four employers (two in the BPO / call center industry, and two in the ICT services sector) remarked on gender disparities, using gender stereotypes to describe female employees as potentially more emotional, and that they also need more time off for pregnancies and childcare issues. Three other employers (one each in the BPO / call center, ICT services and retail sectors) remarked that women are easier to work with and more organized. Interestingly, all employers spoke only about women when discussing issues related to gender; their perception of male staff was not shared.

5.8 SAFE WORK ENVIRONMENT

'Safe working environment' did not emerge as an element of quality employment during FGDs. When asked, youth did not respond to the question with any vested interest. Based on the observed work

environments, most of the youth who participated in the FGDs are based in safe and secure environments where safety is not an issue.

5.9 YOUTH SATISFACTION WITH ICT-ENABLED EMPLOYMENT

As noted in Table 4.5 below, youth employed in ICT services reported the highest levels of content with their current employment (100 percent), followed by youth in financial services (89 percent), likely reflecting the relatively higher salary levels in these two industries, combined with a perception of greater opportunities for advancement.

The BPO / call center industry was the only sector in which youth reported not being content with their current employment, with 50 percent of respondents choosing this option, and an additional 30 percent reporting that they were neither happy nor unhappy. Given this study sample size, these findings are not necessarily representative of the sector as a whole, but are important to link to these same youths' responses on perceived opportunities for advancement, employment stability, and benefit levels, which may indicate the role of these elements in young people's level of employment satisfaction.

Table 4.5: Levels of content with current employment (percentage of employed youth's selection)

Q: Are you happy with your current work?	BPO / call center	Financial services	ICT services	Retail
Yes	20%	89%	100%	60%
Neither happy nor unhappy	30%	11%	-	40%
No	50%	-	-	-
Total	100%	100%	100%	100%

When analyzed by sector, youth's level of content with their current employment roughly matches the proportion of youth searching for a new job (Table 4.6). Youth working in the BPO / call center sector were the most likely to report that they were searching for a new job (60 percent), while only 11 percent of youth employment in the financial services sector and 33 percent of youth employment in the ICT services sector reported that they were searching for new employment. Interestingly, no youth respondents in the retail sector indicated that they are searching for new employment, despite the overall lower levels of salaries and benefits noted earlier, which may relate to their perception of access to opportunities for advancement, as previously noted in Section 4.5.

Table 4.6: Searching for new employment (percentage of employed youth's selection)

Q: Are you currently looking for a job?	BPO / call center	Financial services	ICT services	Retail
Yes	60%	11%	33%	-
No	40%	89%	67%	100%
Total	100%	100%	100%	100%

5.10 UNEMPLOYED YOUTH PERCEPTION OF ICT-ENABLED EMPLOYMENT QUALITY

Most of the unemployed FDG participants indicated that they were interested in those jobs requiring some ICT skills, primarily because of how ICT has infiltrated almost every sector, and because of how it has the potential to make one's work more efficient. Youth appeared most interested in the financial services and ICT services sectors, as they are perceived (rightly) to pay more. Youth showed little interest in the BPO / call center and retail sectors, primarily because of the perception of low pay, long hours, and often long distances needed to travel to work in these industries. The same youth, however, also regard ICT-enabled employment in the financial services and ICT services sectors as more difficult to access, with a higher level of qualifications and experience required. These perceptions indicate that without adequate training, youth may enter into the BPO / call center and retail sectors out of necessity, without understanding of how these entry-level positions could support longer-term career development goals. Helping youth to map their career paths, and locate entry-level positions within their longer-term career

paths, could therefore lead to higher levels of employment satisfaction, particularly when coupled with support from employers to access career advancement opportunities.

6. SKILLS GAPS & TRAINING NEEDS

Key findings

- **Employers' Skills Needs:** Overall, basic ICT skills ranked as the most important technical skill set required for entry-level ICT-enabled employment, along with customer service and sales and marketing skills for BPO / call center, financial services and retail sector employers. Life skills are clearly important for employers in all sectors (and are directly linked to customer service and sales skills). Similarly, employers reported basic ICT and life skills gaps as the key barriers to hiring youth, along with numeracy and literacy gaps.
- **Demand for specialized ICT skills:** Beyond the ICT services sector, employers did not report significant need for specialized ICT skills for entry-level, ICT-enabled employment. The reported need for such skills increased for mid-level positions, though other skill sets still ranked higher. That is not to say that there is no demand for specialized skills, but rather that the scale of demand (when measured by employment numbers) is greater for ICT-enabled occupations that do not require advanced ICT skills. Nonetheless, employers did indicate major challenges recruiting youth for those specialized ICT positions that do exist. Amongst specialized ICT skills demanded by employers, applications development, software development and network administration ranked most highly.
- **Required Employment Experience & Education:** ICT-enabled employment in the BPO / call center and retail sectors appear to be most accessible to youth, with the least amount of previous job experience and education required. This likely explains why reported salary and benefits in these two sectors are lower relative to salaries for entry-level ICT-enabled employment in the financial service and ICT services sector, both of which require more experience and qualifications to access.
- **Training Needs:** The dominant themes amongst employers are that youth need to be better equipped with basic ICT skills, as well as life skills that allow them to be more proactive in taking charge of their careers, including in finding opportunities and relevant training, and taking initiative in the workplace. In fact, during interviews employers emphasized life skills more often than any type of technical skills, when describing training priorities. Training sector stakeholders echoed these sentiments, and also emphasized the importance of numeracy and literacy skills.

Demonstrating the gap between young people's understanding of employer needs, unemployed youth were unable to articulate, in detail, the skills required to access ICT-enabled employment, or how training could help to address any perceived skills gaps. There may be a need, therefore, for improved career guidance services for youth, including of ICT-enabled employment opportunities, the skills and qualifications required to access these opportunities, and of relevant training initiatives.

6.1 TECHNICAL SKILLS REQUIRED FOR ICT-ENABLED EMPLOYMENT

As shown in Table 5.1 below, employers in the BPO / call center, financial services and ICT services sectors selected basic ICT skills at the highest rate, when compared to other skills required for youth to access entry- and mid-level ICT-enabled jobs. Customer service, and sales and marketing skills are also important for employers in the BPO / call center and financial services sectors, and particularly in the retail sector (where employers also selected basic ICT skills at a high rate).

Very few employers in the BPO / call center and retail industry reported that specialized ICT skills are required, either at the entry-level or mid-level. In the ICT services sector, however, specialized ICT skills were selected by nearly half of employers, with the importance of such skills more pronounced at the mid-

level. Such findings mirror other external studies, including one from HSRC et al (2008) that found declining opportunities for low-skilled employment in the ICT services sector, with intermediate skilled workers representing 71 percent of all employees by 2006, an increase of thirty percent from 1995.

Youth employed in the four target sectors reported similar skills requirements for ICT-enabled positions during FGDs, noting that basic ICT skills are a standard requirement and that more specialized skills generally are often not necessary to initially access employment, particularly at the entry-level. Only in the ICT services sector did respondents note that more technical skills such as applications development and programming are necessary. Youth regarded applications development, in particular, as a promising area for future growth within the ICT industry, and a desired area for skills development.

Table 5.1: Technical Skills required for ICT-enabled jobs (percentage of employers' selection)

Skills required	BPO / Call Center		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
Sales and marketing	20%	60%	40%	60%	-	-	67%	67%
Customer service	40%	60%	40%	40%	20%	40%	100%	83%
Administrative	20%	60%	20%	60%	20%	40%	33%	50%
Accounting	-	20%	20%	20%	-	-	17%	33%
Basic ICT	80%	80%	100%	100%	80%	100%	83%	83%
Specialized ICT	-	20%	20%	40%	40%	80%	17%	17%

Researchers also asked employers that reported a need for specialized ICT skills to further select the types of specialized skills required (Table 5.2 below). Key cross-sectoral demands included applications and software development, which matches the findings from the 2011 Joburg Center for Software Engineering skills demand survey. Other specialized ICT skills highly demanded were industry specific, such as network administration, IT help desk support and hardware servicing in the ICT service sector, and accounts payable / billing in the financial services industry. In the BPO / call center industry, employers only indicated a need for specialized ICT skills for mid-level positions. A possible explanation is that BPO's specialized ICT needs are currently provided through external service contracts, including to ICT services firms, or in the case of global BPO firms, provided by their other country offices. As the BPO sector continues to grow, however, technical ICT skills are projected by employers to be important (as indicated in Table 3.2).

Table 5.2: Specialized ICT skills required for entry- and mid-level ICT-enabled jobs (percentage of employers' selection)

Specialized ICT skills	BPO / Call Center		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
Software development	-	20%	-	20%	20%	60%	20%	20%
Applications development	-	20%	20%	40%	20%	40%	20%	20%
Mobile services	-	-	20%	20%	20%	20%	-	-
Hardware maintenance/service	-	20%	-	-	40%	20%	20%	-
Website development/maintenance	-	-	-	-	-	20%	-	-
Network administration	-	20%	-	20%	40%	60%	-	20%
Records management	-	20%	20%	20%	-	-	-	-
Accounts payable/billing specialist	-	-	-	40%	-	-	-	-
ICT Help desk support	-	20%	-	-	40%	40%	20%	-
Other	-	20%	20%	20%	20%	20%	-	-

6.2 SOFT SKILLS REQUIRED

As shown in Table 5.3 below, all soft skills were selected by a substantial proportion of employers, demonstrating the relative importance of these skills in general for workforce readiness, including for ICT-enabled employment.

Table 5.3: Soft skills required for ICT-enabled jobs (percentage of employers' selection)

Soft skills required	BPO / Call Center	Financial services	ICT Services	Retail
Team work	80%	60%	80%	83%
Strong work ethics	40%	40%	80%	67%
Integrity	40%	80%	100%	67%
Loyalty to the company	40%	20%	80%	33%
Communication skills	60%	80%	100%	83%
Managing emotions	60%	60%	60%	33%
Problem solving	60%	80%	100%	67%
Other	20%	-	-	17%

6.3 PREVIOUS EMPLOYMENT EXPERIENCE & EDUCATION REQUIRED

As indicated in Table 5.4 below, at the entry-level, the retail sector requires the least amount of previous employment experience for applicants to access ICT-enabled positions, a situation that likely reflects employers' demand for less technical ICT-enabled positions (as noted in Table 3.2). In the three other sectors, 80 percent of employers reported requiring between 0 to 4 years experience, while 20 percent indicated that no experience was required. Interestingly, though the BPO sector offers the lowest level of entry-level pay and benefits, 40 percent of employers interviewed preferred entry-level employees with at least three to four years of experience, the highest amongst the three sectors. This is likely due to BPO / call center positions requiring significant upfront training (and costs), even for entry-level positions, which would not be required if new recruits already have experience in the industry.

Amongst mid-level positions, employers in the ICT services sector reported the most previous experience, with all participants indicating that a minimum of three years is required. No employers in the financial services sector indicated that mid-level, ICT-enabled positions are available without prior work experience. A minority of employers in both the BPO / call center and retail sectors, however, indicated that mid-level, ICT-enabled positions are accessible without prior work experience.

Table 5.4: Employment experience required for ICT-enabled employment (percentage of employers' selection)

Experience required	BPO / Call Center		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
None	20%	20%	20%	-	20%	-	67%	17%
0 - 2 years	40%	40%	60%	60%	60%	-	33%	17%
3 - 4 years	40%	40%	20%	40%	20%	60%	-	33%
5 - 6 years	-	-	-	-	-	40%	-	33%
Total	100%	100%	100%	100%	100%	100%	100%	100%

In terms of educational qualifications (Table 5.5 below), at the entry-level, employers in the BPO / call center and retail sectors reported the lowest educational requirements for youth to access ICT-enabled employment, with the majority of employers reporting that potential recruits only need to have completed Grade 12 (matric). The majority of employers in the financial services and ICT services sectors, however, require entry-level employees in ICT-enabled positions to have university and/or technical/vocational qualifications, which correlates with youth people's perception of the relative difficulty in accessing employment in these sectors. Interestingly, the educational requirements are similar for mid-level ICT-

enabled positions in all sectors, indicating that work experience may be more critical for youth to access more advanced positions than additional qualifications.

Table 5.5: Educational requirements for ICT-enabled positions (percentage of employers' selection)

Educational requirements	BPO / Call Center		Financial services		ICT Services		Retail	
	Entry	Mid	Entry	Mid	Entry	Mid	Entry	Mid
Grade 12	60%	60%	40%	40%	40%	40%	67%	33%
Technical or vocational	20%	20%	-	20%	60%	40%	17%	17%
University	20%	20%	40%	40%	-	20%	17%	17%
Other	-	-	20%	-	-	-	-	33%
Total	100%	100%	100%	100%	100%	100%	100%	100%

6.4 BARRIERS TO HIRING YOUTH

As indicated in Table 5.6 below, a substantial majority of all employers noted that they face challenges in hiring young people for ICT-enabled employment. Key trends noted from the figures below include:

- 1) Cross-cutting barriers:** high turnover; lack of basic ICT skills; lack of soft skills; and literacy and numeracy gaps.
- 2) Financial services & ICT services sectors:** A high rate of employers in both these sectors noted specialized ICT skills as a predominant recruitment gap. While specialized ICT occupations may therefore have less absolute demand than less specialized ICT-enabled occupations, employers may be facing particular difficulty filling those ICT-specialized positions that do exist.
- 3) BPO / call center sector:** In addition to the cross-cutting barriers noted above, 60 percent of employers noted 'Other' barriers, which primarily included language and communication barriers, key skills necessary for successful employment in this industry.

Table 5.6: Barriers to hiring youth for ICT-enabled employment (percentage of employers' selection)

Recruitment / Retention Barriers	BPO / Call Center	Financial services	ICT Services	Retail
Hiring qualified youth is not a problem	20%	-	20%	-
High turnover	60%	60%	40%	67%
Lack of basic ICT skills	40%	40%	20%	33%
Lack of specialized ICT skills	-	40%	100%	17%
Lack of soft skills	40%	100%	60%	17%
Lack of recruitment agencies	-	-	-	-
Literacy and numeracy gaps	40%	60%	40%	50%
Other	60%	-	-	17%

Training stakeholders also offered their views on skills gaps that are preventing youth from accessing ICT-enabled jobs, with responses that generally matched those of employers, including: 1) literacy and numeracy skills; 2) soft skills; and 3) basic ICT skills.

6.5 HOW TO IMPROVE YOUTHS' PREPAREDNESS FOR ICT-ENABLED EMPLOYMENT

Researchers asked employers in each sector to describe how youth can be better prepared to access ICT-enabled jobs in their business or sector. Overall, employers in the four target sectors placed little

emphasis on the need for improved technical ICT skills; instead, their responses often centered on a need for improved, proactive attitudes amongst youth, and the importance of a quality education, particularly in relation to math and science.

Specific sectoral responses included:

- **BPO / Call center:** In general, employers in this sector suggested that youth need to have improved, proactive attitudes, including in taking ownership of their careers, finding out what employment opportunities exist and developing a passion for what they do. Some employers said that youth should engage in further training, and utilize readily-available resources such as community libraries and youth centers, as well as existing training initiatives. This response may reflect a recognition that the BPO / call center sector can function as a platform for youth to gain work experience and access other career opportunities in the future, provided that youth take advantage of the opportunity and lead the process.
- **Financial services and ICT services:** In both of these sectors, employers placed a particular emphasis on the importance of quality education in math, science and basic ICT, and that ideally youth should learn these skills at an early age, which they can continue to build upon during more advanced schooling and their careers. Employers in the financial services sector also emphasized that youth should identify and take advantage of existing training opportunities, such as those implemented by Harambee (profile in Section 6.3), as well as mentorship programs.
- **Retail:** Employers suggested that for youth to access ICT-enabled jobs in the retail sector, they need to improve basic ICT skills such as typing, access training (particularly learnerships²), and develop a more proactive attitude for the workplace. The government noted similar findings in its more broadly focused study of skills gaps in the retail sector, in which they noted that life skills, ICT and financial literacy are the key cross-occupation skills gaps in the sector (W&R SETA, 2010).

Training stakeholders interviewed echoed the above responses from employers, noting that many youth are not prepared to access ICT-enabled employment opportunities because they lack basic foundational skills, including numeracy, literacy and life skills such as communication and general work etiquette, in addition to basic ICT skill gaps. They also emphasized that the education system is not adequately preparing graduates for these opportunities.

6.6 YOUTH PERCEPTION OF TRAINING NEEDS

Youth employed in the financial services, ICT services and retail sectors indicated that their employers provide ongoing training, and feel that they have sufficient support for career advancement. Youth in the ICT services and financial services sector, in particular, also noted that more advanced, occupation-specific ICT skills are sometimes necessary to access advanced positions, which mirrors the responses from employers on skills requirements for mid-level positions in these two sectors (Section 5.1). Youth employed in ICT services seemed most interested to acquire advanced ICT skills through academic programs, while those in the financial services and retail sector were confident that they could develop additional ICT skills on-the-job.

Youth employed in the BPO / call center sector reported, however, that while they receive sufficient technical training to learn the product system to which they provide services, they do not feel that these are transferable skills, or that these skills support attainment of more advanced positions within the sector. Youth employed in this sector therefore emphasized the benefit of external training programs that could prepare them for work in other sectors, or for more advanced careers in the call center industry.

Unemployed youth felt that in order to access ICT-enabled jobs, they need greater access to ICT infrastructure and applications, in order to improve their ICT skill set. In general, they were unable to articulate specific types of training that would improve their access to ICT-enabled job opportunities, suggesting that they are neither certain of the entrance requirements for these positions, or how training

² A learnership is a government-certified training program, as established in the frameworks set out in the South Africa Skills Development Act. A learnership consists of classroom and work-based experience—generally one year in duration—with a formal assessment leading to an occupational qualification.

programs could help them meet such requirements. Unemployed youth also felt that networking is critical to accessing ICT-enabled jobs, but that they often lack access to or familiarity with networks to learn of opportunities. They suggested that recruitment agencies could help fill this gap.

7. ICT TRAINING PROVIDERS & INITIATIVES

Key findings

- **On-the-job ICT training:** Once employed, youth generally have access to on-the-job training, with the majority or near majority of employers indicating that they provide ICT training to existing staff. Firms in South Africa are incentivized by the South African government to provide training to employees, so a high level of on-the-job training is not surprising within this context.
- **ICT training in schools:** At least half the employed youth interviewed also indicated that they learned ICT skills in school/university, with the proportion being highest for those sectors that have the highest qualification requirements: financial services and ICT services.
- **External Training Providers:** Employers engage a wide variety of public, private and NGO-led training providers, both to source qualified entry-level staff, and to provide on-the-job training to existing staff.
- **Example Initiatives:** There are innovative training initiatives in South Africa targeted towards, and supported by each of the four economic sectors in this study, and which are training unemployed youth to access job opportunities. Youth training initiatives in the BPO / call center and ICT services sectors are targeted, unsurprisingly, towards ICT-enabled employment. Training initiatives in the financial services and retail sectors, however, have yet to tailor their programs specifically for ICT-enabled employment opportunities.

The four training initiatives surveyed in this report are some of the largest in their respective sectors in South Africa and are operating at national scale, yet there is still scope to train far more youth and engage with more corporations, particularly around ICT-enabled employment. The government is also investing significant resources into, and seeking expanded civil society and private sector partnerships for its public FET Colleges, which may provide an opportune platform train youth for ICT-enabled employment at greater scale.

7.1 ON-THE-JOB ICT TRAINING

As shown in Table 6.1 below, in all of the target sectors, the majority (or near-majority) of employers interviewed indicated that they provide ICT training to new employees, and a sizeable portion of employers in the BPO/ call center, financial services and ICT services sectors also indicated that new recruits should have at least basic ICT skills. The ICT services and retail sectors were the only sectors in which some employers indicated that they only hire employees with demonstrated ICT skills (20 percent and 17 percent respectively).

Table 6.1: Are ICT skills taught on-the-job (percentage of employers' selection)

Do you teach ICT skills to new employees on the job?	BPO / Call Center	Financial services	ICT Services	Retail
Yes, we teach youth required skills	40%	60%	40%	50%
Yes, but expect them to have basic skills	20%	40%	40%	-
No, we only hire those with demonstrated skills	-	-	20%	17%
Other	40%	-	-	33%

In terms of where employed youth reported learning ICT skills (Table 6.2 below), most indicated that they acquired these skills at secondary school, while a substantial portion of youth in the financial services sector indicated that they had also learned ICT skills while working, suggesting that they receive significant on-the-job ICT training. Few youth employed in the BPO / call center and ICT services sectors reported that they had learned their ICT skills on-the-job (20 percent and 22 percent respectively), though a substantial portion of BPO / call center staff did report receiving training from a specialized ICT course (potentially from the large-scale, national Monyetla BPO training initiative, described more fully in Section 6.3).

Table 6.2: Where did youth learn ICT skills (percentage of employed youth's selection)

Where did you learn your ICT skills?	BPO / Call Center	Financial services	ICT Services	Retail
Secondary school	60%	89%	78%	50%
On-the-job	20%	89%	22%	40%
Specialized ICT course	50%	22%	22%	10%
Other (including university)	20%	11%	22%	40%

7.2 TYPES OF EMPLOYER-ENGAGED EXTERNAL TRAINING PROVIDERS

During the employer interviews, respondents indicated that their companies work in partnership with a variety of organizations to deliver and support training, including colleges, and private sector and non-profit training providers. Sector-specific responses included:

- **BPO / call center:** Respondents indicated that they work with various external trainers such as Harambee, Monyetla, Columba, People Solutions, and i-Fundi, with others use public Further Education Training (FET) colleges, as they offer a wider range of government certified training (the FET college system is explained further in the next subsection).
- **Financial services:** A few employers indicated that they could not provide the names of training service providers, due to confidentiality issues. Those who could, however, said that they work with universities (such as the University of Stellenbosch), and non-profit youth job training initiatives such as Harambee and those supported by Tshikululu Social Investments. Some firms also noted that they offer short career / business exposure programs to youth during school holidays.
- **ICT services:** Employers in this sector typically work with vendors such as Microsoft, Dell, CISCO, HP, and VMware, which facilitate their staff to develop and improve upon their product-specific knowledge.
- **Retail:** Many of the employers in this sector reported that they conduct their training internally, including through delivering government-certified learnerships for the training of entry-level youth. External organizations engaged included Learn to Earn, Jump Start and Apple Tree, which are initiatives generally targeted toward and supported by select retailers.

7.3 TRAINING INITIATIVES

Researchers interviewed key training stakeholders that are preparing youth for employment in at least one of the target sectors covered in this study, complemented by additional secondary research. These initiatives could be leveraged to support a broader effort on training youth for ICT-enabled employment.

Further Education Training (FET) Colleges

Further Education and Training (FET) in the South African context refers to education and training that takes place after leaving school, including for students that only completed up to Grade 9. FET courses are vocational or occupational by design, and therefore aim to equip students for employment in a specific type of occupation or industry, or in some cases continuation of studies at the tertiary level.

Nearly 340,000 students were enrolled in the public FET college system in 2010, a number which government aims to increase to 1 million in 2014 and to 4 million by 2030 (Papier, 2012b). Following the

FET Colleges Amendment Act of 2012, the government transferred oversight of FET colleges from provincial government to the national Department of Higher Education and Training (DHET). The planned exponential increase in student enrolment, combined with national management of the FET system, is due both to the government's recognition that the system should play a stronger role in preparing unemployed youth for the South African labor market, as well as ongoing concerns related to instructional quality and relevance of training curriculums to industry.

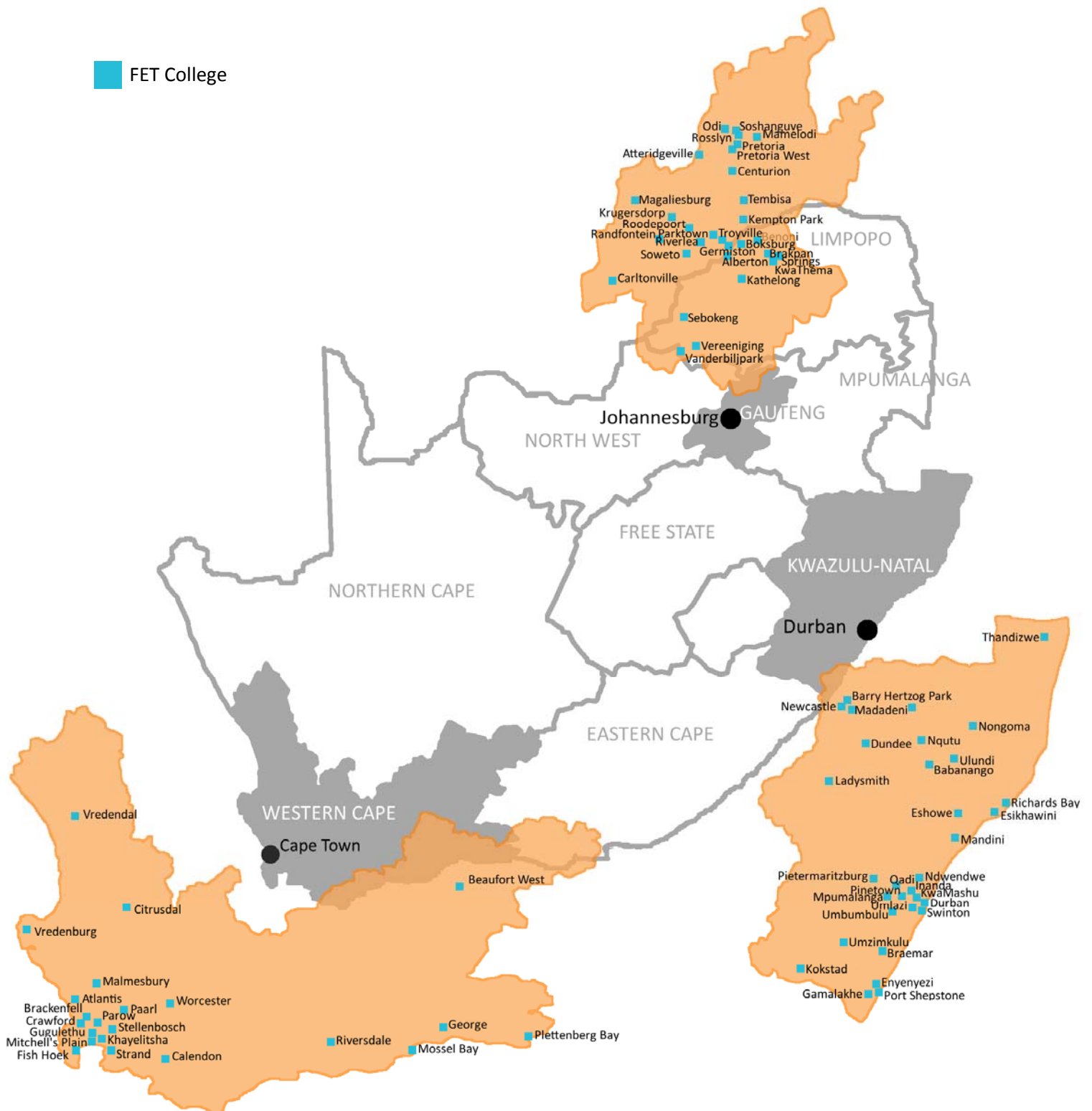
While the FET system presents a number of challenges, it also offers a major platform for leveraging government investments and preparing youth, at-scale, for ICT-enabled employment. There are 50 public FET colleges that operate 248 campuses throughout the country (Papier, 2012a). IYF has identified over 100 FET campuses in Gauteng, KwaZulu-Natal and Western Cape provinces alone that offer ICT-specific qualifications and/or call center, finance, business, HR and administrative qualifications that integrate ICT training (see map in Figure 6.1).

Government is also very open to innovative PPPs that would support FET colleges in better preparing students to succeed in the South African labor market, including in informing curriculums, participating in FET governance systems and support the development of teacher capacity (JET Education Services, 2010). Existing innovative partnerships relevant to the findings from this study include:

- **Cisco Networking Academy:** As part of Cisco's global effort to prepare youth for ICT technician positions, the company has supported 16 FET colleges to become Cisco Networking Academies (goal is to support 50 FETs), and over 1,000 students have received training to date (IT Online, 2012).
- **Further Education Training Institute (FETI) – University of Western Cape:** FETI is supporting the development of FET colleges through: 1) conducting research on the interface between FETs and the workplace; 2) capacity-building of FET college educators; and 3) engaging in advocacy initiatives to support the building of a coherent FET system (FETI, 2010).
- **MOT South Africa:** MOT has introduced its life skills curriculum at select Western Cape FET colleges to support soft skills development. By late 2011, 154 students had completed the course, and an external evaluation by FETI (2012) identified the program as having a significant effect on student retention and success.

Figure 6.1: Public FET colleges in Gauteng, KwaZulu-Natal & Western Cape Provinces offering stand-alone ICT qualifications and/or finance, retail, HR and admin qualifications that integrate ICT training
(map developed by IYF with information from FET college websites)

 FET College



Harambee

Harambee was established in 2010 by Yellowwoods—a South African investment firm—and five of its investee businesses: Hollard, Clientele, Telesure, Direct Axis and Nando's, which operate in the financial services and hospitality industries. Harambee now has 30 corporate partners, including those in the BPO / call center, financial services and retail industries.

Harambee was established to transition disadvantaged, unemployed youth (ages 18 to 28), with no prior work experience, into entry-level jobs where there is a high demand for labor. Harambee addresses both the demand and supply side challenges, by understanding the recruitment needs of employers and increasing the likelihood of a young person integrating into the world-of-work. For unemployed youth, Harambee address the skills and behavioral gaps that prevent them from securing and retaining full-time employment, which thereby assists companies fill entry-level vacancies with qualified staff. Training is tailored to the needs of each employer, and generally includes life skills training combined with technical skills training required by the employer, followed by mentoring of both placed employees and participating employers.

To date, Harambee has placed over 3,000 youth into entry-level employment, and plans to place 10,000 youth by the end of 2014. With training centers in Cape Town, Durban, Johannesburg and Port Elizabeth, and a growing diversity of corporate and government partnerships, it offers a significant platform to train and place large numbers of youth into employment.

Jump Start Initiative (Redcap Foundation)

Mr. Price Group's foundation, the Redcap Foundation, works with a national network of non-profit training providers to implement its Jumpstart training program tailored toward the retail sector.

Catalyx Consulting manages the training implementers—who are organized into an association called Network Empowering the Unemployed (NEU)—who deliver life skills training to unemployed youth and then facilitated their placement into one-week workplace internships. Once the youth have completed their in-store work experience, they are either employed by Mr. Price Group or given a certificate as proof of their participation in the program. The belief is that giving these youth theoretical skills and practical working experience raises their chances of accessing future employment.

The Jump Start initiative has also received funding from the national government's Jobs Fund to scale-up the initiative, including through placing 6,000 unemployed youth into entry-level jobs over the next three years; creating of a standardized core curriculum to guide training providers and ensure minimum standards are met and maintained; and further developing Joblinx, an online tracking and job placement system for unemployed candidates.

While Jump Start does not train specifically for ICT-enabled jobs in the retail sector, its national network of NGO training providers provides ample opportunity for expansion into other occupations.

Monyetla Work-Readiness Program

Monyetla—Sesotho for “opportunity”—is a South African government-financed work-readiness program designed to accelerate the training and placement of disadvantaged youth into entry-level BPO employment. The program is funded by the Department of Higher Education and Training through the National Skills Fund, with training delivered through an employer-led consortia model that also involved NGO training providers and local colleges. Training delivered through the consortia consists of a blend of classroom-based theoretical study, practical training and on-the-job call center experience, followed by skills assessments. Learners receive credit towards a nationally recognized certification in Contact Center Support once the course is completed.

Monyetla implemented an inception training program in 2008, which trained 1,000 unemployed youth to work as entry-level BPO agents in the provinces of Gauteng, Western Cape and KwaZulu-Natal, and achieved an 86 percent pass rate, with 90 percent of graduates placed into employment. An external evaluation of the inception phase found that the initiative was effectively governed and managed, and successfully achieved its proposed outcomes. As cited in the evaluation, “We found that the program was extremely successful. The employer-led model worked very well, particularly in cases where host employers led the process. Having employers lead the program, allowed for those employers to be able to

select the learners that they wanted and get them into employment” (Department of Trade and Industry, et al, 2009). Based on the success of the first phase, a second phase of the program trained 3,500 youth, followed by a third phase reaching 3,000 youth.

The program has the potential to grow, since it utilizes teaching and learning structures that are already in place. As Andy Searle, Managing Executive of the initiative noted, “We haven’t got a skills problem, just a poor attitude among employers and a lack of facilitation for our potentially skilled youth.” Despite three successful phases, however, the initiative is planned to end after its current phase, when government funding will stop. As Andy mentioned, however, there are alternative options to continue Monyetla, including drawing on the consortia model to develop a website where training institutions list the training that they provide, which employers could then contact directly rather than having the relationship facilitated by an organizing body such as Monyetla. Andy suggested that existing BPO training programs could be adapted to e-learning courses and delivered through local internet cafes.

Microsoft Student to Business (S2B) Initiative

The goal of Microsoft’s Students to Business (S2B) South Africa initiative is to provide students with the key competencies they need to excel in their future jobs and to further grow an industry that is empowering, inclusive and highly skilled. The initiative is implemented with the belief that strong local skills enhance economic growth and employment; promote innovation, and further encourage technological and cultural advances in South Africa.

The initiative has two implementation pillars. The first provides basic ICT training to youth along with workforce readiness training, and then links youth to opportunities with participating employers. The second pillar connects unemployed graduates to learnerships in the ICT sector, to give them job experience and improve their employability. The latter pillar recently received government co-funding, and aims to train more than 3,000 unemployed graduates over the next three years.

8. RECOMMENDATIONS

The following recommendations are based on the key finds noted Sections 3 – 6 of this study:

- **Defining ICT-enabled Employment:** As IYF considered a broader view of ‘ICT-enabled employment’, the study led to employers’ identification of a diverse range of associated occupations, including technical ICT positions, call center staff, customer and client service, human resource management and administration, and managers and team leaders. To successfully scale up a digital jobs initiative, stakeholders may therefore want to look beyond positions that require high-level ICT skills. It is clear that youth with improved basic ICT skills, combined with other soft skills, will be better equipped to access a range of occupations where ICT skills are important.
- **Sectors:** Based on employment growth trends and economic sectors with the highest proportion of ICT users, an initiative aiming to prepare youth to access digital job opportunities, at-scale, ideally would include training for employment in the BPO / call center, financial services, ICT services and retail sectors.
- **Geographic targets:** As with the more generalized geographic distribution of employment opportunities in South Africa, ICT-enabled employment opportunities are most prevalent in the metropolitan areas of Johannesburg, Cape Town and Durban. A digital jobs initiative could therefore aim to reach areas where there is the greatest demand, or conversely could aim to also reach smaller metropolitan areas to expand ICT-enabled job opportunities and training initiatives for youth that may otherwise not have access to such employment or services. In smaller metropolitan areas, as well as peri-urban and rural areas, ICT-enabled enterprises may be more relevant.
- **Career Advancement Opportunities:** Amongst interviewed youth, salary was less important for those who had clearly mapped their career path and were confident in the opportunities for advancement within their sector. This included amongst youth interviewed in the retail sector, despite its relatively lower level of salary of benefits, and amongst youth in the ICT services sector, despite it offering the lowest average level of benefits amongst employers interviewed. Facilitating

young people's development of life skills, including goal setting and identifying career pathways, would therefore better prepare youth for the ICT-enabled employment career ladder, particularly in sectors that are more accessible to vulnerable youth (e.g. BPO / call centers and retail).

- **Opportunities in the BPO Sector:** The BPO / call center sector may be able to better leverage its relative accessibility by helping youth employed in the sector to develop transferable skill sets, and to better understand other careers and industries in which those skills are relevant and marketable. In this way, the BPO sector could position itself as key entry-level job experience for longer-term digital employment. As indicated above, life skills combined with goal setting and identify career pathways should be a crucial part of BPO / call center training.
- **Basic ICT Skills & Life Skills:** Overall, basic ICT skills ranked as the most important technical skill set required for entry-level ICT-enabled employment. Similarly, employers reported basic ICT and life skills gaps as the key barriers to hiring youth, along with numeracy and literacy gaps. A digital jobs initiative in South Africa should therefore focus particularly on equipping youth with basic ICT skills and life skills. Such training can and should be tailored toward specific industry and occupational needs, but does not need to focus only on specialized ICT skills for large-scale impact.
- **Specialized ICT skills:** Beyond the ICT services sector, employers did not report significant need for specialized ICT skills for entry-level, ICT-enabled employment. That is not to say that there is no demand for specialized skills, but rather that the scale of demand (when measured by employment numbers) is greater for ICT-enabled occupations that do not require advanced ICT skills. Nonetheless, employers did indicate major challenges recruiting youth for those specialized ICT positions that do exist, and therefore there is also a role for a digital jobs initiative in South Africa to also focus on preparing youth for more technical ICT employment. Existing related initiatives include Microsoft's Student to Business initiative and the Cisco Networking Academies.
- **Career Guidance:** Unemployed youth are often not aware of what ICT-enabled job opportunities exist, what qualifications and skills are required to access these opportunities, and/or training initiatives that could help to address skills gaps. There is a need, therefore, for increasing awareness of ICT-enabled employment opportunities amongst South African youth (particularly vulnerable youth), combined with provision of guidance and mentoring to youth on how to access such opportunities. This type of awareness raising and guidance requires a broader coalition of the private sector, government and civil society. The FET college system provides a particularly large platform for providing this type of guidance and awareness to youth.
- **Training providers and initiatives:** There are a range of public, private and civil society training providers in South Africa, which are increasingly collaborating through innovative public-private partnerships (PPPs). Existing national platforms could be leveraged for a digital jobs initiative in South Africa, and there is also the opportunity to reach greater scale through collaboration with the public Further Education Training (FET) college system, including through PPPs that draw on the expertise of the private sector and capacity building from civil society.

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ANALYSIS of ICT-ENABLED YOUTH EMPLOYMENT in GHANA, KENYA, and SOUTH AFRICA

VOLUME 4: Annexes—South Africa

OCTOBER 2013
Appendices

Supported by



ABBREVIATIONS

ACS	Australian Computer Society
B-BBEE	Broad-based Black Economic Empowerment
BPO	Business Process Outsourcing
CSP	Community, Social and Personal Services
DHET	Department of Higher Education and Training
DPRU	Development Policy Research Unit (University of Cape Town)
FET	Further Education Training
FTE	Full-time Equivalent
FETI	Further Education Training Institute
FGD	Focus Group Discussion
HSRC	Human Sciences Research Council
HR	Human Resources
ICT	Information Communication Technology
IYF	International Youth Foundation
KII	Key Informant Interview
NEU	Network Empowering the Unemployed
NSF	National Skills Fund
PPP	Public-Private Partnership
RYS	Rapid Youth Survey
SETA	Sector Education Training Authority
SME	Small to Medium-sized Enterprise

Annex B: Data Collection Tools

- 1) Employer Survey & Employer Interview Guide
- 2) Youth survey
- 3) Key informant interview guide
- 4) Youth focus group discussion guide

1. Employer Survey & Employer Interview Guide

The researcher shall administer this survey during one-on-one interview with an employer. The researcher should note any qualitative information that the employer adds during the administration of the survey.

If there is time remaining after the survey is completed, the researcher will ask the employer questions from the interview guide.

Begin by asking employer if he/she understands the purpose of the interview. If not, explain how the study is trying to investigate prospects for quality youth employment in South Africa, particularly with regard to disadvantaged youth in the Johannesburg Metropolitan area, working in: BPO / call centers; financial services; retail and ICT services, and specifically ICT-enabled jobs in these sectors. .

The survey should take about 30 – 45 minutes to complete.

Name of Company:
Sector of Focus:
Name of Interviewee:
Title (e.g. HR manager):
Address:
Tel and Email:
Date of Interview:

#	Question and Code (C)	C	Notes
Basic Information			
	Sector of focus (organized according to SETA classifications): 1= Finance, Accounting, Management Consulting and other Financial Services; 2= Media, Information and Communications Technology; 3= Services SETA (e.g., call centers); 4= Wholesale & Retail; 5=Other:		
8	Total number of employees in your company		
Recruitment Levels (overall)			
9	How many employees do you estimate that your company will recruit into entry-level positions (technical and/or supervisory) over the next two to three years? 1 = 1-3; 2 = 4-9; 3 = 10-19; 4 = 20-49; 5 = 50-99; 6 = >100 7 = not sure		
10	How many employees do you estimate that your company will recruit into mid-level positions (technical and/or supervisory) over the next two to three years? 1 = 1-3; 2 = 4-9; 3 = 10-19; 4 = 20-49; 5 = 50-99; 6 = >100 7 = Not sure		
ICT-enabled Occupations and Required Qualifications			
Entry-level Positions & Required Qualifications			
11	In terms of projected recruitment levels, what are the most prominent entry-level occupations in your business that require IT skills? (List them)		
12	Generally speaking, what is the minimum educational requirement for these occupations? 1 = None; 2 = Primary; 3 = Grade 9; 4 = Grade 12 (matric); 5 = University; 6 = Technical or vocational (Including FETCs); 7 = Other:		
13	Generally speaking, how many years of experience are required for an applicant to be hired for these occupations? 1 = None; 2 = 1-2 years; 3 = 3-4 years; 4 = 5-6 years; 5 = 7 years & above		
14	Amongst those entry-level occupations listed above, what technical skills are required? (multiple selection) 1 = Sales & marketing; 2 = Customer service; 3 = Administrative; 4 = Accounting; 5 = Basic IT skills; 6 = Specialized IT Skills		
15	If you selected 6 above, which specialized IT skills are required for these entry-level occupations? (multiple selection) 1 = Software development / service; 2 = Applications development; 3 = Mobile services; 4 = Hardware maintenance / service; 5 = Website development / maintenance; 6 = Network administration; 7 = Records management; 8 = Accounts payable / billing specialists; 9 = IT help desk support; 10= Other:		
Mid-level Positions & Required Qualifications			
16	In terms of projected recruitment levels, what are the most prominent mid-level occupations in your business that require IT skills?		
17	Generally speaking, what is the minimum educational requirement for these occupations? 1 = None; 2 = Primary; 3 = Grade 9; 4 = Grade 12 (matric); 5 = University; 6 = Technical or vocational (Including FETCs); 7 = Other:		

18	Generally speaking, how many years of experience are required for an applicant to be hired for these occupations? 1 = None; 2 = 1-2 years; 3 = 3-4 years; 4 = 5-6 years; 5 = 7 years & above		
19	Amongst those mid-level occupations listed above, what technical skills are required? (multiple selection) 1 = Sales & marketing; 2 = Customer service; 3 = Administrative; 4 = Accounting; 5 = Basic IT skills; 6 = Specialized IT Skills		
20	If you selected 6 above, which specialized IT skills are required for these mid-level occupations? (multiple selection) 1 = software development / service; 2 = applications development; 3 = mobile services; 4 = hardware maintenance / service; 5 = website development / maintenance; 6 = network administration; 7 = Records management; 8 = Accounts payable / billing specialists; 9 = IT help desk support; 10 = Other (specify):		
ICT-enabled Positions & Required Soft Skills			
21	Amongst those entry-level and mid-level occupations identified in questions 8 and 13, what soft skills are most important? (multiple selection) 1 = Team work; 2 = Strong work ethics; 3 = Integrity; 4 = Loyalty to the company; 5 = Communication skills; 6 = Managing emotions; 7 = Problem solving; 8 = Other (specify):		
Barriers to Youth Recruitment			
22	What barriers do you face in hiring qualified young employees for the occupations identified in questions 8 and 13? (multiple selection) 1 = Hiring qualified youth not a problem; 2 = High turnover; 3 = Lack of basic IT skills 3 = Lack of specialized IT skills; 4 = Lack of soft skills; 5 = Lack of recruitment agencies; 6 = Gaps in basic skills (literacy or numeracy); 7 = N/A (not hiring youth); 8 = Other (specify):		
Training			
23	Do you teach computer/ICT skills to new employees on the job? 1 = Yes, we teach them required skills; 2 = Yes, but expect them to have basic skills; 3 = No, we only hire those with demonstrated skills; 4 = Other (specify):		
24	Are you paying or willing to pay for training services to better prepare young people to join your company? 1 = Yes; 2 = No If no, why/not?		
Benefits			
25	Do entry-level employees receive any of the following employment benefits at your business? (multiple selection) 1 = Paid leave; 2 = Health benefits; 3 = Pension/provident fund; 4 = Year-end bonus; 5 = Performance bonus; 6 = Unemployment insurance; 7 = Tuition reimbursement; 8 = Transport allowance; 9 = Meals (or meal allowance); 10 = 13 th check; 11 = No benefits; 12 = Other (specify):		
26	Do mid-level employees receive any of the following employment benefits at your business? (multiple selection) 1 = Paid leave; 2 = Health benefits; 3 = Pension/provident fund; 4 = Year-end bonus;		

	5 = Performance bonus; 7 = Tuition reimbursement; 9 = Meals (or meal allowance); 11 = Other (specify): 12 = Don't know or prefer not to answer	6 = Unemployment insurance; 8 = Transport allowance; 10 = No benefits;		
27	What would you estimate is the average monthly take-home pay for entry-level employees in the occupations identified above? (Rands) 1 = ≤4,000; 2 = 4,001-8,000; 3 = 8,001-12,000; 4 = 12,001-16,000; 5 = 16,001-20,000; 6 = 20,001-24,000; 7 = >24,000; 8 = Don't know or prefer not to answer			
28	What would you estimate is the average monthly take-home pay for mid-level employees in the occupations identified above? (Rands) 1 = 100-4,000; 2 = 4,001-8,000; 3 = 8,001-12,000; 4 = 12,001-16,000; 5 = 16,001-20,000; 6 = 20,001-24,000; 7 = >24,000; 8 = Don't know or prefer not to answer			
29	Do you have a formal contract of employment with your entry-level employees? 1 = Yes; 2 = No If no, why/not?			
30	If yes above, what is the typical duration of your contracts? 1 = ≤1 month; 2 = 2 – 3 months; 3 = 4 – 6 months; 4 = 7 – 11 months; 5 = ≥12 months; 6 = Other (specify):			
31	Do you have a formal contract of employment with your mid-level employees? 1 = Yes; 2 = No If no, why/not?			
32	If yes above, what is the typical duration of your contracts? 1 = ≤1 month; 2 = 2 – 3 months; 3 = 4 – 6 months; 4 = 7 – 11 months; 5 = ≥12 months; 6 = Other (specify):			

Employer Interview Guide

Based on the information already provided, ask relevant follow-up questions to better understand the issues related to ICT-enabled youth employment. Questions may include:

- 1) From your knowledge, what are the promising economic sectors (and sub-sectors) for ICT-enabled youth employment presently and in the near future?

- 2) Are employers willing to train youth to gain ICT skills? Or do they expect youth to possess some level of ICT proficiency? If so, what is it for entry-level and mid-level?

- 3) How can young people in this country be better prepared for these existing or upcoming ICT-enabled jobs?

- 4) Are you working with specific training providers who train your young employees (or training them yourself)? If so, which ones and why?

5) When it comes to hiring new employees, do you encounter different challenges in regard to male and female employees?

2. Rapid Youth Survey

[Note: Researcher to conduct one-on-one interviews with young people and complete this survey after focus groups]

#	Question and Code	Code	Notes
Section I – Identification			
1	What is your age? 1 = 18 to 21; 2 = 22 to 24; 3 = 25 to 29		
2	Gender 1 = Male; 2 = Female		
Section II – Education			
3	What is the highest level of formal education you successfully completed? Select only one. 1 = None; 2 = Primary; 3 = Grade 8; 4 = Grade 9; 5 = Grade 10; 6 = Grade 11; 7 = Grade 12; 8 = University/tertiary; 9 = Technical/vocational (including FETC)		
4	Are you currently enrolled in school or a training program? If no, skip to Q#7. 1 = Yes; 2 = No		
5	If yes, what level? Specify to the extent possible. 1 = Primary school; 2 = Secondary school; 3 = University/tertiary; 4 = Technical/vocational (including FETC); 5 = Short course (specify): 6 = Other:		
6	Do you feel prepared to find work with your educational background? If yes, skip to Q#9. 1 = Yes; 2 = No		
7	If not, which skills do you feel are lacking? 1 = Computer skills; 2 = Starting my own business; 3 = Reading, writing & mathematical skills; 4 = Technical skills (specify): 5 = Soft skills (specify: e.g., communication skills, team work, problem solving): 6 = Other (specify):		
Section III – Work			
8	What is your sector of work? 1 = Finance; 2 = Retail; 3 = BPO / Call centers; 4 = ICT Services		
9	What is your current position (note this is additional information)		
10	Currently, you are, 1 = Employed full-time – salaried job (<i>move on to Q11 and complete Section III.A. only; and answer Q31</i>); 2 = Employed part-time – salaried job (<i>move on to Q11 and complete Section III.A. only; and answer Q31</i>); 3 = Self-employed, running a small, unregistered business or providing services for a fee (<i>skip to Q21, complete Section III.B. only; and answer Q31</i>) 4 = Self-employed, owner of a registered business (<i>skip to Q21 and complete Section III.B. only; and answer Q31</i>) 5 = Supporting a family business (<i>move on to Q11 and complete Section III.A. only; and answer Q31</i>); 6 = Casual laborer (<i>move on to Q11 and complete Section III.A. only; and answer Q31</i>); 7 = Not working (<i>move on to Q31, end of survey</i>)		

Based on the employment status of young people, interviewer to choose either section III.A or section III.B (not both).

III.A. For Employed youth

11	Do you receive any pay or compensation for your work? <i>If no, skip to #14.</i> 1 = Yes; 2 = No		
12	How much was your take-home pay last month? 1 = ≤R500; 2 = R501 - 1000; 3 = R1001 - 1500; 4 = R1501 - 2000; 5 = R2001 - 2500; 6 = R2501 - 3000; 7 = >R3000		
13	To what extent are your earnings sufficient to pay your ongoing expenses (including, if relevant, contributing to your household expenditure, feeding your family, etc)? 1 = Insufficient; 2 = Almost sufficient; 3 = Sufficient		
14	Do you receive any of the following employment benefits? (<i>multiple selection, unless option 11 is chosen</i>) 1 = Paid annual leave; 2 = Health insurance; 3 = Pension/provident fund contribution from the employer; 4 = Year-end bonus; 5 = Performance bonus; 6 = Unemployment insurance; 7 = Tuition reimbursement; 8 = Transport allowance; 9 = Meals (allowance); 10 = Paid maternal leave; 11 = 13 th check; 12 = Paid sick leave 13 = No benefits; 14 = Others (specify):		
15	What level of computer/ICT skills is required for your job? 1 = Basic (e.g., email, internet use, some familiarity with Microsoft Office for admin work); 2 = Intermediate (e.g., proficiency with Microsoft Office including Word, PowerPoint, Excel); 3 = Intermediate (e.g., call center-related ICT skills); 4 = ICT hardware skills (e.g., computer repair); 5 = Advanced ICT skills (e.g., networking, website design, software, mobile development)		
16	How did you learn these skills (<i>Multiple selection</i>)? 1 = School; 2 = On-the-job; 3 = Specialized IT course; 4 = Other (specify):		
17	Did you receive any ICT-related job training sponsored by your employer in the last year? 1 = Yes; 2 = No		
18	What ICT skills do you think you will need to learn to advance your career? (open ended)		
19	Do you currently have an employment contract of at least one year? 1 = Yes; 2 = No		
20	Overall, are you happy with your current work? 1 = Yes; 2 = No; 3 = Neither happy nor unhappy		
III.B. For self-employed youth			
21	Why are you self-employed? 1 = I can't find a job – no qualifications; 2 = I can't find a job – no connections; 3 = Can't find adequate opportunities; 4 = Better income; 5 = I prefer to work for myself; 6 = There was already a family business; 7 = Other:		
22	How are you utilizing ICT in your current operations? (open ended)		
23	What ICT skills do you think you will need to learn to grow your business?		
24	Were you able to break even and make profits after paying all business expenses last month? If no, skip to Q31. 1 = Yes; 2 = No		
25	If yes, how much did you make in net profits? 1 = ≤R500; 2 = R501 - 1000; 3 = R1001 - 1500; 4 = R1501 - 2000; 5 = R2001 - 2500; 6 = R2501 - 3000; 7 = >R3000		

26	To what extent are your earnings sufficient to pay your ongoing expenses (including, if relevant, contributing to your household expenditure, feeding your family, etc)? 1 = Insufficient; 2 = Almost sufficient; 3 = Sufficient		
27	What level of computer/ICT skills is required for your business? 1 = Basic (e.g., email, internet use, some familiarity with Microsoft Office for admin work); 2 = Intermediate (e.g., proficiency with Microsoft Office including Word, PowerPoint, Excel); 3 = Intermediate (e.g., call center-related ICT skills); 4 = ICT hardware skills (e.g., computer repair); 5 = Advanced ICT skills (e.g., networking, website design, software, mobile development)		
28	How did you learn these skills (specify)? 1 = School; 2 = On-the-job; 3 = Specialized IT course (specify):		
29	Are you confident that you will continue to operate this business in a year's time? 1 = Yes; 2 = No		
30	Overall, are you happy with your current work? 1 = Yes; 2 = No; 3 = Neither happy nor unhappy		
Note: All participants must answer this question			
31	Are you currently looking for a job? (<i>because you are not employed, not making enough money and need extra income, or looking for a new job</i>) 1 = Yes; 2 = No		

3. Key Informant Interview Guide

Note to interviewer: Introduce yourself, the purpose of the study, and the goal of this interview. Depending on the focus of each organization, ask relevant questions.

- 1) What youth-oriented training activities or programs is your organization supporting? *Prompt for project activities, donors, partners, etc.*
- 2) What do you think youth consider to be a quality job in this country? *Prompt for local definition of decent work.*
- 3) From your knowledge, what are the promising economic growth sectors/industries for youth employment presently and in the near future?
- 4) What are specific employment or enterprise development opportunities that exist within these sectors/industries for youth (18-29)? Do you know of promising opportunities or occupations for youth that specifically focused on ICT-enabled employment?
- 5) How would you assess the quality of these employment opportunities? *Give examples such as fair compensation, benefits, career advancement, job security, etc.*
- 6) How well do you think South African youth are prepared for these positions?
- 7) What are the skills (both technical and soft skills) and qualifications required for these jobs? Do you know what types of ICT skills may be required? *Prompt for whether basic ICT skills are needed, or more specific technical skills.*
- 8) What would you consider be some innovative programs or policies in place to support youth employment and entrepreneurship in South Africa?
- 9) Is there anyone else in your organization or outside your organization that you think is well informed about these topics that I/we should get in touch with?

4. Youth Focus Group Discussion Guide

Facilitator welcomes group and thanks youth for their participation. Facilitator explains the process and purpose:

- We are here to conduct some research on decent work for youth. We want to have a discussion, which will be about an hour, to learn about the opportunities for youth employment, particularly for ICT-enabled jobs in certain sectors:
 - Provide a definition and examples of ICT-enabled jobs: those jobs that require some technological, IT, etc, related activities, such as using a computer, or Microsoft Word, or operating a switch board, or using the internet. This helps one perform another activity.
 - ICT-enabled jobs in target: services/call centers, wholesale and retail, media, information and communications technology, finance and accounting.
 - What you think about these jobs and your experience seeking these ICT-enabled jobs in target industries. Particular questions are related to access to and quality these jobs, interest levels among young people, skill required (and how you have developed those skills or barriers faced), and career advancement opportunities.
- Your voices and thoughts will lead us to better support youth. Your information will be kept confidential. Your responses will not be shared with your employer or others in your workplace.
- We encourage everyone to be honest and open. Feel free to express different opinions. If you have any questions, feel free to ask at the end of our time. If you don't want to answer, you don't have to do so.
- We have a short, anonymous survey for you to fill out for about five minutes after the FGD to collect basic information about the group.

Warm Up (5 minutes)

- 1) Ask each participant to provide a brief description; facilitator begins the process.
- 2) Discussion of participants' understanding of "ICT-enabled" jobs, and some discussion around one or two examples to contextualize the conversation.

General Questions

- 1) Based on your knowledge, which industries or types of companies and enterprises are creating the most jobs for young people (29 years of age or younger)? Which industries or types of companies and enterprises are you most interested in?
- 2) What kinds of jobs can young people (29 or younger) find within these industries, companies or enterprises? What kinds of jobs would you ideally want? *Probe for both formal and informal, public and private sectors, and for both young men and women.*
- 3) What do you consider to be a good job? *If needed, give examples such as wages, benefits, contract type—based on our definition of "decent work".*

Specific Questions for Employed Youth

- 1) What are the fastest growing ICT-enabled job opportunities in your company or sector?
- 2) What ICT skills are most critical in your job function?

- 3) How and where did you learn those ICT skills (prior to joining the company or on the job)? Did you receive ICT training sponsored by your employer in the last year (specify what kind)? Challenges faced in learning these skills?
- 4) Are there other ICT skills you desire to learn to advance your career in your current field (specify)? Where are you planning to learn them? What opportunities do you see for career growth?
- 5) Are you happy with your current work (thinking about wage, benefits, job satisfaction, security, etc) – why/not? *Probing questions:*
 - a. Do you feel you have the skills necessary to do your job? How did you get trained? If you don't feel prepared, what are some challenges you are facing at work?
 - b. Do you think you have a stable job? Do you find your work fulfilling and rewarding?
 - c. Does your job pay well? Do you get any benefits? If so, what kinds?
 - d. Do you involuntarily have to work more hours than what you get paid for?
 - e. Do you currently have an employment contract for at least one year?
 - f. Are you confident that your employer will not require you to quit your job within a year? Why/not?
 - g. Do you worry about your safety at work or on your way to and from work (e.g., coming home after late shifts)?
- 6) What opportunities do you see for career growth? Do you think you have the necessary skills and experience to take these opportunities? If not, what types of support do you need?

Specific Questions for Self-Employed Youth:

- 1) What is your experience running this ICT-enabled small business? What are/were some key challenges faced? *Probe for specific types of business and different experiences among youth.*
- 2) What skills are most critical in your ICT-enabled job function? How did you learn those ICT skills? Are there other ICT skills you desire to learn to grow your business?
- 3) Why are you self-employed? Do you prefer to be self-employed – why/not?
- 4) Do you consider what you are doing good business in terms of income, growth prospects, etc? *Probing questions:*
 - a. Are you breaking even and making net profits – why/not?
 - b. Do you consider your work stable? Fulfilling? How so?
 - c. Are you confident that you will be able to continue operating in two years?

Specific Questions for Unemployed Youth:

- 1) Are young people like yourself interested in jobs requiring ICT skills in call centers, or in the retail, ICT services and/or finance and accounting sectors? Which of these industries or companies are you most interested in? Why?
- 2) What kinds of ICT skills do you think you need to access these jobs? How can young people obtain these skills? *Probe for access to and quality of skills training programs, and gaps.*
- 3) More broadly, what other types of support or networks do young people need to better access these types of jobs?
- 4) What do you think about the quality of these ICT-enabled jobs based on your knowledge? *If needed, give examples such as wages, benefits, contract type—based on our definition of “decent work”.*



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