

A CALL FOR SUBMISSION OF EXPRESSION OF INTEREST (EoI)

RESEARCH AGENDA 2026/2027

APPOINTMENT OF AN INDEPENDENT RESEARCH REVIEWER AND ETHICS APPLICATION SUPPORT SERVICE PROVIDER

STUDY PROJECT: TREND ANALYSIS OF SKILLS GAPS (TOP-UP SKILLS) OVER THE TEN-YEAR PERIOD (2016/17 TO 2025/26)

Research companies are invited to submit expressions of interest to offer research services to the HWSETA to conduct a research study based on the terms of reference attached to this call.	
Date Published:	
Closing Date:	10:00am, 12 August 2026
Reference Number:	HWSETA-2026/27 EvalResearch-02
Service Category:	Evaluation Research
Person to submit EOIs to:	Lebo Thwala
Email address:	research@hwseta.org.za
Title:	Trend Analysis of Skills Gaps (Top-up Skills) over the Ten-Year Period (2016/17 to 2025/26)

IMPORTANT SCOPE CLARIFICATION

The appointed service provider will not conduct the primary study or collect data. The provider will independently review and quality-assure the research process, support and manage the ethics application, and review the analysis and final report produced by HWSETA.

TERMS OF REFERENCE FOR TREND ANALYSIS OF SKILLS GAPS (TOP-UP SKILLS) OVER THE TEN-YEAR PERIOD (2016/17 TO 2025/26)

Contents

1. BACKGROUND & CONTEXT	3
4. OBJECTIVES	4
5. SPECIFIC RESEARCH QUESTIONS	4
6. SCOPE OF WORK	6
7. COMPETENCY AND EXPERTISE REQUIREMENTS	9
8. TIMELINES OF THE PROJECT	10
9. EXPECTED DELIVERABLES	10
10. QUALITY AND REPORTING REQUIREMENTS	10
11. PRICING	12

1. BACKGROUND & CONTEXT

The Health and Welfare Sector Education and Training Authority (HWSETA) is mandated by the Skills Development Act No. 97 of 1998 as amended, to develop and update its Sector Skills Plan (SSP) annually within the framework of the National Skills Development Plan (NSDP). The SSP addresses the skills development needs of the health and social development sector, in line with the Standard Industrial Classification (SIC) codes as per the HWSETA constitution. One of the SETA's core skills development areas is addressing skills gaps. Although the SSP covers the skills gaps topic, it touches on it briefly and does not unpack implications for the SETA. Furthermore, it is silent on how the organisation should respond to prevailing skills gaps. The study seeks to delve deeper into the skills gaps topic by unpacking the dynamics of skills gaps among sector employees. Thus, the HWSETA requires the services of a research service provider to conduct a review of the proposal, submit the proposal to ethics, and review the final report.

In today's rapidly evolving global economy and the changing nature of work, organisations face a critical internal challenge: skills gaps among their workforces. A skills gap refers to the measurable disconnect between the specific skills an employee possesses and the competencies required to perform their job effectively. For modern enterprises, identifying and addressing these individual capability gaps is not just a periodic task for human resources; it is a continuous strategic necessity. This is essential for maintaining a competitive edge, ensuring effective service delivery and long-term sustainability. This need is especially pronounced in the health and welfare sector, where evolving challenges require its workforce to be ready to respond effectively. Therefore, ongoing skills development is crucial for equipping its workforce. The Health and Welfare Sector Education and Training Authority (HWSETA) recognises the need to respond to skill gaps strategically and effectively. Hence the need for this study. Currently, the SETA has little insight into the skills gaps dynamics across the sector and how it may/not affect sectoral skills demand. Ultimately, the study seeks to provide insight into the dynamics.

2. RATIONALE AND PURPOSE

The Health and Welfare sector is the backbone of societal well-being, yet it faces critical employee skills gaps accelerated by globalisation, technological disruption, and shifting public health needs. In South Africa, these skills gaps directly strain administrative infrastructures, cause operational inefficiencies, and compromise patient outcomes. While the Health and Welfare Sector Education and Training Authority (HWSETA) highlights these challenges in its Sector Skills Plan (SSP), existing data only scratches the surface. A deeper, decade-long analysis is required to

move past baselines, identify core skills gaps and address the skills vulnerabilities among employees in the health and welfare sector. The purpose of this study is to unpack the trends of employee skill gaps in the South African health and welfare sector over the past 10 years. Addressing skills gaps is a core element of the organisation's mandate. By unpacking the root causes and trends of these skills gaps, this research aims to provide actionable insights. A significant amount of funding goes into addressing skills gaps; thus, it is crucial to have these insights for better sectoral planning and funding disbursement.

3. GOAL

The primary goal of this study is to determine the evolution of employee skills gaps in the South African health and welfare sector over the past decade. By unpacking these persistent capability discrepancies, the study aims to provide deep, actionable insights that extend beyond the baseline findings of the HWSETA Sector Skills Plan. These insights will assist the SETA in better planning for the sector and the distribution of grants.

4. OBJECTIVES

The study should, therefore, address the following related objectives:

- a) To quantify the distribution of skills gaps in the health and welfare sector
- b) To identify key skills change drivers that explain the distribution of skills gaps in the health and welfare sector.
- c) To explain mechanisms through which major change drivers impact on skills demand and supply in the health sector
- d) To ascertain if HWSETA's interventions have been appropriate or aligned to the distribution of the skills gaps in the health and welfare sector over the study period

5. SPECIFIC RESEARCH QUESTIONS

The research study seeks to answer the following specific questions in relation to key objectives as numbered above:

- a. **What is the distribution of skills gaps in the health and welfare sector?**
 - i. What is the distribution of skills gaps between pivotal and non-pivotal programmes?
 - ii. How distinct are the skills gaps for levy-paying, non-levy-paying, non-levy paying and levy-exempt organisations?

- iii. What are the main skills gaps for large, medium and small organisations?
 - iv. What are the skills gaps for the aggregated SIC code sub-sectors?
 - v. What are the main skills gaps for the major occupational groups?
- b. What are the key change drivers behind the skills gaps distribution in the health and welfare sector?**
- i. What are the change drivers behind the type of skills gaps identified?
 - ii. How distinct are the change drivers among the SIC code sub-sectors?
 - iii. How distinct are the change drivers among the types of organisations (levy-paying, non-levy-paying and levy-exempt)?
 - iv. How distinct are the change drivers for skills gaps across the different organisation sizes?
- c. What are the explanatory factors (key change drivers) for the prevailing skills gaps in the health and welfare sector?**
- i. What are the explanations behind the key change drivers?
 - ii. What are the differences in key change drivers across the different SIC code sub-sectors?
 - iii. What are the differences in key change drivers across the different organisational types?
 - iv. What are the differences in key change drivers across the different organisational sizes?
- d. To what extent have HWSETA's interventions been appropriate or aligned to the distribution of the skills gaps in the health and welfare sector over the study period?**
- i. Has the HW SETA appropriately responded to the distribution of skills gaps identified?
 - ii. How aligned have the SETA's training interventions been to the skills gaps identified over the 10 years?

6. SCOPE OF WORK

This study focuses on the analysis of skills gaps over the last 10 years. Using the WSP/ATR, the study also seeks to contextualise the identified skills gaps within the SETA landscape and how the organisation responds to the gaps.

The service provider will be required to support the research team through a thorough review of the following key project deliverables:

6.1. Review of the Research Proposal

The service provider will review and provide critical input on the full research proposal to ensure clarity, scientific rigor, alignment with objectives, and feasibility. The review should cover the following key components:

a) Literature Review

- Assess the quality, relevance, and currency of references.
- Identify any critical gaps in the background/context.
- Confirm alignment of the literature with the study objectives.
- Suggest additional literature or theoretical frameworks, where necessary.

b) Research Aim and Objectives

- Assess whether the aim is clearly defined and researchable.
- Check if objectives are specific, measurable, attainable, relevant, and time-bound (SMART).
- Ensure that objectives align with the stated problem and the proposed methodology.

c) Methodology

- Evaluate the suitability of the research design (e.g., cross-sectional mixed methods).
- Review sampling strategy, inclusion/exclusion criteria, and recruitment plan.
- Assess the feasibility and appropriateness of data collection methods.
- Comment on the validity and reliability of the study design.

d) Data Analysis Plan

- Assess the appropriateness of proposed analytical methods for both qualitative and quantitative data (e.g., descriptive stats)
- Confirm whether proposed methods align with the research questions and data types.
- Evaluate any plans for handling missing data (e.g., imputation, listwise deletion).

6.2. Lead the Ethics Application Process

The service provider will be responsible for preparing, compiling, and submitting the ethics application to [a registered Research Ethics Committee \(REC\) by the National Health Research Ethics Council \(NHREC\)](#). This includes:

- Prepare and compile the full ethics application package, including the application form, final or near-final proposal, instruments, participant information and consent documents, recruitment materials, institutional permission letters, data management plan, POPIA documentation and any other REC-required documents.
- Ensuring compliance with national and institutional ethical guidelines, including the Department of Health's Ethics in Health Research Guidelines and the Protection of Personal Information Act (POPIA).
- Ensure that the HWSETA-appointed principal investigator or responsible researcher is correctly identified and that all required institutional signatures and declarations are obtained.
- Submit the application to the agreed REC, pay or administer the approved ethics review fee as specified in the quotation, and provide HWSETA with proof of submission.
- Liaising directly with the ethics committee, as the administrative and technical liaison, to respond to queries, submit revisions, and track the status of the application while obtaining HWSETA approval and signatures before submitting substantive changes.
- Provide the final written ethics decision and approved, date-stamped study documents to HWSETA.
- Support protocol amendments, notifications, progress or closure reports during the assignment where required by the REC.

6.3. Review of the Final Research Report

The service provider will critically review the final research report to ensure high-quality reporting, technical accuracy, and consistency with ethical and methodological standards.

a) Literature Review

- Ensure inclusion of relevant and updated literature aligned with the study's findings and context.
- Evaluate the strength of the discussion.

b) Research Aim and Objectives

- Confirm that the results and conclusions appropriately address the original objectives.
- Check for logical flow and consistency between findings and recommendations.

c) Methodology

- Assess whether the methods used are clearly described, justifiable, and consistent with the approved proposal.
- Review any deviations or limitations and how they were handled.

d) Data Analysis

- Review the clarity and appropriateness of data presentation (e.g., tables, figures, summary stats).
- Evaluate the interpretation of results and the robustness of conclusions drawn.
- Review the final analysis plan, codebook, data dictionary, scoring rules and planned tables or figures before analysis is completed.
- Review evidence of data quality checks, cleaning decisions, missing-data handling and any weighting or adjustment procedures.
- Review anonymised statistical syntax, outputs or analysis summaries sufficiently to assess whether the methods were applied correctly and interpreted appropriately.
- Review the qualitative coding framework, thematic structure, supporting evidence and audit trail.
- Review the integration of quantitative and qualitative findings, including areas of convergence, complementarity or divergence.
- Provide written preliminary findings review memo identifying errors, over-interpretation, unresolved limitations and additional analysis required.

7. COMPETENCY AND EXPERTISE REQUIREMENTS

Prior to the bidder being subjected to the competency/ functional criterion, **it is mandatory** for the bidder to have the research ethics approval capacity where at least two names (team leader and any team member) are confirmed to have an active certificate of Training and Resources in Research Ethics Evaluation (TRREE) for Module 1 (Introduction to research ethics) and Module 3 (Informed consent). For more information on TRREE: <https://elearning.trree.org/>). The certificates should be provided.

NB: If a bidder does not meet these mandatory requirements, they will be disqualified immediately without undergoing the competency/functional criterion.

The successful bidder must have the following competencies:

FUNCTIONAL CRITERION	KEY COMPONENTS	MAXIMUM POINTS AVAILABLE															
1. Team composition and relevant experience	1.1 The team leader must have a minimum of 8 years of experience in research. A minimum of at one (1x) team member is required. A team member must have at least 4 years of individual work experience. The research service provider must submit CVs of all team members listed below. <table border="1"> <thead> <tr> <th>Name & Surname</th><th>Title/Position</th><th>Years of experience in research</th></tr> </thead> <tbody> <tr> <td></td><td>Team members (at least one) [5]</td><td></td></tr> <tr> <td></td><td>Project/Team leader [5]</td><td></td></tr> <tr> <td></td><td>NB: Project/Team leader cannot be team member</td><td></td></tr> <tr> <td></td><td>Total [10]</td><td></td></tr> </tbody> </table> - Table above not provided in the proposal = [0] - Table completed with individual team member with less than 4 years of experience = [0] - Table completed with team leader with less than 8 years of experience in research = [0] - Table completed with at least one team member having 4 years of experience in research specified = [5] - Table completed with a team leader with a minimum of 8 years of experience in research = [5]	Name & Surname	Title/Position	Years of experience in research		Team members (at least one) [5]			Project/Team leader [5]			NB: Project/Team leader cannot be team member			Total [10]		[10 points]
Name & Surname	Title/Position	Years of experience in research															
	Team members (at least one) [5]																
	Project/Team leader [5]																
	NB: Project/Team leader cannot be team member																
	Total [10]																
2. Professional Qualifications of the Research Team	The Project/Team leader should be in possession of the following qualifications (provide a certified copy of the team leader's qualification; the stamp must not be more than 6 months): A minimum of a Master's degree in the field of Psychology, Public health, and Social sciences. - Qualifications below Master's degree = [0] - Master's degree = [20] - PHD = [30] NB: International qualifications must be verified by SAQA and a copy of letters confirming verification. Total [30 points]	[50 points]															

FUNCTIONAL CRITERION	KEY COMPONENTS	MAXIMUM POINTS AVAILABLE
	The research service provider must submit the qualifications of at least one (1x) team member that will be involved in this project <u>listed on the organisation and structure table</u> above in possession of the following qualifications (excluding team leader). A minimum of a Master's degree in the field of Psychology, Public health, and Social Sciences. ▪ Qualifications below Master's degree = [0] ▪ Master's degree = [10] ▪ PHD = [20] (Provide a certified copy of the qualification listed. The stamp must not be more than 6 months). NB: International qualifications must be verified by SAQA and a copy of letters confirming verification. Total [20 points]	
3. Reference Letters	The service provider must submit a minimum of 1 (1x) reference letter with contactable references in <u>provision of research services</u>. The reference letter should be between 2020 and 2026. For a reference letter to be valid it must be dated and signed. No reference letters = [0] Minimum one (1x) reference letters = [20] In addition to meeting the <u>minimum one (1x)</u> reference letter, <u>bonus points</u> will be added when the follow aspects are stated within a valid reference letter. - Reference letter must at least confirm the ability of the research service provider in using <u>mixed methods</u> (both qualitative and quantitative research methods) [10] - Reference letter must at least confirm the exposure of the research service provider to <u>skills development research or SETA landscape research</u> [10]	[40 points]
Subtotal for Functionality (maximum) 100%		100 points
NB: A service provider must score <u>a minimum of 80 points on functionality</u> [competency and expertise requirements] to be considered.		

8. TIMELINES OF THE PROJECT

The duration of the project will be eighty (80) working days from the signature date of the Memorandum of Agreement (MOA). However, adjustments for longer duration may be accommodated for the purposes of the research ethics approval process which is outside the direct control of HWSETA and the service provider.

9. EXPECTED DELIVERABLES

The service provider will be required to deliver the following:

No.	Deliverable
1	Inception report, work plan and integrated review matrix

No.	Deliverable
2	Annotated proposal with tracked changes and consolidated proposal review memorandum
3	Instrument and participant-document review pack, including pilot-readiness recommendations
4	Complete ethics application package and proof of submission to the agreed REC
5	REC query-and-response log, revised documents and resubmissions, where required
6	Final ethics decision letter and approved, date-stamped study documents
7	Data management, codebook and analysis plan review memorandum
8	Preliminary findings and analysis quality-assurance memorandum
9	Annotated draft final report with tracked changes and consolidated report review memorandum
10	Final quality-assurance note confirming the status of material review comments
11	Complete assignment file containing all review versions, correspondence logs and editable deliverables

10. QUALITY AND REPORTING REQUIREMENTS

- The service provider will report to the HWSETA-appointed project lead and the relevant Research and Information Manager or delegated official. The service provider will oversee the general management of the service and performance.
- All substantive reviews will be submitted in Microsoft Word with tracked changes and comments, together with a clean copy and a consolidated review matrix or memorandum.
- Review comments will have to distinguish critical issues, major issues, minor issues and editorial suggestions, and provide a clear rationale and practical corrective recommendation.

- The service provider will have to use current and appropriate research, statistical and ethical standards and disclose any area outside the competence of the proposed team.

11. PRICING

- The proposed project pricing must be all inclusive of VAT.
- The HWSETA may require a breakdown of rates on any of the items priced and service providers are required to provide same.
- The HWSETA reserves the right to negotiate the selection/prioritisation of deliverables in line with the contract price.

The research report for the proposal review, ethics application, and research report review will be confined to the following parameters:

No	TITLE OF THE RESEARCH STUDY	MAX NO. OF PAGES	MAX NO. OF WORDS
1	Trend Analysis of Skills Gaps (Top-Up Skills) over the Ten-Year Period (2016/17 to 2025/26)	100	20 000

The following two tables must be used for the quotation. However, you are free to include more quotation details in your own preferred format in addition to the table shown below.

The first table below accounts for proposal review and ethics application.

Outcome/Output	Activity	Team member(s) involve (<i>Name and position</i>)	Cost inclusive of VAT
Proposal Review			
Ethics Application (<i>should include the estimated ethics committee cost</i>)			
Total			

Second table below accounts for research report review. However, you are free to include more quotation details in your own preferred format in addition to the table shown below.

Key activities	Team member(s) involve (<i>Name and position</i>)	Cost inclusive of VAT
Reading the report with the view to identify strengths and weaknesses		
Strengthening the report by doing additional research and ensuring that it makes a policy contribution		
Locating the report within the skills development literature		
Meeting the Research Manager or research team virtually to exchange ideas on the report (This is a capacity-building component)		
Quality control and self- editing		
Total		

NB: consider the guideline below for reviewing research study report at HWSETA.

ANNEXURE 1: GUIDELINES FOR REVIEWING RESEARCH STUDY REPORTS
GENERAL OVERVIEW
Review whether the report used: ○ appropriate structure to document research processes followed to conduct the study ○ appropriate style of writing, that considers construction of paragraphs and sentences, where: • a succession of well-structured paragraphs helps to create a coherent and logical argument, • paragraphs contain a number of sentences which develop new ideas or expand upon existing ones, • paragraphs which, develop new ideas starts with an introductory sentence (a topic sentence). This tells the reader the purpose of the paragraph and introduces the main idea under development, expanding upon or contrasting with another.

ANNEXURE 1: GUIDELINES FOR REVIEWING RESEARCH STUDY REPORTS

- appropriate language
 - Use of transitional hook, which leads to the next paragraph or topic
- Citations appropriately, where:
 - ideas, facts, theories, concepts, derived from the research and thoughts of others summarized, paraphrased, or used as direct quotes in the report acknowledge sources.

ABSTRACT

Review whether the abstract:

- provides a concise of description the content and scope of the research study; which:
 - identifies the study's objective,
 - its methodology and key findings,
 - conclusions and recommendations

INTRODUCTION

Review whether the introduction:

- provides a **context or background to the topic by** explaining the title in own words or use a quotation from an author who offers a supporting or contradictory statement about the topic area;
- provides a **purpose for writing about this topic by** explaining the problem addressed by the research study;
- **explains the rationale and significance of the research study;**
- **indicate intended users of the report and its intended use;**
- provides **definitions** for complex terminology or acronyms used in the report that need defining, conceptualisation or operationalisation;
- **presents the main ideas that stem from the topic** in the precise order in which they will be discussed;
- narrows the topic down to a specific focus of an investigation;
- establishes a direction for the entire report;
- points forward to the conclusion;
- takes a position and justify further discussion.

LITERATURE REVIEW

ANNEXURE 1: GUIDELINES FOR REVIEWING RESEARCH STUDY REPORTS

Review whether the literature review:

- Places each work in the context of its contribution to understanding the research problem being studied.
- Describes the relationship of each work to the others under consideration.
- Reveals any gaps that exist in the literature.
- Resolves conflicts amongst seemingly contradictory previous studies.
- Identifies areas of prior scholarship to prevent duplication of effort.
- Points the way in fulfilling a need for additional research.
- Locates the research study being conducted within the context of existing literature [very important].

RESEARCH METHODOLOGY

Review whether the presentation of the method used clearly articulate how data was obtained and the reasons why a particular procedures or techniques were used, by:

- Introducing the overall methodological approach used for investigating the research problem,
- Indicating how the approach fits the overall research design;
- Describing the specific methods of data collection used;
- Explaining how collected data was analysed;
- Providing background and a rationale for methodologies that are unfamiliar for readers;
- Providing justification for participant selection and sampling procedure; and
- Describing limitations.

PRESENTATION OF FINDINGS

Review whether the presentation of primary and secondary data collected provides:

- understanding the results within the context of the research problem underpinning your study.
- visuals such as, figures, charts, photos, maps, tables, etc. for non-textual elements to further illustrate key findings, if appropriate.
- A systematic description of results, highlighting for the reader observations that are most relevant to the topic under investigation

ANNEXURE 1: GUIDELINES FOR REVIEWING RESEARCH STUDY REPORTS

- A short paragraph that concludes the results section by synthesizing the key findings of the study.

INTERPRETATION AND DISCUSSION OF FINDINGS

Review whether the interpretation of findings:

- Most effectively demonstrates the author's ability as a researcher to think critically about issues, to develop creative solutions to problems based upon a logical synthesis of the findings, and to formulate a deeper, more profound understanding of the research problem under investigation,
- Presents the underlying meaning of the research study,
- notes possible implications in other areas of study, and
- explores possible improvements that can be made in order to further develop the concerns of the research study,
- Highlights the importance of the study and how it may be able to contribute to and/or help fill existing gaps in the field.
- reveals new gaps in the literature that had not been previously exposed or adequately described, and

Review whether the discussion provides:

- Explanation of whether or not the results
 - go into greater depth when explaining findings that were unexpected or especially profound;
 - take note of any unusual or unanticipated patterns or trends that emerged and explain their meaning in relation to the research problem.
- References to previous research by making a comparison with the findings from other studies to support a claim.
- a claim for how the results can be applied more generally.
- a possible conclusion arising from the results, which may be proved or disproved in subsequent research.

CONCLUSIONS AND RECOMMENDATIONS

Review whether the conclusion

- Presents the last word on the issues raised in the report;

ANNEXURE 1: GUIDELINES FOR REVIEWING RESEARCH STUDY REPORTS

- Summarises thoughts and conveys the larger significance of the study;
- Identifies how a gap in the literature has been addressed.
- Demonstrates the importance of the author's ideas.
- Introduces possible new or expanded ways of thinking about the research problem.

REFERENCES, TABLES, AND FIGURES

Check:

- accuracy, numbering and citation appropriateness
- quality and readability of figures
- completeness of legends, headers and axis labels
- presentation consistency

MANDATORY REQUIREMENTS

- Company registration documents
- Service provider's business address
- Service provider's contact person (name, email address, and telephone number)
- Proof of registration on the Central Supplier Database (attached relevant documents)
- Signed POPI Consent (**Refer to Annexure A below**)

ANNEXURE A: CONSENT IN TERMS OF SECTION 11 OF THE PROTECTION OF PERSONAL

INFORMATION ACT, 2013 ("POPIA")

In order for the Health and Welfare Sector Education and Training Authority ("HWSETA") to consider the applicant's response to the advertisement to become a service provider of the HWSETA, it will be necessary for the HWSETA to process certain personal information which the service provider may share with the HWSETA for the purpose of the bid, including personal information.

The HWSETA will process the Service Provider's Personal Information in accordance with its Privacy Policy. Access to your Personal Information and purpose specification: Personal Information will be processed by the HWSETA for purposes of assessing the service provider's submission in relation to the advertised EOI and the purposes of assessing current services required by HWSETA. We may also share the service provider's Personal Information with third parties within the Republic of South Africa, including to carry out verification and background checks. In this regard, the service provider acknowledges that the HWSETA's authorised verification agent(s) and service providers will access Personal Information and conduct background screening.

Consent:

By [ticking] "Yes" and signing below, you agree and voluntarily consent to the HWSETA's processing of your Personal Information for the purposes of evaluation, including to confirm and verify any information provided in the submission and service provider gives HWSETA permission to do so. The service provider understands that it is free to withdraw its consent on written notice to HWSETA, and the service provider agrees that the Personal Information may be disclosed by HWSETA to third parties. Please note that if you withdraw your consent at any stage, we may be unable to process your bid submission.

Yes ☐ No ☐

Supplier Name

Date

Signature