

GEOGRAPHIC EQUITY IN VOCATIONAL EDUCATION AND TRAINING MARKETS: INTENTIONAL FAILURE OR BENIGN NEGLECT?

Don Zoellner

University Fellow, Northern Institute, Charles Darwin University, Alice Springs, NT 0870, Australia. Email: don.zoellner@cdu.edu.au

ABSTRACT: This article explores outcomes resulting from three decades of national competition and new public management policies favouring increased user choice in vocational education and training markets. Large data sets describing system-wide numbers of enrolments, the number of enrolments in the top 20 training packages, the various fields of education, level of relative remoteness/access to services, Indigenous status and level of relative socio-economic disadvantage are interrogated. If the introduction of contestable markets has delivered the anticipated benefits in access, equity and choice, it would be expected that a larger number of students from each equity group and region would show improvements in the measures described. Unfortunately, detailed results from three states identify an inability of the marketised national training system to produce a nation of lifelong learners who experience equitable access by exercising a wide variety of choices as originally anticipated; calling into question 30 years of bi-partisan commitment to vocational education and training reform.

KEYWORDS: Vocational education and training; markets; regions; lifelong learning; competition.

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1. INTRODUCTION

The mantra of lifelong learning has been an integral element of the vocational education and training (VET) policy environment since the seminal Kangan Report (Australian Committee on Technical and Further Education, 1974) introduced this 'new concept' to Australia nearly half a century ago. Because 'the motives for an individual's choice of vocational education are various and mixed' student choice was to be exercised by obtaining access to a variety of training programs offered by state-based systems of government-funded Technical and Further Education (TAFE) institutions (Australian Committee on Technical and Further Education,

1974). Kangan's guiding principles for TAFE normalised accessible recurrent learning throughout one's entire life course, including the establishment of community colleges in country areas (Australian Committee on Technical and Further Education, 1974).

TAFE's monopoly provision of non-university, post-school education and training received its first serious policy challenge in the Deveson Report's (1990) alignment with the emergence and eventual introduction of national competition policies into the Australian economy (Hilmer *et al.*, 1993). As state and territory government agencies, TAFEs were included in the broader suite of microeconomic reforms introduced by the jurisdictions seeking to withdraw from direct service delivery in favour of privatisation and/or contracting out to competitive markets (Keating, 2004).

The most recent review of national competition policy reiterates that user choice-type public policy settings should make markets work properly; foster diversity, choice and responsiveness in government services; and secure the necessary standards of access and equity (Harper *et al.*, 2015). The notions of choice, access and equity that emerged in the Kangan review have also been re-purposed to justify the quasi-markets that form the architecture of the current vocational education and training system.

From the mid-1990s, national VET policy has inexorably promoted schemes 'to enhance the choice that clients have between the full range of providers – public, private and industry' because increased competition in open markets was 'universally recognised as the most effective way to improve services [and] contain or reduce costs' (Australian National Training Authority, 1994). There has been a 'growing trend towards greater student choice and less government planning of supply' (Productivity Commission, 2011) in response to a 'change in participation in VET as a result of increasing labour market emphasis on formal training and lifelong learning' (viii). Policies facilitating student choice have been made into a key mechanism for reaching an economically desirable state of affairs where all members of society are expected to undertake continuous self-improvement.

The confluence of national competition policy and New Public Management (NPM) principles (Hill and Hupe, 2002) in an attempt to improve quality, increase user choice and reduce costs fit comfortably with public choice theorists' view the potential benefits of governments managing contracts instead of delivering services (Self, 1993). As a result, public funding for VET has substantially decreased, partly as a result 'real efficiency improvements' (Noonan, 2016) and a major decline in student enrolments from 2013 (National Centre for Vocational Education

Research, 2018d). The policy intended to reduce TAFE's near monopoly of provision was also achieved due to the steady increase in the provision of VET by other registered providers as shown in table 1.

Table 1. Per Cent of Government-Funded Student Enrolments by Provider Type.

	2004	2009	2013	2017
TAFE and other government providers	78.8	76.9	55.6	52.3
Community education providers	10.7	8.9	7.3	5.7
Other registered providers	10.1	13.5	36.2	39.9
Source	(NCVER, 2005, 8)	(NCVER, 2011, 15)	(NCVER, 2014b, 17)	(NCVER, 2018a, 5)

This paper explores the results of three decades of bi-partisan policy consistency (Zoellner, 2013) aimed at increasing the amount of choice available to consumers of marketised VET services and to increase their commitment to lifelong learning. By starting to replace traditional curricula with training packages in 1999 allowed VET qualifications to be commoditised to facilitate government purchasing of training (Wheelahan, 2015). If the implementation of consumer choice in the various state and territory competitive VET marketplaces has increased lifelong learning, it should be expected that greater numbers of students studied in a wider range of occupations with improved access to the more than 4,000 training providers that operated in these markets (National Centre for Vocational Education Research, 2018b).

2. BACKGROUND AND METHOD

Analysis of the initial Victorian experience of implementing the most extensive marketisation of Australian VET which commenced in 2009 notes that increasing the range of choices through a 'student entitlement to a government-funded qualification at any training provider in a contestable market' guided that state's undertaking (ACIL Allen Consulting, 2015). The contemporary policy and financial driver of increasingly open, competitive markets at that time were the National Agreement for Skills and Workforce Development. In return for substantial federal funding, each state and territory agreed to implement the 'guaranteed' choice of a publicly-funded formal qualification while ensuring 'the effective operation of the training market' (Council of Australian Governments, 2008). This policy course remained consistent with the Australian National

Training Authority's earlier proposition that 'increased choice makes the VET system more responsive to learners, individual firms and industry' (ACIL Allen Consulting, 2015).

The resulting Victorian Training Guarantee (Department of Innovation, 2008) and its supporting rationales linked VET to labour force productivity growth that would be achieved by 'creating a culture of lifelong skills development'. This major policy position continued the tight connection between access, choice, lifelong learning and VET. The guarantee

- was 'expected to be fully operational for all courses in 2011'
- will provide Victorians 'more choice' from a 'wider range of providers'
- will have 'flexibility in fee charging to allow competition on price' and
- ensure 'Victorians living in regional communities will have access to increased choice of training provision within local communities' (Department of Innovation, 2008).

The South Australian Government (2010) followed the Victorian lead with its introduction of the *Skills for All* policy which contained similar elements:

- a government-funded training entitlement 'to support everybody, regardless of age' that is demand-driven
- allowing 'South Australians to choose the training and provider that best suits them'
- engaging 'more people in training and retraining' by taking a 'regional approach to the delivery of programs'.

Drawing upon the National Centre for Vocational Education Research's (NCVER) National VET Provider Collection the high-level trend analysis reported in this paper has been undertaken to determine if the promotion of lifelong learning through the introduction of choice in selected competitive training markets has produced the intended benefits and outcomes. This national data set was introduced in 1994 in order to capture consistent statistics on a variety of aspects of the emerging national training system. The collection was only able to report on government-funded activity (National Centre for Vocational Education Research, 2018d) until the introduction of Total VET Activity reports in 2015 (National Centre for Vocational Education Research, 2016).

Due to the 2004 standards modifications to improve comparability in the national provider collection, it has been chosen as the earliest date for the

multi-year comparative analysis of a range of student characteristics. This date also corresponds with very high levels of usage of training packages; this is significant because these curriculum replacements facilitate the operations of the VET market by creating a product that can be monetised and establishing a financial price for learning (Wheelahan, 2015). 2009 has been chosen as the next comparison point because it marks the introduction of the most extensive open VET market yet attempted in Australia with the Victorian Training Guarantee (Department of Innovation, 2008) and the introduction of the ultimately disastrous VET FEE-HELP student loan program (Department of Education and Training, 2016). 2009 serves as an early market point in time.

2013 is the next comparison point as the impacts of the Commonwealth Government's removal of subsidies for a large number of apprenticeships and traineeships commenced the steady national decline in government-funded students (National Centre for Vocational Education Research, 2014a). 2013 is also when the demand-driven Victorian reforms had been implemented, the heavily market-driven *Skills for All* initiative was in full operation (South Australia Government 2010) and similar moves towards marketisation through the Certificate III Guarantee program were adopted by the Queensland Government (2013). Finally, 2017 was chosen as a comparison point as it marks what might be described as a mature training market incorporating both government-funded training and early comprehensive data on total VET activity (TVA).

3. RESULTS

Prior to describing the comparative results some contextual information opens this section by drawing upon national statistics on government-funded training from prior to the introduction of the original 36 training packages in 1999 (National Centre for Vocational Education Research, 2002) and comparing them to the latest 2017 data from the contemporary national training system's approximately 60 training packages by using historical time series data (National Centre for Vocational Education Research, 2018d). It is also worth noting that during this period from June 1998 to June 2017, Australia's estimated resident population increased by almost 6 million persons (Australian Bureau of Statistics, 2018).

Between 1998 and 2017, the total number of government-funded students in VET system fell by 21.6 per cent or 328,000 persons to just under 1.2 million (National Centre for Vocational Education Research (NCVER), 2018d), which reflects a 27.2 per cent (516,000 persons) decrease in program enrolments (NCVER, 2018d). TAFE and other

government providers lost 54 per cent of their 1.16 million students in 1998, while community education providers demonstrated a relatively greater loss with a 71 per cent drop to 68,200 students in 2017 (NCVER, 2018d). Other registered providers increased by 314 per cent to 475,000 students in the same time period (NCVER, 2018d).

The decrease in government funding to the VET sector to below levels allocated in 2005-06 has been well-documented (for example, O'Connell and Torii, 2016). With population growth providing a one-third larger potential market, it appears that the state and territory entitlement guarantees have not produced the desired commitment of the Australian population to lifelong learning by accessing the national training system. However, the introduction of greater range of providers to increase user choice through the creation of VET markets was accomplished.

Training Package Enrolment Patterns

South Australia followed Victoria by introducing 'demand-driven' (Department of Innovation, 2008) entitlements to a VET qualification that were intended to make the 'training systems more responsive to changing labour market demands through more competitive and user-focused delivery' (Department of Innovation, 2008). It could be expected that an increasing range of training package enrolments would have occurred and that changes in training package student numbers would reflect the predicted technology-induced changes in the labour market. In 2004, 84 per cent of all government-funded students were enrolled in the top 20 training packages by number of students (NCVER, 2005) and this has progressively increased to 92.7 per cent of students in the top 20 training packages in 2017 (NCVER, 2018a). Total VET activity reports an almost identical pattern of concentration of enrolments in 2017 with some 92.1 per cent of students enrolled in the top 20 training packages which, with the exception of Training and Education, are the same as for government-funded students (NCVER, 2018b).

The same 15 training packages were included in the top 20 by student numbers in each of the years 2004, 2009, 2013 and 2017 (NCVER, 2018a; 2014b; 2011; 2005). Due to name changes and the combining of previously separate training packages (e.g. hairdressing and beauty) there have only been minor variations in the range of qualifications offered by providers since VET marketisation. Of the top 20 of the 33 training packages that were originally introduced in 1999 (NCVER, 2000) 17 of them were still on that list in 2017. The early versions of Australian meat industry, telecommunications training and workplace assessment (later renamed as

training and education) training packages are not in the 2017 list, but have periodically re-appeared in the top 20 in the intervening years.

It appears that the intended expansion of the range of occupations and qualifications that students could choose from has not been achieved; nor is the VET market demonstrating the new occupational groupings in the 21st century labour market that have been forecast. A common view of the future for workers is that they will need a 'genuine commitment to lifelong learning' because 'jobs of intermediate value are at high risk' of being replaced by technology, therefore requiring retraining to enable workers 'to transition to higher value, more skilled jobs' or moving to the 'low value jobs [that] will continue to be performed' (Committee for Economic Development of Australia, 2018). This is the same outlook provided by the Australian National Training Authority (2003) more than a decade earlier when it was predicting 'a sea change in skills requirements' with 'a clear trend to higher skill occupations' and also 'evidence of the persistence of a group of low skill occupations'.

Geographic Enrolment Patterns

One of the four objectives of the 2004-2010 national VET strategy was that 'communities and regions will be strengthened economically and socially through learning and employment' achieved by encouraging local planning and innovation to increase 'the capacity of TAFE and other providers and brokers' to 'take advantage of opportunities for growth' (Australian National Training Authority, 2003, 13). Similarly, the crucial market-enabling policy drivers enshrined in the national agreement for skills and workforce development recognised that public providers had an 'important function in servicing the training needs of industry, regions and local communities' while supplying 'improved skill and job outcomes for disadvantaged learners and communities' (Council of Australian Governments, 2008, 6). As noted previously, both Victoria and South Australia pursued this policy direction with clear commitments that marketised VET delivery would increase both the amounts and choices of training options for regional students and communities.

To determine if these policy intentions have been achieved, the national VET provider data collection's reporting on government-funded students' remoteness status has been compared in the four reference years. The five categories are a measure of relative access to services with major cities having the highest levels and very remote the least (Australian Bureau of Statistics, 2012). The following data analysis of government-funded

remoteness takes place in the context of a system that contracted by 21.6 per cent from 1998 to 2017 enrolling 328,000 fewer students.

Nationally, Table 2 shows the five standard geographic zones had the following national market shares in 2004 and 2017 and then compares the student enrolment changes in pre-market 2004 and prior to markets in 2009 with the mature markets of 2017.

Table 2. Number of Government-Funded Students ‘000 (Per Cent of Total Government-Funded Students).

National	2004	2017	Change 2004-17	Change 2009-17
Major cities	838.8 (52.6%)	728.7 (61.2%)	-110.1 (-13.1%)	(-20.6%)
Inner regional	350.4 (21.9%)	280.9 (23.6%)	-69.5 (-19.8%)	(-28.9%)
Outer regional	229.9 (14.4%)	129.9 (10.9%)	-69.7 (-30.3%)	(-48.0%)
Remote	39.1 (2.4%)	24.5 (2.1%)	-14.6 (-37.3%)	(-40.1%)
Very remote	28.0 (1.7%)	16.6 (1.4%)	-11.4 (-40.7%)	(-52.3%)
Source	(NCVER, 2005, Table 5)	(NCVER, 2018a, 13)		(NCVER, 2010, 9)

Not unexpectedly, the metropolitan areas lost the largest absolute number of student enrolments in a shrinking system, but in fact, lost the smallest percentage of persons studying. The further one moves from the major city areas with the best access to services the greater the relative reduction in VET delivery since 2004. The same pattern of change is even more evident in comparing the pre-market introduction of fully contestable VET markets in 2009 with the mature market of 2017, indicating even larger reductions in the market share incurred in non-metropolitan districts despite government assurances that markets would actually increase choice and availability of training.

Due to Australia's federated governance structures, each state and territory has developed idiosyncratic versions of VET policies, delivery mechanisms and markets in response to local conditions and political priorities (Department of Prime Minister and Cabinet 2014). In order to better understand the national data, the three jurisdictions that were the early movers in the creation of more contestable VET markets are examined next to see if there has been a uniform impact on geographical enrolment patterns.

Victoria (table 3) does not have any very remote areas and given the large numbers of VET students, would be expected to resemble the national pattern fairly closely due to the size of its contribution to combined data sets. The overall national shift of training from regional/remote areas to the city is significantly influenced by changes in that state. Despite stated intentions to the contrary, remote delivery was reduced by 80 per cent

following the introduction of the Victorian Training Guarantee and the regional areas experienced much larger reductions in the availability of government-funded training than experienced in the major cities of Melbourne and Geelong.

Table 3. Number of Government-Funded Students ‘000 (Per Cent of Total Government-Funded Students).

Victoria	2004	2017	Change 2004-17	Change 2009-17
Major cities	272.8 (56.7%)	215.1 (68.3%)	-57.7 (-21.2%)	-75.2 (-25.9%)
Inner regional	125.9 (26.2%)	81.9 (26.0%)	-44.0 (-34.9%)	-54.9 (-40.1%)
Outer regional	36.6 (7.6%)	15.1 (4.8%)	-21.5 (-58.7%)	-23.7 (-61.1%)
Remote	4.7 (1%)	0.4 (0.1%)	-4.3 (-91.5%)	-1.6 (-80.0%)
Very remote	0	0	0	0
Source	(NCVER, 2005, Table 3)	(NCVER, 2018c)		(NCVER, 2010, Table 3)

Queensland (table 4) also demonstrates the pattern of reduced training delivery in the far reaches of the state in favour of Brisbane and the Gold Coast. There is little change in VET enrolment market shares in the major cities and inner regional areas when compared to outer regional/remote/very remote reductions in the order of 50 per cent with absolute numbers dropping in a similar pattern. In this case the overall shrinkage of the training system was achieved by removing training choices from those areas that already had the least access to services.

Table 4. Number of Government-Funded Students ‘000 (Per Cent of Total Government-Funded Students).

Queensland	2004	2017	Change 2004-17	Change 2009-17
Major cities	124.7 (44.7%)	124.7 (44.7%)	-4.6 (-3.7%)	-0.8 (-0.5%)
Inner regional	48.4 (17.3%)	48.4 (17.3%)	+0.1 (+0.2%)	-10.6 (-17.9%)
Outer regional	63.7 (22.8%)	63.7 (22.8%)	-30.9 (-48.5%)	-28.2 (-46.2%)
Remote	12.3 (4.4%)	12.3 (4.4%)	-6.9 (-56.0%)	-5.9 (-52.2%)
Very remote	8.9 (3.3%)	8.9 (3.3%)	-4.3 (-48.3%)	-4.5 (-49.5%)
Source	(NCVER, 2005, Table 5)	(NCVER, 2018c)		(NCVER, 2010, Table 3)

By way of contrast, South Australia's *Skills for All* (table 5) produced very different remoteness factor outcomes while sharing the national pattern of the reduced overall provision of government-funded student enrolments. This was achieved by retaining similar pre- and post-marketisation percentages of training in each of the geographical areas, albeit off a much smaller base than the other two states. The marketisation

of VET provision also maintained the already very high concentration of VET delivery in Adelaide while the number of students being trained in remote and very remote areas is almost statistically insignificant.

Table 5. Number of Government-Funded Students '000 (Per Cent of Total Government-Funded Students).

South Australia	2004	2017	Change 2004-17	Change 2009-17
Major cities	70.4 (63.2%)	39.0 (62%)	-31.4 (-44.6%)	-34.1 (-46.6%)
Inner regional	17.2 (15.4%)	7.9 (12.6%)	-9.3 (-54.1%)	-9.6 (-54.8%)
Outer regional	11.9 (10.7%)	11.2 (17.7%)	-0.7 (-5.8%)	-6.8 (-37.8%)
Remote	4.4 (3.9%)	2.9 (4.6%)	-1.5 (-34.1%)	-3.1 (-51.7%)
Very remote	2.1 (1.8%)	1.5 (2.3%)	-0.6 (-28.6%)	-0.5 (-25.0%)
Source	(NCVER, 2005, Table 5)	(NCVER, 2018c)		(NCVER, 2010, Table 3)

Total VET activity reporting offers a much larger data set of students enrolled in both government- and non-government funded training, although it is more difficult to analyse trends as only three years' worth of information was available at the time of analysis. However, if the introduction of contestable training markets increased the range of choices to regional and remote areas, as promised in the various policy statements, it could reasonably be expected that TVA statistics would show a different pattern from the government-funded information given above because they capture private provision data. The national 2017 TVA report indicates that 59.2 per cent of student enrolments were in major cities, 19.0 percent in inner regional areas with the remaining 19.8 per cent enrolled in the other three remoteness categories; between 2016 and 2017 major cities delivery increased by 1.8 per cent while each of the others progressively dropped a larger amount, with remote down 4.7 per cent and very remote reduced by 5.6 per cent (National Centre for Vocational Education Research 2018b, 14). Increasing the numbers of non-government providers has resulted in a significantly larger concentration of training in the major cities markets compared to government-distributed training programs.

Access and Equity

In its analysis of the anticipated benefits of the VET system reforms, ACIL Allen (2015, 30) cites the growth rate in the number of Indigenous students in Victoria between 2008 and 2013 as a 'prime example' of increased participation of equity and disadvantaged groups in formal training, while noting that 'since the introduction of the Victorian Training Guarantee, the growth in Indigenous enrolments has not matched the

growth of the VET market in Victoria'. This view needs to be placed in context of the national population trends for Indigenous Australians. In spite of the overall government-funded training national market shrinking, from 1998 to 2017 the number of Indigenous students has nearly doubled from 44,200 to 84,500 (National Centre for Vocational Education Research 2018d, table ten) while in Victoria, the growth was from 3,900 to 6,400 enrolments in the corresponding time period.

Between the 2006 and 2011 censuses the eastern states and the Australian Capital Territory reported a rapid increase in the number of persons identifying as Indigenous of greater than 20 per cent with this growth having been primarily concentrated in capital cities and inner regional areas, continuing a pattern that commenced in 1981 (Taylor and Bell, 2013). These levels and locations of growth were repeated in the 2016 census with the southeast of the nation (Brisbane to Melbourne) experiencing the highest growth rate of Indigenous people (between 20 and 33 per cent) counted in the census and they are 'increasingly likely to live' in the major cities and inner regional areas (Markham and Biddle, 2017). It is possible that the reported increase in Indigenous enrolments in Victoria was less to do with the benefits of VET marketisation and more likely the result of the rapid increase in the Indigenous population. This data also serves as another source that confirms the increasing migration of training from regional/remote areas to the more populated areas.

As described earlier, both the Kangan Review of TAFE and the Harper Review of national competition policy stressed the significance of access and equity considerations in public policy development and implementation. The National VET Provider Collection also reports on the Socio-Economic Indexes for Areas (SEIFA), which produces an Index of Relative Socio-Economic Disadvantage (IRSD) based on the resources of people and households in a locality (NCVER, 2018b). Based on their residential address VET students are assigned to one of five equally sized statistical groups, with quintile one representing those who are most disadvantaged through to the most advantaged being in quintile five.

In line with an overall decrease in the number of government-funded students in the national training system, each of the quintiles has reported a significant reduction in the absolute number of students between 2013 and 2017. However, nationally the reduction of 136,100 students from quintiles one and two was significantly larger than the loss of 91,100 students from quintiles four and five. In other words, more students from the most disadvantaged areas suffered a much greater loss of choice and access to training when compared to the most advantaged. The situation in Victoria closely resembles the national results with the most disadvantaged

two quintiles losing 80,100 students in the same time period compared to a reduction of 60,600 in the most advantaged two quintiles. Queensland does not follow the national pattern with quintiles four and five dropping by 14,300 students compared to a smaller reduction of 11,600 experienced by the most disadvantaged. South Australia reports the most significant withdrawal of training from the most disadvantaged two quintiles, with enrolments decreasing by 55,800 compared to only 17,800 lost in quintiles four and five.

Finally, between 2016 and 2017 Total VET Activity reports increased training of +0.03 per cent nationally for students in the most disadvantaged two quintiles, compared with an increase of 5.9 per cent for the two most advantaged (NCVER, 2018b). Because the SEIFA IRSD is based on geographic areas, these relative shifts in access and choice of training, from the most disadvantaged to those who are better off socio-economically, is likely to again be reflecting the broader shift of training from regional and remote areas to the major cities.

4. DISCUSSION

There is a 'significant disparity' in tertiary education attainment between regional, rural and remote areas as compared to the major cities; 'university participation is higher in the cities than in regional and remote areas, the opposite is the case in VET' (Department of Education and Training, 2019, 5). In spite of the repeated specific reassurances that a contestable market in VET would benefit regional areas, the results demonstrate a major failure of policy. A New South Wales Legislative Council (General Purpose Standing Committee, 2015) inquiry into VET concluded that a contestable training market will benefit all sectors of the vocational education and training sector'; but also described that 'the committee received compelling evidence that the contestable training market under Smart and Skilled is not working for regional, rural and remote communities' (General Purpose Standing Committee, 2015, 6). Students living in major cities have a variety of post-school options including much greater access to higher education, whereas VET is often the only option for those who are regionally based. 'In major cities, around 40 per cent of people have a bachelor degree or higher, compared to 20 per cent in regional areas and less than 17 per cent in remote areas' (Department of Education and Training, 2019, 5).

The Halsey Review into regional, rural and remote (RRR) education (2018, 54) found the need for a review that should 'take into account the numbers and diversity of providers, quality, costs, regulation and

effectiveness of contestable markets' in RRR locations. Put simply, training providers have retreated to the major cities. For example, in late 2018, Victoria had 1014 registered training organisations headquartered in the state (Training.gov.au, 2018). Based on their postcode, 88 per cent (889) of these Victorian training providers are located in the major city zone which includes Geelong. 110 (10.8 per cent) providers are in the inner regions, 15 (1.5 per cent) in the outer regions and none are located in remote Victoria. Of those providers located in outer regional areas, only five are private providers and they are quite specialised in areas such as shearing, diving or pilot training. Of the 777 private for-profit providers located in Victoria, only 65 (8.3 per cent) are located outside the major city area.

Likewise, the reduction of training being provided to the most disadvantaged Australians is not achieving the notions of access and equity elaborated in the Kangan Review and used as a rationale for the adherence to national competition policy. The analysis argued in this paper demonstrates while choice of provider has materialised in the major cities and some inner regional areas, it has not occurred in the other three geographic areas nor for the most socio-economically disadvantaged. In addition, an equally valid range of other student choices has been reduced or ignored altogether in the marketisation of VET. These include choice of career, occupation, quality, location of training, method of study, price, post-school study options and course of study. It is also noted that 'state and territory governments have reduced their support for higher level VET qualifications' (Department of Education and Training, 2016, 2), thus further reducing choice and a natural progression through lifelong learning.

The concentration of student enrolments in the top 20 training packages demonstrates the absence of some of these other choices because providers have to make financial considerations of the costs of delivery and for the majority of providers in the contestable market there is the need to make a profit. This reductive pattern is also evident in the study supported by VET FEE-HELP loans, which are believed to have been driven by providers' cost considerations and where 'only six courses account for over half of all loans' (Department of Education and Training, 2016, 22).

5. CONCLUSION

The results of this trend analysis of student characteristics demonstrate that there are some clear patterns emerging from the now relatively mature contestable VET markets in each state and territory. Since the 1974 Kangan Review of TAFE, vocational education and training public policy

considerations has inexorably been linked with access and equity in pursuit of lifelong learning goals. Since mid-1990s these relationships have been systematically measured through the collection of nationally consistent statistics that record how the national training system provides equitable access to training for students in a range of population characteristics.

Despite the large increase in the national population and potential market size, there has been an unambiguous reduction in student numbers in the government-funded portion of the training system since 1998. There has also been a substantial decline in government funding. While a causal link between student numbers and the availability of public funding can only be speculated upon, it is clear that various state guarantee or entitlement programs have reduced the total amount of government financial support available for lifelong learning and, as well, there has been an increasing concentration of enrolments in a relatively small number of training packages and the qualifications they specify. The policy preoccupation with creating contestable training markets in order to give students increased choice has had significant consequences. The singular focus upon increasing the choice of provider has reduced or removed altogether other choices for communities, employers and students. Some of the choices that have been impacted include the location of training, mode of study, courses, range of occupations, levels of qualifications and post-school options.

Different state-level policies and programs show that this loss of access and choice is not inevitable. For example, Queensland demonstrated that training could be reduced more heavily for those who are relatively more advantaged. This also demonstrates that policy choices do have consequences. The current situation has resulted from either the deliberate application of national competition policy and accepting geographical market failure or a form of benign neglect towards certain groups receiving the delivery of VET services.

The national training system delivered through an open and competitive training market is producing a smaller number of qualified persons in an increasingly narrow range of occupations. While lifelong learning remains an integral part of policy rhetoric, the reduction of funding, access and equitable choices in a wide range of VET-related areas does not facilitate the permanent commitment to self-improvement and skills development that will enable participation in the labour market as it develops in the future.

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