Report of the Ministerial Committee on Articulation Policy

THE PURPOSES, PRINCIPLES AND PROCEDURES OF PROGRAMME ARTICULATION IN SOUTH AFRICA'S POST-SCHOOL EDUCATION AND TRAINING SYSTEM

1. INTRODUCTION

Articulation is an essential component of an education system that operates as the centre-piece of an egalitarian society with a complex multidimensional economy.

In the early years of the democratic era it was hoped that a differentiated and articulated education and training system would take root. The advent of the National Qualifications Framework (NQF) together with other policy initiatives in the South African educational and qualifications landscape was seen as an epoch-making development, as a vital impetus towards the construction of a fully articulated educational system that would resonate with the human development skills required in the new economy, with the challenges of building a more equitable society and providing all South Africans with the opportunity to grow to their fullest potential.

Unfortunately, this has not yet transpired.

The South African Post-School Education and Training (PSET) system is riddled with conceptual and systematic challenges and incongruities. Users of the PSET system experience a lack of coherence and articulation between and within the sub-frameworks that constitute the NQF. Moreover, the system is perceived to be incessantly producing and reproducing gender, class, racial and other inequalities in access to PSET opportunities and to success in PSET programmes.

If such deficiencies are not immediately addressed, PSET will slide in the long run towards an elitist system. Even more importantly, if no major changes are introduced with some measure of urgency, large numbers of young people are likely to face very bleak futures at the receiving end of the indecencies of poverty, unemployment and inequality.

What is needed then is a well-articulated PSET system that brings about linkages between its different parts, where there are no silos and no dead-end qualifications; a system that aids and does not frustrate the creation of working opportunities for the youth and the general population and in so doing undermines existing structural and attitudinal socio-economic barriers to learning and careers; and above all, a system that inspires hope among young people and adults who have missed out in the past.

The creation of the Ministry and Department of Higher Education and Training (DHET) in 2009 and the publication of the DHET's *Green Paper for Post-School*

Education and Training (2011) and the forthcoming White Paper have provided strong impetus towards the development of a system that is designed to address South Africa's human resource development needs and provide lifelong learning opportunities to all South Africans.

The NQF is a single integrated system for the "classification, registration, publication and articulation of quality assured national qualifications", as indicated in section 4 of the NQF Act, 2008 (Act 67 of 2008). It comprises three co-ordinated qualifications sub-frameworks for:

- General and Further Education and Training, contemplated in the General and Further Education and Training Quality Assurance Act, 2001 (Act 58 of 2001) overseen by Umalusi.
- Higher Education, contemplated in the Higher Education Act, 1997 (Act 101 of 1997) overseen by the Council on Higher Education (CHE).
- Trades and Occupations, contemplated in the Skills Development Act, 1998 (Act 97 of1998) overseen by the Quality Council for Trades and Occupations (QCTO) (s. 7).

The objectives of the NQF are to:
(a) create a single integrated national framework for learning achievement;
(b) facilitate access to, and mobility and progression within, education and training career paths;
(c) enhance the quality of education and training; and
(d) accelerate the redress of past unfair discrimination in education, training and employment opportunities (s. 8).

These objectives are clearly designed to contribute to the full personal development of each learner and the social and economic development of the nation at large.

The South African Qualifications Authority (SAQA) and the Quality Councils (QCs) must seek to achieve the objectives of the NQF by:
(a) developing, fostering and maintaining an integrated and transparent national framework for the recognition of learning achievements;
(b) ensuring that South African qualifications meet appropriate criteria, determined by the Minister as contemplated in section 8 [of the NQF Act], and are internationally comparable; and
(c) ensuring that South African qualifications are of an acceptable quality.

Articulation was therefore regarded as an essential element in the post-1994 education and training system as it is in the construction of good education systems worldwide.

However, when the Minister published the new NQF sub-frameworks in December 2012 he said he was not yet satisfied that the optimum degree of articulation had

been achieved. He directed SAQA to provide him with "a draft policy on the principles that should direct the articulation pathways for the NQF".[1]

SAQA delivered its report and a proposed action plan on articulation to the Minister on 14 June 2013.[2] On 30 August 2013 the Minister published amendments to the sub-frameworks.[3] The Minister determined that for the time being Umalusi will remain responsible for general and vocational qualifications at levels 1-4 on the NQF, the QCTO will be responsible for occupational qualifications at levels 1-8 on the NQF, and the CHE will remain responsible for higher education qualifications at levels 5-10 on the NQF.

Also on 30 August 2013 the Minister appointed a Ministerial Committee on Articulation Policy comprising:[4]

> Prof. Ahmed Bawa (Chairperson)
> Dr Mark Abrahams
> Mr Uthando Baduza
> Ms Maryna Marais
> Dr Thabang Matobako
> Mr Archie Mokonane
> Ms Makano Morojele
> Mr Seamus Needham
> Prof. Heather Nel
> Mr Dan Nkosi
> Ms Hellen Ntlatleng
> Ms Rooksana Rajab, and
> Ms Danita Welgemoed

The terms of reference of the Committee are:

1. To consider SAQA's advice and action plan; and
2. To prepare and submit a draft national articulation policy which includes proposals for immediate implementation as well as proposals that may take longer to implement

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[1] Department of Higher Education and Training, *Determination of the Sub-frameworks that Comprise the National Qualifications Framework (NQF),* Notice 1040 of 2012, *Government Gazette* No. 36003, 14 December 2012, para. 19.

[2] South African Qualifications Authority, SAQA Advice to the Minister of Higher Education and Training following the Determination of the Sub-frameworks comprising the National Qualifications Framework which was published on 14 December 2012, Annexure A: Draft Policy on the Principles to Direct Articulation Pathways in the NQF, and Annexure B: Draft Action Plan on Articulation, 13 June 2013.

[3] Department of Higher Education and Training, *Amendment to the Determination of the Sub-frameworks that Comprise the National Qualifications Framework (NQF),* Notice 891 of 2013, *Government Gazette* No. 36803, 30 August 2013.

[4] Department of Higher Education and Training, *Ministerial Committee on Articulation Policy* Notice 890 of 2013, *Government Gazette* No. 36802, 30 August 2013.

A meeting of the Minister with SAQA and the three QCs on 16 August 2013 preceded the work of the Committee. The theme of the engagement was "Improving articulation and coherence in the post-school qualifications system". This meeting was intended to discuss approaches to articulation within and between the NQF sub-frameworks, including SAQA's advice to the Minister, in the context of crisis points in the PSET system. The Minister advised the Committee to reflect on SAQA's advice but not be constrained by it.

2. PURPOSE AND CONTEXT OF THE REPORT

This document is intended to provide purposes, principles and recommendations for articulation. These are intended to guide the creation of a policy framework to inform the articulation practices of role-players in the formal post-school education and training sectors. This will facilitate access, progression and mobility of learners between and within the three sub-frameworks of the NQF.

A number of critical issues beset the PSET system. One such issue is the lack of coherence and articulation between and within the sub-frameworks that constitute the NQF resulting in a system that lacks systemic and curricular articulation and a slide towards an elitist architecture.

The PSET system works to a lesser or greater extent for those students who are in the system. Currently it does not offer adequate opportunities to unemployed (unqualified) school leavers, post-grade 12 school leavers and the unemployed/unskilled mature learners. Indeed the current system does not quite work for employed learners either as they have similar difficulty negotiating the post-school system. This policy exercise aims at broadening participation by building in inclusivity.

3. CHALLENGES BESETTING THE PSET SYSTEM

The term "post-school education and training" (PSET) refers to a diverse set of education and training institutional arrangements for school leavers as well as for those adults who have never been to school but require education and training opportunities.

The *Green Paper for Post-School Education and Training* (p. 3) defines PSET as constituting the following:

(a) The Further Education and Training Colleges;
(b) The Higher Education and Training Institutions;
(c) The Adult Learning Centres;
(d) The Sector Education and Training Authorities (SETAs);
(e) The National Skills Fund (NSF); and
(f) The quality assurance, advisory and regulatory institutions.

In the Committee's view the PSET system is riddled with conceptual and organisational incongruities, in particular:

(a) The disorganised provision of education and training;
(b) Lack of parity of esteem between academic and vocational qualifications;
(c) Inadequate response to the varied needs of the current socio-economic context, in particular inadequate response to the needs of youth and adults who are not in education, training or employment — in the main those who yearn for second chance education and training opportunities and success;
(d) Lack of definition and order in learner progression routes and articulation arrangements;
(e) The registration of a host of qualifications on the NQF that are dead-end in nature;
(f) The failure to build coherence between the NQF sub-frameworks; and
(g) The absence of robust articulation arrangements between the different programme- and institutional-types including the forthcoming post-school community colleges for adult learners.

The evolution of vocational education in South Africa remains complex and multi-faceted; even controversial. Critics elsewhere have argued that the meaning of vocational education has been reduced to the "exclusive acquisition of a relatively narrow band of employment-related or job-specific skills and competencies" (Anderson, Brown & Rushbrook, 2004: 234)[5]. (In South Africa's case this criticism appears to relate more directly to the QCTO's occupational qualifications programme than Umalusi's vocational education qualifications, though in principle the QCTO's occupational learning programmes are deliberately not job-specific.) As such, critics argue, human capital formation and instrumental learning have become the panacea to unemployment and inequalities created by the present national and global economic order. Hence human capital learning trumps democratic learning because it maximizes 'returns on investment' as it supposedly provides students and workers with the necessary skills and knowledge for economic success within the prevailing labour market (Hyslop-Margison & Sears, 2010: 3)[6].

Critical scholars have warned against the implications of this approach based on a narrowing orientation to vocational education as technical training that, amongst other effects produces skills that limit the type of employment possible to youth. Most importantly, their criticism relates to the 'warehousing effect' such training has on members of the working class resulting from a technocratic accountability and rational control model of vocational education. This has a huge bearing on articulation, as the question becomes, "Where do these youth go after leaving the 'warehouse'"?

[5] Anderson, D.L., Brown, M., Rushbrook, P., 2004, Vocational education and training, in *Dimensions of Adult Learning: Adult Education and Training in a Global Era*, eds Griff Foley, Allen & Unwin, Crows Nest NSW Australia, pp. 234-250
[6] Emery J Hyslop-Margison and Alan J Sears, *Neo-Liberalism, Globalization and Human Capital Learning: Reclaiming Education for Democratic Citizenship,* Springer, Dordrecht, 2010.

The Committee therefore views it as important to consider education and training within the framework and value systems of lifelong learning, education for democracy and social justice, and active, innovative participation in the economy.

4. ARTICULATION AS A CEMENTING INSTRUMENT

A definition of articulation is provided by a World Bank study of higher education differentiation and articulation in 12 African countries in 2007:

> *Articulation refers to the mechanisms that enable student mobility within and among the institutions that comprise the tertiary system, for example, academic credit accumulation and transfer, recognition and equivalence of degrees, recognition of prior learning, and so forth.* (N'gethe *et al.*: xvii)[7]

In the case of this policy document, the ideas of N'gethe *et al.* will be extrapolated to the post-school education and training system which makes the project somewhat more complex. This view is amplified in a statement made by the Minister of Higher Education and Training:

> *A well-articulated system is one in which there are linkages between its different parts; there should be no silos, no dead ends. If a student completes a course at one institution and has gained certain knowledge, this must be recognised by other institutions if the knowledge gained is sufficient to allow epistemological access to programme[s] that they want to enter.* (Minister B E Nzimande, 15 February 2013)

Articulation requires an integrated approach to the three broad public policy areas, namely, education and training, the economy, and social development or social security. South Africa has socio-economic challenges including deep inequalities. A properly articulated education system is an essential element in the armoury to fix this unjust state of affairs.

The Ministerial Committee on Articulation reflected on the purposes of articulation in the context of South Africa's current realities and the changes taking place in global knowledge systems.

4.1 The economy

There is a clear and unambiguous requirement that the education and training system must meet the needs of the economy. On the one hand there is well-documented evidence that the economy is skills-starved. On the other hand this is an economy in constant transition. There is need therefore to ensure that South Africans are ushered into an education and skills system that takes these needs into account: that we address the skills shortage directly and with vigour and that the

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[7] Njuguna N'gethe, George Subotzky, George Afeti, *Differentiation and Articulation in Tertiary Education Systems: A Study of Twelve African Countries.* World Bank Working Paper No. 145, The World Bank, Washington D.C., 2008.

pathways are open for individuals to migrate through the system picking up new skills and engaging in new educational opportunities.

The system must take into account the objective realities that persist. For instance, it must take into account the socio-economic challenges and the skills and educational development needs such challenges present. It is essential to ensure that individuals are not trapped in unskilled or low-wage sectors of the economy. Articulation will ensure that there will be an ongoing, lifelong learning approach to the labour market so that it retains flexibility and relevance.

There is also a need to interrogate the supposed linear relationship between training and the labour market. How can our understanding of the low labour absorption rates inform and underpin our broadened conceptualization of articulation?

4.2 Unemployment

The system must be accessible to individuals who are out of work so that they have the best possible opportunity to get into work or so that they can engage in productive labour in self-employment opportunities. It is clearly the case that educational opportunities do not create jobs but if there is a mismatch between the needs of the labour market and the nature of the country's skills and educational programmes then this serious problem has to be addressed. Articulation will ensure that unemployed or potentially unemployed people may find some route into the education system to gear them for new employment opportunities. For example "employment skills access programmes" linked to effective articulation arrangements may enable the PSET system to provide unemployed and potentially unemployed learners with second chance or re-entry opportunities to access workplace training, FET colleges, nursing colleges, agricultural colleges, community colleges or other education and training opportunities.

4.3 Inequality

Socioeconomic inequality remains a sad characteristic of our society. Our basic education system reproduces deeply embedded inequalities of opportunity. It is impossible to assess the full potential of South Africans at the point that they leave school – especially those that attend schools in rural, peri-urban and inner city contexts. It is imperative therefore that the post-school education and training system has sufficient flexibility to facilitate the migration of learners through different parts of the system so that individuals may have the opportunity to explore their potential. This will include the availability of second chance or re-entry opportunities. Such flexibility requires a fully articulated post-school system of education and training.

4.4 Access

The participation rate of South Africans in post-school education (and in particular in higher education) has been largely stagnant between 1994 and 2013, notwithstanding the rapid increase in intake into the FET college sector in the last two years. This is largely because the NCHE process of 1995 did not address in any

systematic way the issue of massification or growth.[8] The challenge South Africa faced then and faces now is that of capacity and affordability. Higher education is the largest part of the post-school education system and also the most expensive part per student FTE. This is often referred to as the 'inverted pyramid' problem.

A more effective, affordable, efficient structure would have the college sector (FET, nursing, agricultural, etc.) and other forms of post-school education and training as the largest part of the system; larger that is, than the university system. This would reduce the cost of education per FTE. The best way to ensure this outcome is to have a properly articulated system. So one may say to a school leaver in the Ugu District of KZN (for example), you may attend the local campus of Esayidi FET College for the first two years and if you achieve such and such you will be assured entry into a higher education institution. The establishment of pathways of access depends fundamentally on the creation of a fully articulated system. Here we use access defined as *"The right of qualified candidates to apply and to be considered for admission to higher education"* (Council of Europe and UNESCO: 1997)[9]. Once again we are driven by the imperatives of constructing a post-school system and so the articulation arrangements for access have to reach beyond the higher education sector.

4.5 Success

There is wide recognition that our system is very wasteful with extraordinarily high dropout rates, very low throughput rates in senior secondary, further and higher education and unnecessary repetition of learning (such as post-Grade 12 students being placed in NC(V) Level 2 and NC(V) Level 4 learners placed in N4 when they have already covered a similar curriculum in more depth); but the system is not geared to allow students to find multiple pathways to success. The Adult Education and Training (AET) system has similar learning impediments.

In a system with such disparities and dislocations, it is extremely important to ensure that students are able to take multiple pathways to reach their preferred educational destinations. Very few students exiting our schooling system are sufficiently prepared in mathematics, for example, to be able to participate in engineering programmes. Pathways should exist to allow students to build towards their educational destinations. Articulation will be a very serious intervention in contributing to students' improved success. It is not enough to build access.

4.6 Building an educated populace
South Africa is a complex, multi-layered, maturing democracy. The central challenge is to enhance and deepen the critical participation of its people in the construction of a caring, egalitarian society. Our education system in all its manifestations has to

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[8] National Commission on Higher Education, 1997, *Report: A Framework for Transformation,* Pretoria, Human Sciences Research Council Publications.

[9] Council of Europe and UNESCO, *Convention on the Recognition of Qualifications concerning Higher Education in the European Region* (Adopted in Lisbon on 11 April 1997), Paris, Section 1, Article 1.

be central to this project. It has to ensure that every South African is aware of this historical role. Perhaps of more importance is the role of education in shaping our nationhood. Every South African should have access to learning about our literature in all its forms and inventions. Every South African should have access to courses on our history and of our place in the global community. And so on. This is not the role of basic education alone. And so, one may argue that in an articulated system of education these general education elements will be built in, whether the programmes are vocationally-oriented or formative in nature. The general education elements are likely to be a significant part of the glue that holds together the articulated system.

4.7 Hope and inspiration
A system that works for the general population is one that inspires and provides hope. It undermines barriers – both systemic and attitudinal. It evokes confidence that the post-school system meets peoples' needs, for which articulation is a necessary condition.

These purposes criss-cross and amplify each other. What is clear is that we must start with the material conditions that prevail. The construction of an education system that is decidedly post-apartheid and post-colonial and one that is sensitive to the needs of an economy in transition has to ensure the fullest possible mobility of individuals. This is not to argue that every individual will access the maximum amount of mobility. Quite the contrary would be expected. Our key challenge is to design a system that is flexible enough to provide the opportunity for people to find pathways that meet their needs.

5. PRINCIPLES OF ARTICULATION

The Committee identified a number of principles that should underpin an articulated post-school system. These are laid out here for consideration and discussion.

5.1 The education-training continuum
Learning, whether theoretical or practical needs to be considered a single continuum even though dichotomies are built into the ways that we discuss education – theory-praxis, education-training, workplace learning-class-based learning, and so on. The different kinds of learning that define the post-school system form this continuum.

All programmes offered in the system must contain general education elements that will ensure the programmes that have a vocational bent will also provide students with the knowledge and learning tools to migrate into and out of different pathways of education and training.

5.2 Simplicity
The system should be a simple one, with simple rules so that the educational and skills development pathways are easily understood and accepted by both providers and consumers of programmes.

5.3 Systemic articulation

The post-school education and training system should have a clearly laid out philosophy and set of policies and procedures that guide the construction of an articulated system. Any other policies and procedures that the DHET or any other department formulates must take cognizance of and provide support for articulation policies and procedures.

On the question of structures, the QCs and SAQA should (at least partially) be re-imagined to give sustenance to articulation rather than the other way around. At a systemic level, there is a critical need for the QCs to consult with each other on the formulation of qualifications after consultation with relevant bodies and industries to find common ground for articulation as opposed to separate 'silo-based' qualification development.

5.4 Programmatic versus institutional articulation

Programmes must articulate and not institutions. The fact that programmes are offered by institutions must not determine whether programmes articulate or not.

5.5 Curriculum articulation

Curriculum design teams in consultation with employer groups should design broad curriculum guidelines on a programme-by-programme basis so that articulation is optimized. At the very least this should be done at a regional level so that transferability and articulation for most students is maximized. The Occupational Teams assembled to drive the scarce skills development programme for the Strategic Integrated Projects (SIPS) of the South African National Infrastructure Plan illustrate the collaborative model advocated by the Committee.[10]

Programmes should be designed with horizontal, vertical and diagonal articulation so as to ensure that they do not become 'dead-ends'.

A critical problem identified in previous articulation attempts is the inability to match unit standards (outcomes) based qualifications with disciplinary knowledge based qualifications for purposes of progression. Quality assurance bodies have found it difficult to accommodate similar units of learning for comparative purposes when one is unit standards based and another is discipline based.

Qualifications need to be rationalised. For example there are cases where 10 to 12 different types of qualifications have been developed by various SETAs specifically for various economic sectors. Whilst these are vocational (or occupational) in nature

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[10] "In simple terms, Occupational Teams are groups of people who come together to focus on the specific challenges faced by those seeking to qualify in a specific occupational area. They are made up of two principal interest groups – those who provide the theoretical foundation for the occupation – and potential employers who wish to influence the programmes offered at those institutions and are in position to provide structured workplace learning. Two further interest groups that need to participate in this conversation are those responsible for maintaining standards for various occupations and those who provide simulated practical learning outside of the institution." Department of Higher Education and Training, "Occupational Teams to boost skills for Strategic Infrastructure Projects," Media Statement, 6 August 2013.

with specified electives, the qualifications themselves could be designed generically with optional specialisations. This would avoid duplication of qualifications, resources and barriers to articulation.

5.6 Differentiation

The post-school education and training system has to be differentiated but fully articulated. Both differentiation and articulation should meet the needs of the material conditions of society.

There is an ongoing debate and discussion about the differentiation of the higher education system. This should be brought to a conclusion and institutions should be funded optimally to fulfill their mandates. Some will be predominantly outstanding teaching institutions and some research intensive universities – though we must expect all institutions to undertake both research and undergraduate teaching and learning.

Addressing the matter of differentiation within the FET college sector is also of utmost importance as account is taken of the physical location of college campuses, their proximity and relationship to specific industries and their evolving capacity.

5.7 Effectiveness and efficiency

The PSET system has structural inefficiencies that make it expensive. Articulation must be designed in such a way as to address these and to improve its effectiveness. A part of this is the need to build accountability and legitimacy both internally and externally.

Constructive accountability enables institutions to move beyond a compliance mode of operating but able to set standards, a form of "measuring up".[11] Measuring up means having the ability to grasp and deal with external envisioning processes so that the system is outwardly geared to meet the needs of society. It means being able to connect local needs and desires to provincial, national as well as international opportunities. It means that institutions are not only able to cope with the demands of being measured externally, but able to engage constructively with and inform external systems of measurement.

6. REPRESENTING ARTICULATION – A THREE DIMENSIONAL MATRIX

For articulation to work there has to be effective articulation at the systemic, programmatic and curricular levels.

There are steering mechanisms that will drive the articulation agenda such as planning, funding and quality assurance.

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[11] "Measuring Up" was a series of biennial report cards issued by the National Center for Public Policy and Higher Education between 2000 and 2008 that provided the general public and policy-makers with information to assess and improve postsecondary education in each state of the United States (http://www.insidehighered.com/news/2010/12/01/measuring_up).

And then there are the institutional forms, infrastructure and devices that are necessary for management of articulation.

It is possible to think of a three-dimensional matrix:

Axis 1: Articulation levels
Axis 2: Steering mechanisms
Axis 3: Institutions and devices

The population of such a matrix will provide a clear picture of what needs to be developed and what does not. A key example may be the existing articulation pathway between public FET colleges and universities in for example, financial planning qualifications, that provides FET colleges the ability to deliver NQF level 5 qualifications and for these to directly articulate into an NQF level 6/7 higher education qualification. This three-dimensional matrix will be populated as such a study progresses.

7. ARTICULATION PATHWAYS FOR LEARNERS

It is important to determine all of the articulation pathways that are possible in the South African system. This will allow the clear and unambiguous definition of the rules and procedures of articulation and to focus on its key characteristics such as simplicity, transparency, and so on. Articulation may take an inter-institutional form or an intra-institutional form. In each case articulation is in or between learning programmes – formative, vocational or occupational training – and, where appropriate, the workplaces where structured work experience is undertaken. It may be vertical, lateral or diagonal. Articulation is always programmatic and not institutional.

Recognition of Prior Learning (RPL) and Credit Accumulation and Transfer (CAT) are key mechanisms for articulation. Funding incentives and changes to existing post-school education and training legislation will need to be put in place to ensure that these mechanisms are effective. Current debates on SAQA's CAT policy have revealed the limited extent to which SAQA is able to intervene in education and training systems to oversee and coordinate education and training provision across the three qualifications sub-frameworks.

Some of the pathways that must be considered are:

7.1 Inter-institutional
Vertical, lateral or diagonal articulation between two or more (cluster) institutions offering learning programmes at different levels, e.g. between FET and HE(T); between FET colleges and adult learning; between FET colleges and GET (Grade 9 as an exit point); between FET colleges and workplaces; between FET colleges, catching up with additional subjects or improvement of subjects, then entry to, or credits for HE. These arrangements can be anchored on **articulation agreements** and are mostly dependent on the mutual esteem of institutions for each other in terms of

degree of equivalence, programme quality, assessment and quality assurance (Ronel Blom, 2013).[12]

7.2 Intra-institutional

Intra-institutional articulation can be from one course to another; from one programme to another; or from one department/faculty to another. For example, course to course articulation relates to instances where an institution matches its courses or requirements to course-work completed from another department or faculty of the same institution. This comparison is undertaken to ensure that learners who have completed such a course will not have to repeat unnecessarily. Another example is when a learner holds a diploma or degree from a faculty or school of the same institution and intends to change careers or re-route to another pathway. Articulation must enable such a learner to receive credits for prior study towards the newly chosen programme. Such arrangements can also be anchored in **articulation agreements** and are also mostly dependent on the mutual esteem of institutions or faculties and departments in terms of equivalence, programme quality, assessment and quality assurance

8. POLICY RECOMMENDATIONS

8.1   The post-school education and training system must be **articulated by design rather than by default**. The existence of the NQF created a framework for this but insufficient attempts were made in the earlier years to ensure that qualifications on the framework created various kinds of 'ladders of learning' despite the fact that articulation is one of the requirements for a qualification to be registered. The current situation is unsatisfactory. Though considered and consistent efforts have been made in recent years to design articulation into qualifications that are registered on the NQF the practical effect has not been successful.

8.2   To mitigate the risk of failure again an **Articulation Policy Framework** should be developed. Such a policy framework would contain sections on
   • The philosophical underpinnings and principles of articulation
   • Agreements on predetermined obligations for the development of programmes
   • Access and credit transfer arrangements to facilitate portability and transferability
   • The alignment of existing qualifications sub-frameworks and curriculum development initiatives with the aim of building articulation;
   • The alignment of quality assurance processes with the needs of articulation; and
   • The alignment of learning programmes with structured work experience where this is a requirement of full qualifications and occupational competence.

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[12] Ronel Blom, "Articulation in the South African Education and Training System," PowerPoint presentation, March 2013, 2nd National Qualifications Framework (NQF) Research Conference: Building Articulation and Integration, 4th-6th March 2013, Kopanong Conference Centre, Johannesburg.

8.3   Programmes (and the institutions that offer them) must be part of **an opt-out system rather than an opt-in system** for articulation. That is, by definition, all programmes will articulate (vertically, horizontally or diagonally) unless application is made and permission received for a programme not to articulate. Planning would therefore be a central part of the articulation project and funding should be used as a steering device.

The Further Education and Training Act, 1998 (Act 98 of 1998) and the subsequent Further Education and Training Colleges Act, 2006 (Act 16 of 2006) as amended by Act 3 of 2012 shortsightedly restricted FET college provision to NQF levels 2-4 (with a possible 10% provision at post NQF Level 4), whereas many colleges at the time already offered over 90% of their provision at post-NQF Level 4. If colleges are to change the perception of being a second rate alternative to school provision, they need to offer a wider range of programmes beyond NQF level 4. This is not to imply that all colleges should offer NQF level 5 or 6 programmes, but that differentiation opens the possibility of some colleges offering higher education and occupational programmes at this level which is critical for parity of esteem. At the outset, this provision could be done in partnership with universities while capacity issues are addressed. (A similar arrangement, tailored to their mandates, might also apply to the forthcoming community colleges.)

8.4   There should be **three spheres of post-school education and training**: the formative/academic sphere, the vocational sphere and the adult learning sphere. These are not by any means fully sealed. For instance, much learning in the formative/academic sphere has vocational purpose, while learning in the vocational sphere will by definition have formative/academic elements.

All programmes offered in the post-school education system, irrespective of the sphere that they occupy, rest on the education-training continuum. They must contain different kinds of learning.

All programmes should include general education elements (mathematics, languages, physical and social sciences and humanities) to the minimum extent of X% to address a number of the purposes and principles listed above. The general education component would act as one type of glue for articulation – in particular for diagonal and horizontal articulation between the three spheres.

8.5   Notwithstanding the very broad spectrum of programmes and qualifications that exist in the post-school education and training system, it would appear that NQF Level 5 qualifications play a critical role in creating an articulated system. It is recommended that there should be **just three NQF Level 5 qualifications**: one for each sphere. These qualifications must articulate vertically (within a sphere), horizontally (between spheres) and diagonally (between spheres).

8.6 Quality promotion, assurance and management are essential threads through the post-school education and training system. Three QCs exist. It is recommended that **the scope of the QCs be adjusted**: all basic education qualifications should be quality managed by Umalusi; all qualifications offered in the higher education sphere (including the formative/academic Level 5 qualification) should be quality managed by the CHE; and all qualifications in the vocational sphere (including N1 to N3) should be quality managed by the QCTO. This arrangement does not exclude the possibility that QCs by agreement could collaborate in implementation of quality assurance.

This may also be an opportunity to re-imagine the nature of the quality assurance system and the institutional forms of the QCs.

8.7 DHET should perform a **review of the institutional landscape** to consider whether the current institutional types address the socio-economic needs of South Africa.

8.8 DHET should consider the establishment of a **dedicated articulation directorate (or an Articulation Office)** for the purposes of guiding implementation, enhancing continuous policy improvements, monitoring and evaluation.

8.9 Notwithstanding that these recommendations argue strongly that articulation must be conceived of at the programmatic level, articulation interfaces and partnerships among institutions are central to the success of these policies. It is recommended that **articulation agreements are struck between PSET institutions**. Such agreements must emphasize the following:
- ethics and principles of articulation partnerships
- predetermined obligations for each partner/institution
- access and credit transfer arrangements to facilitate portability and transferability
- agreements on qualifications and curricula requiring articulation
- design and development of articulation-specific qualifications; and
- quality assurance requirements for agreed upon articulation curriculum and qualifications.