



WORKER EDUCATION TECHNICAL TASK TEAM

WORKER EDUCATION FRAMEWORK SOUTH AFRICA

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EXECUTIVE SUMMARY

BACKGROUND AND INTRODUCTION

According to the Human Resource Development Council of South Africa (HRDCSA) Worker Education problem statement, “there is no clear collective vision on an integrated, accredited and non-accredited worker education and training framework in South Africa. As a result no national coordinated and integrated Policy and Legislative Framework is available to guide and support the implementation of worker education and training.”¹

The Worker Education Technical Task Team, one of nine in the HRDC, commissioned a Worker Education Study in November 2012:

- To conduct an analysis and attain a common understanding of the current provision and understanding of the three pillars namely Worker Education Ideology, Vocational education and Joint Worker Education within the Worker Education and Training context;
- To conduct a study on global/international practice in the Worker Education environment focusing on the above three pillars;
- To compare and consolidate the analysis report on the current system and the benchmarking report;
- To define a common vision for National Worker Education Framework; and
- To produce a National Integrated Worker and Education and Training Framework and costed Implementation Plan.²

The study was carried out within strict margins of time and resources. It started out with a national overview of worker education which forms the basis of our understanding of the current context of worker education in South Africa and frames the approach using three pillars of worker education as adopted by the WE TTT in the original brief:

Pillar 1: Worker Education,

Pillar 2: Vocational Education,

Pillar 3: Joint Worker/Management Education.

Following this, an international review was done within the constraints of the project to learn from best practice. This highlighted that, while there are permutations of worker education projects that may be relevant as a foundation for promoting worker education in South Africa, there is no precedent for an integrated policy framework.

¹ (<http://www.hrdcsa.org.za/content/worker-education> accessed 13/03/09)

² (<http://www.hrdcsa.org.za/content/worker-education> (accessed 29/03/13))

The third and final component of the study is the proposed “Worker Education Framework South Africa”

Using a conceptual framework designed by the research team in collaboration with the Technical Task Team, a worker education matrix was designed. This matrix attempts to locate and recognise worker education programmes that currently exist, and proposes that the horizontal and vertical axes of the matrix be populated with worker education options for use by all workers (and non-workers) as a model which allows for choice in the future.

It is important to note that worker education has deep ideological foundations. There are also conflicting perceptions of its purpose amongst different stakeholders which makes worker education, as a concept, a highly contested terrain. The approach adopted in this study is that the Worker Education Framework should be more than the sum of its parts. Held together by a vision and mission and an enabling, coordinated and integrated environment to focus on improving the human resource development base and skills of South Africa through collaboration of all social partners, it is seen as part of an overall strategy to accelerate human development, reduce poverty and attain sustainable economic development.

The role of the worker as citizen (reflected in the Constitution, where workers’ specific rights as workers³ are only one aspect of their much broader rights as citizens) is the basis on which all other roles depend. Workplace rights, for example, depend in part on an enabling legal environment which, in turn, depends on the legislative process in which all citizens, including workers and their organisations, participate. Thus workers cannot be genuinely empowered in the workplace if they are disempowered in society as a whole. Conversely, the empowerment of workers as citizens will be affected by their empowerment as workers. The proposed Worker Education Framework proceeds from this broad view of the interaction between workers as citizens and workers as producers.

WORKER EDUCATION: A MODEL FOR SOUTH AFRICA

The starting point for developing a worker education model is the need identified by HRDCSA for a “clear collective vision on an integrated, accredited and non-accredited worker education and training system in South Africa.”

Vision: Capable and skilled workers in a just society free of poverty, inequality and unemployment.

Mission: To develop relevant and integrated knowledge, skills and attributes of workers through high quality accredited and non-accredited worker education.

Key Objectives

³ Section 23 of the Constitution.

- To establish a sustainable worker education agenda
- To deliver excellent worker education learning programmes

The aim of the present exercise is to develop a policy framework within which the competing interpretations and purposes of worker education can be accommodated on a sustained basis. The term “integrated” refers to the policy level rather than the level of content (though, as will be suggested below, this does not exclude points of mutual support between different forms of worker education). From this it is also clear that worker education needs to be understood, or defined, in the broadest possible sense in order to encompass the multiplicity of its forms.

The approach to Worker Education is based on a broad understanding that its envisaged outcome and the output of progressive education in general is the transformation of socio-political, economic and cultural structures, values and practices in order to facilitate the attainment of the vision of a just society.

A capability model for worker education is envisaged, in which the worker education framework guides a programme which enhances and expands the capability of South African society in a manner that optimises prosperity and equality.

The **structure of Worker Education** has at its heart the agenda of social transformation, justice, equality and a participatory and inclusive democracy that avails social, political, economic and cultural rights and opportunities to everyone and prioritizes the needs of the marginalized and disempowered sectors of society. This requires a systematic improvement of competencies which enables workers and working-class communities to grapple with the totality of social and power relations that affect their lives, position and contributions in all affairs and spheres in society and all aspects of life.

The **worker education matrix** emerged as the most appropriate format for illustrating effective integration and coordination of worker education. It is envisaged that there should be horizontal as well as vertical articulation through and across all “pillars” and sub-frameworks. This includes articulation between non-accredited and accredited training (without implying that accredited training is necessarily at a higher level than non-accredited training). The matrix is a versatile tool which could be used to pin-point nationally, by province, locally or by sector, competency gaps that need to be addressed.

A number of **challenges** have been identified for consideration towards adoption and implementation of the worker education framework.

The **Implementation Guidelines** are presented in three phases. Phase 1 being the development phase focusing on the establishment of an implementation body. Phase 2 is the planning and design phase and phase three covers programme delivery. The Guidelines also include a time-frame and cost estimate.

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ACRONYMS AND ABBREVIATIONS

ABET	Adult Basic Education and Training
AET	Adult Education and Training
AMCU	Association of Mineworkers and Construction Union
ATR	Annual Training Report
CCMA	Commission for Conciliation, Mediation and Arbitration
CETC	Community Education and Training Centre
CHET	Centre for Higher Education Transformation
CLC	Community Learning Centre
CLEO	Centre for Labour Education and Organising
COSATU	Congress of South African Trade Unions
CTFL SETA	Clothing, Textile, Footwear and Leather Sector Education and Training Authority
DBE	Department of Basic Education
DHET	Department of Higher Education and Training
DLL	Division for Lifelong Learning
DoE	Department of Education
DoL	Department of Labour
DSD	Department of Social Development
EAP	Employee Assistance Programme
EPWP	Expanded Public Works Programme
ESCR-Net	International Network for Economic, Social and Cultural Rights
EWP	Employee Wellness Programme
FEDUSA	Federation of Unions of South Africa
FET	Further Education and Training
GDP	Gross Domestic Product
GET	General Education and Training
GETC	General Education and Training Certificate
GETCA	General Education and Training Certificate for Adults
GLU	Global Labour University

HET	Higher Education and Training
HEI	Higher Education Institution
HRD-SA	Human Resource Development Strategy for South Africa
ICESCR	International Covenant on Economic, Social and Cultural Rights
IDC	Independent Development Corporation
ILO	International Labour Organisation
ILRIG	International Labour Research and Information Group
LRA	Labour Relations Act
MERSETA	Manufacturing, Engineering and Related Services Sector Education and Training Authority
MICT SETA	Media, Information and Communications Technologies Sector Education and Training Authority
NACTU	National Council of Trade Unions
NALEDI	National Labour and Economic Development Institute
NASCA	National Senior Certificate for Adults
NDP	National Development Plan
NEDLAC	National Economic Development and Labour Council
NEET	Not in Employment, Education or Training
NEHAWU	National Health and Allied Workers' Union
NEPI	National Education Policy Initiative
NGO	Non-government Organisation
NPC	National Planning Commission
NPO	Not for Profit (or non-profit) Organisation
NQF	National Qualifications Framework
NSC	National Senior Certificate
NSDS	National Skills Development Strategy
NSF	National Skills Fund
NSFAS	National Student Financial Aid Scheme of South Africa
NUM	National Union of Mineworkers
NDP	National Development Plan
NPC	National Planning Commission

NUMSA	National Union of Metalworkers of South Africa
NYDA	National Youth Development Agency
ODL	Open and Distance Learning
OER	Open Educational Resources
PALC	Public Adult Learning Centre
PDM	Post-graduate Diploma in Management
POPCRU	Police and Prisons Civil Rights Union
PSETA	Public Service Sector Education and Training Authority
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SADTU	South African Democratic Teachers' Union
SAQA	South African Qualifications Authority
SDC	Skills Development Committee
SDF	Skills Development Facilitator
SERI	Socio-Economic Rights Institute of South Africa
SETA	Sector Education and Training Authority
SJC	Social Justice Coalition
SLP	Social Law Project, Faculty of Law, University of the Western Cape
SWOP	Society, Work and Development Institute
TAC	Treatment Action Campaign
TUACC	Trade Union Advisory Coordinating Council
UCT	University of Cape Town
UKZN	University of KwaZulu-Natal
UNISA	University of South Africa
UWC	University of the Western Cape
WE	Worker Education/Worker Education for Empowerment/Political Education
WEF	Worker Education Framework
Wits	University of the Witwatersrand
WSP	Workplace Skills Plan

Terms and Definitions

Adult education and are used to refer to all other forms of education for adults. There are no clear dividing lines between general, vocational, occupational and professional education. They represent points on a continuum, with considerable overlap at times.

Capabilities: Based on the concept of Human Development, capabilities focus on what workers are able to do as workers and citizens, relating to the opportunity freedoms, process freedoms and justice. (*Human Development Report 2010*)

Competencies: “Applied competence” has three constituent elements: foundational competence embraces the intellectual/academic skills of knowledge together with analysis, synthesis and evaluation, which includes information processing and problem solving; practical competence includes the concept of operational context; and reflexive competence incorporates learner autonomy. (*SAQA Level Descriptors for the NQF*)

Further education refers to education offered in Further Education and Training (FET) colleges and similar programmes in other vocational colleges.

Higher education is used to refer to the education that normally takes place in universities and other higher education institutions, both public and private, which offer qualifications on the Higher Education Qualifications Framework (HEQF).

Human Development: Human Development, a concept made popular by Amartya Sen, is the expansion of people’s freedoms to live long, healthy and creative lives; to advance other goals they have reason to value; and to engage actively in shaping development equitably and sustainably on a shared planet. People are both the beneficiaries and the drivers of human development, as individuals and in groups. (*Human Development Report 2010*)

Human Resource Development: Human resource development (HRD) is the process of increasing the knowledge, skills and capacities of all people in a society

Economic Terms – accumulation of human capital and its effective investment in the development of an economy

Political Terms – prepares people for adult participation in political processes as citizens in a democracy

Socio-cultural Terms – helps people to lead fuller and richer lives, less bound by tradition . . . unlock doors to modernisation. (*HRDC South Africa*)

Human resource development (HRD) policies concern the quality of the labour force and the regulation of the labour market. Quality in turn is a function of basic and higher education, training programmes and the overall health of the population. The quality and adaptability of the labour force is a key driver in creating a favourable environment for both domestic and foreign enterprises to grow through new investment and to adapt quickly to changing circumstances. (*OECD Policy Framework for Investment User’s Tool Kit*)

Occupational education refers to educational programmes that are focused on preparation for specific occupations, as well as ongoing professional development and training in the workplace.

Relevant education: Relevant worker education that meets the priority needs of the economy and society

Skills development is sometimes used in a narrow way, to refer only to occupational qualifications and workplace-based training

Vocational education: *Vocational education* refers to a middle level of education which provides knowledge and skills to enter the economy through a general, broad orientation in vocational areas, as well as general learning in essential areas such as Language and Maths. *(Green Paper For Post-School Education And Training)*

Vocational education programmes are actually aimed at more mature learners. (Ministerial Committee on Adult Education and Training Green Paper)

Worker: The literal meaning of “worker” is someone who works, and would include both work in an employment relationship and self-employment. *(Keywords for a 21st Century Workplace)*

Worker Education encompasses three pillars, i.e. **Pillar 1: Worker Education/Worker Education for Empowerment/Political Education**, Pillar 2: Vocational Education and Training (VET) and Pillar 3: Worker-Management Education and Training.

Worker Empowerment: Worker empowerment is both a process and an outcome increasing workers’ ability to bring about change to better influence the course of their lives and the decisions which affect them as individuals or groups and as workers and citizens.

1. BACKGROUND

The Human Resource Development Council of South Africa (HRDCSA) is a national, multi-tiered and multi-stakeholder advisory body under the leadership and stewardship of the office of the Deputy President of South Africa. It is managed by the Ministry of Higher Education and Training. The multi-sectoral advisory HRDCSA was established in March 2010. It is represented by a number of Government Ministers as well as senior business leaders, organised labour and representatives from academia and civil society who serve on the HRD Council.

The HRDCSA creates an enabling, coordinated and integrated environment to focus on improving the human resource development base and skills of the South African people through a partnership and collaboration of all social partners. It is an attempt by government to accelerate human development, reduce poverty and attain sustainable economic development.⁴

The council in 2010 adopted a Human Resource Development Strategy for South Africa 2010 - 2030 which sets broad priorities for the next 20 years. The strategy seeks to ensure universal access to quality basic education that is purposefully focussed on a dramatic improvement in skills to meet the demands of a growing economy.

To implement the strategy the Council adopted a five point plan based on the following priorities:

- Strengthening and supporting of the FET colleges to increase access for students;
- Production of intermediate skills (with Artisans given a special focus), and professionals;
- Production of Academics and stronger partnerships between Industry and Higher Education Institutions;
- Worker Education; and
- Foundational Learning.

“In any country, HRD refers to formal and explicit activities that will enhance the ability of all individuals to reach their full potential. By enhancing the skills, knowledge and abilities of individuals, HRD serves to improve the productivity of people in their areas of work – whether these are in formal or informal settings. Increased productivity and improvements to the skills base in a country supports economic development, as well as social development. Our central national concern is to accelerate development so that there is a match between supply and demand for human resources. HRD is about taking purposeful action to increase the aggregate levels of skills in the workforce so that we can maximise opportunities for individuals, thereby benefiting society as a whole. This strategy is a call to action. Its primary purpose is to mobilise multi-stakeholder participation, and to encourage

⁴ (<http://www.info.gov.za/speech/DynamicAction?pageid=461&sid=28387&tid=72866> accessed 13/03/09)

individuals and organisations to take on the challenge of improving the human resource stock of our nation.” [HRDS p7]

Nine Technical Task Teams have been established and form the pillars of the HRDCSA plans, to drive forward the work of the five-point plan.⁵

According to the HRDCSA Worker Education problem statement, “there is no clear collective vision on an integrated, accredited and non-accredited worker education and training framework in South Africa. As a result no national coordinated and integrated Policy and Legislative Framework is available to guide and support the implementation of worker education and training.”⁶

The Worker Education Technical Task Team commissioned a Worker Education Study in November 2012:

- To conduct an analysis and attain a common understanding of the current provision and understanding of the three pillars namely Worker Education Ideology, Vocational education and Joint Worker Education within the Worker Education and Training context;
- To conduct a study on global/international practice in the Worker Education environment focusing on the above three pillars;
- To compare and consolidate the analysis report on the current system and the benchmarking report;
- To define a common vision for National Worker Education Framework; and
- To produce a National Integrated Worker and Education and Training Framework and costed Implementation Plan.⁷

⁵ <http://www.hrdcsa.org.za/content/about-hrdcsa> (accessed 29/03/13)

⁶ (<http://www.hrdcsa.org.za/content/worker-education> accessed 13/03/09)

⁷ (<http://www.hrdcsa.org.za/content/worker-education> (accessed 29/03/13))

2. INTRODUCTION

The research study started out with a national overview of worker education in South Africa. It forms the basis of our understanding of the current context of worker education in South Africa. This document sets out a policy approach to worker education and frames this approach using three pillars of worker education, namely, **Pillar 1: Worker Education/Worker Education for Empowerment/Political Education**, Pillar 2: Vocational Education, Pillar 3: Joint Worker/Management Education. It looks at the provision of worker education in terms of existing frameworks and proposes a worker education matrix that will enable articulation with existing education frameworks.

Following this, an international review was done in order to learn from best practice, and this has highlighted that there are permutations of worker education projects that may be relevant as a foundation for executing worker education in South Africa.

Using a conceptual framework designed by the research team, in collaboration with the Technical Task Team, a worker education matrix was designed. This worker education matrix attempts to locate and recognise worker education programmes that currently exist, and proposes that the horizontal and vertical axes of the matrix be populated with worker education options for use by all workers (and non-workers) as a model of choice in the future.

The chapter on articulation requires an assessment of what is currently on offer in the accredited/non-accredited arena of education and training, with the aim of articulating this with what is on offer (accredited and non-accredited) in the Worker Education, vocational education, and worker/management education arena.

The implementation guidelines and resourcing chapters close this study. With this, the aim is to activate and enable the worker education framework, by including the inputs of a large number of related stakeholders.

After 1994 the changing macro-economic policy context led to a shift away from viewing adult education as a necessary tool to building a post-apartheid society, to regarding it, narrowly, as a way to meet the skills demands of the economy.

A human capital approach to worker education was adopted. This approach, which emphasises individual access to vocational education and training and upward educational and economic mobility, has gained ascendance in trade unions.⁸

It is important to state that worker education has deep ideological foundations. There are also conflicting perceptions amongst different stakeholders and this makes worker education as a concept, a highly contested terrain.

⁸ Cooper, 1998

2.1 Ideological contestation

Preliminary feedback⁹ has shown that there are conflicting perceptions among different stakeholders of the purpose as well as the content of worker education. Stated most baldly, opposing models emerge of worker education as being primarily concerned, at one extreme, with vocational training in order to make workers more productive to the benefit of employers and, at the other extreme, with Worker Education aimed at making workers' organisation more effective in struggling against employers. It follows that most of the education aimed at the worker as a citizen (the worker's place in society) will be delivered in the form of Worker Education. A needs assessment is likely to clarify the picture considerably. The Worker Education Framework should then propose means of addressing the existing situation along these lines.

In essence, the role of the worker as citizen (reflected in the Constitution, where workers' specific rights as workers¹⁰ are one aspect of their much broader rights as citizens) is the basis on which all other roles depend. Workplace rights, for example, depend in part on an enabling legal environment which, in turn, depends on the legislative process in which all citizens, including workers and their organisations, participate. Thus workers cannot be genuinely empowered in the workplace if they are disempowered in society as a whole. Conversely, the empowerment of workers as citizens will be affected by their empowerment as workers.

It is with this broad view of workers as citizens and workers as producers that this research study is undertaken.

At the broadest societal level it has already been argued that policy-making involves the construction of frameworks within which divergent interests can be accommodated. An integrated Worker Education Framework needs to give practical meaning to this principle. It cannot mean privileging one vision over another, nor can it mean that both should be submerged. Rather, it means following the labour relations model in South Africa and around the world: acknowledging the autonomy as well as the conflicting interests of employers and workers by creating institutions through which they can negotiate their differences or, if these fail, resort to power play. A policy framework must engage with and respond to these issues, separating areas which are not contentious (e.g., the purely technical aspect of vocational training) from those that are more highly charged (e.g., social and political objectives) and creating structures appropriate to both.

Perhaps we should at this point draw a distinction between worker education and trade union education. The significance of this is that trade unions and, by extension, trade union education serve the 30% of organised labour in formal employment. The Worker Education

⁹ See TTT questionnaires.

¹⁰ Section 23 of the Constitution.

Framework would seek coverage for all workers, also those who are not formally employed.¹¹

Thus, the Worker Education Framework should be more than the sum of its parts. Held together by a vision and mission and an enabling, coordinated and integrated environment to focus on improving the human resource development base and skills of the South African people through a partnership and collaboration of all social partners, it is part of an overall strategy to accelerate human development, reduce poverty and attain sustainable economic development.

2.2 Worker education within the overall adult educational policy framework

South Africa has a long history of finding innovative ways to provide adults with opportunities to learn. These range from the first workers' night schools started in 1919, to myriad popular education programmes that were a key feature of the liberation struggle and sectoral organisations (DHET 2012a). Immediately prior to 1994, a broad spectrum of providers were involved in adult education, ranging from literacy projects run by religious groupings and NGOs to programmes run by worker organisations and political parties, state night school academic programmes as well as training provided by mining companies (Larney 2006). These initiatives provided adults and young people with literacy, numeracy and communication skills, and developed their capabilities as individuals, sectors and communities to contribute towards social change and social justice. As a result, there are still many different understandings of Adult Basic Education and Training (ABET): that it refers to literacy and numeracy education; that it is part of work-related training linked to the skills requirements of particular industries or sectors; or that it encompasses lifeskills and non-accredited types of training such as HIV and AIDS training (Larney 2006).

Post-1994 policy has developed a holistic understanding of education, linking different forms of education and different educational institutions to national developmental goals:

“The Green Paper aims to align the post-school education and training system with South Africa’s overall development agenda, with links to various development strategies such as the New Growth Path, the Industrial Policy Action Plan 2, the Human Resource Development Strategy for South Africa 2010-2030, and South Africa’s Ten-Year Innovation Plan. This will allow it to contribute more effectively to the goal of inclusive economic growth and development, and to contribute to fundamentally reducing unemployment and poverty. The Green Paper provides a vision for a single, coherent, differentiated and highly articulated post-school education and training system. This system will contribute to overcoming the structural challenges facing our society by expanding access to education and training opportunities and increasing equity, as well

¹¹ This is in line with the labour clause of the Constitution (section 23), which applies to “all workers”, not only “all employees”.

as achieving high levels of excellence and innovation.” (Green Paper for Post-School Education and Training, cited in National Review draft p 12)

“Higher education is the major driver of new knowledge but, in addition to formal higher education institutions, more and more diverse organisations and institutions are becoming important sites of knowledge production and application for a fast-changing world, such as non-governmental and privately funded research institutes, science councils, state-owned enterprises, the private sector and even some government departments. In order to encourage the expansion of these diverse sectors of knowledge production, and world-class innovation and research, and to ensure coordination and coherence of knowledge production and innovation, “(t)he framework in which the knowledge production system operates and its relationship to innovation and industry need to be reconfigured” (NPC 2011: 262) and a broad enabling framework and policy developed.” (National Review draft pp 11-12)

Clearly, there is a place for worker education as a legitimate area of education and training within this vision. This raises the need to define it at the BROADEST level: the NATURE AND PURPOSE of worker education, premised on the role of the worker as citizen AND producer, equipped to participate in processes of social development at the political, economic, community and other levels.¹²

Worker education in this sense is captured in the three “pillars”, or categories, identified by the Technical Task Team which is referred to as “Worker Education/Worker Education for Empowerment/Political Education”, “vocational education” and “joint worker-management”. Worker Education/Worker Education for Empowerment/Political Education refers mainly to non-accredited forms of worker education typically delivered by trade unions, NGOs and other institutions identified in the National Review.¹³ Vocational education refers mainly to accredited work-related education and training delivered both inside and outside the workplace.¹⁴ Joint worker-management education is also mainly non-accredited and based inside and outside the workplace.¹⁵ It follows that most of the education aimed at the worker as a citizen (the worker’s place in society) will be delivered in the form of Worker Education, which may include components of accredited education – for example, at higher education institutions.

In the development of policy, Adult education and adult training converged and became known as Adult Basic Education and Training (ABET), becoming formally structured within the NQF, signalling a shift away from adult education for emancipation to adult education for economic growth (Larney 2006:38). This new ABET policy was seen as key to preparing

¹² See definition suggested above

¹³ See xxx

¹⁴ See National Review xxx.

¹⁵ See National Review xxx.

those who had been denied educational opportunities in the past for lifelong learning and development within an NQF structure that integrated education and skills training.

Worker education in its broadest sense of adult and youth learning also continues to take place through a variety of non-formal community and popular education initiatives and projects, run by community-based organisations (CBOs), social movements and government departments (DHET 2012a: 30). However, other than merely listing examples of these by trawling through databases, no current systematic record of the types of such programmes being run nationally or provincially seems to exist.

3. NATIONAL REVIEW

3.1 Introduction

The National Review sought to provide an analysis of the current situation of worker education in South Africa as it occurs in different sectors such as trade unions, labour service organisations, non-profit organisations (NPO)s, education institutions and relevant companies and organisations in the private and public sectors. The focus for the review was on the ‘three pillars’ of worker education.

The Review also sought to investigate ways in which worker education provides opportunities for capacity-building and empowerment of workers *as workers* as well as of workers *as citizens*, and where these opportunities complement each other, or not.

Approaches to worker education within the South African labour movement have gone through various changes since the 1970s and in the course of in the course of forming national education and training policy in South Africa since 1994.

In the 1990s the relationship between labour, capital and the state changed, from a previously oppositional stance to one of political alignment; a political partnership with the new democratic government was forged. This allowed the trade unions to play a key role in shaping education and training reform; being instrumental in the development of the National Qualifications Framework (NQF) as well as being central to the development of skills policies and national skills development strategies.

The unions have had particular influence in workplace training and standards-setting issues, in the provision of Adult Education and Training (AET), and in pushing for the Recognition of Prior Learning (RPL).

Attempts to regularise and formalise trade union education towards greater coherence with the NQF has led to reduced education capacity in the unions. Overall, trade union education seems to be in increasing decline, with less attention being given to membership education and more attention to leadership development (Cooper 2005).

The Worker Education Framework attempts to restore the importance of the ideological forms of worker education referred to as pillar one, or ‘Worker Education/Worker Education for Empowerment/Political Education’. Vocational education and training – pillar two – because of its more formal nature and alignment with global HRD discourses tend to attract support and resources more readily. Joint worker-management education – Pillar three – is considered important in the context of the WEF for building workplace democracy in general. It should be considered essential in the public service as a contributor to effective delivery of public services.

3.2 The Policy Context

A raft of legislation has been informing the direction of education and training in South Africa since 1994, starting with section 29 of the Constitution of South Africa adopted in 1996 which deals with education. It provides for basic rights to education which takes into account issues of equity, practicability and the need to redress the results of past racially discriminatory laws and practices.¹⁶

A National Qualifications Framework (NQF) for pegging all qualifications and levels of education and training has been implemented, reviewed, and more changes were subsequently made. The National Skills Development Strategy (NSDS) III (2011), the National Development Plan (NDP) (2011) and the Green Paper on Post-school Education and Training recognise that despite the many years since skills development legislation came into being, the majority of the South Africa population remain unskilled or under-skilled, perpetuating poverty and inequality and constraining economic growth, and have attempted to address the situation.

The HRD-SA (Human Resource Development Strategy for South Africa 2010-2030) represents an essential intervention for promoting the country's development agenda and resonates with the significance attached to HRD in the international development discourse.¹⁷

The following outlines key legislation, policy and strategy relating to worker education.

Table 1: Key Legislation, Policies and Strategies

KEY LEGISLATION, POLICY, STRATEGY	DESCRIPTION OF SECTIONS (of particular relevance to the WEF)
The Constitution of South Africa, 1996	<p>As the supreme national law, the South African Constitution makes provision for equal entitlement to rights, privileges and benefits of citizenship.¹⁸ Enshrined in the Bill of Rights are the democratic values of human dignity, equality and freedom.¹⁹ These values inform the approach to this research as the basis for the Workers Education Framework.</p> <p>Section 29 of the Constitution makes provision for the right to:</p> <ol style="list-style-type: none">Basic education, including adult basic educationFurther education, which the state, through reasonable measures, must make progressively available and accessible.
The National Qualifications Framework (NQF) Act 67 of 2008	The National Qualifications Framework (NQF) is a comprehensive system approved by the Minister of Education for the classification,

¹⁶ Human Resource Development Strategy for South Africa (HRD-SA) 2010-2030 [p5]

¹⁷ Human Resource Development Strategy for South Africa (HRD-SA) 2010-2030 [p7]

¹⁸ The Constitution of South Africa, 1996.[Preamble]

¹⁹ The Constitution of South Africa, 1996.[Bill of Rights]

	<p>registration, publication and articulation of quality-assured national qualifications.²⁰</p> <p>The South African Qualifications Authority (SAQA) and the Quality Councils (QC) are intended to meet the objectives of the NQF through frameworks for recognition of learning achievements and internationally acceptable quality standards.</p>
<p>Higher Education Act 101 of 1997 (incorporating all amendments up to December 2010)</p>	<p>Section 7 makes provision for the Council for Higher Education (CHE) to perform its functions in relation to qualification, quality assurance and quality promotion. To this end it functions in its capacity as the QC for higher education in terms of the NQF Act in terms of which it is responsible for implementation of the Higher Education Quality Framework (HEQF).</p>
<p>Further Education and Training Colleges Act 16 of 2006 (incorporating all amendments up to December 2010)</p>	<p>The purpose and application of the Act is to:</p> <p>(a) enable students to acquire -</p> <ul style="list-style-type: none"> (i) the necessary knowledge; (ii) practical skills; and (iii) applied vocational and occupational competence; and <p>(b) provide students with the necessary attributes required for –</p> <ul style="list-style-type: none"> (i) employment; (ii) entry to a particular vocation, occupation or trade; or (iii) entry into a higher education institution
<p>Adult Education and Training Act 52 of 2000 (incorporating all amendments up to December 2010)</p>	<p>The Act serves to:</p> <ul style="list-style-type: none"> • Regulate adult education and training; • Provide for the establishment, governance and funding of public adult learning centres; • Provide for the registration of private adult learning centres; • Provide for quality assurance and quality promotion in adult education and training;
<p>National Qualifications Act 67 of 2008: Guidelines on Strategy and Priorities for the NQF 2012/2013</p>	<p>The Act provides for an integrated NQF comprising three sub frameworks each developed and managed by a quality council:</p> <ol style="list-style-type: none"> 1. General and Further Education and Training Qualifications Sub Framework (GFETQSF), developed and managed by Umalusi. 2. Higher Education and Qualifications Sub Framework (HEQSF), developed and managed by the Council on Higher Education. 3. Trades and Occupations Qualifications Sub Framework (OQSF), developed and managed by the Quality Council for Trades and Occupations (QCTO). <p>S23 Calls for a less bureaucratic and more robust, purposeful and focused system that will support public and private providers.</p>
<p>National Skills Development Strategy (NSDS) III</p>	<p>NSDS III is set up to:</p> <ul style="list-style-type: none"> • Ensure increased access to training and skills development opportunities and achieve the fundamental transformation of inequities linked to class, race, gender, age and disability. • Address the challenges of skills shortages and mismatches to improve productivity in the economy. • Outline the changes in policy for strategically aligning South

²⁰ National Qualifications Framework Act 67 of 2008. [4]

	<p>Africa's education and training to meet the demands of the economy from 2011 to 2015.</p> <ul style="list-style-type: none"> • Support the New Growth Path, the Industrial Policy Action Plan, the HRD Strategy and sector development plans (DHET 2011). • Address some of these issues constraining the expansion of the economy and to promote a closer synergy between the formal education system and the world of work so as "to promote a skills development system and architecture that effectively responds to the needs of the labour market and social equity" (DHET 2011: 6).
National Development Plan	<p>The National Development Plan (NDP)(National Planning Commission 2011) recommends that the state support and develop a coordinated system for providing a diverse range of further education and training opportunities, with a set of strong national qualifications as well as a variety of non-formal programmes. One of the strategies that the NDP emphasises is the need for the integration of theoretical learning with practical training and to establish closer linkages between employers and education and training institutions, and it sees involving the SETAs as one way to achieve this.</p>
Green Paper for Post-School Education and Training	<p>The Green Paper:</p> <ul style="list-style-type: none"> • Identifies a major problem in the system as inadequate provision of post-school education and training. It recommends that by 2030, South Africa ought to have a post-school system that provides a range of accessible alternatives for young people. • Recommends that the key area for expansion must be the public further education and training (FET) college sector. • Seeks to explore the establishment of a new institutional type, provisionally called Community Education and Training Centres (CETCs), to address the needs of out-of-school youth and adults. The existing public adult learning centres will be absorbed into this category of institution. • Envisages that the Department of Higher Education and Training builds, resources and supports this expanded system hence improving research capacity will be a major focus for universities. • Addresses a central problem i.e. the lack of coherence within the post- school system as a whole, between basic education and the post-school system, and between the post-school system and the labour market.
The Recognition of Prior Learning in the context of the South African National Qualifications Framework. Policy document adopted by SAQA June 2012	<p>The policy addresses the key roles and functions of ETQAs who must facilitate the implementation of RPL and quality assure assessment policies of their constituent providers.</p>
Human Resource Development Strategy for South Africa (HRD-SA) 2010-2030	<p>HRD represents a key lever for accelerating economic growth and development in South Africa. The responsibilities of government arising from this strategy are significant. However, the strategy is not solely related to the responsibilities of government. It is a call to all stakeholders and agents that have a role to play in HRD: workers,</p>

	employers, the non-governmental sector, educators, learners, parents, individuals and the community. It is a call to create a better life for all South Africans.” ²¹
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The regulatory system must be streamlined, to ensure that accreditation and quality assurance requirements strengthen educational institutions, without becoming barriers for them. Non-formal educational provision targeted at specific community needs, as well as on-going professional development, need not always lead to qualifications or be provided through accredited providers.

Addressing these key problem areas will enable us to address ongoing inequalities with regard to socio-economic status, race, gender, geographical location, age, disability, and HIV status. This would also ensure that the post-school system contributes to changing the economy to one that relies more on the value-adding skills of its people than on easily replaceable and cheap unskilled labour.

The following section will deal with provision of worker education as it currently exists.

3.3 Provision of Worker Education

Worker education in this sense is captured in the three “pillars”, or categories, identified by the Technical Task Team which will be referred to throughout the document as

Pillar 1: **Worker Education/Worker Education for Empowerment/Political Education**

Pillar 2: Vocational education:

Pillar 3: Joint worker - management education

Worker Education/Worker Education for Empowerment/Political Education refers mainly to non-accredited forms of worker education typically delivered by trade unions, NGOs and other institutions identified in the National Review.²² Vocational education refers mainly to accredited work-related education and training delivered both inside and outside the workplace.²³ Joint worker-management education is also mainly non-accredited and based in the workplace.²⁴ It follows that most of the education aimed at the worker as a citizen (the worker’s place in society) will be delivered in the form of **Worker Education/Worker Education for Empowerment/Political Education**, which may include components of accredited education – for example, at higher education institutions.

There is general agreement that there is a need to focus on labour intensive manufacturing and intermediate skills for service and exports for both economic high growth and job creation, but the National Development Plan (NDP) points out that the Further Education

²¹ Human Resource Development Strategy for South Africa (HRD-SA) 2010-2030 [p30]

²² See xxx

²³ See National Review xxx.

²⁴ See National Review xxx.

and Training (FET) college system has fallen far short of providing this skills training. Furthermore, the training that they currently offer does not articulate adequately with the workplace and produces low numbers of poorly trained graduates, which has led to a loss of confidence in their employability across the board.

Some critics of human resource development strategies in South Africa argue that trade union education:

- Has been on the decline
- Has been increasingly outsourced
- Outsourcing has resulted in de-politicisation
- Formalisation and alignment to National Qualifications Framework (NQF) has resulted in reduced capacity in the unions
- Focuses more on leadership and less on membership

This has led to calls on the labour movement to refocus its energies on the original purpose of worker education, arguing that although labour needs to continue to fight for the fundamental right of all workers to gain open access to the formal education system, gaining increased access in itself will not transform these educational institutions into representing the interests of the working class. Implicit in this position is an assumption that trade unions represent the interests of the working class.

On 7 February 2013, a media report quoted the General Secretary of COSATU as follows:

“South Africa has a trade union density rate of 30 percent. We have a huge task ahead as a federation, especially amongst the most vulnerable and exploited workers”²⁵

a. Pillar 1 – Worker Education/Worker Education for Empowerment/Political Education

The National Review looked at examples of Worker Education/Worker Education for Empowerment/Political Education programmes offered by trade unions, the purpose of these programmes and whether they are accredited or non-accredited. Secondly, the part played by labour service providers in Worker Education/Worker Education for Empowerment/Political Education is briefly explored. The third group of Worker Education/Worker Education for Empowerment/Political Education providers touched on is labour education institutions. Privately owned organisations are also involved in Worker Education/Worker Education for Empowerment/Political Education to some extent, usually at the further education and training level, and a few examples of these are presented. Finally it looked at the role of higher education in Worker Education/Worker Education for Empowerment/Political Education

²⁵ <http://www.iol.co.za/business/business-news/only-30-percent-of-workers-in-unions-vavi-1.1466283#.UUbishdBPSg> Accessed 18/03/2013

Worker Education/Worker Education for Empowerment/Political Education for the Labour Movement

The following are examples of the range of **Worker Education/Worker Education for Empowerment/Political Education** that is undertaken by trade unions, from the shop floor to formal education and training. It also looks at worker education in education public and private institutions. The lists are not an exhaustive but merely a snapshot of some current trade union education programmes based on available information.

Table 2: Worker Education/Worker Education for Empowerment/Political Education for the labour movement

PROVIDER	EDUCATION OVERVIEW
Trade Unions	
National Education, Health and Allied Workers Union (NEHAWU)	NEHAWU, along with educating its workers, makes considerable input into educational policy. For example, at its recent policy conference in June 2012, it called for – among others – increasing attention to be paid to free, quality education for all; compulsory grade R; more teaching and learning resources and support for schools and for school governing bodies; an expanded, affordable higher education and training sector with full NSFAS bursary funding for needy students; building quality capacity in the FET college sector; and monitoring processes to ensure implementation of the National Skills Accord and (NEHAWU Bulletin 2012).
National Union of Mineworkers (NUM)	The National Union of Mineworkers (NUM) established the Elijah Barayi Memorial Training Centre (EBMTC) in 1993, which now has two FET campuses. ABET programmes have been developed in partnership with construction, energy and mining companies to improve the numeracy and literacy levels of its members and shop stewards. Political training and educational programmes for shop stewards and members are also run at the EBMTC, aimed at deepening their class consciousness and to enhance solidarity on the shop floor. In addition, programmes are in place to develop union leadership as well as for administrative training related to case preparation and training in labour law for its members.
South African Democratic Teachers' Union (SADTU)	An indication of where this trade union is focusing, i.e. on the professional development of its members (teachers), was the pilot study initiated by the SADTU research department. The research aimed to develop a needs assessment instrument to inform the professional development of SADTU members (SADTU 2011). The motivation for this study was the critical need to improve the SA education system, which cannot happen without appropriate teacher development, but which, it argued, must identify teachers' needs first in order to provide effective training.
National Union of Metal Workers of South Africa (NUMSA)	Educational activities extend across NUMSA's five pillars of union education: <ul style="list-style-type: none"> • shop steward training; • staff development; • political education; • membership education; and • leadership development (including for office bearers) (NUMSA 2011). NUMSA believes that a standard curriculum should be developed to train all shop stewards to be effective in their roles as representing workers. Staff training spans a broad range of competencies. NUMSA also negotiates with employers to provide ABET for workers.
South African Municipal and	SAMWU produced a 2002/03 Political Education Book to facilitate political

Allied Workers Union (SAMWU)	education programmes and discussions in the branches and the provinces. In addition it allows for political education at workplace level, and not just at leadership level, whilst at the same time communicating with members about the current burning issues that confront the labour movement in general and SAMWU in particular.
Service Providers to the labour movement	Tend to be non-profit organisations that are involved in a range of labour-related activities, especially research and non-accredited education. Their purpose is to strengthen the labour movement as a whole and they could be said to align most closely with an ideological model of trade union education, having a largely political agenda.
Commission for Conciliation, Mediation and Arbitration (CCMA)	Independent dispute resolution body established in terms of the Labour Relations Act, 66 of 1995 (LRA), the CCMA in addition to its core services, has an education unit which produces educational material and gives training and advice.
Labour-Community Advice Media and Education Centres (LAMEC)	Educates communities by means of trade union public programmes which are aired by approximately 40 local radio stations in South Africa.
Labour Research Services (LRS)	The LRS has a trade union library and a wide range of educational material and resources available to its members, which currently includes 15 registered trade unions. Among these is the South African labour history project and archive to promote knowledge and understanding of the history of the working class and its struggles (www.lrs.org.za).
International Labour Research and Information Group (ILRIG)	ILRIG provides education, publications and research for the labour and social movements in Southern Africa focusing on globalisation. Every year since 2002 it has held a week-long 'Globalisation School', to which activists from a wide range of organisations, including social movements and trade unions throughout Africa, are invited. The topic of the 'school' in 2012 was the 'Capitalist Crisis and Political Power' (www.ilrig.org.za).
National Labour and Economic Development Institute (NALEDI)	Conduct policy research to build the capacity of the labour movement.
Labour Education Institutes	An organisation funded by trade unions, often with support from Government, that provides education and training, research and other support to the trade union/workers movement.
Development Institute for Training, Support and Education and for Labour (DITSELA)	<p>The Development Institute for Training, Support and Education for Labour (Ditsela) pathways in Sotho) was established in 1996 by COSATU and FEDUSA, the two biggest trade union federations in South Africa, to serve the needs of the members in their sectors.</p> <p>The primary focus of Ditsela is labour education, to increase the pool of trade union educators, organisers, activists and researchers, especially women, although it also conducts educational research that can strengthen the working class and the trade union movement.</p> <p>Ditsela's National Education Programme offers a range of courses that have been developed over the years in response to the needs of its constituency and the challenges facing the labour movement. In 2013, these include the Danlep Educator Development course, a one-year advanced course for union leaders. This is an NQF level 5 accredited Certificate in Education offered in partnership with the University of the Western Cape to enhance effectiveness of the labour movement through improved understanding of labour law.</p> <p>Ditsela also offers targeted support to labour organisations nationally and regionally on request, or pro-actively to vulnerable sectors, assessing their needs and developing appropriate plans to build their capacity through</p>

	education and training interventions and providing resources.
Workers' College	<p>The Workers' College is committed to:</p> <ul style="list-style-type: none"> • providing education to workers and to worker leaders and communities that empower them and their members • developing educational practices that sustain the participatory and critical learning processes • promoting the values of open debate, democracy and non-discrimination on the basis of race, sex, religion or political affiliation • promoting competent and efficient trade union and community organizations. <p>The college (http://www.workerscollege.org.za) facilitates a variety of courses and programs for trade unionists and community activists from within South Africa as well as the African continent. The Workers College programs are easily accessible to working adults. The content is practical and based on or linked to issues in the workplace, community or real life scenarios. The learning methods are interactive, inclusive and participatory.</p>
Worker Education/Worker Education for Empowerment/Political Education in Higher Education	<p>Despite accusations of having exclusionary mainstream programmes, many university departments provide Worker Education/Worker Education for Empowerment/Political Education programmes that promote active citizenship and challenge dominant social and economic discourses, as well as professional development and skills development programmes for trade unions, workers and managers.</p>
University	Continuing Education / Short Course Programmes
Cape Town	<p>Law@Work, Faculty of Law's Professional Development Project offers seminars, lectures, short courses and courses of post graduate standard. Courses include: Labour Law, Negotiating Skills, Legal writing, Introduction to Administrative Justice</p> <p>Continuing Education –</p> <ul style="list-style-type: none"> • Units and departments offer non-credit-bearing courses which may be orientated towards professional development, executive capacity building or general interest. • Formal degree or diploma programmes which are designed to allow students to study while continuing to work.
Free State	<p>Short Learning Programmes of a credit and non-credit bearing nature are offered in the faculties of Law, Humanities, Natural and Agricultural Sciences, Economic and Management Sciences, Education, and Theology</p>
Rhodes	<p>Certificate short course in Labour Law (Business School);</p> <p>Honours & Masters Courses, Dept. of Political and International Studies) include: The Politics of Collective Action, Reconstructing the South African mind, Poverty and Privilege, The Politics of Social Policy; Understanding Domination, Community justice and freedom, Labour Economics</p>
Western Cape	<p>Social Law Project has been presenting a variety of accredited and non-accredited training programmes aimed at trade unionists and workers since 1993. An example of a non-accredited programme is the Danlep programme currently being presented in partnership with Ditsela as a CE Programme in labour law.</p> <p>Certificate in Economic Development is an example of an accredited programme is a Certificate in Economic Development programme offered jointly by School of Government and SLP to over 300 shop stewards since 2006.</p>

Witwatersrand	<p>In January 2007 the GLU Masters programme (Labour and Development, Economic Policy, Globalisation and Labour) was introduced by the <i>Global Labour University</i></p> <p>SWOP at the University of the Witwatersrand, Johannesburg strives to conduct high quality research on the world of work. We are primarily academic in orientation, with an emphasis on disseminating research through teaching, publications and conferences. We attempt to maintain communication and interaction with a broad range of actors within the world of work, such as organised labour, business, government and other research organisations.</p>
Private providers	
Athena Private FET College	Shop steward development programme; OHS compliance training
Intec College	Labour relations
Kusile Consulting Services	Shop steward training
Lexisnexis	Labour law programmes tailored to clients' needs.
Astrotech	Labour relations programmes

All the trade unions are involved in education and training of their membership and office bearers one way or another, providing both formal and non-formal **Worker Education/Worker Education for Empowerment/Political Education** programmes. Many play a role in education policy development; some have formal education committee structures; some have a very strong continuing education focus and offer substantial bursaries to their members, even assisting retrenched workers with re-skilling and entrepreneurial training.

Labour service organisations are generally independent, non-profit organisations offering para-legal/legal or other labour-related services and are involved in research and development work aimed at strengthening the union movement. Education programmes that they offer are therefore 'political' in nature and mostly non-formal and not accredited.

There are many labour service organisations but currently very few labour education institutions. Of the two institutions mentioned in this chapter, one is 'owned' by two of the biggest trade union federations in the country, focusing on labour education – especially for women -that increases the pool of trade union educators, organisers, activists and researchers and on building a strong workers' education movement in South Africa. The other is an autonomous institution, catering for activists from unions and community movements alike, whose education programmes are aimed explicitly at developing activists who are critical thinkers and thus at strengthening activist movements.

In addition to the labour movement, there are other **Worker Education/Worker Education for Empowerment/Political Education** providers such as private education and training organisations and higher education institutions. Public FET colleges do not offer 'political' worker education courses. Worker education programmes offered by accredited or non-accredited private providers tend to be in the area of labour relations or shop steward

training in the FET band of the NQF and to be offered along with other, more commercially oriented courses.

Worker education programmes in higher education institutes are mostly formal courses offered as accredited qualifications and may provide access to additional higher education opportunities, but non-accredited courses are also offered and are usually internally certificated by the individual institution as part of the continuing education programme. These worker education programmes were found to be located in particular labour research units within faculties, rather than being institutionally driven, and deal with labour law and labour relations issues.

Worker Education/Worker Education for Empowerment/Political Education outside the labour movement - Worker education for community solidarity

Education for the working class takes place in a variety of spaces and locations, especially non-formal and informal education that is aimed at building community solidarity and strengthening socio-economic activism. Where social movements have arisen as a desperate response of civil society to social inequities, the education and empowerment of the communities involved has been intrinsic to the success of these initiatives. More formally constituted non-profit organisations and institutions that have arisen around issues of social injustice place the education of the working class centrally to their activist and advocacy work.

Campaigns serve to forge working class solidarity, to strengthen community activism and to enable ways of working collaboratively in the collective struggle. This form of popular mass action and activism is seen as a vital and effective way of working class communities to learn more about issues that affect them and to challenge and change inequalities in existing systems that keep them marginalised and downtrodden. It is also a way of bringing to public attention the necessity for communities to be actively involved in democratic decision-making processes at a local level.

Movements like Abahlali baseMjondolo could be seen to be building bottom-up popular democracy. Most of the intellectual activity takes place in discussions in meetings and through song, but the organisation has an extensive collection of political and legal writings and reports related to the work of the movement accessible through its website. In addition, newspaper articles and press statements, pamphlets and articles produced from within the movement itself provide an immediate history of the movement.

Coalitions e.g. the Social Justice Coalition has undertaken large numbers of educational campaigns in centres affected by and at high risk of xenophobic attacks. Educational campaigns and activities around the conditions that lead to an unsafe society are designed to empower residents of working class communities to take practical steps to protect themselves better and to create awareness of why crime and violence occur and take root in such conditions.

Institutes like the Socio Economic Rights Institute of South Africa (SERI) is a non-profit organisation providing professional, dedicated and expert socio-economic rights assistance to individuals, communities and social movements. It facilitates popular education workshops around the country in poor communities and to strengthen social movements and has produced several educational resource booklets. Campaigns form part of its educational work.

Independent NGOs such as Khanya College offers assistance through educational and training workshops, publications and research to organisations and individuals within working class and poor communities to respond to the challenges posed by the forces of economic and political globalisation. Its education programme supports trade unions but also new forms of organising, especially among atypical and vulnerable workers, such as farm workers.

In conclusion, the orientation of **Worker Education/Worker Education for Empowerment/Political Education** programmes and initiatives presented in this section are essentially about mobilising around and accessing social justice. The education is either informal, taking place organically within social movements, in non-formal spaces, or in FET or Higher Education institutions. Many of these initiatives are underpinned by a research base or include research activities and are all either directly stakeholder driven or directed at socio-economic inequalities that affect working class communities. Much of these empowering forms of **Worker Education/Worker Education for Empowerment/Political Education** are non-accredited, and are therefore largely self- or donor funded.

At the same time many of the higher education institutions offer Continuing Education (CE) learning programmes as illustrated in Table 2

Unemployment is such a pressing problem in perpetuating poverty and inequality in the country and is the driving motivation behind the Green Paper on Post-School Education and Training (DHET 2012a). The NSDS III draws attention to the important role NGOs and CBOs play in the further education and training of workers to critically engage with the workplace as well as of the unemployed for the broader economy. Consideration could be given to undertaking a review of this in itself as solutions need to be found to the devastatingly high rates of unemployment.

b. Pillar 2 – Vocational education

Introduction

The NSDS III sets out strategies and targets for meeting economic development needs for the period 2010 – 2015. The evaluation of the National Skills Development Strategy II (for the period 2005 – 2010) showed that a great deal of public funding had been spent on education and training in the private and the public sectors and on training for the unemployed and for preparing the youth for employment. However inadequate

management of this information had resulted in a lack of reliable, comprehensive and coherent data that could be analysed, which made it very difficult to determine the outcomes and impact of expenditure.

The NSDS III attempts to address some of these issues that are constraining the expansion of the economy and to promote a closer synergy between the formal education system and the world of work so as “to promote a skills development system and architecture that effectively responds to the needs of the labour market and social equity” (DHET 2011: 6). Although the NSDS III seems to focus largely on the unemployed and addressing the inadequacies of the formal education and training systems, it does address the need to continually upgrade the skills of the existing workforce and to promote the expansion of such training.

The NSDS III specifically addresses the urgent need to strengthen the FET college sector, in particular to build the capacity of college lecturers and improve the qualifications and teaching competence of FET staff.

The NSDS III recommends strengthening HET capacity where necessary, and in particular improving the qualifications and teaching competence of HET staff.

To achieve full employment by 2030 it is estimated that the country will need 11 million more jobs. Continuous learning and a culture of innovation that promotes competitiveness are essential ingredients of any growing economy, so a substantial research and development sector is needed. The NDP urges that the production of highly skilled professionals be expanded as a priority and the numbers of African and women postgraduates increased, and especially PhD graduates, to improve research and innovation capacity.

There are serious problems with the provision of skills training and education through the public education and training sector, both at intermediate and at higher skills levels, and that this constrains both the development of the economy as well as access of the under-educated working class to opportunities to improve their socio-economic circumstances.

Education and training in the workplace

Despite many years since skills development legislation came into being, the majority of the South Africa population remains unskilled or under-skilled, perpetuating poverty and inequality and constraining economic growth.

Company approaches: Research (Cooper 2009: 3) shows an uneven approach to workplace training by employees, with a substantial number of them not offering any training and most of the remainder providing only short training courses that were highly job specific. The majority of this training was not accredited and therefore would not afford

transferability of skills and would not allow progression, mobility or career-pathing. Furthermore, recognition of prior learning (RPL) was not practised in any of these companies, casual workers were not provided with opportunities to enhance or broaden their skills.

Public Sector: The public sector is a major employer in South Africa, accounting for approximately 10% of total employment in 2010. Despite the substantial expenditure of public funds, the NSDS II review found that the institutional mechanisms to measure the impact of this skills development were not in place and there was very little data indicating the effects on public service productivity, increased earnings or increased job mobility.

SETA Education and Training

There are currently 21 SETAs for designated sectors of the economy responsible for ensuring that the skills requirements of their economic sectors are identified accurately and that an adequately and appropriately skilled workforce is available to meet these needs. SETAs are intended to address the skills shortages by identifying the skills need of specific industries and sectors, to be a conduit to up-skilling both employed and unemployed citizens, to assess and monitor their progress and ensure that they successfully complete their programmes and are certified as competent to compete in the workplace and find suitable employment.²⁶

The SETAs are responsible for the administration, management, quality control, support and financial allocations, including provision of bursaries, in relation to learning programmes and apprenticeships in their respective sectors

The Green Paper on Post-school Education and Training (2012a) points out numerous challenges relating to SETA governance structures and processes. However, it assures us that the DHET is putting mechanisms in place to ensure increased accountability of SETAs.

Sector skills plans seem to follow a largely human capital approach to training – focusing on meeting the needs for skills shortages and scarce skills in their sectors. There is no mention of collaborative education and training initiatives between management and workers. It gave only passing mention to RPL and to training for the disabled.

The following list highlights selected SETA performance issues as referenced in the National Review.

Table 3: Individual SETA Performance

SETA	DESCRIPTION	PERFORMANCE
MerSETA	Manufacturing, Engineering	<ul style="list-style-type: none"> Learnerships provided good opportunities

²⁶ ETDP SETA

	and Related Services SETA comprises the largest manufacturing sector in the economy	<p>for work-based learning, linking theory with practice and deepening the skills base of the economy, as well as providing entry level skills and work experience for unemployed people which improves their employability.</p> <ul style="list-style-type: none"> Concern that the majority of learnerships were undertaken at the lower NQF levels, 1 and 2, rather than at the intermediate skills levels
Clothing, Textile Footwear and Leather (CTFL) SETA		<ul style="list-style-type: none"> The DoL report revealed that there was deep unhappiness, particularly in the clothing sector, with the role of the CTFL SETA, with most companies refuting the value of the SETA's role and capacity. These companies complained that although the CTFL SETA claims to promote up-skilling and multi-skilling the workforce, in reality SETA funding is targeted at adult education and training (AET, formerly known as ABET²⁷) and learnerships for lower end operators Companies are unhappy that the CTFL SETA had used much-needed skills training funds for shop steward training
Wholesale and Retail (W&R) SETA	One of the biggest employment sectors and fastest growing sector of the economy (W&R SETA 2012: 26) in South Africa	<ul style="list-style-type: none"> 76% of the workforce is non-unionised, compared to 68% for all sectors nationally, largely because of the high numbers of casual and temporary labour. These workers receive very little, if any, skills development FET colleges offer very little in the way of modularised, part-time or evening courses, presenting a very real obstacle for workers who wish to access accredited further education and training

Over time, inefficiencies in the system resulted in many businesses having lost faith in the SETAs' capacity to enable skills development according to the prevailing education frameworks.

The private sector itself is far from being perfect in providing adequate or appropriate sector-based skills training.

Trade unions could play a far stronger role in workplace skills training of their members. Articulation of qualifications both horizontally and vertically within the education and training system, and more widespread and targeted implementation of RPL could go a long way to improve workers' access to better work and lifelong learning opportunities.

²⁷ The acronym ABET is used in this review as its use is still widespread in the literature

c. Pillar 3 – Joint Worker-management Education

For reasons beyond the scope of this exercise the worker – management spectrum is widely perceived as being diametrically opposed and with little capability of points of common interest, including that of education and training.

In practice a number of mainly commercial initiatives exist to provide education in work-related topics to mixed audiences of workers (trade unionists) and employers (managers). Examples of these are the Annual Labour Conference and Annual Labour Law Seminars organised by the legal publishers, LexisNexis, and diploma courses in labour law offered by several law faculties countrywide.

While very few collaborative or mutually beneficial initiatives were found to be taking place in this area it needs to be emphasised that there are opportunities for worker-management education and training that are not being sufficiently explored. One possible area of engagement is worker-management collaboration around education and training in the workplace. Here, trade unions could play a more active role on Skills Development Committees to ensure that workers receive appropriate education and training not only for their work but also for their personal development and to be able to access lifelong learning opportunities.

Trade unions also need to promote Recognition of Prior Learning (RPL) for workers more actively and collaborating with employers in this regard could maximise benefits for both parties.

Finally, worker-management collaboration around shop steward training could ameliorate a perceived conflict of interest and develop a better understanding of each other's perspectives.

An example of this type of joint worker education is an induction programme undertaken by a leading corporate company in the transport sector. Together with an external service provider, a continuous programme (spanning 4 years already) covers issues related to corporate culture, history of the company, organisational development issues, staff issues, and personal empowerment. The process allows for two way communication around corporate as well as individual empowerment issues, in the company of a member of the executive team who fully participates in the 2 day workshop. This has led to improved working conditions and provides a space for immediate feedback and contact between workers and managers.

This is an example of worker-manager education where the binaries are understood in terms of a class hierarchy in a capitalist firm.

3.4 Conclusion

Much of the current South African policy around post-school education and training and development targets, although intended to reduce poverty and inequality, is located within a neo-liberal paradigm of human capital or human resource development. As the architects of the Worker Education Framework the research team will adopt a key architectural design principle of “form follows function”²⁸ which means that the purpose of any creation or construction should be the starting point for its design.

Worker education has been shown to be located, for the purposes of the proposed worker education framework, within three ‘pillars’: ‘Worker Education/Worker Education for Empowerment/Political Education’, ‘vocational education’ and ‘worker-management’ education.

Pillar 1: Worker Education/Worker Education for Empowerment/Political Education

Political worker education spans trade union and associated education and training, including accredited and non-accredited education at the general, further and higher education bands. It also includes social solidarity education, such as popular education and education that happens in movements for social justice, especially community mobilisation around socio-economic inequalities or human rights issues. RPL is not widely understood in the workplace or advocated by the trade unions. Although there are a number of worker education qualifications offered in higher education these will need to be mapped more thoroughly for the purposes of developing an integrated worker education framework. SETA and NSF funding should also be leveraged for worker education as trade unions pay skills levies.

Pillar 2: Vocational Education

Workers need not only ‘political’ education so that they can understand how society, the economy and work is structured within the current global capitalist framework and their constitutional rights in the system, but they also need to be productive citizens, for which they need education and training for work.

Much of the vocational and skills training takes place under the auspices of the Sector Education and Training Authorities (SETAs), in the form of work-based education and training programmes and funded from skills development levies.

However, it is claimed that the SETAs are not performing their mandate as effectively as they should as a large proportion of SETA funding continues to remain unspent. In addition,

²⁸ Luis Sullivan considered the father of modern sky scrapers, wrote in 1896 “It is the pervading law of all things organic and inorganic, of all things physical and metaphysical, of all things human and all things superhuman, of all true manifestations of the head, of the heart, of the soul, that the life is recognizable in its expression, that form ever follows function. This is the law.”

research indicates that there is still a critical shortage of artisans in the country, but that little training is taking place at this intermediate level.

There is very little training for contract, temporary and casual workers who are not unionised and skills training for the unemployed remains largely the domain of civil society organisations which find it difficult to access sustained funding. They also need to be drawn into a framework for worker education and become formally recognised through simple registration procedures, based on the value of their programmes as discussed.

Pillar 3: Worker-management Education

Worker-management education offers a fruitful opportunity for potential employer-worker conflicts to be resolved and for both parties to benefit. The worker education framework could make recommendations to expand such collaborations.

4. INTERNATIONAL REVIEW: LEARNING FROM BEST PRACTICE

4.1 Introduction

The review set out to identify and distil worker education policies (WE) and practices that South Africa's Worker Education Framework (WEF) can benefit from according to the single social objective of the proposed WEF for South Africa: '...the promotion of substantive equality through realising the full potential of workers who have historically been denied opportunities of self-development' (Social Law Project Inception report, 2012). It is understood that 'divergent and contradictory interpretations' of 'worker education' and its purpose by different stakeholders exist nationally and internationally. However, as Professor du Toit points out, 'every society is premised on the accommodation of divergent and competing interests in dynamic ways.' He argues that 'policy-making by its nature involves the construction of over-arching frameworks within which those forces can interact in bringing about new solutions in an on-going process of transformation ('final' solutions do not exist).' [IR p4]

It is therefore understood that 'the aim should be not only to develop (and continue refining) a vision in which WE becomes identifiable as a discrete discipline and policy objective, but where the various purposes of WE are combined in mutually supportive ways.'²⁹ The understanding of the WEF as a 'work in progress', and the allocated time frame for the international review, called for the rapid approach taken in this review. [IR p4]

It is understood that the Technical Task Team (TTT) and SLP's understanding of 'worker education' locates it *within* the notion of adult education as a process of life-long learning. Both these concepts (adult education and life-long learning) are imbued with different meanings in the international data collected depending on the country context. At the same time some of the usages of these terms distinguish 'worker education' from *accredited* vocational and occupational training or ABET understandings of 'adult education'. With its emphasis on *integrated/articulated* 'worker education', 'employee' and 'joint worker-management' pillars, 'worker education' further distinguishes itself from understandings of life-long education as being only 'civic' or only 'popular' education. [IR5]

Based on the understanding of 'worker education' that blends, transcends, extends and crosses boundaries, the review set out to:

- a. Distil best practice guidelines from the policies, procedures and principles of international WE organisations such as the ILO, IFWEA, GLU, Ruskin College and others
- b. Search for examples of where and how an integrated, articulated WE framework, as envisaged in South Africa, has been applied internationally

²⁹ See WEF outline, 2013:1.

- c. Distil learnings from examples where elements or components of an integrated, articulated approach is evident in policy and/or practise.

4.2 Policy Framework: Values and principles of International WE organisations

The International Labour Organisation (ILO) (www.ilo.org) is the international organization responsible for drawing up and overseeing international labour standards. It is the only 'tripartite' United Nations agency that brings together representatives of governments, employers and workers to jointly shape policies and programmes promoting Decent Work for all. This unique arrangement gives the ILO an edge in incorporating 'real world' knowledge about employment and work.

The Preamble of the ILO constitution states:

- 'Whereas *universal and lasting peace* can be established only if it is based upon *social justice*;
- And whereas *conditions of labour exist involving such injustice hardship and privation to large numbers of people as to produce unrest* so great that the [peace and harmony of the world are imperilled; and an improvement of those conditions is urgently required;
- Whereas also *the failure of any nation to adopt humane conditions of labour is an obstacle* in the way of other nations which desire to improve the conditions in their own countries.'³⁰

The Global Labour University (GLU) (<http://www.global-labour-university.org/298.html>) evolved in a global economy characterised by increasing economic and social inequality and rising unemployment that has seen the most disadvantaged social groups being affected the most. The project is global in outlook and builds in particular on the expertise of the GLU partner institutions in Brazil, Germany, India and South Africa.

According to its website, the GLU sets out to 'strengthen the intellectual and strategic capacity of workers organisations and to establish much stronger working relationships between trade unions, the ILO and the scientific community.' *It seeks to 'strengthen trade union capacity and competence to promote the values of the ILO's 'Decent Work' agenda and enable workers' organisations to engage more effectively in social dialogue on social and economic policy issues like employment, social protection, and the implementation of international labour standards.'*³¹

Ruskin College actively promotes transformative worker education and its work has an anticipatory element. The beliefs that underpin the activities of Ruskin College date back to

³⁰ <http://www.ilo.org/dyn/normlex/en/f?p=1000:1:0::NO::> accessed 19 January 2013

³¹ <http://www.global-labour-university.org/16.html> accessed 18 January 2013

1899, 'a time of ferment in political and educational ideas'. The College 'aimed to provide *university-standard education for working class people so that they could act more effectively on behalf of working class communities and organisations - trade unions, political parties, co-operative societies, working men's institutes and so on*'. They believe that 'education can and does transform individual lives and societies.'³²

The International Federation of Workers' Education Associations (IFWEA) is an international organisation that brings together national and international trade unions, workers' education associations, NGOs and foundations engaged in the provision of adult education opportunities for workers and the communities in which they live throughout the world. It has observer status at the ILO and UNESCO, maintains close relations with the International Trade Union Confederation and the Global Union Federations, and shares mutual membership with SOLIDAR in Brussels.

IFWEA appears to push the boundaries between a transformative and anticipatory approach to worker education. According to its website, IFWEA embraces the 'liberal adult education' tradition in workers' education, as an essential strand of democratic life and civil society.' It further 'recognises and addresses the need for a broad approach to workers' education, including the importance of the arts, culture, literature and history in the curriculum.' An excerpt from a paper by IFWEA's general secretary titled '*Adult learning as a global challenge*' reads:

'The philosophy, value and ethics of worker's education are based on the inalienable right of adults to lifelong learning as a cornerstone of democracy. Where there is no democracy, workers' education directs itself towards building it. Where democracy exists, workers' education examines, extends and entrenches it'. (Ryklief, 2009:1).

These international organisations provide a wealth of information on worker education internationally. Further research on their extensive networks would be useful for future stages of the WEF process. [IR9]

4.3 Pillar 1: Worker Education/Worker Education for Empowerment/Political Education

The following are key examples of national and international organisations offering worker education. This is by no means an exhaustive list but provides an indication of the overall purpose and lessons learnt.

³² <http://www.ruskin.ac.uk/about/history> accessed 18 January 2013

Table 4: International examples - Pillar 1: Worker Education/Worker Education for Empowerment/Political Education

Organisation	Purpose of training	Key lessons
Arbeit und leben [<i>Work and Life</i>] Further Education institution supported by the German Trade Union Federation (DGB) and the German Adult Education Association Germany	To contribute to education programs that develop the WORK and LIFE of people premised on social justice, equity and solidarity with the goal of democratic participation	<ul style="list-style-type: none"> • A professional organization of political and social education • The Federal Working Group is the umbrella organization of the 160 WORKING AND LIVING institutions in the states and municipalities • Sponsored by the German Confederation of Trade Unions and the community colleges
Arbetarnas Bildningsförbund (ABF) (The Workers' Educational Association) Sweden	To contribute to enabling people to study together and form an opinion on key social issues, based on principles of democracy, diversity, justice and equality	<ul style="list-style-type: none"> • Politically independent organisation which shares the values of the labour movement • Financing comes from grants from the government, county and municipal councils, and fees from the participants and the affiliated organisations. The central ABF receives government grants, which it distributes to the local branches based on the scope of their activities.
Escola Nacional Florestan Fernandes (ENFF) Brazil	To think, plan, organize and develop political and ideological training for MST's activists and leaders, as well as for the working class [Moviment dos Trabalhadores Rurais Sem Terra (MST) – <i>Brazil's Landless Workers Movement and ENFF is its school</i>]	<ul style="list-style-type: none"> • coordinating formal and informal courses in training centers in several states
European Trade Union Institute (ETUI) is the independent research and training centre of the European Trade Union Confederation (ETUC)	To devise and deliver training programmes for the ETUC as a whole and to develop the European dimension in trade union education at all levels	<ul style="list-style-type: none"> • provides the ETUC and its affiliates with programmes and exchanges that strengthen the European trade union identity • Receives financial support from the EU
IFWEA	International organisation responsible for the development of workers' education	<ul style="list-style-type: none"> • Courses to selected trade union, and membership organisation leaders • Online curricular, which can also be adapted for face-to-face workshops, for adult and labour educations to

		utilise in their education activities.
ITUC-Africa, Togo	To strengthen trade unions in Africa and to provide a common voice for all African workers to realise a healthy and safe working environment and a decent life for all by fighting all forms of exploitation and discrimination, defending human and trade union rights, promoting social justice, peace, democracy and vigorously pursuing the preservation of the environment.	<ul style="list-style-type: none"> • Structure of education in the unions is weak and education not reaching the right people
Labour and Economic Development Research Institute of Zimbabwe (LEDRIZ) Zimbabwe	To promote collaborative policy-oriented research for the African labour movement on common challenges.	<ul style="list-style-type: none"> • A Trust governed by a Board consisting of six trade union leaders and four academics • To strengthen the labour movement's capacity to carry out policy oriented research that will protect, safeguard and advance the rights and interests of working people of Zimbabwe
Labour Education Research Network (LEARN) NGO Philippines	To raise workers' consciousness of their conditions, rights and capabilities to change that condition.	<ul style="list-style-type: none"> • Provides various services primarily to workers, both from the private and public sectors or formal and informal labour • Workers' empowerment by developing an alternative workers' education that blends the economic, political and socio-cultural struggles of the workers; propagates an alternative socialist system; and is guided by the basic principles of trade union solidarity, democracy, self-reliance and autonomy
Labour Resource and Research institute (Larri) Namibia	The institute carries out research and education aimed particularly at empowering workers and their trade unions.	
Paulo Freire Institute	To build networks of scholars, teachers, activists, artists and community members dedicated to social justice	<ul style="list-style-type: none"> • Use of education as a vehicle to empower oppressed across the world
United Association for Labour Education	To strengthen the field of labour education in order to meet the changing needs of unions and workers	Education is considered an essential tool of union transformation, developing new leadership and meeting the ever-changing needs of unions and workers.

Workers Educational Association (WEA) UK	To provide educational opportunities to adults facing social and economic disadvantage	Through curriculum themes of employability, health & wellbeing, community engagement and culture, the WEA gives students the confidence to learn new skills, live healthier lives, engage in society and broaden their horizons.
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4.4 Pillar 2: Vocational education

In the main, examples of vocational education and training in different countries resonate with understandings of vocational education and training in South Africa. In Table 5 below we have drawn some key examples from the International Review.

Table 5: Vocational Education: key examples

Country	Type of Vocational Education system	Key lessons
Croatia	Comprehensive, learning outcomes based NQF that will link and coordinate different education and training subsystems.	Recently established government agency for adult education will be in charge of accrediting non-formal education providers
Portugal	Comprehensive national systems for validation are in place - national system of recognition, validation and certification of competences (RVCC).	<ul style="list-style-type: none"> a number of policies and initiatives have been 'developed for validation of non-formal and informal learning
Denmark	Danish Adult Education system (AE)	<ul style="list-style-type: none"> non-formal has been developed with the principles of self-governing institutions, life-long learning without the need for formal examinations, and a drive towards the recognition of prior learning (RPL) and validating this prior learning
Czech Republic	NQF for lifelong learning	<ul style="list-style-type: none"> linking the subsystems in the national education system and improving its permeability; making the whole system more readable for all stakeholders, namely learners and employers; linking initial and continuing education and learning; building the base for recognising learning outcomes irrespective of the way they were achieved; systematic involvement of all stakeholders in vocational education and training and in the development of national qualifications; support for disadvantaged groups and people with low qualification levels.' It is suggested that 'another issue to be dealt

		with is the integration of non-formal qualifications and validation of non-formal and informal learning in the NQF developments and equivalences of qualifications’
Finland	NQF based on the European Qualifications Framework (EQF)	Adult Education policy is designed to provide a wide range of study opportunities for the Adult population
Cuba		Most information on Cuba is in Spanish. However, what is available in English suggests that further research on Cuba’s education system is warranted.

In a conference focusing on Recognition of Prior learning, held in South Africa in December 2012, a French educationist, Patrick Werquin, presented the view that France has over the past two centuries had a constant focus on adult learning. More precisely, France has always focused on the preparation of adults for the labour market. The principle in France is that for a worker to be and remain productive, she has to be trained throughout life.³³

He referred to this focus on adult vocational training leading to the creation of the *écoles d’ingénieurs* (higher education institutions preparing high-level engineers and scientists) by Napoleon the First, in order to organise the training and the qualification process for the management of staff in charge of developing the trade industry. This principle also drove the training policy during the Industrial Revolution and gave rise to the apprenticeship system in 1919, aimed at providing France with a qualified labour force.

Companies also played an important role. They set up their own schools (*écoles d’entreprises*) to upgrade the competences of their workers³⁴.

Just before World War II there was a new more philanthropic movement, which also promoted the education of the population. It was then that that *Association pour la formation Professionnelle des Adultes* (Association of Adult Vocational Training) was created. It promoted accelerated education and training for job seekers.

He refers to the widespread belief in France that a qualification can be achieved in different ways. The pathway and the method can be different but the qualification is the same. This principle was passed into law in 1971, called *Loi sur la formation continue* (Law on Continuous Training) and this is what in French is called “*acquis*”, which is best translated as “learning outcomes” but literally means “what has been acquired”.

³³ Recognition of Prior Learning: taking RPL to scale, in SAQA Bulletin Volume 12, Number 13, December 2012, p. 58-62

³⁴ See Migros School Club in Switzerland for an example outside France, as well as the German Dual System whereby employers are committed to the vocational preparation of young people

He highlighted one of the challenges in implementing this “acquis” as the fact that the designers of the qualifications remained attached to the idea that assessment is about assessing a formal learning episode or module, as opposed to any kind of learning experience, and even though the qualifications are designed in collaboration with employers and active employees, the designers seem to have difficulty moving away from the concept of inputs (number of hours).

It is noteworthy that France has had an NQF since 1971. It is reported that it is standard nowadays to have an NQF in relation to the validation of non-formal and informal learning. Many countries have adopted this approach, probably because the learning outcomes are at the heart of both the qualifications framework and the validation system.

In the 1960's France developed a credit system, based on units that could be accumulated towards a qualification, which paved the way for learning and qualification modules.

The French *Validation Des Acquis de l'Experience* system can be characterised as follows:

- A comprehensive approach: - any kind of learning outcome, however acquired, can be validated
- A qualification should be disconnected from any formal learning spell, a qualification should be attached to an assessment
- Creating new routes to qualifications is a way of increasing equity as this will provide a second chance for a qualification
- The Validation des Acquis de l'Experience will create an incentive for people to resume formal learning

The Programa Integrar of Brazil provides a different example where we see a trade union providing vocational education and training. ‘... it is an example of integrated education and training for civil society’ (Fischer & Hannah, 2002:95) and blurs the boundaries between Vocational Education and Training and what we refer to as **Worker Education/Worker Education for Empowerment/Political Education**. It also unites two dominant paradigms of adult education, i.e. human resource training and popular education.

In most countries vocational training is prioritised and conceived of in terms of needs of the economy. In those instances, human development is regarded as secondary or supplementary and in some instances conceived of as ‘soft skills’ to enhance vocational and technical skills. Similarly, ‘life-long learning’ and ‘adult education’ are viewed through these different lenses.

This is in line with a caution expressed by a participant at the WE expert consultation held at UWC on 7 February 2013. He warned that ‘adult education’ and ‘worker education’ were being used in a generic way, with negative consequences for political/solidarity/trade union education. Turkey appears to be the exception and

serves as an example where human development is prioritised above economic development, or is given equitable weight.³⁵

4.5 Pillar 3: Joint Worker-Management Education

In Turkey an ILO/European Union project offered a ‘worker-management project for supply chain factories on productivity and working conditions’. The ILO training provided ‘assistance to Multinational Enterprise supplier factories in the textile and clothing sector to meet the challenges confronting them’. The project aimed to ‘bridge the gap by training both workers and managers on issues related to quality, productivity and work place conditions with a focus on worker-management relations.’ It included modules on globalisation and the changing nature of productivity, international labour standards, productivity, building trust, collective bargaining, human resource and skills development, gender, health and safety at work at the workplace’. This was conducted under the banner of ‘social dialogue’.³⁶

Examples of worker managed enterprises

Joint worker-management education is considered important in the context of the WEF for building workplace democracy in general. Management by workers may be seen as the highest form of workplace democracy.

The International Review highlighted a few examples of worker-managed enterprises. The Mondragon Corporation (Basque Spain) is managed according to ‘basic cooperative principles’. The corporation has an ‘educational network which includes a number of Vocational Training Centres as well as its own University’.

As pointed out in the National Review, the area of worker-management education and training has not been sufficiently explored. Further research is needed to understand better how worker-management education can avoid a situation where the influence of trade unions and collective bargaining could be compromised.

4.6 Conclusion

The international review set out to which best practice models exist from which ‘an integrated, accredited and non-accredited worker education and training system in South Africa’ could draw. The understanding of the WEF as a ‘work in progress’, and the allocated time frame for the international review, called for the rapid approach taken in this review.

³⁵ An excerpt from the Report on Adult Education in Turkey (2011) of the European Association for the Education of Adults (EAEA) is reproduced in the International Review as it resonates with some of the values and principles implicit in the proposed WEF. [IR22]

³⁶ <http://www.ilo.org/public/english/region/eurpro/ankara/areas/texttrain.htm>

When no single model could be found in the specified time, the review set out to identify and distil components and elements of worker education policies and practices that South Africa's (WEF) can benefit from according to the single social objective of the proposed WEF for South Africa: '...the promotion of substantive equality through realising the full potential of workers who have historically been denied opportunities of self-development' (SLP Inception report, 2012).

The review confirmed that 'divergent and contradictory interpretations' of worker education and its purpose by different stakeholders exist internationally.

The components and elements of policies and practices that constitute international promising practices in this review are intended to confirm, support and inspire local thinking and are not intended as a mould. The inclusion or exclusion of some examples finally turned on their applicability in the South African context of uninterrupted trans-historical inequality, and the trans-nationally driven growth of inequality in the wake of neoliberal economic policies. This review was alive to the fact the NQFs are regarded as neoliberal, market oriented instruments that could pose a threat to trade union influence and collective bargaining if it is not managed well.

Notwithstanding, the proposed Worker Education Framework draws on lessons from the international findings as it relates to enhance its own foundation for empowering workers as active citizens and simultaneously developing workers as producers.

In Pillar 1 the overwhelming message relates to education as a vehicle for empowering workers, as citizens and employees, to understand their obligations and assert their rights to social justice and democracy.

Pillar 2 has highlighted that vocational education means much the same in most countries and echoed in South Africa.

Pillar 3 has not revealed much by way of mainstream best practise examples. It has, however shown possibilities in alternative business environments. Joint worker-management education international best practise requires further investigation.

5. WORKER EDUCATION: A MODEL FOR SOUTH AFRICA

5.1 Introduction

The starting point for developing a worker education model is the need identified by HRDSCA for a “clear collective vision on an integrated, accredited and non-accredited worker education and training system in South Africa.”³⁷

The aim of the present exercise should be understood as developing a policy for coherent worker education practise based on existing frameworks within which the competing interpretations and purposes of worker education can be accommodated on a sustainable basis. The term “integrated” should be understood in the same sense; it refers to the policy level rather than the level of content (though, as will be suggested below, this does not exclude points of mutual support between different forms of worker education). From this it is also clear that worker education needs to be understood, or defined, in the broadest possible sense in order to encompass the multiplicity of its forms. A useful explanation is the following:³⁸

“Worker education is the process of providing the space, opportunity and resources for workers to develop their:

- Understanding of their role in society as part of the working class
- Skills, competencies and abilities both at an intellectual and practical level to contribute to the productive forces of society and to be able to make such contribution
- Realisation of the value and use of their own prior learning, experiences and skills acquired in the course of their struggles within their communities, organisations and working environment
- Role as change agents in society and to make an effective contribution for the collective good
- Ability to represent their rights and interests both at an individual and collective level
- Organisations which represent their interests.”

³⁷ <http://www.info.gov.za/speech/DynamicAction?pageid=461&sid=28387&tid=72866> (accessed 13/03/09)

³⁸ From Kessie Moodley’s response to question 1 of the Technical Task Team questionnaire. See also Inception Report where it is expressed as follows: “Worker education ... is concerned with developing workers’ understanding and capacities at different but inter-related levels: their collective role in society (which calls for knowledge of the functioning of society and the economy), their individual role as producers (their technical expertise), and their role as members of productive teams in workplaces. All three levels are mutually supportive and should be approached within a single framework, geared to the developmental objectives captured in the Bill of Rights and the Constitution.”

5.2 Approach to worker education

The approach to Worker Education is based on a broad understanding that its envisaged outcome and the output of progressive education in general is the transformation of socio-political, economic and cultural structures, values and practices in order to bring them in harmony with and facilitate the attainment of the vision of a just and egalitarian society. It is understood that the Worker Education Framework should seek to contribute to:

- 1) Democratic, collective, participatory and liberatory knowledge production processes and education practices;
- 2) Equitable access to and development of the knowledge, skills, information, competencies, capabilities, resources, and platforms that enable people to participate in social, political, economic and cultural affairs with dignity;
- 3) The recognition, acknowledgement and respect of workers' and working-class experiences, struggles, and contributions in all social spaces, within and outside the establishment/mainstream,
- 4) Respect for and recognition of the educational and socio-political practices, values and platforms/spaces established by Workers' and the Working-class out of their own struggles and experiences;
- 5) The removal of systemic, structural and institutional barriers to equitable allocation of and access to education, knowledge, power and resources;
- 6) Respect for the plurality of perspectives, strategies, methodologies relating to the social, economic, political and cultural issues and challenges and to the nature of education and its role in society³⁹

One such approach is the Human Development paradigm which is about

“expansion of people’s freedoms to live long, healthy and creative lives; to advance other goals they have reason to value; and to engage actively in shaping development equitably and sustainably on a shared planet. People are both the beneficiaries and drivers of human development, as individuals and in groups.”
(HDR: 2010 p22)

The key components of human development have been described as (1) *well-being*, (2) *empowerment and agency* and (3) *justice*.⁴⁰ These correspond closely with the vision and mission of the Framework.

The Human Development Index (HDI) is a composite measure for measuring progress in human development that implores governments to focus on human development on the one hand and adopt development goals on the other hand as a minimum requirement to stem and even reverse the growing levels of inequality in the world. As an end in itself, HD is

³⁹ Input from Kessie Moodley, Workers College 31 May 2013

⁴⁰ Human Development Report (HDR) 2010 p22

about enriching human lives and increasing the capabilities of people to lead full, productive, and satisfying lives.⁴¹

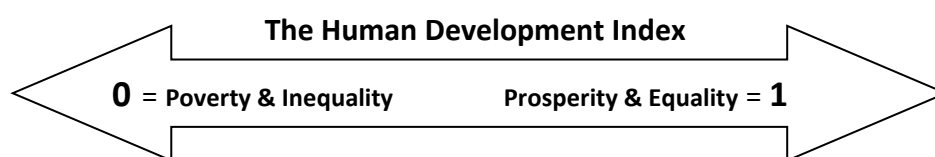


Figure 1: Human Development Index

The HDI⁴², the UNDP’s universal measure of human development, sets a minimum of 0 which represents extreme poverty and inequality and a maximum of 1 which represents optimal prosperity and equality. The scale of 0 – 1 is the global standard for measuring human development in any country. Each of the three dimensions of the human development index is also measured on this scale of 0 to 1.

In 2010 South Africa, characterised as a medium development country, scored 0.597, Norway was the most developed country with an HDI of 0.938 and Zimbabwe the least developed with an HDI of 0.140, according to the UNDP HDR.

Table 6: Disaggregated HDI 2010

Country	HDI	Life Exp	Mean years of schooling	Expected years of schooling	Gross national income per capita (USD)
Norway	0.938	81	12.6	17.3	58 810
SA	0.597	52	8.2	13.4	9 812
Zimbabwe	0.140	47	7.2	9.2	176

Source: SALGA HDF 2011

The inequality-adjusted HDI (IHDI) takes into account inequalities in a given country. The difference between the HDI and IHDI measures the “loss” in potential human development due to inequality. The average loss is approximately 22%. The country with the highest human development, Norway, had a loss of 6.6%, while the country with the lowest HDI, Zimbabwe, had a loss of 29.9%. South Africa, with a 31.2% loss, showed higher levels of inequality than even Zimbabwe, locating South Africa among the most unequal nations in the world measured in terms of its Human Development Index

⁴¹ Social Law Project. 2011. SALGA Human Development Index for Local Government in South Africa. [6]

⁴² Human Development Index (HDI) (<http://hdr.undp.org/en/statistics/hdi/>, accessed 31 March 2013)

While South Africa has a relatively sophisticated infrastructure, a well-developed private sector and a stable macro-economy, it suffers from vast inequality.

The Worker Education Framework presents an opportunity for addressing the loss in potential human development by reflecting country-specific problems and priorities as well as local problems and priorities. It could measure its own impact by way of the Human Development Index and South Africa's current baseline of 0.597.

The research findings nationally and internationally together with the HD approach have pointed us in the direction of a capability model for worker education in which the worker education framework guides a programme of worker education which enhances and expands the capability of South African society in a manner that optimises prosperity and equality (see Figure 2 below).

Figure 2: The Capability Model

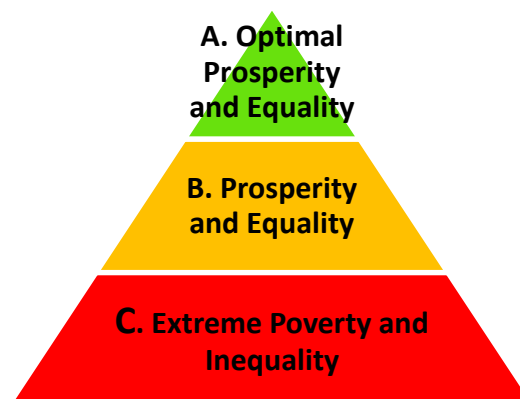


Diagram A: The HD pyramid South Africa 2013

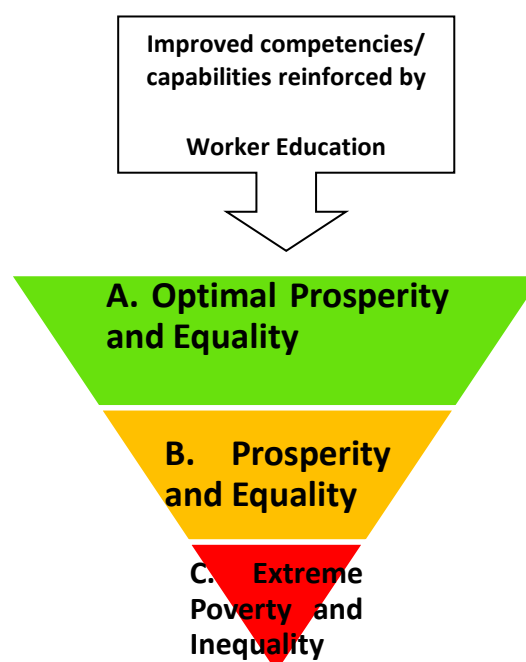


Diagram B: Desired HD Pyramid for South Africa

The impact of the interventions guided by the Framework contributes to transforming the pyramid in Diagram A which represents South African society as it currently exists. Improved competencies and capabilities result in a more productive, more prosperous and more equitable society as represented in Diagram B. Monitoring and evaluation of the implementation of WE will be benchmarked at 0.597 on the HDI. A monitoring and evaluation system needs to be designed to enable continuous programme review and needs assessment. The WEF thus has the potential of moving South Africa along the human development trajectory from left to right along the arrow in Figure 1: **Human Development Index**, representing human development progress.

5.3 The structure of worker education

At the heart of Worker Education is the agenda of social transformation, justice, equality and a participatory and inclusive democracy that avails social, political, economic and cultural rights and opportunities to all its citizens and prioritizes the needs and demands of the marginalized and disempowered sectors of society. This requires the systematic and systemic improvement of competencies and capabilities which allows workers and working-class communities to grapple with the totality of social and power relations that affect their lives, position and contributions in all spheres in society and all aspects of life.

While Worker Education speaks directly to the agenda of the transformation of power and social relations and the building of competencies and capabilities to pursue workers' rights and social, economic, political, environmental and gender justice, it is essential for Vocational and Worker-Management Education to be cognisant and considerate of this agenda of Worker Education and its concerns; and for Worker Education to also be alive to the needs and concerns of Vocational and Worker-Management Education.

In the context of South Africa's transformative constitutional regime and its social cohesion focus, the complementarities and contradictions between these three pillars (and other pillars of Worker Education not expressed in this framework) should be based on the recognition of the various and special ways in which each pillar can contribute to the promotion of substantive equality (as envisaged in the Bill of Rights) through realising the full potential of workers who have historically been denied opportunities of self-development and active participation in shaping how society is organized and run.⁴³

Guided by these principles, the integrated Framework is structured around the following components:

a. Vertical Pillars⁴⁴

⁴³ Input from Kessie Moodley, Workers College, 31 May 2013

⁴⁴ The reference is to the 'Vertical Pillars' as discussed in part 3.3 of the document (pp 19-30 above).

Pillar 1: Worker Education/Worker Education for Empowerment/Political Education

Pillar 2: Vocational Education

Pillar 3: Worker-Management Education

b. Horizontal Qualifications Sub-frameworks

“Sub-framework” means one of three qualifications sub-frameworks which make up the NQF as a single integrated system: the Higher Education Qualifications Sub-framework, the General and Further Education and Training Sub-Framework and the Occupational Qualifications Sub-Framework.⁴⁵ Each sub-framework is managed by a quality council as listed in 7.

Table 7: Quality assurance



Sub-framework	Quality Council	Legislation
Adult Education	Umalusi	Adult Education and Training Act 52 of 2000
General and Further Education and Training	Umalusi	General and Further Education and Training Quality Assurance Act 58 of 2001
Higher Education	Council for Higher Education	Higher Education Act 101 of 1997
Trades and Occupations	Quality Council for Trades and Occupations	Skills Development Act 97 of 1998 Skills Development Levies Act 9 of 1999

⁴⁵ SAQA. 2012. Level Descriptors for the South African National Qualifications Framework.

5.4 The Worker Education matrix

In trying to conceptualise a national worker education and training framework, the matrix below emerged as the most appropriate format for illustrating effective integration and coordination of the various forms and levels of worker education, geared towards a collective vision of equality, prosperity, and full employment.

Table 8: The Worker Education Matrix

CONTENT  QUALIFICATION SYSTEM 	Pillar 1 [Worker Education/Worker Education for Empowerment/Political Education]			Pillar 2 Vocational Education and Training (VET)	Pillar 3 Worker-Management Education
A HET: Accredited	A1			A2	A3
B HET: Non-Accredited	B1			B2	B3
C General & FET: Accredited	C1			C2	C3
D General & FET: Non-Accredited	D1			D2	D3
E Occupational: Accredited	E1			E2	E3
F Occupational: Non-Accredited	F1			F2	F3
G Adult Learning Programmes	G1			G2	G3

The vertical pillars start with **Worker Education/Worker Education for Empowerment/Political Education** on the left, to worker-management education on the right. Learning paths weave vertically, horizontally and diagonally to form a coherent matrix for accommodating different programmes of worker education, incorporating both accredited and non-accredited training.

It is envisaged that there should be horizontal, vertical as well as diagonal articulation through and across all “pillars” and sub-frameworks⁴⁶. This includes articulation from non-accredited to accredited levels (without implying that accredited training is necessarily at a higher level than non-accredited training).

The matrix, while providing for coherence and integration within education and between education and work (in terms of outcomes), is flexible enough to accommodate the variety of competencies and levels appropriate to the various economic sectors.

Every sector would be able to populate the matrix with its own set of sector-specific competencies to describe the learning to be achieved at each level of each of the sub-frameworks. This would be especially relevant to Pillars 2 and 3. Pillar one would have mostly generic competencies applicable to most sectors.

As was envisaged by the NQF, workers will be able to enter and exit the WEF at any point of the learning paths which accommodates accredited and non-accredited training.

By populating the matrix with existing programmes, it can also be used to pin-point competency gaps that need to be addressed by industrial sector, nationally, by province or locally.

5.5 Scope and Content

Pillar 1: **Worker Education/Worker Education for Empowerment/Political Education**

The TTT defined the focus of this pillar as understanding of worker rights and interests and advancement of their socio-economic-political wellbeing. The scope and content is, however, currently undefined and should be based on the objective of education for empowerment of workers to be capable citizens and producers. Empowered workers are capable of exercising their labour rights in the workplace and their basic rights and responsibilities as citizens. With this at its core, Pillar 1 competencies need to be clearly defined for each of the qualification levels (G1, F1, E1, D1, C1, B1, and A1). This aspect of worker education has been neglected. Given the strong tradition of worker solidarity, there

⁴⁶ Notice 1040 of 2012, Government Gazette No. 36003, Determination of the Sub-Frameworks that comprise the National Qualifications Framework (NQF), comprises policy in terms of s8(2)(b) of the NQF Act 67 of 2008. The Act provides for an integrated NQF comprising three sub-frameworks, each developed and managed by a quality council. See n 45 above for

is a wealth of experience and existing learning programmes that need to be recognised, harnessed, and expanded upon.

Pillar 2: Vocational Education

Unlike Pillar 1, Pillar 2 has much more definition and has been the subject of several policy documents⁴⁷. A myriad of structures are already in place, including 21 SETAs who are responsible for sector skills plans.

Pillar 3: Joint worker-management education is even less developed than Pillar 1, both in theory and practice, and can be expected to grow as Pillar 1 is strengthened.

5.6 Articulation

Articulation has been defined as follows in Clause 34 in the Guidelines on strategy and priorities for the NQF 2012/2013:

“Mechanisms for ensuring that competent learners and workers are able to progress within the learning system and along their chosen career paths are particularly important if the national human resource development priorities are to be met. This will require system-wide articulation and equivalence arrangements to be put in place. Policy and criteria for assessment, recognition of prior learning and credit accumulation and transfer also have strategic importance and must be given appropriate priority.”⁴⁸ [19]

Given the raft of existing education legislation and policy frameworks and the ever-changing world of work, articulation becomes a critical element for any worker education framework. The Green Paper for post-school education and training argues that “[a]rticulation with the labour market has two elements. Firstly, it is about matching the supply of and demand for skills in this market. Secondly, it is about developing better links between education institutions and industry to create further opportunities for apprenticeships, learnerships (*learning programmes*), work experience and training.”⁴⁹ In addition, and in light of the WEF, it may be said that there is need for articulation or expression of education and training that workers find valuable in enhancing their role as workers and citizens, both within Pillar 1 and between Pillar 1 and the remaining pillars.

One of the strategies emphasised by the National Development Plan (NDP) is the need for integration of theoretical learning with practical training and to establish closer linkages between employers and education and training institutions. Involving the SETAs is seen as one way to achieve this.

⁴⁷ Vocational education is covered in, among other, the Human Resource Development Strategy for south Africa 2010-203, FET Colleges Act 16 of 2006, National Qualifications Act 67 of 2008.

⁴⁸ Guidelines on strategy and priorities for the NQF 2012/2013 p.19

⁴⁹ Green paper for post school education and training p.14

There is evidence of this in France's focus on vocational preparation of adults for the labour market. Historically, companies played an important role. They have set up their own schools (*ecoles d'entreprises*) to upgrade the competences of their workers. Trade unions also opened establishments to help re-skilling disabled workers, who were injured at work, so that they could resume working.⁵⁰

Recognition of prior learning (RPL) is a crucial mechanism for enabling effective articulation. In South Africa, one of the purposes of RPL, specifically championed by trade unions and recognised in state policy documents, is redress for past and present discriminatory practices. Many trade unionists and workers have vast knowledge of and experience in the work they do, although they may not have the "papers" or accreditation to prove it. RPL is based on articulation (movement) of workers who have had their competencies tested and accredited on a par with formal qualifications. It therefore relies on standard-setting and quality assurance. There is an urgent need to develop common understandings of the types of learning to be recognised for different RPL purposes. A SAQA document explains:

"Wisely used, RPL can contribute to the vertical and horizontal and mobility of workers both in their career paths and in the learning system, and may both express and reinforce the integration of education and training and the application of learning in different contexts."⁵¹

RPL thus aims at providing a systematic acknowledgement of knowledge and experience achieved in different contexts and in so doing provides access to certain qualifications or parts thereof.

Based on the human development approach of expanding capabilities, RPL could become a powerful mechanism for harnessing existing skills. It may go some way in fast-tracking some of the skills lacking in the South African workforce through recognition and harnessing of skills acquired outside of the formal education system either through non-accredited training or work experience, or a combination of the two.

⁵⁰ Enabling recognition of non-formal and informal learning outcomes in France: the VAE legislation in SAQA Bulletin, Volume 12 Number 3, December 2012. See discussion at pp 39-40 above.

⁵¹ Working document of the recognition of prior learning in SAQA Bulletin, Volume 12 Number 3, December 2012 p.3-4.

6. RESOURCING AND FUNDING WORKER EDUCATION

The report put forward the view that existing funding needs to be used more effectively and should encompass 'worker education'. Amounts to be allocated could only be determined once workers, educators, researchers, facilitators, assessors, employers and other stakeholders determine the set of competences that constitute 'worker education' as a field of development. The determination of key competences for different sectors of the economy would be the outcome of broader sector stakeholder discussions. Pillar One competences would be mostly generic across sectors and would be the outcome of a multi-sector stakeholder consultative process. Whether this should be a statutory forum or not should be determined at a later stage. The key funding challenge is to ensure much greater levels of support for pillar one education and training, which is most constrained at present.

6.1 Institutional funding

According to the Green Paper on Post school education and training (launched by the DHE in 2012), current funding modalities present multiple challenges across the post-school education system.

For the university sector, the funding model has made some attempts to bring about greater equity between historically black universities and those which were more advantaged in the past, but has not succeeded entirely in doing so. At state-funded higher education institutions the existing funding formula is arguably biased towards research output rather than teaching, which disadvantages institutions which are less research-intensive and have greater teaching challenges. Funding furthermore prioritises student throughput, to the advantage of universities with stronger teaching infrastructure and higher admission criteria.

For public FET colleges and adult education centres, funding is based largely on student enrolment. This makes it difficult to plan and build institutional capacity. FET colleges face significant challenges with regard to student accommodation and other infrastructure needs. While colleges have had insufficient resources to meet the country's needs for mid-level technical and vocational skills, very little funding from the levy-grant institutions has been directed to training youth and adults in the colleges. The levy-grant institutions have spent most of their resources on short unit-standards based courses, some of which have been of little value in improving the skills of the workforce. This is a problem that the National Skills Development Strategy III (NSDS III), released in January 2011, tries to address by requiring SETAs to spend more on substantive courses leading to occupational, vocational and professional qualifications at public colleges and universities, particularly universities of technology⁵².

⁵² Green Paper on Post school education and training (DHE), p.12-13

At the same time, the design of the qualifications framework and quality assurance system has in some instances made it difficult for providers to offer non-formal programmes, as the emphasis has been on formal qualifications and unit standards. In some parts of the system this may have led to a reduction in the already small amount of educational provision, and contributed to the general collapse of not-for-profit and community-based provision, and youth development organisations. For many providers offering short programmes aimed at professional, organisational or community development, it is difficult to fit the training that they do into unit standards, let alone find accredited assessors to assess it, and moderators and verifiers to moderate and verify it. Such organisations have struggled to get funding, as both international donors and the South African government have assumed that anyone providing any kind of training must fit into the quality assurance system⁵³.

Demand for financial aid is outstripping the amounts available through the National Student Financial Aid Scheme (NSFAS). Research indicates that more than 25% of the total student undergraduate population at universities is on financial aid, and the demand is still unfulfilled and is rising. There are pressures to increase the number of students on financial aid, as well to increase amounts of financial aid for existing recipients in the university system. Substantial increases in the resources available to students in both universities and FET colleges have been made in the past two years, but much more needs to be done to reach the goal of free education up to undergraduate level. There is an ongoing problem with the status and lack of funding of the B.Tech degree as currently students enrolled for this qualification do not qualify for assistance from NSFAS⁵⁴.

There is sufficient legislation that addresses funding sources for education and training. Amongst these the following include references to funding for higher education and training.

Table 9: Institutional funding

ACT	INSTITUTION	FUNDING SOURCES					
		Funds allocated by the State	Donations & contributions	Fees: from students or services	Money raised by the institution	Income from Investments	Loans
Adult Education Act, 2000	Public centre	✓	✓	✓	✓	✓	
NQF Act	SAQA	✓	✓	✓	✓	✓	
FET Colleges Act		✓	✓	✓	✓	✓	✓
Higher Education	Higher Education	✓	✓	✓	✓	✓	✓

⁵³ *ibid.*

⁵⁴ *ibid.*

Act, 1997							
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Amongst these, the Adult Education Act 52 of 2000 has a section on funding of public centres that refers to the values (fair, equitable, transparent) underpinning the allocation of resources to these centres.

Subsidies are generally allocated to higher education institutions according to formulae. This form of funding is open to registered private centres after consultation with the Council of Education Ministers and with the concurrence of the Minister of Finance.

A public higher education institution may only with a resolution of its council, not taking into account any vacancy that may exist, enter into a loan or an overdraft agreement.

6.2 Potential funding sources for worker education

The National Skills Fund and Sector Education and Training Authorities (SETAs) are pivotal points for resourcing the worker education framework.

The National Skills Development Strategy (NSDS) guides the work of SETAs and the National Skills Fund (NSF) in terms of resource allocation and use.

The NSF was established in 1999 in terms of the Skills Development Act (SDA), 1998 to support the implementation of the NSDS

Section 28 of the SDA states that:

“The money in the Fund may be used only for the projects identified in the national skills development strategy as national priorities or for such other projects related to the achievement of the purposes of this Act as the Director-General determines.”

There are currently 21 SETAs in South Africa. One of the primary objectives of the SETAs is to collect skills levies from employers within each sector, in terms of the Skills Development Levies Act and make the money available within the sector for education and training. This was to go to employers and training bodies, and to learners in the form of discretionary grants and bursaries.

A 2011 conference on artisan training (National Artisan Development Conference, State, Employer, Labour, FET College, SETA Partnership, 2012) recommended the formation of a single disbursement model across all SETAs, and for RPL to form part of this disbursement model. This standardised SETA funding model included that funding be the same for all SETAs, and that funding must be ring-fenced for the full apprenticeship period of three years.

8.3 Dedicated funding

To the extent that providers of worker education may not qualify for institutional funding or other funding sources mentioned above (for example, NGOs or labour service organisations as referred to in Table 2 above), consideration must be given to establishing a dedicated fund for the provision of worker education. This would apply particularly to education and training falling within Pillar 1.

8.4 Resource mobilisation

Both social development and economic effectiveness are key parts of the South African approach to worker education and both need to include state led and state guided initiatives and partnerships. Successful points of delivery as well as new ones need to be recognized.⁵⁵ The delivery model will be the cost driver. This means that all worker education modules or courses will have their defined delivery models. Deciding on a delivery model is the result of a number of factors, such as the available architecture for learning, the age of a learner, previous experience, mental and physical able-bodiedness, bridging support (where required), and mechanisms to support and retain the worker as learner within the worker education matrix.

⁵⁵ *ibid.*p.6-7

7. IMPLEMENTATION GUIDELINES

7.1 Vision and Mission

Vision

Capable and skilled workers in a just society free of poverty, inequality and unemployment.

Mission

To develop relevant and integrated knowledge, skills and attributes of workers through high quality accredited and non-accredited worker education.

Key Objectives

- To establish a sustainable worker education agenda
- To deliver excellent worker education learning programmes

7.2 Introduction

These Guidelines set out to identify a number of steps to move towards the population of the worker education matrix as an exercise that will impact meaningfully on the affected workers and all stakeholders in that sector as well as, ultimately, the general public of South Africa.

The role of the worker as citizen (reflected in the Constitution, where workers' specific rights as workers⁵⁶ are one aspect of their much broader rights as citizens) is the basis on which all other roles depend. Workplace rights, for example, depend in part on an enabling legal environment that, in turn, depends on the legislative process in which all citizens, including workers and their organisations, participate. Thus workers cannot be genuinely empowered in the workplace if they are disempowered in society as a whole. Conversely, the empowerment of workers as citizens will be affected by their empowerment as workers.

There are a number of important steps that need to be taken in order to move towards the content population of a worker education matrix. Each step is seen as laying a basis for the following steps while building on the outcomes of preceding steps in order to arrive at a concrete plan of action, including curricula and delivery mechanisms, for various programmes relevant to the needs of different sectors (as decided upon by stakeholders in those sectors in conjunction with the implementation body) located in all three pillars and across all levels.

⁵⁶ Section 23 of the Constitution.

The first stage consists of the establishment of a delivery framework, including a conceptual framework to be used in programme design. Thus there is a need for far reaching consultation, managed by an apex body to facilitate contributions by relevant stakeholders.

7.3 Phase 1: The Development Phase

Establish an implementation body

The work of the WE TTT should be reconstituted and an effective interim structure, possibly in the form of a Worker Education National Interim Council (WENIC), should be established to manage the process towards adoption and implementation of the Framework.

Pillar 1

A number of organisations, such as, for example, Workers College, DITSELA and others mentioned in this report exist in the realm of worker empowerment education and would need to be assessed in terms of their capability for contributing to implementation of the WEF. A process would need to be designed for electing/nominating representation from this pillar on to a Worker Education National Interim Council

Pillar 2

The 21 existing SETAs occupy an important space within the vocational worker education space and need to be assessed for their effectiveness. SETA representation on the national council would need to be defined.

Pillar 3

This pillar has no formalized recognized mechanism to oversee and/or regulate management worker education. The outcome of the institutional assessments in Pillars 1 and 2 would contribute to recommending an appropriate structure for effective management of worker education.

Worker Education National Interim Council (WENIC)

The WENIC should be tasked with drafting terms of reference and appointing an executive structure, to be cascaded to the provinces, responsible for:

1. Designing a National and Provincial Worker Education Strategic Plan 2014-2018
2. Designing a National and provincial Worker Education Programme Implementation Plan 2014-2018

The WENIC should delegate responsibility for implementation to an executive structure.

7.4 Phase 2: Planning and Design

a. Conduct Programme Research

i. Audit of Worker Education programmes

An audit of WE learning programmes is an essential first step in establishing the full scope of what is currently on offer, both formal and non-formal, by sector, by providers, by quality and relevance, at which levels, in which sub-frameworks, etc. It would be a sensible idea for the Audit to produce a database of worker education to be housed and maintained by the WE management authority. Given the fact that Pillar 2 (Vocational Education) programmes are better documented, Pillar 1 programmes will be prioritised.

ii. Needs assessment

The audit should be followed by a needs assessment. This is essential given the fact that worker education is neither sector specific, nor is there an existing SETA for worker education able to develop a worker education sectoral skills plan as per the requirements of the NSDS.

Workers and employers must be convinced of the need for and importance of the training on offer to make optimal use of it, hence the necessity for a needs assessment.

Any viable worker education initiative should be the result of a comprehensive needs assessment of the skills and aspirations of those for whom it is intended. The scope of the policy framework (fields of study which it covers) as well as the content of specific programmes should be based on an extensive process of consultation with all stakeholders to establish needs (such as employers, to the extent that they require certain outcomes to render vocational training meaningful), as well as areas of difference and potential conflict that need to be accommodated. This is not to say that employers are limited to engaging with vocational education and training only. The basic criterion, however, would be to view each topic through the eyes of workers in order to understand the questions that need to be addressed and give the ensuing programmes legitimacy.

Given the position that trade unions find themselves in at the bargaining councils, and the fact that bargaining councils have extensive powers to introduce training programmes,⁵⁷ an important question would be the priority given to worker education by trade unions.

An inclusive needs assessment exercise will also have to consider, among others, national skills development targets and sectoral needs extending from the self-employed street vendor all the way to multi- national corporations that employ thousands of workers.

⁵⁷ See s 28(1)(f) of the LRA: one function of bargaining councils is “to promote and establish training and education schemes”.

The national needs assessment will have to be coordinated and mapped from a central coordinating point/apex body located within/delegated by the management structure.

b. Identify a set of core worker education learning programmes

Based on the needs assessment, identify a core set of learning programmes.

Develop a set of key course descriptors for each learning programmes.

c. Curriculum Development and Pedagogy

The details of learning programmes and curricula are beyond the scope of the Framework. The Audit and Needs assessment will shape the content of worker education with recommendations for harnessing or discontinuing existing learning programmes based on relevance and quality. It will also identify the need for new programmes.

The complexity of the worker education matrix requires that a skilled cohort of actors able to advise, support and quality assure its effectiveness. The National Development Plan⁵⁸ suggests that the starting point for such a coordinated system should be to strengthen Further Education and Training (FET) colleges, adult learning centres and technical high schools. In addition, a diverse set of private, workplace and community-based training providers should be supported to provide targeted, work-based training as well as community and youth programmes. Sector Education and Training Authorities (SETAs) should play a more effective role in the production of skills that meet the immediate needs of employers.

Based on the outcomes of the needs assessment the matrix will be able to generate a detailed profile of the developers, providers, and quality assurers across all pillars and at all levels, both inside and outside the existing frameworks and learning sub-frameworks. This will be an essential step towards identifying providers and other actors qualifying for funding.

The matrix should simplify the criteria for access/accreditation/portability/credit transfer, amongst others, as it takes into account the fact that each of the three NQF pillars has an apex body that will continue its function, as will the various institutions delivering education and training at different levels. The exercise should aim at aligning structures delivering worker education with existing structures, to operate as far as possible on the same basis as those concerned with other fields of study. It will involve conceptualising horizontal as well as vertical articulation between different sites/levels of worker education delivery, both inside and outside the NQF framework.

Such articulation is premised on a developmental or life-long learning approach, in which the paradigm is for workers to progress from elementary to more advanced levels during

⁵⁸ National Review p.10.

their working lives as well as in terms of social and political involvement. Thus, “management sciences” should not be seen as a field that is by definition foreign to worker education; it should be seen as an integral part of workers’ developmental progression – not in “ceasing to be workers and becoming managers” but in acquiring the capacity for self-management and control of work processes in ways that would be individually and collectively empowering as well as reducing hierarchy and bureaucratic inefficiencies in the workplace.

d. Register of approved worker education service providers

The Audit of Worker Education Programmes Report together with the Needs Assessment Report should result in a Preliminary Register of Service Providers. This should provide the basis for a process of verification and approval of service providers.

e. Monitoring and evaluation System

The monitoring and evaluation system needs to cover both quality and impact.

Quality

This must take into account the fact that each of the three NQF sub-frameworks has an apex body that will continue its function, as will the various institutions delivering education and training at different levels. The exercise should aim at aligning worker education with existing structures, to operate as far as possible on the same basis and to strive towards a streamlined and simplified approach.

Impact

Baseline information is often a problem when it comes to measuring impact. If the aim of the Worker Education Matrix is to be an enabler for improving the level of education, a key indicator of human development, then it would be advisable to use the HDI as a composite measure. At a programme level it would be important to have a coherent set of key indicators for systematic measurement of impact at a programme level.

It is recommended that a monitoring and evaluation system would need to be designed at the outset. The matrix will be a useful tool for systematising the data collection for such a system which will have to continuously monitor the relevance and quality of the programme in order to ensure that it remains at the cutting edge.

f. Support and partnership networks: Local, National, Regional and International

The idea of support and partnerships is based on the understanding that worker education is neither more of the same nor re-inventing the wheel, but harnessing and building existing infrastructure and knowledge.

Trade unions are empowered in building networks. These typically extend to local, provincial, national, regional and international networking. There is opportunity within this networking that may be harnessed in activating and strengthening worker education in South Africa.

Globalisation and regionalization has also provided opportunities for transnational issue networks which exercise influence both in the form of political clout and of production of new policy relevant knowledge in that issue area. Such networks obviously influence how norms, rules and institutional mechanisms are established and used. For example there is now a treaty to reduce landmines and there is a transnational network of organizations that have worked towards that goal; the same thing is taking place with environmental and human rights networks⁵⁹. In a similar manner, worker organization and unionization has recognized its common crosscutting power and this has resulted in transnational and trans-regional alliances and networking. This study is limited to a national worker education study; however, the possibility does exist to build trans-regional and transnational alliances and networks and thereby strengthen worker education, recognizing that not all workers belong to workers' organisations or trade unions.

The International Review should be used as a basis for identifying potential partnerships which should be pursued by the worker education implementing structures.

7.5 Phase 3: Programme Delivery

According to a UK based training group⁶⁰ there are many ways to meet people's learning needs. The methods chosen will depend upon how people prefer to learn, the number of people needing training, and a budget. Providing for people with special needs is also an aspect that must be taken into consideration for budgetary and inclusion purposes. This study has only considered implementation for able-bodied, able-minded individuals and a further study will need to be undertaken to address special needs.

The need for choice is important in a worker education matrix, as worker education is largely premised on adult education principles, namely, that adults have many and varied demands made on them by employers, family, community and society at large as well as having to manage their own education and training, in terms of technical proficiency, social relevance and responsibility within the work environment.

Some of the available methods include In-house courses, External training courses, Conferences and events, Recognition of Prior Learning, E-learning/blended learning, Open

⁵⁹ Nuket Kardam, Institutional Mechanisms and Global Governance Middle Eastern Technical University, Ankara, Turkey

⁶⁰ www.skills-thirdsector.org.uk/

Educational Resources, Books and journals, Coaching, Mentoring, Shadowing, Secondments, Action learning as described in Appendix XX.

It is recommended that before rolling out the programme to scale, it should be tested by way of a 2-year pilot programme. The pilot programme should be implemented by a number of approved worker education service providers.

7.6 Time-Frame and Cost Estimate

The worker education programme would be mutually beneficial to Government, Business and Labour and should be co-funded through the various structures.

Deliverable	Time Frame																				Cost Estimate for 5 years (Rand)
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
Phase 1: Development Phase																					
Worker education National Interim Council																					500 000
Executive Structure																					6 000 000
Phase 2: Planning and Design																					
Research																					
Audit of worker education programmes																					1 350 000
Needs Assessment																					600 000
Identify a set of core worker education learning programmes																					100 000
Register of approved worker education service providers																					500 000

The second key challenge revolves around the issue of Recognition of Prior Learning (RPL). RPL is essentially about harnessing existing capability and competencies acquired outside of the formal systems of education, training and work. It is this process of recognition which needs to be systematically standardised and the WE matrix offers a stepping stone for systematising such standardisation.

Thirdly, internal inefficiencies within and amongst SETAs, presents a challenge for effective articulation. Given the SETAs' track record, it is essential to avoid 'more of the same' and to build rigorous, yet simple systems of accountability (that include inputs from workers themselves) into the WE model. According to a source in the TTT, the DHET is putting mechanisms in place to ensure increased accountability of SETAs.

The fourth challenge is presenting worker education as yet another framework, may meet with resistance as a result of "framework fatigue" This being the result of numerous existing education frameworks, a key challenge is to **synchronise** these frameworks along clear pathways towards fulfilling the vision and mission of the WEF. This also means embedding worker education in existing frameworks as much as possible rather than seeking to developing it as a stand-alone addition (just as, for example, science education is embedded in existing framework at all levels).

Finally, differences in curriculum format between the three NQF sub-frameworks emanate from a lack of co-operation, within a highly structured NQF resulting in a dysfunctional education system. Effective implementation of the WEF will require the full support of SAQA as the national quality assurance authority.

9. CONCLUSION

The worker education matrix is based on the notion of building capable and productive citizens via learning pathways which could be vertical, horizontal, or diagonal. Qualifications can be obtained through learning programmes or work experience thus making a standardised approach to RPL that allows for innovative and worker-sensitive approaches an imperative.

The content of worker education is currently biased towards vocational education (Pillar 2) and especially given the current context of labour instability the worker empowerment component (Pillar 1) needs to be bolstered.

The Skills Levy is well established and state driven and should be used accordingly. Funds available in the skills development arena may be identified and ring-fenced (this could mean identifying a number of cents in the skills levy for worker education).

A productive and empowered work force is of mutual benefit to the country as a whole and will require joint ownership and responsibility from Government, Business and Labour.

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Appendix 1: Draft Terms of reference for Needs Assessment

Preface

In order to fully appreciate the worker education matrix, an in-depth needs assessment will need to be planned and implemented. This is a large scale undertaking and will need significant planning and resourcing to be effective. Most importantly, it has to be premised on being able to measure impact and therefore monitoring and evaluation will form the basis of this needs assessment and all activities linked to it.

As such decisions related to representation, methods, resourcing and prioritization will be the domain of the full needs assessment. At this stage, it is premature to pre-empt any of these, other than to spell out what the terms of reference may be for this needs assessment.

What is a needs assessment?

According to Strohauer⁶¹ a needs assessment is the process of identifying performance requirements and the "gap" between what performance is required and what presently exists. On a macro level, an assessment of needs will take place in alignment with strategic goals, and will of necessity include organizational, occupational and individual needs. On a micro level an assessment is done to clarify a problem and identify a gap, against which an intervention may be identified and implemented.

In order to enable effective needs assessment, the following has to be noted.

- Assessment is the evaluation of needs, barriers and resources
- A Needs Assessment is conducted before an activity is planned
- It must be stressed that “Want” and “Need” are not synonyms and that the worker education framework will sufficiently contain the core and elective options. Needs are contributing factors, as in What *needs* to be resolved to help close a gap, and Needs often relate to *barriers*. Wants are possible solutions, a proposed means to filling the gap
- Gaps are the spaces between what currently exists and what should exist

Purpose of a Needs Assessment

It has been mentioned earlier that a needs assessment is the basis upon which the Worker Education matrix is mobilized. Information gathered in this process needs:

- To help determine where to begin the content of the training program

⁶¹ Training Needs Assessment: A Systematic Approach, Joan Strohauer, DoE

- To determine how to present the content
- To get buy-in

Phases of a Needs Assessment

Pre-Assessment

This stage is important as it provides a baseline of what is available. By asking the question: “What do we know?”, we are able to collect data that is the foundation of the Gap Analysis. It answers to:

- What is the current state?
- Where should we be?
- How do we compare to others?
- What’s new?
- What’s important?

Assessment

This stage allows for the evaluation of the data and asks the following questions:

- What are our barriers? (internal and external)
- What Needs have we identified?
- Are some gaps bigger than others?
- What are our priorities?
- Do we have the resources to address them?
- Why do anything at all?

Gathering Data

This stage is continuous and research and development is the foundation of gathering effective data, and the processing (collating, analyzing and reporting on) available data. It must be noted that data gathering is the cornerstone of any needs assessment project and that this process may be resource and time consuming. Data may be gathered through:

- Interviews
- Surveys/Questionnaires
- Focus Groups
- Observation
- Existing Data

Action Plan/Prioritisation

This stage asks: How are we going to translate what we have into what workers have stated as a need?

- Which Needs can we address?
- How are we overcoming barriers? (List additional barriers hindering progress)

Have any areas been identified for follow-up or future opportunities for educational intervention?

Appendix 2: Worker Education Delivery modes

In-house courses

1. Developing a course to be run on a work premises and tailored to the needs of workers and volunteers.
2. This may require the services of an external trainer to develop and deliver the course, or there may be an available in-house resource that has relevant expertise within the organisation to deliver the training. If the latter, you might need to ask whether there is a need for some “train the trainer” training to ensure that communication of knowledge is effective.

External training courses

3. Attending external training courses have the advantage of allowing for networking and learning from workers in other organisations. This networking element is one of the reasons classroom based training remains so popular. External training can be expensive, but there are many courses available that are priced on a sliding scale.

Conferences and events

4. Conferences are ideal for getting up to date with developments and for networking and learning from others.

Recognition of Prior Learning

5. RPL has an important place in the country’s skills agenda, as represented in seminal documents such as the New Growth Path, the National Qualifications Framework Act, the National Skills Development Strategy (NSDSIII), and the Human Resource Development Strategy (HRDS). The exclusion of explicit RPL clauses from NSDSIII results from the transfer of RPL function from SETAs to the new Quality Councils in the NQF. The QCTO may delegate assessment functions to Assessment Quality Partners, including SETAs and professional bodies.⁶²
6. There is need for a multi-dimensional national RPL system. It is important to recognize different types of learning – including formal, non-formal and informal learning; everyday knowledge and skills; practical wisdom and other types of learning and indigenous knowledge. RPL involves advisory, administrative and pedagogic (or mediating) as assessment interventions.
7. In addition, RPL is considered to be part of the education and training system, not separate from it.
 - a. RPL must be responsive to many different work and learning contexts. Thus the differentiation of RPL practices is of key importance and “developmental

⁶² Working document on RPL in SAQA Bulletin Vol 12 No, 3, December 2012, p. 3

RPL”, which responds to the actual situations and learning needs of individual workers and learners, needs to be the dominant mode. This responsiveness needs to include a focus on a wide range of NQF levels.⁶³

8. The most common response to the question why RPL is not applied is that of cost. Funding of RPL and the cost of applying RPL consist of:
 9. the participation fee for any applicant
 10. how much it costs the system and the organisations
11. The cost to individuals varies greatly, depending on the nature of the assessment, the level that is being assessed and the subject matter that is being assessed. There is a direct cost in terms of a registration fee and the cost of a guidance and support process. The latter is not compulsory, but is advised, as there is evidence that suggests that those applicants properly guided during the preparation process have a much better success rate at the assessment and benefit more from their new qualification in the labour market (Recotillet and Werquin, 2009).⁶⁴
12. The cost to organisations includes the direct cost of assessing applicants (assessors, committees, paperwork) and the cost of elaborating the standards to the targeted qualification. It must be noted that committee members are not remunerated but do receive a compensation fee. Here also, is an opportunity for sponsorship through a fund that is dedicated to RPL.

E-learning/blended learning

13. E-learning is increasingly being used to supplement traditional courses. With the developments in technology, structured E-learning is becoming more sophisticated and can be tailored to individual and small groups of learners. It can be used to provide large groups of people with the same material whilst still allow individuals to learn in their own time.

Open Educational Resources

14. In its simplest form, the concept of Open Educational Resources (OER) describes any educational resources (including curriculum maps, course materials, textbooks, streaming videos, multimedia applications, podcasts and any other materials that have been designed for use in teaching and learning) that are openly available for use by educators and students, without an accompanying need to pay royalties or licence fees.
15. OER have the potential to advance the delivery of education by increasing the availability of relevant learning materials, reducing the cost of accessing educational materials, and stimulating the active engagement of teaching staff and students in creating learning resources.

⁶³ ibid. p. 4

⁶⁴ in SAQA Bulletin Vol 12 Number 3, Dec 2012, p. 77

16. Initially the project was conceived as an extension of the International Association of Digital Publications' (IADP) Affordable Access project from South Africa into the SADC region. The Affordable Access project provides free and/or heavily discounted copyrighted electronic textbooks to students at tertiary institutions. It relies on Digital Rights Management systems to protect the interests of the publisher.

Books and journals

17. Sometimes a learning need can be met simply by reading a suitable book or using an appropriate toolkit. Where the need is to keep up to date with current developments, a journal subscription and allowing time for workers to read as part of the working week can be a simple and effective way to keep learning current.

Coaching

18. Coaching consists of a series of structured one-to-one meetings focused on improving an individual's skills and performance, usually for the current job. Coaches seek to bring an objective perspective to a structured dialogue to help individuals find solutions to issues they are facing.
19. Sometimes coaches are hired from outside the organisation, but increasingly organisations expect all line managers to operate as coaches, which may indicate a training need at line management level.

Mentoring

20. Typically mentors will be experienced managers (but not individuals' line managers) who regularly meet more junior colleagues to help them perform better and develop them for career advancement. For more senior managers, outside mentors may sometimes be hired. There is no reason why workers cannot be trained as mentors as well.

Shadowing

21. Shadowing involves spending a short period time with someone in a different job – either within your own organisation or externally. This might include sitting in on meetings, observing how day to day tasks are done. Shadowing can be useful as part of an induction when you shadow more experienced staff.
22. It can also be used as a development opportunity where both parties can learn from each other, as being shadowed can help you review the ways in which you habitually work.

Secondments

23. A secondment allows an individual to take on a different role in a different part of the organisation (or in another organisation) for a set period of time – usually a few

months. This might be a full time secondment from your existing job, or part time while you retain some of your existing responsibilities. These opportunities can be valuable in helping an individual learn about different ways of doing things.

Action learning

24. Action learning is a form of learning by doing. It involves working in small groups of around 6-8 people meeting on a regular basis, working through real problems with the support of the group. Drawing on the skills of listening and questioning, this method helps you to reach solutions and commit to taking action.
25. The previous section alluded to delivery methods and a worker education framework will use the needs assessment results to select from these the most appropriate methods of learning and teaching.
26. The following section focuses on the resourcing or funding of a worker education framework. It draws on available policy documents and assumes that there are sufficient mechanisms in place to enhance what's on offer, with a well researched, participative worker education framework.