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Crediting worker education? Insights from South African experiences

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ABSTRACT

This paper explores South African experiences in using formal credentials in worker education. In specific, it analyses the value and use of the outcomes-based, unit standards-based qualifications registered on the South African national qualifications framework for "trade union practice." Creating formal qualifications for worker education programmes was hotly debated for many years in the labour movement. The paper finds little evidence of positive achievement of the creation of a formal qualification route for trade unionists. The main stated reason for the introduction of the formal qualification route was to support the educational and labour market mobility of union activists. There is no evidence of this to date, and the paper argues that the design of the qualification makes it unlikely to become a possibility. The existence of the qualification has facilitated funding for worker education, but a greater success would have been to convince public bodies to fund worker education according to its intrinsic logic. The paper also finds that to date the negative consequences that many unionists predicted in these debates have not arisen. However, this seems to be in spite of and not because of the qualification model and may be attributable to the strength of the single provider of the qualification.

KEYWORDS

Worker education; credentials; trade union qualifications

Introduction

Worker education – where organised workers come together and share ideas and learning in order to strengthen their collective capacity – has a long and complex engagement with formal education. This paper focuses on one aspect of this relationship in South African worker education – formal credentials. The use of formal qualifications for worker education had been hotly debated in the labour movement for many years until the implementation of a qualification that has been developed, offered and awarded in "trade union practice" in the past 10 years. The paper argues that there is little evidence that this qualification achieved the goals of those who advocated for aligning worker education to formal credentials. Conversely, offering worker education programmes against this unit standards-based qualification also does not seem to have resulted, to date, in the negative consequences that many unionists predicted. However, it does seem to have absorbed a lot of time and resources from the limited amount of worker education that remains in South Africa.

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My analysis is drawn from three key sources. The first is a set of focused discussions with experienced union educators, in particular about their experiences in working with the formal qualifications in trade union practice. The second is reflections on my personal experience as a union educator involved in the early debates about the national qualifications framework and formalisation of worker education. I was the national educator for the Transport and General Workers' Union in the 1990s; in this capacity I worked with Ditsela, a then newly established organisation providing a range of worker education programmes (Ditsela is discussed further below). After leaving the union, my research started to focus on the qualifications system in South Africa, and as a researcher I continued to provide support for the worker educators who were engaged in the process of consultation about whether or not a formal qualification should be developed. The third part of my analysis is based on an analysis of the actual qualification documentation. All of this is located in the research literature into qualifications frameworks and into relationships between credentials and labour markets. I have not engaged in an analysis of the politics of the credentialisation debate within the union movement, as this would require an analysis of archival sources that I have not done.

My object of analysis when talking about worker education is based on the definition of Michael Koen et al.:

> Worker education is education of workers by workers (through their organisations), for purposes that they themselves determine. Worker education is worker-controlled and working-class orientated with a core objective of building working class unity, collective organisation and solidarity. It is aimed at building working class consciousness for the purpose of advancing working class struggles for progressive alternatives and against capitalism. (Koen et al. 2018, 23)

Koen et al.'s definition was arrived at through a synthesis of inputs from a range of South African organisations involved in worker education as well as trade unions. It *excludes* the education of workers to do work – the skills training that employers may think of as worker education.

The development of formal qualifications for "trade union practice"

This section of the paper presents an overview of two qualifications that have been developed for trade union practice. Starting with an overview of the history of the qualifications framework and the broader skills system, I show how the system that the unions participated in designing affected the education that unions and union-related providers offered to their own members and officials.

The South African national qualifications framework and the labour movement

The role of the union movement, and in particular the National Union of Metalworkers of South African (Numsa), in the conceptualisation of the policies and institution that govern skills development in South Africa is well documented (Allais 2007, 2014; Lugg 2007; Samson and Vally 1996a, 1996b). Particularly important in this regard are the South African national qualifications framework as well as the skills levy and associated Sectoral Education and Training Authorities (SETAs), both of which I explain in this section.

Numsa's ideas fed into ideas within the Congress of South African Trade Unions (Cosatu), which in turn fed into debates and negotiations among unions, business and the state about industrial training towards the end of apartheid and in the early years of the transition to democracy in South Africa. All three groups were influenced by the idea that a highly-skilled labour force capable of achieving flexible specialisation would enable South Africa to succeed in the global economy (Desaubin 2002; Kraak 1994; Lugg 2007; Mukora 2006; Von Holdt 1991). There was also acknowledgement that black workers had been denied access to formal education and training and denied promotions on the grounds of lacking formal qualifications (Samson and Vally 1996a, 1996b; Webster 1985). Unionists hoped that a clear relationship between skills, grading and wages would allow workers to move up a career path (Industrial Strategy Project 1994).

Numsa's engagement with their counterparts in Australia led to the notion of using specifications of competency in the workplace as the basis of qualifications (Lugg 2007; Spreen 2001). Australia had reformed its vocational education system through the idea of "competence-based training," and, while this approach had subsequently been demonstrated to have led to many problems in that country (Wheelahan 2008, 2010, 2011), at the time it seemed attractive to the South African unionists, and Numsa in particular, because they were interested in skill-based grading systems (Allais 2014; Lugg 2007). Through Numsa, the idea of reforming education and training through qualifications based on statements of competence – specifications of what learners should be able to do at the end of a learning process – became the policy of Cosatu. Cosatu in turn fed these policy ideas into education policy debates in the broader anti-apartheid movement.

While much debate remained on many aspects of these issues, as well as the role of adult education more broadly within Cosatu and its unions, the officially backed policies led to the formal introduction of the South African national qualifications framework in 1996. The designers and supporters of the framework hoped that groups of stakeholders would create new qualifications and unit standards (part qualifications) consisting of learning outcomes, and that this would lead to new provision of education opportunities, including opportunities for people who had been denied access to education in the past as well as to individuals getting qualifications based on the knowledge and skills that they already had (Departments of Education and Labour 2002; SAQA 1999, 2000a, 2000b, 2000c, 2004).

Learning outcomes were the key feature of the new qualifications. The idea was that educational institutions would redesign their learning programmes against learning outcomes developed by stakeholders, or develop new programmes to meet the learning outcomes. Educational institutions would be free to choose their own "content" as long as they enabled learners to "acquire" the outcomes specified (SAQA 2000a). This was seen as an alternative to the authoritarian and prescriptive curriculum of the apartheid government as well as a way of ensuring that employers and workers could play a much larger role in defining standards of training. Outcomes were also believed to be a mechanism for improving quality – because, it was hoped, they would specify standards for all educational provision, and all educational institutions would have to meet the standards, thus ensuring that all learners were given education of an equal quality (SAQA 2000d).

Finally, there was an aspiration of achieving parity between different types of qualifications. Here, the hope was that, through the creation of a hierarchy of levels onto which all qualifications would be placed, society would come to value learning programmes that had historically been of low status (SAQA 2000c). For example, if the

national senior school leaving certificate (the "matric") was placed at level 4 on the framework of qualifications, then all other qualifications placed on level 4 would be formally seen as equivalent to this certificate.

Two years after the formal creation of the qualifications framework, the Skills Development Act was passed (Department of Labour 1997). This Act created the Sectoral Education and Training Authorities, or SETAs, as labour market intermediaries. SETAs were funded through a levy-grant system: employers were taxed one percent of their payroll. The SETAs were set up in different areas of the economy, with two broad roles. One role was the distribution of grants back to employers upon receipt of training plans and reports; this was intended to create an incentive for employers to train as well as to enable the SETAs to develop a picture of the training needs of their sector (Department of Labour 1997). Their second main role was the quality assurance of educational provision in their respective economic sectors. Trade unions, as employers, also paid a skills levy, which was allocated to the Education, Training and Development Practices (ETDP) SETA.

It is well documented that the ambitious policy goals of the qualifications framework were not achieved, and implementation problems with the qualifications framework and the skills development system emerged quickly (Allais 2013, 2014; Breier 1998; Cooper 1998; Departments of Education and Labour 2002; Ensor 2003; Kraak 2004; Muller 1998). A policy review of the qualifications framework was initiated in 2000, and after lengthy disputes between the departments of education and labour, the qualifications framework was completely changed in 2009 (Allais 2011a). Various reviews as well as a Ministerial Task Team have led to various changes to the SETAs over time (DHET 2012).

As time passed, the formal education and training system complied less and less with the rules and requirements of the qualifications and quality assurance system; instead, it was the least formalised and least institutionalised parts of the education and training system that were most likely to attempt to adopt, or to be forced to adopt, the unit standards-based model (Allais 2012). This included small private providers, short courses offered by non-governmental organisations and workplace-based training providers. There were also providers offering short courses that were, briefly, declared to be compulsory. For example, all educators were told that they would have to do short courses in assessment. But lecturers in universities and teachers in schools did not do them, while many college lecturers were compelled to, and people working for private training providers enrolled for them because they were linked to future funding opportunities. Schools were not affected by the problems of the qualifications and quality assurance regime. Universities developed a completely different system of quality assurance – also with considerable contestation. In other words, the educational providers offering education to the vast majority of South Africans did not use the new unit standards-based qualifications, and nor were they quality-assured by the SETAs (Allais 2012).

The policy reform implemented in 2009 split the qualifications framework into three sub-frameworks (Republic of South Africa 2008). Three quality councils were created for higher education, general and further education and training and for trades and occupational education and training, respectively; the first two were created off existing structures, and the third was completely new. These quality councils were given the power to oversee the development of qualifications, and the outcomes-based and unit standards-based qualifications design was no longer a requirement (Department of Labour 2008; Allais et al. 2007). The "skills development" function, including the SETAs and the

Quality Council for Trades and Occupations, was moved from the Ministry of Labour to the new Minister of Higher Education and Training. The process to develop a trade union qualification was already underway by this time – using the original rules and systems of unit standards-based qualifications that had been subject to review – and largely ignored by the formal education and training system (Allais 2012).

So, by 2010, South Africa had an elaborate and complex system of qualifications development and quality assurance that was used by the small, disparate and mainly weak "system" of provision for workplace-based training, occupational training, continuing professional development, community development, adult education, youth development and so on (Allais 2012). There was a completely different set of qualifications and systems for developing qualifications and curricula as well as systems for quality assurance in the formal education and training system. The systems used outside of the formal education and training system have been complex, cumbersome, in constant flux and with little demonstrated benefits to date – and it was in these systems that the trade union qualification was located.

Rosemary Lugg (2007) describes the increasing unease of trade unionists in relation to the skills system that they had been part of initiating – in particular, that they felt unable to participate meaningfully in the plethora of structures that had been created. And yet, as the system was being implemented, and as problems were emerging, there were intense debates within the trade union movement about developing a formal qualification for trade union education, between those who wanted worker education to engage more directly with these systems, and those who continued to argue against the credentialisation and formalisation of worker education. I briefly explore these debates in the following section, and highlight some key goals of the advocates of qualifications and concerns of the opponents.

The debates within the union movement

The general goals and aspirations for the qualifications framework and the establishment of the skills development policies and institutions – encouraging and funding training, parity of esteem for different educational routes, recognition of learning obtained on-the-job and outside of formal education, improving quality – were refracted into debates within the union movement about the creation of formal qualifications for worker education. My analysis of these debates is based on my interviews with union educators, my participation in the discussions both initially as a union educator and later as a researcher supporting the discussions and a few published pieces of research. Unfortunately, archival research of minutes of meetings has not been done to date, and it is not clear the extent to which relevant minutes are extant across the federations and worker education providers.

The unions participating in the design of the skills development architecture were arguing for certificates and qualifications for the skills that workers had gained in their workplaces (Samson 1999; Samson and Vally 1996a, 1996b; Von Holdt 1991). It would have been strange for those union officials for whom the union was their workplace to not consider obtaining certificates for the skills and knowledge they had gained both as union

activists and at work. When Ditsela introduced the new qualifications, this debate, reflected from the perspective of those arguing for credentials, was captured in the introduction:

> Many trade unionists have vast knowledge of and experience in the work they do, although they often do not have the 'papers' or accreditation to prove it. . . . The FETC: TUP [Further Education and Training Certificate: Trade Union Practice] Pilot is only the beginning of a truly developmental journey. It signals the first real step of providing worker-friendly access to a registered qualification.[1]

The unionists hoped that both workers who were union members, and officials who worked for unions, would benefit by having formal qualifications for labour market mobility and access to further education programmes. Equally importantly, cash-strapped unions and labour service organisations needed to obtain funds from the SETAs to conduct training, and, according to the educators whom I interviewed as well as based on my notes from the credentialling discussions, SETAs put considerable pressure on the credentialling project, directly and through their approach to funding. SETAs decided that only education offered against registered qualifications and quality-assured by them would be funded. This decision, in the context of a dramatic and rapid drying up of funding that had previously been channelled to the non-governmental sector by international donors, gave institutions little choice. Union educators were forced into this system by the need for funding, as well as a desire to access formal qualifications, with the promise of improving workplace chances of their members and staff.

One concern with the creation of formal credentials for worker education was that they could undermine democratic processes in organisations in which democratic principles are foundational. For example, there was a fear that the creation of formal qualifications could lead to only those who attained them being elected as shop stewards – through overt or explicit requirements. The fact that many workers would not meet the entry requirements for a level 4 qualification would further exacerbate this problem. Another concern was that formalisation would lead to the depoliticisation of worker education or to less control by workers of worker education. My research into the implementation of the qualifications framework led me to suggest, as discussed further briefly below, that the qualification model was conceptually flawed, and would therefore lead to problems in the curriculum design of the union qualifications.

Despite these concerns, the federations of unions which control Ditsela, as the largest provider of worker education, decided to opt for formal qualifications. I now turn to an overview of the design, development and implementation of these qualifications.

The development of qualifications in trade union practice

In the 2000s, two qualifications in "trade union practice" were developed and registered on the South African national qualifications framework: a *Further Education and Training Certificate: Trade Union Practice* (level 4) and a *National Diploma: Trade Union Practice* (level 5).[2] Level 4 is the level at which the National Senior Certificate, the senior secondary education qualification commonly known as "matric," is pegged. Level 5 is roughly equivalent to certificates issued after one year of tertiary education.[3] The two qualifications are in "trade union practice."

The learning programme that leads to this qualification has to date only been offered by Ditsela, the largest external provider of education to the trade union movement. In South Africa today much trade union education is provided by what are referred to as labour service organisations (Koen et al. 2018). These are not-for-profit non-governmental organisations. Ditsela is the largest of these. It was established in 1996 by two of the then largest federations of trade unions, Cosatu (the Congress of South African Unions) and Fedusa (the Federation of Unions of South Africa). Later Nactu (the National Council of Trade Unions) joined. All three federations are represented on the board.[4]

At the time of writing, 124 people had achieved the level 4 certificate since its inception in 2010 (Hartman and Tjemolane 2020). As far as I can ascertain, the level 5 qualification has not yet been offered or awarded.

The programme in trade union practice has been largely funded through the ETDP SETA. As mentioned above, SETAs have tended to only provide financial support for formal education and training programmes – other than the in-house training that employers can claim some of their levy funds against (Allais 2012). This meant that while the labour movement was contributing to the SETA by paying its levy, it had difficulties in accessing funds from the SETA. After many frustrated interactions between the labour movement and the ETDP SETA, in 2005, the SETA commissioned research into the feasibility of a national qualification in trade unionism. For the labour movement, this meant engaging with the formal structures of the South African Qualifications Authority (SAQA) to develop a new, outcomes-based, unit-standards based qualification. This led to the creation of a committee consisting mainly of union educators to develop the two formal qualifications.

In March 2009, a consultative workshop was held by Ditsela and the SETA to plan the implementation of the level 4 qualification. It was agreed that Ditsela would offer it to 50 learners – 10 from each of the federations which existed at the time (Cosatu, Fedusa, Nactu and Consawu), and 10 from community-based organisations. It was also agreed to offer the qualification in the mode of a learnership. Learnerships were a mode of delivery implemented by the then Department of Labour in 2001, initially with the intention of replacing the apprenticeship[5] system with a new type of learning programme that included structured workplace learning as well as formal education, and culminating in a nationally recognised qualification (Visser and Kruss 2009).

The first intake of 50 learners to the level 4 Trade Union Practice qualification was in 2010. According to Ditsela representatives, most of the learners were full-time union officials, mainly organisers and educators. Some were shop stewards based in companies, but for all of them, the workplace in which the unionists would do their structured learning was the union or community organisation that the learners came from. It was agreed that the course would run over 18 months, with roughly 1 week contact time per module and a minimum of 6 weeks between contact sessions.[6] This meant that about 30% of the learning would happen through facilitated contact sessions and the remaining 70% through on-the-job (at the union) learning.[7] Every learner in the programme identified a mentor, and a workshop for mentors was organised.

A structure was set up to monitor the implementation of the programme, with representation from the unions (as employers), the SETA and Ditsela. A specific sub-structure was created to oversee and monitor the workplace component of the learning programme. The certificate is issued by the ETDP SETA, who conducts quality assurance of the assessment.

According to a Ditsela representative, 37 of the learners initially enrolled obtained the full qualification in 2012 – a relatively high throughput rate. Some struggled with specific modules, in particular the compulsory maths and language requirements, and in particular those who did not come from trade unions – those from the community-based organisations – did not complete the learning programme. A new group of 40 was enrolled in 2014 and 38 of them obtained a full qualification; a group of 39 was enrolled in 2018 and 30 of them obtained the qualification. In Cape Town, an additional cohort of 30 was enrolled in 2018 of which 19 learners obtained the qualification (Hartman and Tjemolane 2020).

As far as I could ascertain from discussions and searching for documentation, to date no tracer study has been conducted, nor has there been much formal analysis of the contribution of this approach to worker education in the labour movement.

Analysis

I now turn to an analysis of the achievements and problems to date, starting with achievements. I do not dwell on access to funding – which was a goal of the formal qualifications. This is because it is only an achievement within the circular logic of the quality assurance system – it was only necessary to develop qualifications to gain funding because the SETA as the quality assurance body insisted on it. The qualifications were developed, and funds were obtained. However, a greater success would have been to convince public bodies to fund worker education according to its intrinsic logic. My focus below is, first, on the qualifications themselves in relation to the research literature on qualifications frameworks; second, on the role of the qualification in achieving labour market and educational mobility; and finally, on the role of the formal credentials in organisations that value internal democracy.

The conceptual flaws of the outcomes-based qualification model, in relation to the trade union practice qualifications

There is considerable research demonstrating that the outcomes-based, and unit standards-based qualification model that the union movement was forced into is flawed (Allais 2007, 2011a, 2011b, 2014, 2017, 2018; Gamble 2004a, 2004b; Phillips 1998, 2003; Wheelahan 2008, 2010, 2011; Wolf 1995, 2002; Young 2007, 2011). A key critique in the literature is that the outcomes model assumes that learning outcomes have a meaning independent of context. Because this is not true – learning outcomes are always open to contestation and interpretation – they become over-specified through a range of technical terms and rules. These include specific rules for the formulation of learning outcomes, broken down into specific learning outcomes, as well as "range statements," "assessment criteria" and other specifications. This leads to complex and lengthy documents in terms unfamiliar to educators or learners, and which, as argued by various educational critiques, are not a viable starting point for curriculum design (Allais 2014; Wheelahan 2010; Wolf 1995).

This over-specification is a major reason why the unit standards-based model in South Africa largely collapsed and was for the most part abandoned (Allais 2011a), similar to experiences in other countries (Phillips 2003; Young 2011). Equally serious is that the unit standards-based model marginalises and undermines both the knowledge and practice base of curricula, because its approach does not start from a serious consideration of bodies of knowledge and fields of practice, but instead attempts to delimit tasks.

This approach does not offer a useful starting point for curriculum designers to select and sequence knowledge and tasks. In many cases outcomes-based qualifications work against the integrity of the conceptual webs of bodies of knowledge and fields of practice that contain considerable and complex tacit knowledge (Allais 2014). The best-case scenario is one whereby the curriculum designer already has a strong sense of what the curriculum should look like. But in this case, the learning outcomes get in the way. If the curriculum designer does not already know what should be in the curriculum, the learning outcomes offer no clear guidance or starting point. Vastly different learning programmes, of vastly different standards, and breadth and depth of knowledge, have been developed against the identical learning outcomes in the South African system (Allais et al. 2007).

It is because of the problems of the qualifications framework that I expected, both in my participation in the early debates and when I initiated this research, that the new trade union practice qualifications would be plagued by curriculum problems common to education programmes attempting to use learning outcomes.

And indeed, when looking at the actual qualification documentation, the problems seem similar to those experienced elsewhere in the education system. To the credit of the unionists who were involved in the qualification design, the qualifications are simpler and more straight-forward than many unit standards-based qualifications. But as is the case for all such qualifications, they are accompanied by additional layers of specification which add complexity without adding clarity. And, as experienced elsewhere in the education system, complex bodies of knowledge are reduced to ostensibly straight-forward "competencies" in ways that either trivialise the competencies required for work or reduce them to something meaningless.

Consider, for example, one of the unit standards of the level 4 trade union practice qualifications, "Demonstrate an understanding of political economy" (SAQA n.d.). The unit standard states that "the person credited with this Unit Standard will be able to understand that political economy explains how power is organised and exercised in society" (SAQA 243850n.d.). While analysis and examination of power relations is clearly key to the work of trade unions, "how power is organised and exercised in society" is the subject of research, analysis and debate. Competence here is not something that can be simply or straight forwardly demonstrated, assessed and quality-assured against in a straight-forward manner – there is no simple performable explanation of power relations in political economy.

The document goes on to narrow down the terrain, stating that the qualifying learner will be capable of:

- "Describing elementary concepts of economics in relation to political economy.
- Comparing contemporary economic systems.
- Describing how property ownership influences the formation of social classes.
- Understanding the political economy of South Africa and the global context." (SAQA 243850n.d.)

All of these point to areas of knowledge, analysis and debate that are indeed important for trade unionists, but are rendered meaningless when presented as simple competencies in which someone can be found competent or not competent.

For example, the first specific outcome described above has the range statement, "[c]oncepts include but are not limited to supply and demand, profit margin and surplus value, factors of production" to add clarification, as well as four assessment criteria:

- "The term economics is defined in relation to the influence on the political arena.
- Profit margin is calculated in order to determine surplus value.
- The influence of surplus value on workers [sic] wages is described with examples.
- The evolution of economic systems is described in relation to class formation." (SAQA 243850n.d.)

The fourth assessment criterion has an additional range statement: "Economic systems may include but are not limited to primitive communalism, slave-based economy, feudalism, communism, socialism and capitalism" (SAQA 243850n.d.).

The first three immediately show a dramatic narrowing of the original outcome statement, while the fourth could encompass many life studies of history. All the specific outcomes have range statements and assessment criteria, in line with the requirements of unit standards.

Another unit standard states that learners must be able to "[d]emonstrate an understanding of working class theories" (SAQA n.d.) Here, the qualifying learner must be capable of:

- "Explaining the foundations that underpin working class theories.
- Describing working class history and struggle and how it impacts on the trade union movement.
- Describing role and purpose of trade union organisations in advancing working class theory." (SAQA 243846n.d.)

Yet another example is a unit standard which requires unionists to "[i]dentify between morally acceptable and unacceptable behavior" (SAQA n.d.) This includes the following abilities:

- Describe and explain how a society is shaped by key ethical ideas.
- Explain the concept of moral responsibility.
- Distinguish between moral and other types of problems.
- Adopt and explain a moral position. (SAQA 116481n.d.)

Other key learning outcomes of the qualification are:

- Conduct negotiations in labour mediation.
- Organise and mobilise workers.
- Demonstrate an understanding of the trade union movement. (SAQA n.d.)

Thinking about any of these as a "competence" makes nonsense of them – none of them are simple skills that can be measured as present or absent in an individual. The "learning outcomes" discussed above are based on complex, nuanced organisational skills, subtle ideological debates and broad bodies of knowledge. All point to the complexity of the work of unionists and the range of areas of education and training which could benefit unionists in their work. But none of them make sense as a learning outcome.

So much for the qualification documentation. Now I turn to considering whether or not, and the extent to which, the unit-standards have influenced the actual delivery of curriculum. The most typical case for unit standards-based qualifications is that they are not used at all – this was the fate of the vast majority of unit standards and unit standards-based qualifications, and appears to be the fate of the level five trade union practice qualification thus far.

The second most likely scenario is that providers design courses according to their own understanding of the field and needs of the learners and learning programme, and then retrospectively fit them with unit standards. In this case, the learning outcomes are more like course objectives – which are useful in any course, when derived from the content of the course, and not *vice versa*.

The courses delivered against the trade union practice qualification are clearly aligned to the unit standards. It is not clear – and further research would be required to establish this – what the role of the unit standards was in the course design. Given the existence of a single provider that was already offering formal programmes in the same areas, it can be assumed that existing curricula fed into the process, leading to good curricula and learning materials in spite of, not because of, the qualification requirements. As discussed above, for the trade union practice qualification there has been to date a single provider, Ditsela. Educators in Ditsela work with a well-developed set of courses and a coherent sense of the content of the learning programmes that it offers; there is a community of practice involved in the development and delivery of the programme.

Thus, although the model is flawed in general, the very specific circumstances of delivery of union education have meant that these problems do not appear to have been seriously detrimental. Educators involved in offering the programmes argue that the content is not significantly shaped by the qualifications, which a consideration of the teaching materials confirms. In other words, in practice, the curriculum development problems discussed in the literature do not seem to have emerged in worker education.

The trade union practice qualification as a credential versus the needs of worker education

One of the major goals for the creation of formal qualifications was to enable unionists to obtain a formal credential in order to access further learning as well as workplace recognition. I found no evidence of achievements in this regard; further, I argue that the design of the qualification makes it unlikely to be a possibility.

Two points can be made here. The first is that the SETA did not provide funds for a systematic tracer, and there is no documented analysis of unionists' rationale for doing the programme as well as their trajectories after it. There is only anecdotal data about the value the qualification gave to individuals. It is possible, for example, that workers were able to access jobs where a level 4 qualification is a formal requirement.

The second point is that it is unlikely, though not completely impossible, that the qualification facilitated progression into further learning. This is in part because, as discussed above, the unit standards-based qualifications were largely abandoned by the formal education and training system, and therefore the qualification will not carry substantial value as a credential within the mainstream education and training system.

This does not mean that there is no benefit to the kinds of training provided through worker education. If more and more unionists are given access to systematic worker education, there is a total benefit in terms of the substantive value of education provided. But the substantive learning that happens in an education programme is not the same as how educational credentials are used in labour markets. The former can be understood as the use value of education and the latter as the exchange value of education.

In labour markets qualifications are in some cases seen as a proxy for skill; in other cases, they are seen as a proxy for ability relative to other job applicants (Bills 2003). Different labour markets operate differently in this regard (van de Werfhorst 2011), and in many cases they are both in operation to some extent. Employers frequently select potential employees with the highest possible level of qualifications relative to the potential pool of applicants, even when they have no use for the knowledge and skills obtained through these qualifications in the workplace. In so far as the latter selection process is underway, gaining a formal level 4 credential that does not offer a pathway into the education and training system is of limited benefit in a labour force that increasingly is in possession of a matric certificate (Asmal et al. 2020; Bhorat, Cassim, and Tseng 2016). In other words, the signalling value of the trade union practice qualifications is likely to be low, because of the structure of the South African labour market, because of qualification inflation and because of how employers read credentials (Allais 2016).

To the extent that the value of the qualification is primarily within the labour movement, the qualification will be valued by unions to the extent that they value the awarding institution; however, this would have been the case even in the absence of a formal qualification.

None of this questions the substance of learning in this programme in specific, the value of the learning which takes place in unions or the need for worker education to engage with formal education and formal bodies of knowledge. In terms of the last point, Linda Cooper (2018) has argued, "central to the epistemology of workers' education is that abstract, general knowledge ('theory') needs to be brought into dialectical relationship with workers' experiential knowledge." And anecdotal evidence suggests that some of the programmes in which union educators work with universities, or universities give access to unionists, are valuable. But it does mean that offering a unit standards-based qualification is unlikely to offer individuals new progression pathways in the formal education system or in the labour market.

Finally, the small numbers discussed above could also be an indication that worker education is suffering – if this programme is a focus to the detriment of others. Koen et al. (2018) suggest that this could be a possibility when they point out that over 20% of the offerings of labour service organisations are now linked to formal qualifications. The possibility remains that the focus on formal qualifications which reach very small numbers of individuals is undermining the objectives of worker education. In other words, the substantive developmental role of worker education may be under threat if

more resources are directed to programmes which have limited benefit to worker education as a whole and workers in general, and little resources and support go to strengthening the home-grown training that unions do themselves.

It is also possible that formal credentials were assumed to improve quality. There is no evidence that this has been the case – the quality of the programmes offered seem to derive from the strengths of the organisation offering the programmes, not from the formalisation. The trade union practice qualification, (at the time of writing still) issued and quality-assured by the SETA, is in the middle of a quality assurance system in flux, a difficult situation for a small not-for-profit organisation. Meeting accreditation requirements can be a huge burden for highly stressed not-for-profit small educational organisations – often with little visible benefit. I have found no study to date that demonstrates quality improvement on the basis of meeting such quality assurance regimes in any field.

I now turn to an analysis of my findings about the concerns of unionists opposing the qualification route. I did not find evidence of the problems predicted by union activists – a clash with democracy.

Formal union education in the context of democratic organisations

One of the major fears about credentialling union education was that it would undermine democracy in the labour movement. However, this potential negative consequence does not seem to have emerged to date. In terms of entrance requirements, this may partly be because of a flexible approach to entry requirements from Ditsela, which has included a process of recognising the prior learning of candidates for the programme (officially, in order to enrol for the level 4 qualification, a unionist would have to have "demonstrated competence in Communication and Mathematical Literacy at NQF Level 3 or equivalent," SAQA n.d.).

There is no evidence to date that people are trying to get into elected or appointed positions in the union in order to access the programme or that people are denied the ability to contest positions if they have not got the qualification. This may also be due to the fact that the numbers on the formal qualification programme are relatively small, and there still are vibrant grassroots training programmes through Ditsela, other labour service organisations and unions themselves (although, as argued by Koen et al. (2018) union education in general is weak).

It may also be that many people who have completed the programme have subsequently left the union movement, and there is some anecdotal evidence that this is the case. If it is – and a proper tracer study could ascertain this – it could suggest that the programme is of limited value to the union movement and possibly negative in its effects even if positive to individuals, if it facilitates enabling unionists to leave the union movement. Further research into why people have chosen to do the course, and why they chose to be shop stewards and the factors that led to their leaving the union movement would also improve the ability of unions to make a proper analysis of the value of the programme to worker education.

Very limited achievements

In summary: one of the two trade union practice qualifications has been offered and awarded through a curriculum that was designed over many years with much thought and debate from experienced union educators. The strengths of the programme seem to derive from the role of the provider, and not because it was designed against the unit standards. But the value of this qualification to worker education, and the rationale for a formal qualification for worker education, remain questionable.

Thus far, the only clear and unambiguous achievement of the creation of a formal qualification to date is that it has enabled the labour movement to access funds for worker education. While this is a considerable achievement, more flexibility in the funding system would have obviated it. There is no legislative reason why the SETAs could not continue funding worker education while relaxing their requirement for formal qualifications and quality assurance. Various policy documents from the Department of Higher Education and Training (DHET 2012, 2013) have argued about the need to change this requirement formally.

There is no evidence that the qualification has assisted in terms of either labour market mobility or access to education, while there is considerable reason to question the possibility of either. However, a clash between the formal trade union programmes and democracy within the labour movement also does not appear to have materialised to date, nor do the curriculum problems that have plagued outcomes-based education appear to have emerged. This seems to be in spite of and not because of the qualification model – the qualifications themselves are typical of outcomes-based qualifications – and could be attributable to the strength of the single provider of the qualification.

The predicted problems could still emerge. It is not inconceivable, for example, that an employer who wanted to control the training of shop stewards (feasible because shop stewards get absorbed into human resource positions), could in the future attempt to offer their own programme against this qualification. In this scenario, the conceptual flaws of the qualification model would become highly apparent in terms of clarity about what those outcomes actually mean, particularly in a field which is ideologically contested.

Notes

1. http://www.ditsela.org.za/articles/first-formal-qualification-in-trade-unionism. Accessed November 25, 2018.
2. www.saqa.org.za. Accessed October 29, 2018.
3. In UNESCO's International Standard Classification of Education this is ISCED-5, short-cycle programmes aimed at preparation for work.
4. South Africa currently has five trade union federations; the other two are Saftu (the South African Federation of Trade Unions, which was founded in 2017 when Cosatu split) and Consawu (the Confederation of South African Workers, which is the smallest federation, founded in 2003 to bring together unions previously not aligned to any federation).
5. Both systems are still operational in South Africa today.
6. www.ditsela.org.za. Accessed December 3 2018.
7. The COVID-19 pandemic has made this model very difficult, according to a Ditsela representative, personal conversation February 15, 2021.

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