

GOVERNANCE OF STRATEGICALLY RELEVANT RESEARCH IN THE WHOLESALE AND RETAIL SECTOR

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This work was supported by the Wholesale & Retail Sector Education & Training Authority and various retail business enterprises

Abstract

This paper reports on a comprehensive survey of priority research needs of the South African wholesale and retail sector, with the objective of providing an overview of the most significant research requirements of this significant economic sector. The survey was conducted across a spectrum of sector stakeholders including corporate, independent and informal traders, in all provinces. Survey methodology encompassed a structured priority-rating questionnaire, complemented by dialogic interviews with thought leaders in the sector, and with government and labour union officials. Considering functional areas and Standard Industry Classification divisions, the multiplicity of research problems perceived by industry stakeholders is analysed and distilled into the 'Top Ten Research Priorities' for consideration by the retail industry, government policy makers and academic researchers.

Keywords: Wholesale, Retail, Research Priorities, Professionalism, Skills Development, Sector Sustainability

1. INTRODUCTION

1.1. Background and context for the study

Wholesale and retail (W&R) in South Africa is a significant growth sector of the economy and a major employer. Statistically, it is a sector that is more volatile with respect to cyclical changes and global economic conditions than many other sectors. It is the fourth largest contributor to Gross Domestic Product (GDP) with a contribution of around 15% and employs around 22% of the total active workforce of the country. The highest densities of retail enterprises are found in the Gauteng, KwaZulu-Natal and Western Cape provinces. Collectively, these provinces make up 76% of the workforce of the W&R sector. About 87% of the sector is made up of small enterprises, 9.5% medium and 4.5% large enterprises (W&RSETA, 2011).

1.2. Nature of the research problem

South Africa, in common with many developed and developing economies, has moved increasingly towards mall-based retailing, with implications for the sustainability of small, medium and micro-retail traders and their job creation potential. According to South Africa's National Development Plan (NDP Vision 2030), an additional 11 million jobs are required, many of which will have to come from the retail sector. Furthermore, ownership of assets must be broadened to historically disadvantaged groups, constraints on investment and job creation must be removed, and South Africa must be positioned to build on its competitive advantages (Altman, 2013). To assist the sector to achieve these goals, strategic

research is required to provide an overview of research requirements within the South African W&R sector.

1.3. Objectives of the study

The core objective of the survey was, therefore, to provide an overview of the most economically relevant and strategically significant research requirements within the South African W&R sector. The study set out to prioritise strategic, tactical and operational research requirements for the W&R sector, within the framework of South Africa's National Development Plan (NDP Vision 2030). Thus the emphasis is on a review of the current status of the industry, researchable problems that exist in the industry, identification of research that is needed in the industry, and thus aims to provide assistance for researchers in identifying and selecting academic research topics that are topical, practical and helpful to the W&R industry.

1.4. Importance of, and justification for, the study

Considering the size and importance of the retail sector as mentioned above, the W&R sector has the potential for significant contribution to, or inhibition of, the achievement of the NDP's socio-economic objectives. This potential applies not only within South Africa, but also internationally, via the W&R sector's interaction across the African continent, and collaboration with the emerging Brazil, Russia, India, China, South Africa (BRICS) group of developing economies. Therefore, a clear identification and prioritisation of the sector's research needs was felt by industry leaders to be essential. The importance

of this study is also supported by the THRIP Annual Report (2012/2013) which emphasises the importance of "contributing to demand side skills for industrial development" and "developing high level skills linked to industry-relevant research." Furthermore, this approach is supported by Santa Clara University (one of the top retail research institutes in the USA), who "brings thought leaders from academia and industry to collaborate on ... topics that are of mutual interest" in order to identify future research projects (Retail Management Institute's 2014 Hack-a-thon, 2014).

1.5. Summary of methodology

A mixed methods approach was adopted, including depth interviews, participation in various workshops and a survey questionnaire. A broadly representative list of W&R sector organisations, trade associations, academics, banks and related private and government agencies was identified. The study was conducted largely in the Western Cape, Gauteng and KwaZulu-Natal provinces, as these three provinces account for the largest proportion of retailers in South Africa. The researcher participated in a number of retail seminars focussing on retail research problems. A questionnaire was developed to identify key strategic, tactical and operational problems, within selected functional areas and the major W&R categories. A pilot study was conducted to test the questionnaire before commencing with the survey. In addition to information yielded by the questionnaire, in-depth interviews with various government sources, banks, academics and industry leaders also provided data on the research problem. The information obtained from both the interviews and the survey were summarised and then scrutinised and tested during a focus group discussion, during which leading industry professionals were present.

1.6. Structure of the paper

Having set the scene in the Introduction, extant literature covering retail sector research need identification is presented next, followed by an overview of the South African retail sector and W&R needs. Then a more detailed explanation of the methodology used for the study is given. This is followed by a presentation of the findings, summarised, according to the different methods, to the 'burning issues' for South Africa, Africa and BRICS retailing. The paper is then concluded with a list of the 'top ten priorities' for the W&R sector and some recommendations for the sector.

2. RETAIL RESEARCH NEED IDENTIFICATION

A comprehensive literature search has found virtually no material on how the research needs of an industry are identified. We then studied how various international commercial and academic retail research institutes identified what research to undertake to try to get a better understanding of this process. It appears that research is undertaken based on personal interests, perceived industry needs and opinions of individuals, company/industry consulting, close collaboration within an industry or a formal need identification

processes, or a combination of these. These various methods are summarised below:

- *Personal interests*: Many universities choose a specific area of interest on which to focus, and then select research topics that are of interest to the individual academics, or that are suggested by client companies (Institute of Retail Management, 2016; The Retail Institute, 2016).

- *Perceived industry needs/opinions*: Industry experts, collaborating with retailers, decide on what research projects to conduct, based on their own knowledge or expertise (IGD, 2015; David F Miller Center for Retailing Education and Research, 2016).

- *Company/industry consulting*: Based on areas of expertise, a consultant or academic will either undertake research in their area of specialisation or according to requests from a retailer (Centre for Retail Research, 2016; Institute for Retail Studies, 2016; The Retail Institute, 2016; Oxford Institute of Retail Management, 2016).

- *Close collaboration within an industry*: Retailers participate with researchers on a "council" or advisory board and meet, usually a couple of times a year, to identify and decide on research projects (Centre for Retail Management, 2001; Baker Retailing Centre, 2016; Centre for Retailing, 2014).

- *Formal need identification processes*: Santa Clara University holds a 'Hack-a-thon' twice a year, bringing thought leaders from academia and industry together to identify leading edge retailing research topics that are of mutual interest (Retail Management Institute, 2014).

This summary shows that the conducting of a formal industry needs analysis is unusual with only Santa Clara University conducting a formal analysis as is envisaged in this study.

3. STATUS OF THE SOUTH AFRICAN RETAIL SECTOR

The South African retail sector's contribution to economic growth, employment promotion and poverty reduction, in support of the national Accelerated Shared Growth Initiative for South Africa's (AsgiSA) economic development strategy, is difficult to identify. This is so because "reliable comparative data on direct and indirect growth, employment and linkages with SA manufacturing sources, are relatively hard to come by" (National Labour & Economic Development Institute 2007:11).

Wholesale and retail is regarded as a significant sector of the South African economy and a major employer. It is the fourth largest contributor to Gross Domestic Product with a contribution of about 15% and employs about 22% of the total active workforce of the country (W&RSETA 2011). Statistics SA (2011) reports that employment statistics for September 2011 increased by 1% but there is doubt regarding the accuracy and reliability of current wholesale and retail trade employment data (Coleman, 2012; Kotze & Gumede 2013).

According to the W&RSETA (2011:6-8) recent data trends indicate that permanent employment within the sector as a percentage of the total South African workforce has been decreasing, from a high of 27% in 2001, to 22% in 2010. This suggests that the practice of periodic employment of casual staff is increasing, aligned with projected peak retail sales periods.

The W&RSETA 2011-2016 Sector Skills Plan

(W&RSETA 2011:6) notes that the highest densities of W&R enterprises are found in the urbanised provinces of Gauteng, KwaZulu-Natal and Western Cape. Together, these provinces make up 76% of the total national workforce of the W&R sector. Significantly, the Sector Skills Plan notes that about 87% of the number of businesses in the W&R sector are small enterprises, compared with 9.5% medium, and 4.5% large corporate, enterprises. Furthermore, only 65% of businesses in the W&R sector are formally registered. There are probably over 100 000 informal traders in the sector, with an estimated annual sales turnover of R7 billion, making up approximately 10% of total national retail sales.

South Africa, in common with many developed and developing economies, has moved increasingly towards shopping centre or mall-based retailing. This has negative implications for the sustainability of informal and micro-retail traders (Müller 2013; Charles 2013) and their future job creation potential, which is one of the objectives of the NDP.

According to Bureau for Economic Research (2013: 2) the South African retail outlook is not very encouraging, characterised by deteriorating consumer confidence levels, rising prices, weak employment prospects, a slowdown in credit extension and the projected easing in government social grant spending which will weigh on retail sales volumes.

PriceWaterhouseCoopers (2012) mentioned that retail margins are under intense pressure in the current South African economic environment. "First, decreasing disposable income leads to lower consumer spending, with direct impact on the bottom line. Second, shrinking margins in the FMCG industry make negotiations with suppliers of branded goods increasingly difficult. Last but not least, maturity in many markets leads to the introduction of new formats, including increasing numbers of convenience stores and discount retailers, thus generating fierce competition" (Wilkinson 2013). Among all retail merchandise categories, mass grocery retail is predicted to be the outperformer between 2013 and 2017, in growth terms. Business Monitor International (2013) nevertheless remained positive on South African private consumption.

A review prepared for the National Credit Regulator (NCR 2011) highlights the demand for retailer credit access and support needs by SMEs, and analyses the funding and support programmes available. In addressing the effectiveness of public sector support of small and emerging businesses, the review poses the question: "Why has government support of small businesses failed?" (NCR 2011: 43). This question was also highlighted by the Retail Council of South Africa (Pillay 2013), as well as by executive members of the South African Small and Medium Enterprises Federation (Venter 2013a), and the Informal Traders Alliance (Müller 2013).

According to the director of the Retail Association (Cohen 2013), "Gearing up for future growth, retailers need to take a strategic look at the sector's labour market requirements. The economic and regulatory environment is shifting. Whether in South Africa, the African continent, or abroad, collaborative, innovative and pro-active strategies are vital to ensure that retail has the human capital capacity to stimulate and sustain growth in the sector".

Philip's (2010) critique of the inequitable

structure of the South African economy was described by Makgetla (2013) as "highlighting an issue which the W&R sector needs to consider seriously". Philip argues that while much scholarship has focussed on critiquing the concept of the 'second economy', the stark inequalities that characterise South African post-apartheid society and its economy must be addressed.

Raman & Fisher (2010) provide insights into an aspect of international W&R performance that is likely to be a significant challenge to South African retailers, namely the context of technological innovation and international expansion. This theme of how best to engage potential customers through 'omni-channel retailing' is also explored by Rigby (2011).

Further national, provincial and municipal governance factors that may promote or retard the growth potential of the South African W&R sector that emerged from the literature and from initial discussions with industry experts include:

- economic and social upgrading in value chains (Barrientos and Visser 2012),
- urbanisation and metropolitan consumer trends towards 'the 24 Hour Economy' (Gauteng Department of Economic Development 2012),
- municipal trading hours legislation (City of Cape Town 2013),
- proposed licensing legislation for all businesses including informal retailers (Davies 2013),
- retailer public reputations and trust perceptions (Falala 2013),
- W&R pricing strategies (Meijer and Bhulai 2013),
- corporate governance principles and practices (Van der Heever 2013),
- effectiveness of skills development and support for emerging retail and other firms (Mfenyana 2013; Nkosibomvu 2013; Kotze & Gumede 2013; Müller 2013; Charles 2013),
- the need for effective collaboration amongst retail trade associations (Consumer Goods Council of South Africa undated; Pillay 2013),
- the "toxic relationship between government and private sector" (Landman 2013); the transformational role of regional socio-economic development agencies, within the National Development Plan objectives and strategies (Gauteng City-Regional Observatory 2012; Nyar 2012; Gabriels 2013; Lewies 2013; Western Cape Economic Development Partnership 2013; Gordon & Tshabangu 2013).

This overview of the status of the South African retail sector highlights many potential problems that could warrant further investigation in order to clarify ways that the sector could better contribute to the economic and social development of South African society. For this reason, qualitative empirical research was designed to identify those problems that require emphasis and which should become priorities for any researchers conducting research in the retail sector.

4. METHOD

Aligned with the research objectives, a mixed methods cross-sectional methodology was used, combining qualitative seminar inputs and dialogic interviews with wholesale and retail thought leaders,

and a quantitative priority analysis questionnaire, administered through personal contacts with sector stakeholders.

With the assistance of W&R Sector Educational and Training Authority (W&RSETA) management across all provinces, a purposive sample of sector businesses, trade associations, labour unions and relevant government agencies was developed. The sample was structured to identify and prioritise W&R stakeholders' and thought leaders' perceptions of sector strategic and operational problems, and any needs for policy review within South Africa (Nyar 2012; Makgetla 2013; Mowzer 2013; Strachan 2013; Gabriels 2013), across the African continent (Scholtz 2013), and with regard to the emerging BRICS group of developing economies (Davies 2013).

Of 206 contacts made and survey questionnaires distributed, 64 were completed and analysed, within the generic Wholesale & Retail functional areas and the three major divisions of Standard Industrial Classification (SIC) categories in the sector as defined by Statistics South Africa (2011), namely:

- SIC Division 61: Wholesale and Commission trade;
- SIC Division 62: Retail trade excluding motor vehicles and fuel; and
- SIC Division 63: Retail trade of motor vehicles and fuel.

The questionnaire was based on the information gathered via the literature review and the expert interviews, and was designed to identify and prioritise key W&R research problems in South Africa, within the three major W&R SIC divisions and the following functional areas:

- corporate governance, strategy and risk management;
- marketing, sales promotion and public/stakeholder relations;
- procurement, supply chain and distribution logistics;
- branch operations management, systems and technology;
- finance: access, viability and sustainability;
- in-store production and quality assurance;
- human resources: talent management, employment equity, skills development and labour relations;
- safety, security, waste management and loss control;
- premises and asset management;
- development projects and new ventures;
- formal/informal W&R challenges & opportunities;
- non-store, catalogue and on-line W&R trading.

The researchers also participated in a CPUT W&R Seminar focussing on sector research problems and opportunities held in May 2013. They also participated in debates during W&RSETA Sector Skills Plan annual stakeholder forums in the three high-density provinces of Gauteng, Western Cape and KwaZulu-Natal, in May and June 2013. Relevant W&R seminar and W&RSETA stakeholder forum inputs were incorporated into the findings, in order to formulate a broadly representative perspective of priority research topics.

Multiple data sources and collection methods, from a number of different geographic regions, provided triangulation that ensures the findings are trustworthy and credible.

5. FINDINGS

The data gained from the CPUT seminars, W&R thought leader interviews and management/stakeholder questionnaires, combined to provide evidence of a consistent range of challenges for future in-depth research in the W&R sector, which are detailed below.

5.1. CPUT retail sector seminar: observations and opportunities

During a seminar on the research needs in the retail sector, convened by the CPUT Wholesale & Retail Leadership Chair (Steyn 2013), several potentially meaningful research needs were identified in the various presentations, as summarised below.

5.1.1. Priority perspectives on retail expansion into Africa

Perspectives were provided by a widely experienced W&R sector legal practitioner (Scholtz 2013). Based on considerable pragmatic experience of corporate retail expansion into other regions of Africa, he recommended that business environmental factors which South African retailers considering expansion across the continent need to research should include:

- language, culture & economic growth potential;
- property development, rental and ownership issues;
- procurement & supply chain logistics;
- retail management availability, skills development and retention;
- governance, corruption and legal protection factors.

5.1.2. The BRICS developmental options

Key points from a policy presentation made by the Minister of Trade and Industry (Davies 2013) in Cape Town, regarding South Africa's role in the Brazil-Russia-India-China-South Africa (BRICS) group of developing countries, were considered. Although national W&R sector strategies do not feature specifically in the Department of Trade and Industry (DTI) mandate, nor in the Minister's BRICS policy presentation, strategic research needs and questions for the retail sector can be extrapolated.

5.1.2.1. The global context

- BRICS countries are fast emerging as new sources of global economic growth, trade and investment flows, re-shaping the global economy. BRICS will account for 61% of global economic annual growth by 2014, and developing countries' share of world trade will double over the next 40 years; hence the strategic importance of strengthening trade, investment and development co-operation.

5.1.2.2. South Africa's BRICS membership strategy

- Develop a platform to address opportunities arising from growth in intra-BRICS trade.

- Champion a paradigm for equitable development that focuses on mutually beneficial complementary trade, not destructive competition.
- Advance support for Africa's developmental agenda (especially regional integration, industrial capacity and infrastructure development).

5.1.3. The W&RSETA perspective

W&RSETA Chief Officer: Qualifications and Research (Sipengane 2013) contributed a presentation on the W&RSETA's national priorities and research strategy, based on their in-depth knowledge of the sector. Key points in his presentation were:

- Develop and update W&R Sector Skills Plan;
- Commission impact assessment studies on completed projects;
- Economic impact of the Wholesale & Retail sector in the South African economy.

5.1.4. The CPUT Retail Department perspective

In parallel with the national Research Priority Needs Survey conducted with industry management and stakeholders, CPUT Retail Department priority perspectives were summarised in a seminar presentation (Venter 2013b). Within a framework of functional areas similar to that used in the industry survey, the CPUT Retail Department presentation identified their perceptions of high priority research topics, including:

- corporate governance, strategy and risk management;
- marketing, sales promotion and public/stakeholder relations;
- procurement, supply chain and distribution logistics;
- branch operations management, systems and technology;
- finance: access, viability and sustainability;
- in-store production and quality assurance;
- human resources: talent management,

employment equity, skills development and labour relations;

- safety, security, waste management and loss control;
- development projects and new ventures;
- formal / informal W&R challenges & opportunities;
- non-store, catalogue & on-line W&R trading.

6. DISCUSSION OF RESEARCH FINDINGS

The priority ratings and qualitative responses elicited by the survey questionnaire, stakeholder and thought-leader dialogic interviews, CPUT Retail Seminar and W&RSETA Sector Skills Plan forums will now be summarised, according to the functional areas previously mentioned.

Significant comments by stakeholders are quoted; and regional and/or sub-sector trends (such as W&R corporate business/informal trader responses, labour union concerns, niche market issues and urban-rural differentials) are noted where potentially relevant for meaningful research consideration and planning.

6.1. National issues: overall W&R sector survey findings: perceived research priorities

Aggregate priority research issues relating to the wholesale and retail sector within South Africa are depicted below. These were identified by respondent weightings within the defined W&R functional areas and were used to indicate priority functional areas for future in-depth research topics. Figure 1 illustrates graphically the total weighted priority scores for each functional area, for national priorities. This highlights that "corporate governance, strategy and risk management" and "HR management, skills development and labour relations" were perceived as the two broad areas needing research most urgently.

Figure 1. Overall W&R sector survey findings: national research priorities



For each of these priority areas, a number of research topics were identified from the overall responses - these were termed "Burning Issues" for priority in-depth research.

6.1.1. Corporate Governance, Market Strategy & Risk Management

- Buy South African: W&R need to collaborate

with local manufacturers and suppliers to promote local products at the right price and quality; but national government also needs to come to the party, with tax incentives and import controls.

- Enterprise financial governance: better budgeting, integrated reporting and cash flow management skills (especially for SME and informal traders).

- Noting the growth of SA urbanisation into city-regions, with challenges of spatial planning, how

well are corporate retailers and informal traders co-operating, for mutual socio-economic benefit?

6.1.2. Human Resources, Equity, Skills Development & Labour Relations

- Shortage of retail management skills and employment equity in attracting women for permanent careers, especially in rural areas.
- Talent management is essential for attracting, developing and retaining scarce W&R skills: linked with youth development goals - a challenge that needs urgent attention and co-ordinated action.
- Consultative labour relations and productivity agreements/incentives for sustainable company results; we need to find each other.

6.1.3. Branch Operations Management

- The core of a successful retail business; practical management skills training is essential, so that retail operations knowledge is properly applied, on the job.

6.1.4. Finance: Access, Viability and Sustainability

- Highlighted by the Informal Traders Alliance: Access to development finance is essential, to facilitate co-operative bulk purchasing, for competitive pricing;
- Access to customers in high-traffic areas such as shopping malls; we need partnerships with big business, to develop ourselves.

6.1.5. Competitive Procurement, Logistics and Supply Chain optimisation

- The ongoing problems of cost-efficient and timely procurement processes, linked with the need for Fair Trade and job creation policies, were highlighted by a high proportion of respondents, especially those in apparel and home textile retailing.
- The increasing counterfeit and illicit trade has been identified by the Consumer Goods Council (Pillay 2013) as a problem, involving significant volumes of fake goods; and leading to the establishment of a CGCSA industry task group to recommend action.
- The problem of low production capacity for converting textiles into locally manufactured products for retail sales.

6.2. International: Africa and BRICS

Figures 2 and 3 illustrate the priority research problem ratings for each W&R functional area as related to the Africa and BRICS groupings, i.e. the international "burning issues" facing South African retailers. Interestingly, the most important areas for research differed considerably from the national priorities. For retail trading in both Africa and BRICS countries, "procurement, supply chain and distribution logistics" and "statutory/legal requirements" were seen as the most important areas of research need.

Figure 2. Overall W&R sector survey findings: Africa research priorities

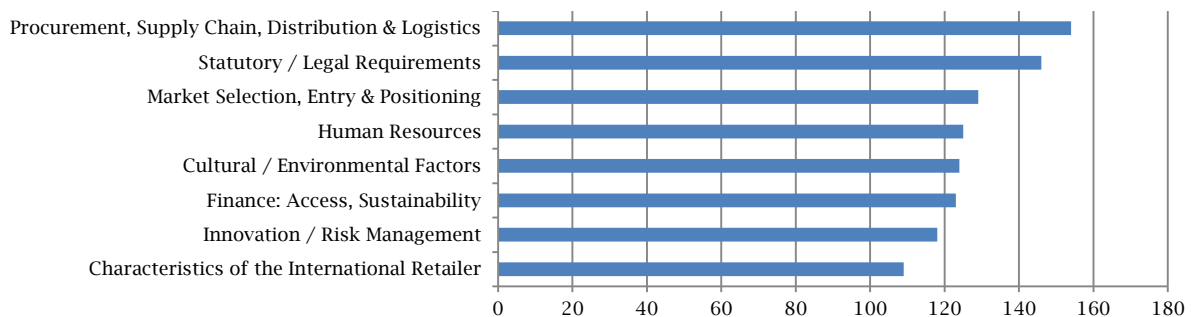
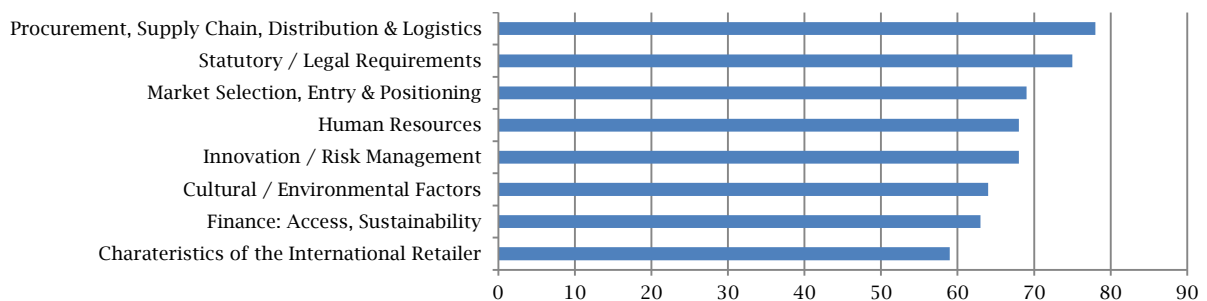


Figure 3. Overall W&R sector survey findings: BRICS Countries research priorities



Combining the "burning issues" from the Africa and BRICS responses, international research topics for future prioritisation was suggested by the respondents, as summarised below.

6.2.1. Procurement, Supply Chain, Distribution & Logistics

- As an importer and wholesaler, exchange rate fluctuations are beyond our control and increased

product prices cannot always be passed on to the retailer and consumer.

- China and Brazil governments support their local manufacturers far more than SA, via direct and indirect incentives and measures. How should this be addressed, to promote our local procurement and job creation?

6.2.2. Statutory / Legal Requirements

- We need a research service to help SA retailers know other countries' legal procedures and local customs; this is critical for our successful expansion into Africa and interacting in BRICS.

6.2.3. Cultural / Environmental Factors

- Cultural diversity - we as retailers must better understand the varied and diverse customer base across Africa, if we are to deliver on their needs in a way that is appropriate and adds to the local customer experience.

6.2.4. Market Selection, Entry and Positioning

- Multi-national marketing strategies: As SA retailers begin or continue to expand into Africa, timing of entry and establishing a popular brand is critical to gain market share.

6.2.5. Human Resources

- Multi-national HR management skills are a priority need, for selection, training and retention of South African and local staff in other African countries.

6.2.6. Finance

- Credit offerings: this remains an important method to drive international W&R sales - but at what point will granting credit facilities become detrimental, as the retailer struggles with increased bad debts?

- Financial governance assessments and sustainable assistance criteria are urgently needed, to support SA retailers for their expansion into Africa.

6.2.7. Characteristics of the International Retailer

- Expertise is essential in operational and cost efficiencies, across varying cultures and retail models. The need to maximise profit margin within competitive environments, is a challenge to all retail companies in varying international markets.

7. SUMMARY OF FINDINGS

Based on the above discussions and the opinions expressed in the various workshops/ presentations, a qualitative analysis reduced the possible research topics to a 'top ten' list, which we believe should direct research in the W&R sector over the next few years. Table 1 lists the 'Top Ten Researchable Topics' and identifies which of the problem areas for each of the national, African and BRICS priority areas they apply to. It can be seen that all ten topics address a comprehensive coverage of all the priority areas. It should also be noted that each of these ten topics could be broken up into a number of different individual research projects. They thus act as a guide and focus to direct research to important areas in the sector.

Table 1. Top ten researchable topics and their prioritisation

Research topics	National	Africa	BRICS
Explore talent management as a tool for attracting, developing and retaining scarce W&R skills, linked with youth development and employability goals.	2	4	4
What corporate strategies, governance and risk mitigation steps should SA W&R promote, in support of National Development Plan: Vision 2030 objectives?	1, 5	7	5
Define and explore logistics challenges and risks for W&R ventures in Africa and BRICS countries.	8	1	1
Evaluate 'Customer Centricity' in SA retail business strategy and processes; define how to build a sustainable customer base, especially for emerging retailers and small traders.	3		
Towards sustainable financial governance: better budgeting, integrated reporting and cash flow management skills especially for SME and informal traders in both rural and urban South Africa	4, 9	6	7
Analyse and evaluate shrinkage and loss control strategies in high-performance retail and wholesale businesses.	1, 5	7	5
Analyse, define and evaluate technology trends and challenges for 21st century retail managers, in South Africa and Africa.	2, 3, 6, 12	7	5
Explore and propose optimal tenant mix models for shopping centres, in a transforming SA, towards achievement of NDP: Vision 2030 objectives.	2, 7, 11		
Analyse and evaluate the opportunities, problems and potential risks for South African wholesalers and retailers, in e-Retailing, e-Tailing, and e-Commerce.	9, 12	7	5
Analyse and evaluate strategic information on priority aspects required by the W&RSETA, for effective updates of the W&R Sector Skills Plan.	2	4	4

8. CONCLUSIONS AND RECOMMENDATIONS

With a view to expediting a shared vision and development of a W&R sector 'collaborative network' in South Africa, it is recommended that the 'Top Ten Researchable Topics' can facilitate a strategic focus on key issues which have emerged from this national

survey. These topics address a range of issues that would be of interest and benefit to major chain retailers, middle size, smaller and informal retailers, in a number of the critical functional areas of the retail business. Furthermore, there are sufficient topics of interest and importance to the wider sector stakeholders, such as retail associations, private

consultants, academic researchers and the W&RSETA, such that all W&R stakeholders can contribute to improving knowledge about the sector, and they will also benefit from each other's knowledge generation.

Retail sector analyst and consultant Parker (2013) reflected that "the successful retailer is the one who correctly identifies the key issues, develops strategies to address them, and tactics to accomplish them. This is what drives retail innovation and efficiency and leads entrepreneurs to be bold, experiment, and take risks. Take all that away and you'll have a moribund market that simply feeds on itself and goes nowhere. The greatest incentive for retail entrepreneurship is the opportunity to make profits. The more that is undermined, the fewer retail entrepreneurs we will develop".

Noting this 'reality check', the researchers strongly recommend that the prioritisation of the research topics should be facilitated and implemented in professional consultation with W&R business stakeholders, representative member organisations, mandated labour union representatives and relevant government agencies. Such consultation should result in, and form, collaborative partnerships around W&R research topics that focus on promotion of the socio-economic principles and objectives of South Africa's National Skills Development Strategy III (Republic of South Africa 2011) and the National Development Plan.

Given the multi-faceted nature of the identified W&R sector problems and opportunities, the envisaged collaborative network will need to include a core of mandated representatives from the sector trade associations, government agencies, organised labour and W&RSETA. Additional expertise, experience or insights for specialised research topics could be co-opted when necessary.

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