

NON-GOVERNMENTAL ORGANIZATION**NOTICE 3110 OF 2025****THE COUNCIL FOR QUALITY ASSURANCE IN GENERAL AND FURTHER
EDUCATION AND TRAINING (“UMALUSI”)****PUBLICATION OF THE UMALUSI ARTICULATION POLICY FOR QUALIFICATIONS IN THE
GENERAL AND FURTHER EDUCATION AND TRAINING QUALIFICATIONS SUB-FRAMEWORK**

- (1) In 2001 Umalusi, the Council for Quality Assurance in General and Further Education and Training, was mandated by parliament, in its founding Act, the General and Further Education and Training Quality Assurance Act, 2001 (Act 58 of 2001) as amended, as the quality assurance body for qualifications at Levels 1 – 4 of the National Qualifications Framework (NQF)
- (2) The NQF Act, (Act 67) of 2008 as amended, established Umalusi as one of the three Quality Councils responsible for the management and development of qualifications registered on their respective sub-frameworks. In terms of Section 24 of the NQF Act, each Quality Council is required, among other things, to develop policy and criteria to guide processes and protocols for the development of qualifications on its subframework and for registration with the South African Qualifications Authority on the NQF.
- (3) The *Articulation Policy for Qualifications in the General and Further Education and Training Qualifications Sub-framework* has been developed in accordance with Section 8(2)(b) of the NQF Act, as amended, which mandates the Minister to determine and publish policy on NQF matters in the gazette. In line with the objectives of the NQF, this Articulation Policy is also issued under Section 27(b) of the NQF Act No. 67 of 2008, as amended, which requires Umalusi to adhere to any policy set by the Minister as outlined in Section 8(2)(b) of the NQF Act.
- (4) Umalusi hereby publishes the *Articulation Policy for Qualifications in the General and Further Education and Training Qualifications Sub-framework* as it is applicable to the General and Further Education and Training Qualifications Sub-framework, for implementation.



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CHAIRPERSON: UMALUSI COUNCIL
DATE: 25 FEBRUARY 2025



**THE ARTICULATION POLICY FOR QUALIFICATIONS IN THE GENERAL AND FURTHER
EDUCATION AND TRAINING QUALIFICATIONS SUB-FRAMEWORK**

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1. Definitions and glossary

Articulation	<p>Refers to the process of forming systemic, specific, and individual connections between qualifications and/or part-qualifications to allow for the horizontal/lateral, vertical, and diagonal movement of learners through the formal education and training system, as well as its linkages with the world of work. It is used interchangeably with "Learning Pathways."</p> <ul style="list-style-type: none"> i. Horizontal articulation refers to articulation within and between NQF sub-frameworks at the same NQF level; ii. Vertical articulation refers to articulation between NQF levels within an NQF sub-framework; iii. Diagonal articulation refers to articulation between NQF levels and across NQF sub-frameworks; iv. Systemic articulation refers to a 'joined-up' system including qualifications, professional designations, policies, and various other official elements that support learning and career pathways; v. Specific articulation refers to aligning qualifications through inter- or intra-institutional agreements, such as memoranda of understanding, credit accumulation and transfer, and other mechanisms; and vi. Individual articulation refers to supporting learners in their learning and career pathways through flexible admission, curricula, teaching and learning, and learner support systems, such as the quality of qualifications and learning, career development services, and other mechanisms.
Assessment	<p>For the purposes of this policy, assessment refers to the process of identifying, gathering, and interpreting information and evidence against the required competencies in a qualification, part-qualification, or professional designation. This process is used to make a judgement about a learner's achievement, and includes evaluations that lead to such judgements.</p>

Credit accumulation	Refers to the process of accumulating the necessary credits required to complete a qualification or part-qualification.
Credit Accumulation and Transfer (CAT)	Refers to the process of accumulating credits from one or more cognate learning programmes within a provider and transferring those credits for recognition towards a qualification or part-qualification, either within the same provider or across different providers. CAT is a method of recognising formal learning.
Credit transfer	Refers to the vertical, horizontal, or diagonal movement of credits towards a qualification or part-qualification, either within the same NQF level or across different levels, typically between different programmes, departments, or institutions.
Credits	Refer to the unit of measurement used to quantify the amount of learning in a qualification or part-qualification, where one (1) credit is equivalent to ten (10) notional hours of learning.
Formal learning	Refers to learning that takes place in an organised and structured education or training environment, and is explicitly recognised as part of a formal curriculum.
General Education and Training	Refers to all learning and training curricula that lead to a qualification at Level 1 of the NQF, which is the level below Further Education and Training.
General and Further Education and Training Qualifications Sub-framework (GFETQSF)	Refers to the sub-framework of qualifications on NQF Levels 1-4, developed and managed by the Umalusi Quality Council, as outlined in Sections 4-7 of the <i>National Qualifications Framework Act (Act No. 67 of 2008)</i> . The GFETQSF is a sub-system of the NQF that requires co-ordination with the sub-frameworks managed by the Quality Council for Higher Education and the Quality Council for Trades and Occupations (QCTO).
Informal learning	Refers to learning that occurs through daily activities related to paid or unpaid work, family or community life, or leisure. It may also include deliberate self-teaching.
Learner	Refers to any individual, regardless of age, engaged in learning at any level of the NQF and in any provider, work, or social context, including formal, informal, and non-formal learning. This term is used interchangeably with "Student."
Learning pathways	See "Articulation"

Learning programme	Refers to a structured and purposeful set of learning experiences, including modules/subjects and other learning activities, which contribute to the achievement of specified learning outcomes.
Level descriptors	Refers to a statement that describes the learning achievements expected at a particular level of the NQF. These descriptors provide a broad indication of the types of learning outcomes and assessment criteria suitable for a qualification at that level.
Lifelong learning	Refers to learning that occurs throughout an individual's life, across all contexts—life-wide, life-deep, and lifelong. It encompasses acquiring knowledge, understanding, attitudes, values, and competencies that contribute to personal growth, social and economic well-being, democratic citizenship, cultural identity, and employability.
National Qualifications Framework (NQF)	Refers to the comprehensive ten-level framework and system, approved by the Minister of Higher Education, Science and Innovation, for the classification, co-ordination, registration, publication, and articulation of quality-assured national qualifications and part-qualifications.
Non-formal learning	Refers to planned learning activities that are not specifically aimed at achieving a qualification or part-qualification. It is often associated with learning that enhances workplace practice and may include intentional self-teaching.
NQF Act	Refers to the South African NQF Act No. 67 of 2008, as amended.
Outcomes	Refer to the contextually demonstrated end-products of specific learning processes. These outcomes encompass knowledge, skills, and values, and may be either generic or specific.
Parity of esteem	Refers to assigning equal value and status to qualifications at the same NQF Level, even if they have different routes of study. It is achieved when both qualifications provide equal opportunities for progression to employment and/or further studies.
Part-qualification	Refers to an assessed unit of learning that is registered as a component of a qualification on the NQF.
Qualification	Refers to a registered national qualification.
Recognition of Prior Learning (RPL)	RPL refers to the principles and processes used to make visible, assess, and acknowledge the knowledge and skills a person has acquired informally or non-formally. This

	process facilitates alternative access and admission, recognition and certification, or further learning and development.
Registered qualification	A qualification listed on the GFETQSF of the NQF by SAQA, in accordance with <i>Section 13(1)(h)</i> of the <i>National Qualifications Framework Act (Act No. 67 of 2008)</i> .
Student	See "Learner"
Sub-framework of the NQF	Refers to one of the three co-ordinated qualifications sub-frameworks that collectively form the NQF as a single integrated system, namely, the General and Further Education and Training Qualifications Sub-framework (GFETQSF), the Higher Education Qualifications Sub-framework (HEQSF), and the Occupational Qualifications Sub-framework (OQSF).
Umalusi	The Council for Quality Assurance in General and Further Education and Training, established in terms of the <i>General and Further Education and Training Quality Assurance Act (Act No. 58 of 2001)</i> .

2. Acronyms and Abbreviations

CAT	Credit Accumulation and Transfer
CHE	Council on Higher Education
DHET	Department of Higher Education and Training
EC	Elementary Certificate
GC	General Certificate
GFETQSF	General and Further Education and Training Qualifications Sub-framework
HEQSF	Higher Education Qualifications Sub-framework
IC	Intermediate Certificate
MoA	Memoranda of Agreement
NC	National Certificate
NLRD	National Learners' Records Database
NQF	National Qualifications Framework
OQSF	Occupational Qualifications Sub-framework
QC	Quality Council
QCTO	Quality Council for Trades and Occupations
RPL	Recognition of Prior Learning
SAQA	South African Qualifications Authority

THE ARTICULATION POLICY FOR QUALIFICATIONS IN THE GENERAL AND FURTHER EDUCATION AND TRAINING QUALIFICATIONS SUB-FRAMEWORK

3. Preamble

- 3.1 The National Qualifications Framework (NQF) Act No. 67 of 2008, as amended, establishes the NQF as a comprehensive system for the classification, registration, publication, and articulation of quality-assured national qualifications.
- 3.2 Articulation is a crucial component of an education and training system, providing a mechanism for enabling learning pathway possibilities that align with the human development skills required in a democratic society. Articulation serves both the needs of individual learners and the broader economy.
- 3.3 Articulation is achieved through various related policies, processes, and other mechanisms. This policy specifically addresses the relationship between learning pathways, Recognition of Prior Learning (RPL), and Credit Accumulation and Transfer (CAT).
- 3.4 The South African NQF comprises three articulated NQF Sub-frameworks: the General and Further Education and Training Qualifications Sub-Framework (GFETQSF), the Higher Education Qualifications Sub-Framework (HEQSF), and the Occupational Qualifications Sub-Framework (OQSF). Each of these is overseen by one of three Quality Councils (QCs), that is, the Council for Quality Assurance in General and Further Education and Training (GENFET), known as Umalusi; the Council on Higher Education (CHE); and Quality Council for Trades and Occupations (QCTO). NQF Levels 1-4 encompass general and further education qualifications (including schooling), while NQF Levels 5-10 pertain to higher education. Occupational qualifications are positioned on NQF Levels 1-8. Qualifications on the OQSF overlap with those on the GFETQSF (Levels 1-4) and the HEQSF (Levels 5-8).
- 3.5 Transitions between different education levels can occur *vertically* (across NQF levels within a Sub-framework), *horizontally* (within an NQF level, either in or across Sub-frameworks), or *diagonally* (across NQF levels and Sub-frameworks).
- 3.6 A well-articulated system is one in which there are connections between its various components. There should be no silos or dead ends. If a student completes a course at one institution and gains the relevant knowledge and skills at the required levels, this should be recognised by other institutions, provided the knowledge gained is sufficient to facilitate epistemological access to the programme(s) the student wishes to enter. Students should be supported in their individual learning and career pathways.

4. Background

4.1 Umalusi is the QC for General and Further Education and Training, as outlined in the General and Further Education and Training Quality Assurance (GENFETQA) Act No. 58 of 2001, as amended in 2008.

4.2 Within the GFETQSF, RPL and CAT are key mechanisms that facilitate articulation in the national education and training system. CAT refers to the process of accumulating credits from one or more related learning programmes at a provider and transferring these credits for recognition towards a qualification or part-qualification, either at the same provider or a different one. Credits previously earned may be recognised as meeting the requirements for a different qualification, and, subject to identified limits, credits earned towards one qualification may count towards meeting part of the requirements of another qualification. Each credit directly correlates with notional hours required for a qualification or part-qualification, with one credit equivalent to 10 notional hours of learning. Additionally, credit accumulation refers to the total sum of credits necessary to complete a qualification or part-qualification.

4.3 CAT is a mechanism used to promote articulation between qualifications within a sub-framework of the NQF. The primary purpose of CAT is to enhance student mobility and improve their chances of completing qualifications. CAT also supports articulation across the sub-frameworks of the NQF, thereby facilitating lifelong learning and enhancing access to the workplace.

4.4 The relationship between credits accumulated through CAT is determined by research that assesses the degree of overlap and/or equivalence of curricula in the respective qualifications, allowing for credit transfer. Qualifications eligible for CAT may belong to the same or different sub-frameworks.

4.5 RPL processes and CAT are closely linked to assessment practices. Together, they form the mechanisms that support the movement of individuals both within and between completed and incomplete qualifications within the GFETQSF and across other sub-frameworks, as outlined in the NQF Act No. 67 of 2008, as amended.

5. The Purpose of the Policy

5.1 The purpose of the policy is to:

5.1.1 enable the implementation of articulation and strengthen the achievement of the NQF objectives, particularly by:

- a) facilitating the mobility and progression of students within the General and Further Education and Training sector and between NQF Sub-frameworks;

- b) ensuring that students are supported in their individual pathways through RPL and CAT when entering higher education; and
 - c) accelerating the redress of unfair discrimination in education and training, including in the provision of learning and employment opportunities.
- 5.1.2 create an enabling environment within the General and Further Education and Training sector to ensure, *inter alia*, that:
- a) articulation occurs within GFETQSF, between the GFETQSF and the OQSF, and between the GFETQSF and the HEQSF;
 - b) institutions collaborate to develop learning and career pathways; and
 - c) support is provided for learners as they follow their individual learning and career pathways.
- 5.1.3 effect functional articulation within the General and Further Education and Training sector in South Africa, with specific reference to the need to:
- a) accelerate access to General and Further Education and Training, as well as career paths;
 - b) facilitate the mobility and progression of students within the General and Further Education and Training;
 - c) accelerate the redress of unfair discrimination in the provision of learning opportunities;
 - d) promote partnerships and collaborations between institutions through the development of, and adherence to, Memoranda of Agreement (MoA) to develop learning pathways and ensure that the learning they offer is linked to these larger pathways; and
 - e) ensure that students are supported in their individual pathways through articulation mechanisms such as CAT.

6. The Scope and Application of the Articulation Policy

6.1 This policy applies to:

- a) all qualifications and part-qualifications registered on the GFETQSF that are designed to articulate with qualifications on the OQSF and/or HEQSF;
- b) the specific policies for each qualification or part-qualification on the GFETQSF, as referenced in (a) above, which should be interpreted in relation to this policy; and
- c) all public and accredited private institutions of education and training that offer qualifications and part-qualifications on the GFETQSF.

7. Legislative Mandate

7.1 The General and Further Education and Training Quality Assurance Act No. 58 of 2001, as amended, assigns the responsibility for quality assurance in General and

Further Education and Training in South Africa to Umalusi, the QC for Quality Assurance in General and Further Education and Training. Umalusi was established to uphold norms and standards in General and Further Education and Training. Its mandate includes, among other responsibilities, the following:

- 7.1.1 developing and maintaining a sub-framework of qualifications for General and Further Education and Training;
- 7.1.2 quality assurance of all exit-point assessments for these qualifications; and
- 7.1.3 certification of learner achievements.

7.2 This Articulation Policy is governed by the legislative mandates outlined in the NQF Act No. 67 of 2008, as amended, including any revisions thereto, as well as the GENFETQA Act No. 58 of 2001, as amended.

8. Articulation Policy Principles

The following principles serve as the foundation for implementing articulation within the General and Further Education and Training sector.

8.1 Articulation addresses lifelong learning

Through clear articulation routes, access to lifelong learning should be provided to support holistic personal development and address social, community, and labour market needs. Citizens should have the opportunity to pursue multiple learning pathways to achieve their preferred educational goals. These pathways should enable individuals to work towards their desired learning and career outcomes.

8.2 Articulation should include credible and fair procedures and practices to validate learning

The criteria, procedures, and practices for quality—encompassing the assessment and validation of learning—should be credible, relevant, reliable, fair, and transparent.

8.3 Articulation should be done by design

a) the Post-School Education and Training system should be intentionally articulated, rather than occurring by default. The NQF provides a framework for articulation between and within the three NQF Sub-frameworks. For articulation to be effective, it should be integrated at the systemic, programmatic, and curricular levels. Curriculum design teams within institutions of learning—comprising representatives from employer and industry groups—should develop broad curriculum guidelines on a programme-by-programme basis. They should also engage in curriculum alignment efforts to optimise articulation. Programmes must be designed with horizontal, vertical, and diagonal articulation to ensure they do not lead to dead ends.

- b) progression pathways and articulation must be established during the design of new qualifications or part-qualifications for registration on the NQF, to facilitate the implementation of CAT once these qualifications are in place:
- i. systemic articulation should be ensured by aligning qualification and part-qualification development and implementation with NQF legislation and policy;
 - ii. specific articulation should be based on formal agreements within the education and training system, as well as between two or more education and training sub-systems, specific institutional types or institutions, and the NQF Sub-frameworks, following NQF policies, principles, criteria, and guidelines; and
 - iii. efforts should be made to support individual learning pathways by optimising diverse and flexible admission and progression processes, such as RPL, CAT, bridging courses, mentoring, and other forms of learner support.

8.4 Articulation is both systemic and specific

- a) *systemic articulation* is grounded in legislation, national policies (such as this articulation policy), and formal requirements within the education and training system; and
- b) *specific articulation* is based on both formal and informal agreements within the education and training system. This includes agreements between two or more education and training sub-systems, specific qualifications and learning programmes, institutional types, and is guided by policies and accreditation principles.

8.5 Articulation ensures redress, equity, social justice, and inclusiveness

This policy aims to ensure that every individual has the right to access and engage in learning opportunities that meet their personal, economic, and community needs. It seeks to make learning outcomes visible and valued. The policy actively promotes access to, and mobility within, learning opportunities, with a focus on overcoming barriers to access and progression while fostering success.

8.6 Articulation ensures programmatic rather than institutional articulation

The post-school education and training system should be flexible enough to support the movement of learners within and between different types of institutions, with a particular focus on the articulation of qualifications, part-qualifications, and learning programmes.

8.7 Articulation promoting the value of learning outcomes

- a) the equal value (parity of esteem) of similar learning outcomes achieved through formal, non-formal, and/or informal learning is a result of a trusted

and credible quality assurance system and praxis. Competencies assessed and accumulated through non-formal and informal learning should be treated on par with those obtained through formal learning towards achieving a qualification or part-qualification.

- b) quality comparison based on credible methods:
- i. must enable adequate comparison mapping, which relies on the availability of the necessary information about accumulated credits—transcripts alone are insufficient;
 - ii. should be based on credible methods that assess the extent to which the curriculum content and outcomes align, guided by the NQF Level Descriptors, and in conjunction with the quality standards developed and published by the QCs;
 - iii. must consider the purpose, NQF level, and credits of each qualification/part-qualification, as well as the broader application of the qualification/part-qualification within the context for which it was designed, ensuring the validity of the credit content; and
 - iv. should evaluate the degree of similarity between the content and outcomes for which credits have already been awarded and those in the qualification/part-qualification for which credits are being sought, ensuring that learners possess the necessary knowledge to succeed in further learning.

8.8 Fairness and transparency

Improved transparency, achieved through more effective communication and clear objectives, is desirable. For example, transparency can be further enhanced by scrutinising appeals processes against shared standards. Increased disclosure and a well-informed understanding of strategies to reduce potential liability should help the public better understand the roles and decisions of General and Further Education and Training institutions regarding articulation. This, in turn, will provide comparative information that supports informed decisions when selecting post-school education and training institutions. Additionally, rules, regulations, and any register of precedents that inform or govern decisions on articulation must be valid, fair, reliable, and transparent.

8.9 Fair procedures

All policies and procedures related to articulation should be clear, easily understood, and readily accessible to learners. These should be made known to learners before enrolment. Relevant, reliable, fair, and transparent criteria, procedures, and practices must be employed for validating learning.

8.10 Specificity

The recognition of credits for transfer between qualifications is determined based on the nature of the qualifications, their relationship to one another, the

complexity and scope of the curricula related to the subjects for which exemption or inclusion is sought, as well as the nature of the assessment used.

8.11 Parity of esteem of qualifications on the same NQF levels

Parity of esteem among institutions requires the ability and commitment to communicate diplomatically, offer constructive suggestions, refrain from dictating terms, and provide clear justification where articulation cannot be achieved.

8.12 Supplementarity

Where the CAT comparison process identifies overlaps of less than 80% between the content and outcomes for which credits have been awarded and the modules/subjects for which CAT is sought, the relevant recognised provider may choose not to recognise any accumulated credits. In such cases, the provider must offer the candidate clear, practical advice, and guidance on alternative learning pathways.

9. Roles and Responsibilities of the Implementation of Articulation

This section outlines the guidelines that define the roles and responsibilities of various role-players and stakeholders, including the DHET, SAQA, and education and training providers.

9.1 Responsibilities of the DHET

The DHET will be responsible for:

- (a) providing an enabling legislative and planning environments for articulation;
- (b) developing the policy and guidelines to facilitate articulation across the post-school education and training system;
- (c) monitoring and evaluating the implementation of the Minister's articulation policy by the relevant entities, with the goal of further developing and adapting articulation in an evolving post-school education and training system;
- (d) providing overall leadership in the implementation of articulation according to the Minister's articulation policy;
- (e) collaborating with other government departments to remove outdated policies and legislation that hinder articulation;
- (f) considering advice from SAQA and the QCs on all aspects related to the further development and implementation of articulation, ensuring alignment with the objectives of the NQF Act; and
- (g) receiving and responding to reports from SAQA and the QCs regarding the implementation of articulation.

9.2 Responsibilities of SAQA

SAQA will be responsible for:

- (a) determining, in terms of Section 13 ((h)(i) and (ii) and after consultation with the QCs, the criteria for articulation, and assessing whether these criteria have been applied in qualifications and part-qualifications submitted to SAQA for registration on the NQF;
- (b) ensuring, in consultation with the Minister, that all new qualifications and those submitted for re-registration include statements about articulation. If no articulation possibilities exist, the QCs should provide reasons;
- (c) providing leadership to the QCs regarding articulation processes and practices to ensure the creation of an integrated and articulated education and training system;
- (d) providing annual reports to the Minister, after consultation with the QCs, on the implementation of articulation across the education and training system;
- (e) resolving, in terms of Section 13(1)(a), (b), (e), and (f) of the NQF Act, as amended, any systemic challenges and incongruities, addressing deficiencies to ensure a well-articulated system that links its various parts;
- (f) advising the Minister, where necessary, on potential amendments to legislation or the publication of regulations; and
- (g) co-ordinating the work of the QCs to ensure that articulation conflicts are eliminated or effectively managed.

9.3 Responsibilities of Umalusi

Umalusi will be responsible for:

- (a) collaborating with SAQA, on a date agreed upon in consultation with the Minister, to review all current qualifications and ensure they include clear articulation routes. If articulation is not possible, reasons should be provided;
- (b) ensuring, in terms of Section 27 (h)(iii) and (iv) of the NQF Act, as amended, that all new qualifications and part-qualifications submitted to SAQA for registration contain clear articulation routes and determined statements on how articulation can be practically achieved. Where articulation is not possible, reasons should be provided;
- (c) working towards simplifying the NQF by controlling the proliferation of institutional qualifications submitted for registration, aiming for more generic qualifications that support curriculum comparability based on NQF level descriptors, while allowing for some diversification of content;
- (d) supporting General and Further Education and Training institutions in developing and implementing new progressive access, articulation, and CAT policies;
- (e) identifying and eliminating dead ends in learning pathways for learners as they arise;

- (f) working directly with accredited education and training providers to ensure that they have, and are implementing, fair and credible articulation policies in line with this policy and its guidelines;
- (g) collaborating with other QCs to identify opportunities for articulation and CAT; and
- (h) supporting and monitoring the implementation of this policy.

9.4 Responsibilities of education and training providers

Education and training providers will be responsible for the following:

- (a) adhering to the principles and responsibilities outlined in this policy;
- (b) ensuring that their institutional policies enable articulation and are aligned with the Minister's Articulation Policy [*"The Articulation Policy for the Post-School Education and Training System of South Africa (2017)"*], as well as with SAQA and Umalusi's articulation policies for qualifications within the GFETQSF;
- (c) providing career advice services that include guidance on career pathways and articulation routes;
- (d) promoting and implementing articulation, RPL, and CAT within the institution;
- (e) where relevant, establishing inter-institutional partnerships and agreements that facilitate vertical, lateral, or diagonal articulation of qualifications and part-qualifications. These agreements will be guided by, and dependent on, principles of parity of esteem;
- (f) ensuring that learning and career pathway opportunities are included in inter- and intra-institutional collaborative partnerships;
- (g) providing timely, appropriate, and ongoing advice on articulation to learners, and offering support to those pursuing articulation opportunities;
- (h) regularly reflecting on and reviewing their institutional articulation policies and practices, including obtaining and considering learner feedback on their experiences;
- (i) ensuring that learners have access to, and are familiar with, institutional articulation policies, and are supported in utilising articulation routes when needed. Regular feedback should be gathered from learners on the efficacy of the articulation process;
- (j) developing mechanisms to monitor the implementation of articulation and ensuring that exclusionary practices relating to articulation are avoided; and
- (k) maintaining and submitting articulation-related records that are compatible with the data categories required for the National Learners' Records Database (NLRD).

10. Policy Guidelines

10.1 Introductory Statements

- 10.1.1 the NQF Act No. 67 of 2008 established Umalusi as a Quality Council for General and Further Education and Training, as provided for in its founding legislation, the GENFETQA Act No. 58 of 2001, as amended. Umalusi is responsible for quality-assuring qualifications at NQF Levels 1–4 and developing policies to support these qualifications.
- 10.1.2 the *Articulation Policy for Qualifications in the General and Further Education and Training Qualifications Sub-framework* has been developed in accordance with Section 8(2)(b) of the NQF Act, as amended, which mandates the Minister to determine and publish policy on NQF matters in the gazette. In line with the objectives of the NQF, this articulation policy is also issued under Section 27(b) of the NQF Act No. 67 of 2008, as amended, which requires Umalusi to adhere to any policy set by the Minister as outlined in Section 8(2)(b) of the NQF Act.
- 10.1.3 this policy serves as the key mechanism for implementing the NQF objectives, which are to:
- (a) establish a unified national framework for recognising learning achievements;
 - (b) promote access, mobility, and progression within education, training, and career paths;
 - (c) improve the quality of education and training; and
 - (d) expedite the redress of past unfair discrimination in education, training, and employment opportunities.
- 10.1.4 as a key mechanism, articulation plays a vital role in building a fully articulated education system that aligns with the human development skills needed in a democratic society.
- 10.1.5 articulation includes related policies such as RPL and CAT. It is a fundamental component of the education and training system.
- 10.1.6 Umalusi will collaborate with other sub-frameworks and education institutions to establish pathways between vocational or occupational programmes and academic programmes, promoting articulation and ensuring that learners do not encounter dead ends.
- 10.1.7 ensuring the articulation of qualifications or part-qualifications is a key priority for the Department of Education, SAQA, and the QCs.

10.2 Regulatory Framework

10.2.1 this policy should be read in the context of the following legislative frameworks, policies, and documents that support the need for improved articulation:

- a) the GENFETQA Act No. 58 of 2001, as amended in 2008;
- b) the NQF Act No. 67 of 2008, as amended;
- c) the Articulation Policy for the Post-School Education and Training System of South Africa;
- d) the GFETQSF Policy;
- e) Umalusi's Policy for the Management of Qualifications in the GFETQSF;
- f) Umalusi's Policy and Criteria for the Development, Registration, and Publication of Qualifications for GFETQSF;
- g) SAQA's Policy and Criteria for CAT within the NQF;
- h) SAQA's Policy and Criteria for the Implementation of RPL;
- i) Umalusi's Policy and Criteria for CAT;
- j) Umalusi's Policy for the Implementation of RPL in the GFETQSF;
- k) the Policy on Articulation into and within Higher Education;
- l) the SAQA Principles of Articulation;
- m) the White Paper for Post-school Education and Training: Building an Expanded, Effective, and Integrated Post-School System;
- n) the National Development Plan (NDP); and
- o) this policy is further informed by the following published SAQA Policies: *Policy and Criteria for the Registration of Qualifications and Part-Qualifications on the National Qualifications Framework* and *Policy for Implementing Recognition of Prior Learning in the Context of the National Qualifications Framework*.

10.3 Guiding Statements

- a) the policy will apply nationally to all articulation arrangements by recognised education and training providers;
- b) the legislative mandate provided by the NQF Act and the *Articulation Policy for the Post-School Education and Training System of South Africa* has been used to develop and gazette this policy;
- c) articulation can be understood in various ways, including:
 - i. joined-up qualifications and part-qualifications.
 - ii. inter-institutional arrangements, such as curriculum alignment, Memoranda of Understanding, and CAT.
 - iii. flexible institutions that support learners as they follow their pathways.
- d) articulation must contribute to students' improved success beyond simply providing access to institutions and/or learning programmes;

- e) articulation arrangements must be equally accessible and beneficial to students entering courses and/or programmes of study with credit transfer, as well as those entering directly without credits for prior learning;
- f) the act of recognising and transferring credit implies the acceptance of a course in place of a course offered at the receiving institution, or in place of an institutional or programme requirement. This means that the course from which the learner applies for transfer does not have to be identical to the course for which transfer credit is granted;
- g) articulation must be by design rather than by default; and
- h) Umalusi will ensure that qualifications and part-qualifications submitted to SAQA for recommendation for registration indicate articulation routes that underpin learning and career pathways.

11 Implementation and Review

- a) Umalusi is the custodian of this policy, while the implementation of articulation is the responsibility of the institutions. This includes both inter- and intra-institutional articulation within education and training institutions. These institutions will carry out extensive advocacy and communication efforts to inform learners about the various learning pathway opportunities available;
- b) consideration should be given to establishing standardised admission requirements for similar learning pathways and lifelong learning categories;
- c) this policy shall become effective on the date of its publication by Umalusi;
- d) the policy will be reviewed every five years, or earlier if deemed necessary; and
- e) any comments or feedback regarding this policy should be submitted to Umalusi via the following email address: info@umalusi.org.za.

RELATIONSHIP OF THE GFETQSF WITH OTHER SUB-FRAMEWORKS

NQF Sub-Framework/ Quality Council	NQF Level	NQF Sub-Framework and Qualification Type		NQF Sub-Framework/ Quality Council
Higher Education Qualifications Sub-Framework (HEQSF) Council on Higher Education (CHE)	10	Doctoral Degree Doctoral Degree (Professional)		Occupational Qualifications Sub-Framework (OQSF) Quality Council for Trades and Occupations (QCTO)
	9	Master's Degree Master's Degree (Professional)		
	8	Bachelor Honours Degree Postgraduate Diploma Bachelor's Degree	Specialised Occupational Diploma	
	7	Bachelor's Degree Advanced Diploma	Advanced Occupational Diploma	
	6	Diploma Advanced Certificate	Occupational Diploma Advanced Occupational Certificate	
	5	Higher Certificate	Higher Occupational Certificate	
General and Further Education and Training Qualifications Sub-Framework (GFETQSF) Umalusi	4	National Certificate	National Occupational Certificate	
	3	Intermediate Certificate	Intermediate Occupational Certificate	
	2	Elementary Certificate	Elementary Occupational Certificate	
	1	General Certificate	General Occupational Certificate	